



Flash report on television

April 2013

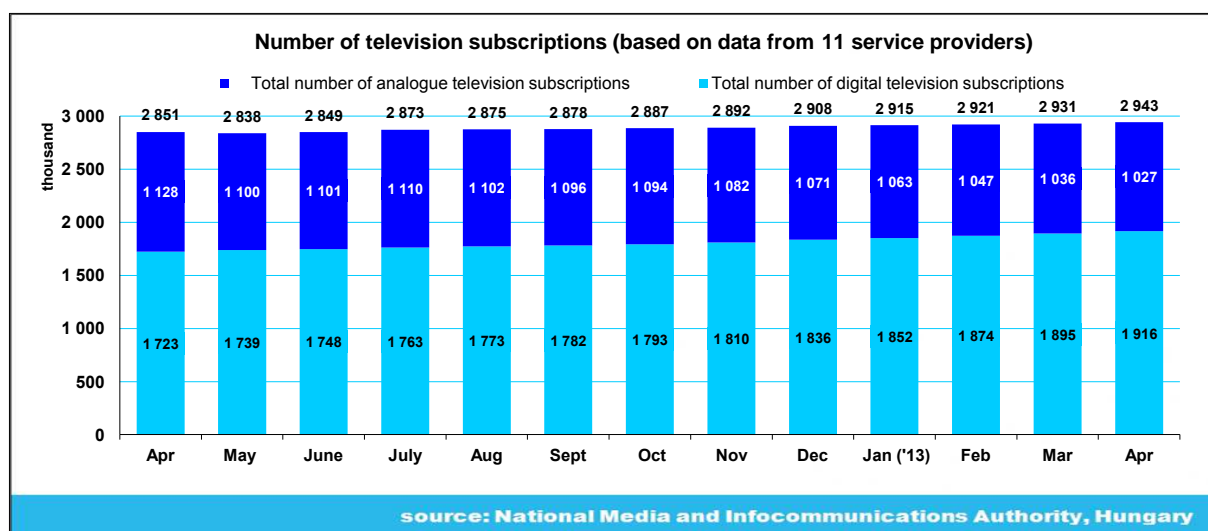


NATIONAL MEDIA AND
INFOCOMMUNICATIONS
AUTHORITY • HUNGARY

Flash report on television, April 2013

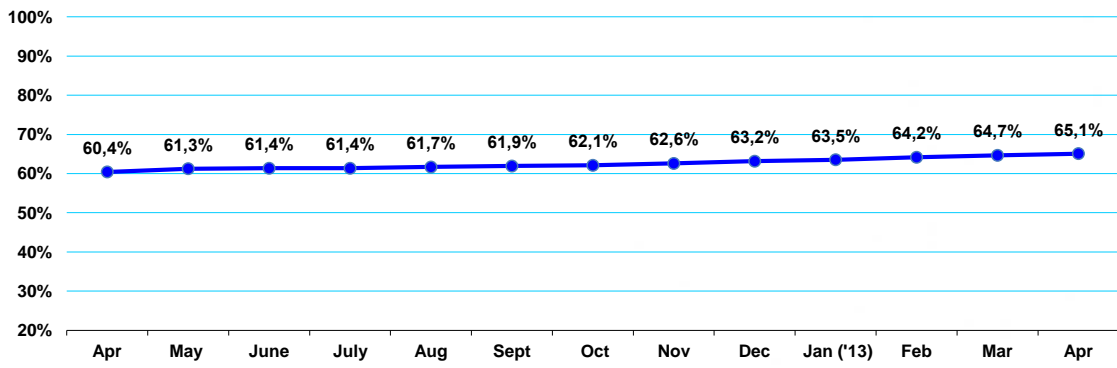
Data provided by Magyar Telekom Nyrt., Invitel Zrt., UPC Magyarország Kft., DIGI Kft., PR-TELEKOM Zrt., Tarr Kft., ViDaNet Zrt., PARISAT Kft., Hello HD Kft., UPC DTH S.á.r.l., Antenna Hungária Zrt.

Summary data of broadcasting subscription service			Base:
Total number of television subscriptions (estimated):	3 313 000	Number of television subscriptions (regardless of technology). Estimated value for the entire market.	Entire market (estimated value)
Number of television subscriptions:	2 942 866	Number of television subscriptions (regardless of technology). Based on data from the above mentioned data suppliers, covering ~88 % of the broadcasting market. [No.]	11 major market players
Number of subscriptions on wired networks (CATV, IPTV):	1 932 569	Number of broadcasting subscriptions on cable television networks and IP networks. Based on data from the above mentioned data suppliers, covering ~83 % of the wired broadcasting market. [No.]	9 major market players
total number of analogue television subscriptions of these:	1 027 015	Number of analogue broadcasting subscriptions on cable television networks. [No.]	9 major market players
of these digital subscriptions:	905 554	Number of subscriptions with set-top-boxes. Number of subscriptions where the subscriber termination point is capable of accessing the service and at least one programme is digitally transmitted. [No.]	9 major market players
Number of wireless subscriptions (DTH, HDig):	918 449	Satellite broadcasting and number of Hello Digital service subscriptions. Based on data from the above mentioned data suppliers, covering 100% of the wireless broadcasting market. [No.]	Entire market: 4 market players
Number of MinDig Tv Extra's subscriptions:	91 848	Broadcasting subscription service - on DVB-T standard - provided by Antenna Hungária, covering 100% of these subscriptions. [No.]	Entire market: 1 market players
Total number of digital television subscriptions:	1 915 851	Number of digital television subscriptions (regardless of technology). Including: (Digital CATV, IPTV, DTH, HDig, coded DVB-T) [No.]	11 major market players
Average number of set-top-boxes installed at subscriber termination points (regardless of technology):	1,49	Number of CATV, IPTV, DTH, HDig set-top-boxes / Number of CATV, IPTV, DTH, HDig subscriptions [No.]	11 major market players
Average number of set-top-boxes installed at subscriber termination points (wired service):	1,19	Number of CATV, IPTV set-top-boxes / Number of CATV, IPTV subscriptions [No.]	9 major market players
Average number of set-top-boxes installed at subscriber termination points (wireless service):	1,79	Number of DTH, HDig set-top-boxes / Number of DTH, HDig subscriptions [No.]	Entire market: 4 market players
Average number of smart cards installed at subscriber termination points (MinDig TV Extra service):	1,19	Number of MinDig TV Extra smart cards/ Number of MinDig TV Extra subscriptions [No.]	Entire market: 1 market players



Note: Based on data from the above mentioned data suppliers, covering ~88 % of the broadcasting market.

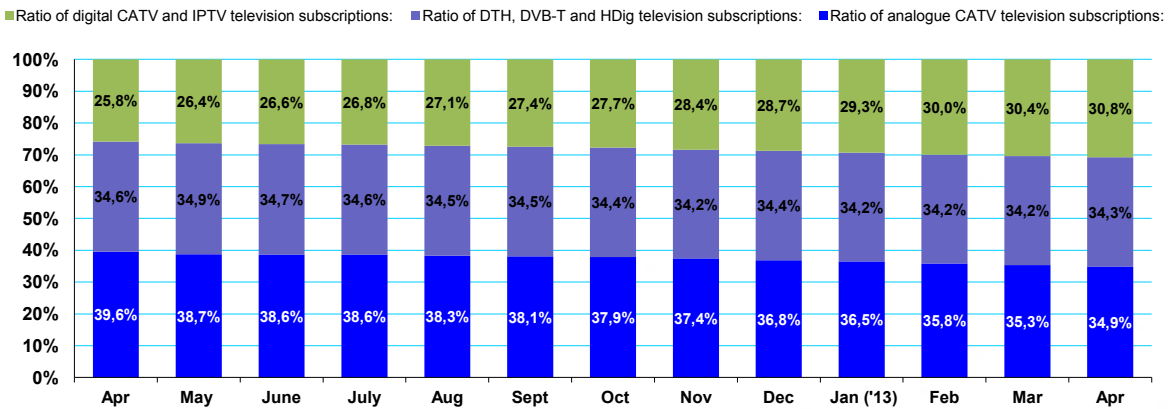
Ratio of digital television subscriptions (based on data from 11 service providers)



source: National Media and Infocommunications Authority, Hungary

Note: Based on data from the above mentioned data suppliers, covering ~88 % of the broadcasting market. Total number of digital television subscriptions / television subscriptions

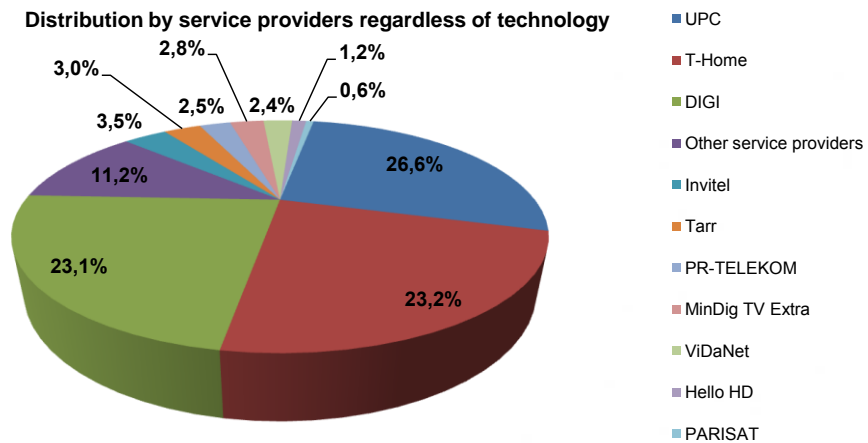
Distribution by technology (based on data from 11 service providers)



source: National Media and Infocommunications Authority, Hungary

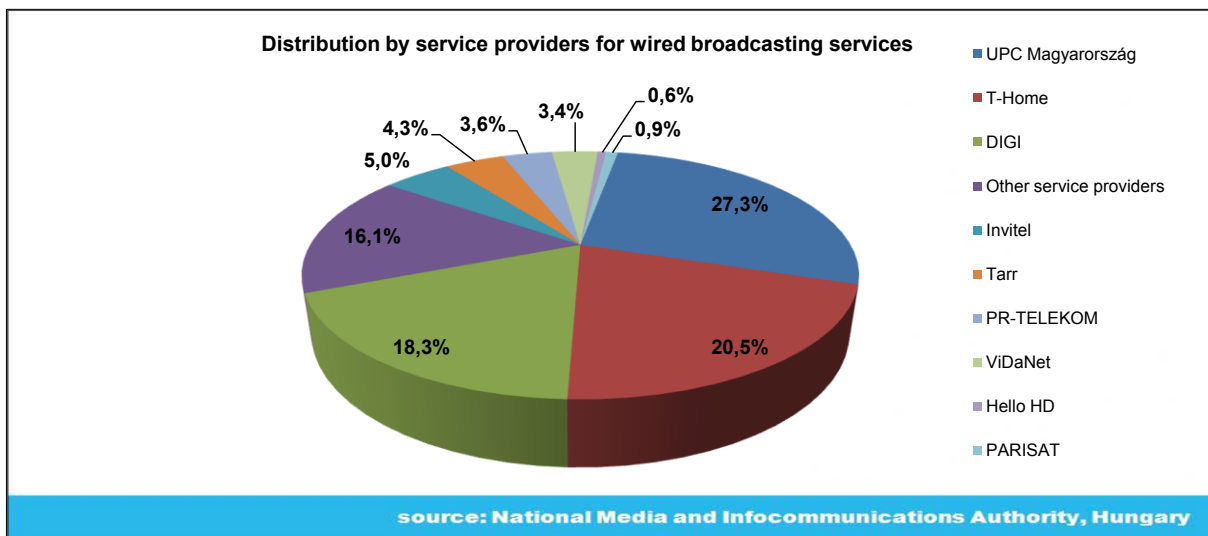
Note: Based on data from the above mentioned data suppliers, covering ~88 % of the broadcasting market.

Distribution by service providers regardless of technology

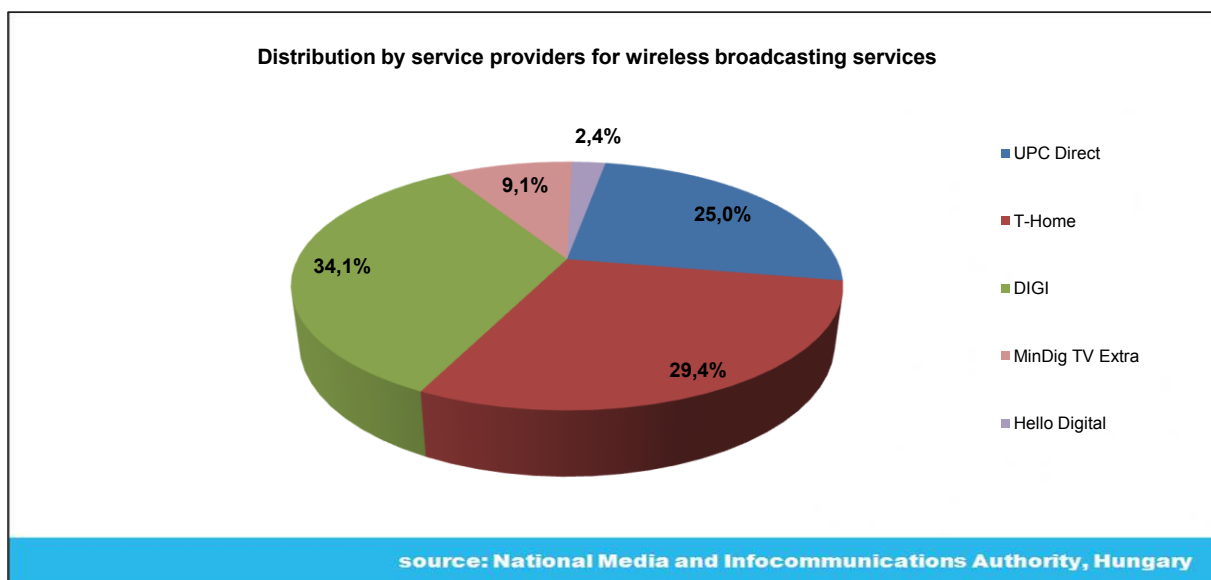


source: National Media and Infocommunications Authority, Hungary

Note: The market shares were defined based on the total market's estimated values and technologically neutrally.



Note: The market shares were defined on the basis of the number of wired subscriptions (CATV, IPTV) related to the total market's estimated values.



Note: The market shares were defined of the total market's estimated values based on the number of wireless subscriptions (DTH, coded DVB-T, HDig).

Definitions of concepts used in the report:

Broadcasting: based on Act No. LXXIV, 2007 (on the rules of broadcasting and digital switchover). Electronic communication service provided via any of the transmission networks, whereby analogue or digital broadcasting signals are transmitted from the program provider to the receiving set of the subscriber or user, regardless of the transmission network and technology applied. In particular, the following shall be regarded as broadcasting: free-to-air broadcasting, satellite broadcasting, broadcasting via a hybrid fibre-coax transmission system, as well as broadcasting a program by a transmission network using an Internet Protocol, if the type or conditions of the service are equivalent to those of broadcasting or this method substitutes broadcasting performed in another way. Broadcasting accessible by a subscriber as a separate service or included in a package together with other electronic communications services against a fee shall also be regarded broadcasting. However, signal transmission via a network suitable for connecting less than 10 receiving sets shall not classify as broadcasting.

Wired broadcasting: Broadcasting subscription service provided through cable television networks (CATV) and IP networks (IPTV).

Wireless broadcasting: Satellite (DTH) and Hello Digital (HDig) broadcasting service subscriptions.

CATV: Cable television network. Cable television networks are wired infrastructures capable of distributing radio and television signals to subscribers.

IPTV: (Internet Protocol Television) Digital television service provided through IP (Internet Protocol).

DTH: (Direct-to-Home) Broadcasting service provided through satellites.

HDig: (Hello Digital) Wireless, terrestrial microwave service provided by Hello HD Kft. in Budapest and its surroundings.

Set-top-box: Electronic device connected to the television set and an external signal source, capable of converting the incoming signals to content that can be displayed on the television screen.

MinDig TV Extra: Broadcasting subscription service - on DVB-T standard - provided by Antenna Hungária.

DVB-T: (Digital Video Broadcasting - Terrestrial) the standard of digital terrestrial video broadcasting.

Smart kártya: Smart card provided by service provider which is necessary to use of MinDig TV Extra coded service.

Market size: Determined by expert estimates based on data collected by the National Media and Infocommunications Authority for the entire market, and market research information.