

TELEVISION CONTEXT IN THE CZECH REPUBLIC

Number of TV-equipped households¹	3,961,000
Number of registered TV receivers ²	
• natural persons paying by SIPO ³	3,309,336
• natural persons submitted directly to CT	79,852
• legal persons and natural persons self-employed	194,200
a total of 3,583,388	

Households with satisfactory reception of TV signal¹

public service television	
• CT1 3,939,000, i.e.	99.4%
• CT2 3,914,000, i.e.	98.8%
• CT24 1,387,000, i.e.	35.0%
• CT4 1,300,000, i.e.	32.8%
commercial channels	
• TV Nova 3,932,000, i.e.	99.3%
• Prima TV 3,769,000, i.e.	95.2%

Average daily television viewing time¹

- viewers aged 15 and older, 3 hours 14 minutes, of which Czech Televisions 62 minutes
- males 2 hours 57 minutes, of which Czech Televisions 62 minutes
- females 3 hours 30 minutes, of which Czech Televisions 62 minutes
- viewers 4-14 years 1 hour 49 minutes, of which Czech Televisions 33 minutes.

¹ Source: ATO - MEDIARESEARCH, data for 2007

² Data as per 31 December 2007

³ Not including licence-fee payers exempt from the payment



CZECH TELEVISION - PUBLIC BROADCASTER

Inception on 1 January 1992 by the Czech Television Act as an independent public service channel

Statutory body Director General appointed by the Czech Television Council for a six-year term

Supervisory body The Czech Television Council, composed of fifteen members elected by the Chamber of Deputies of Czech Parliament for a six-year term, with one-third replaced every two years

Organizational units Czech Television Prague, Brno Television Studio, Ostrava Television Studio

Number of employees: 2,881 natural persons at 31 December 2007 (by 1,189 people, i.e. 29.21% less than in 1993 - the first year of CT broadcasting in the separate Czech Republic)

Number of daily broadcasting hours 98.7 hours a day - CT1¹ + CT2 + CT24 + CT4 (by 25.7% more than the channels CT1, CT2 and CT3 broadcast in 1993, the first year of CT broadcasting in the separate Czech Republic, and by 71,8% more than two channels F1 and CTV in 1992, the first year of a new CT institution broadcasting)

The funding mainly by the television licence fee supplemented by revenues from business operations

Programme television broadcasting of a broad range of genres, news provider, and broadcaster of major sports

events, important producer and co producer of films, documentaries and current affairs programmes

Broadcasting two nationwide channels CT1 and CT2 (analogue terrestrial broadcasting, digital terrestrial broadcasting DVB-T, digital satellite distribution, cable distribution, IPTV); news channel CT24 (digital terrestrial broadcasting DVB-T, digital satellite distribution, cable distribution, IPTV, on-line on the Internet); CT4 (digital terrestrial broadcasting DVB-T, digital satellite distribution, cable distribution, IPTV); Teletext CT on CT1, TeletextExpress on CT2, Teletext on CT4; hidden teletext subtitles at most programmes at CT1, CT2 and CT24; electronic programme guide EPG on all four channels within the DVB-T broadcasting, satellite digital and IPTV distribution, record controlling systems - VPS and PDC systems on CT1 and CT2, PDC system on CT24 and CT4; selected programmes broadcast on the Internet www.ceskatelevize.cz/vysilani

Public benefit activities media partnerships and broadcasting of non-commercial spots, own charity projects Help the Children! and Advent Concerts

Membership in international organizations

EBU European Broadcasting Union

BFA Broadcasting Fee Association, which brings together the European institutions collecting concessionary fee

CIRCUM European Association of Regional Television

EGTA European Group of Television Advertising

EDN European Documentary Network

FIAT/IFTA International Federation of Television Archives

PRIX ITALIA the oldest radio and television festival in the world

IMZ International Music Media Centre PBI

Broadcaster association of public service

SECEMIE the broadcaster Euronews

International cooperation

DigiTAG, (Digital Terrestrial Action Group)

The international European group for terrestrial digital broadcasting

Founder and organizer of

International Television Festival "Golden Prague" (since 1964)



¹ Including simultaneous regional television broadcasting of separate circuits - Prague, TS Brno and TS Ostrava

BASIC ORGANIZATIONAL STRUCTURE

(at April 1, 2008)

Director General

Secretariat, Programme and Audience Research, Long Term Programming Strategy and Development, Controlling and Internal Audit

Brno TV Studio

News, Sports, Personnel and Legal Department, Programming, Production, Economics

Ostrava TV Studio

News, Sports, Personnel and Legal Department, Programming, Production, Economics

Programming

Programme Planning and Editing, Visual Presentation, Programming Centres, Archives and Programme Libraries, ITF Golden Prague

Economics

Planning and Controlling, Financing, Accountancy

Production

Production Centres, Scenic Department, Production Services, CT Graphic Centre, Transportation

Technology

Picture and Sound Production, Secretariat and Chief Engineer, News Service Premises Technical Equipment, Transmission and News Technology, Film, Lighting, Broadcasting

News, Current Affairs, Sport

News, Sport, Current affairs, News Service Headquarters, Portal CT24

Commerce and Communication

TV Licence fees, Commerce Department, Internet, Teletext, Marketing and Communication, Project Office, Commercial Department and New Media

Operation and Trusteeship

Communications and Technical Services, Common Technology Operation, Purchasing Department and Customs Declarations, Information Technology, Fire Brigade, Building Administration

Legal Department

Collecting Societies, Copyright Issues

Human Resources Department

Human Resources Department, Press Department, Labour and Wages, External Relations Department

FUNDING

Operating under a special law, Czech Television is not financed from the state budget, but it manages its own assets. Its budget is balanced. Its sources of income are both the licence fee, amounting to some 80% of the revenues budget, and business operations related to programme production and broadcasting.

TV licence fee

The law imposes the payment of the fee on natural persons and legal entities that own a television set, or hold, or use it for other legal reason for at least 1 month.

Under the Act No. 348/2005 coll., On radio and Television Fees, as amended, each household pays a lump fee for any number of television sets, self-employed natural persons and legal persons for each device eligible for a distributive and optional reproduction of TV broadcasting. The fee maturity is scheduled for the 15th day of the period for which it is charged. A TV set is considered to be any appliance eligible for a distributive and optional reproduction of TV broadcasting, irrespective of the way of reception, even when adjusted by the holder for any other purpose.

A new law on Radio and Television Licence Fees, the Act No. 348/2005 coll., came into force in September 2005. Under this law TV fee was increased from CZK 120

to 135 a month on 1 January 2008. The increase only compensates for the loss of income of Czech Television due to the revocation of broadcasting commercials.

Commercials

Along with the regulation of TV fee a flat cancellation of broadcast commercials came into effect in CT, with the exception of the period of transition from analogue to digital terrestrial broadcasting. The revenues from broadcasting commercials will be used specifically under Act No. 304/2007 coll. (so-called "diginovela") to promote and develop terrestrial digital television broadcasting, and to digitize CT Archive.

CT is obliged to transfer the revenues to the accounts:

- a) CZK 150,000,000 annually to the State Fund for Support Cinematography,
- b) CZK 15,000,000 annually to the special account of the Czech Telecommunication Office for the development of terrestrial digital broadcasting,
- c) the remainder, after having subtracted the cost associated with collecting and administration of the revenues (CZK 500,000,000 in 2008), is deposited from CT to the special account in charge of CT. CT will use two-thirds of the funds (CZK 333,333,000 in 2008) from the account to promote and develop

terrestrial digital television broadcasting in the Czech Republic, particular to develop and operate the multiplex public service under the Czech Television Act; and the other resources (CZK 166,667,000 in 2008) to administer and digitize CT Archives.

Commercials may be broadcast on CT by the amended Act on the operation of radio and television broadcasting of November 2007 by the end of the transmission of terrestrial analogue to digital terrestrial broadcasting. The amount of commercials may not exceed 0.75% of daily airtime on CT1 and 0.5% of daily airtime on the other TV programmes. The revenue from the sale of commercial slots cannot be used by Czech Television to finance its activities, as mentioned above. A budget proposal of the Special Account in charge of CT is submitted for approval to the Czech government.



PROGRAMMING

In 2007 Czech Television broadcast on its channels CT1 and CT2 18,423 hours including regional broadcasting, i.e. average 50.5 hours a day.

Czech Television is a nationwide broadcaster. The share of regional Brno and Ostrava television studios in the offer of nationwide broadcasting circuits must be at least 20% of the total CT broadcasting time monthly.

The share of regional television studios in the nationwide broadcasting is many times higher than in previous years. It is almost five-fold that Czech Television exceeds the statutory quota of 25 minutes of daily independent regional broadcasting of news and current affairs.

In 2006 and 2007 CT broadcast an average of 124 minutes a day on regional circuits.

The share of TS Brno and Ostrava in the nationwide broadcasting was 21.8% (which is by 1.8% above the legal limit) in 2007, that is by 2.7% more than in 2006.

The proportion of programmes for the hard of hearing audience has been growing continuously. In 2007 Czech Television offered more than 76% of broadcast programmes with closed or on-screen captioning, or with a simultaneous interpretation into sign language, while law makes it obligatory for 70% of the programmes.

CT broadcast 6,990 hours of television premieres on its channels CT1 and CT2 in 2007, which represented 40% of the total broadcasting airtime of these channels.

Out of the number 625 hours premieres were broadcast simultaneously with the channels CT24 and CT4.

The channels CT24 and CT4 featured 7, 118 hours of television premieres, which represented 41% of the total broadcasting airtime of these channels.

Programmes earmarked for children - 1,806 hours, i.e. 10% of the national broadcasting airtime of 17,520 hours.

CT in-house programmes on CT - 12,318 hours, that is 70% of the national broadcasting airtime.

Acquired programmes on CT - 5,202 hours, i.e. 30% of the national broadcasting airtime, of which: domestic 815 hours, i.e. 5%, foreign 4,387 hours, i.e. 25% of the national broadcasting.

European works and legal quotas in CT broadcasting in 2007, CT 87.4% of European programmes (of which at CT1: 88.1%, CT2: 86.7%), 19.1% of independent works, (CT1: 21.1%, CT2: 16.9%), 65.2% of which younger than five years (CT1: 67.5%, CT2: 62%).

Mandatory quotas are as follows: more than 50% of broadcasting time for European works on every channel,

at least 10% share of European independent production and of this share at least 10% of programmes first broadcast less than five years ago. It does not include broadcast news, sports, games, Teletext, commercials, teleshopping, sponsor messages and connecting broadcasts.



VIEWERS

Information on audience response to its broadcasting is an important guide for Czech Television, in particular for programme composing. Czech Television, therefore, uses two main sources of feedback from viewers – audience satisfaction research and electronic measurement of viewing figures.

Audience satisfaction research gathers on a regular basis data on viewer satisfaction with programmes in the form

of a questionnaire filled in by a 750-strong panel that represents a sample of the adult population of the Czech Republic.

The data serve for calculating the satisfaction quotation from +10 to -10. Audience satisfaction is unrelated to programme ratings.

Czech Television Audience share in 2007

(Share in %)

24-hour share

	viewers older than 15 years	children 4-14 years old
CT1	22.66	22.79
CT2	8.01	6.48
TV Nova	39.59	40.11
Prima TV	19.36	14.80
Others *	10.38	15.82

Prime time share 19-22 hours

	viewers older than 15 years	children 4-14 years old
CT1	24.87	19.26
CT2	6.12	5.56
TV Nova	43.92	50.69
Prima TV	17.98	15.02
Others *	7.11	9.47

* Digital channels CT24 and CT4 are also included in the "others" item.

Source: ATO - MEDIARESEARCH

Digitilization goes on

Digitilization of terrestrial television broadcasting in the Czech Republic was launched on 21 October 2005 when Czech Television, in cooperation with the joint stock company Radiokomunikace, started distributing the signal of its channels CT1, CT2 and CT24 within telecommunication network A using the DVB-T standard. This mixed multiplex was extended by CT 4 SPORT channel on 10 February 2006.

Digital signal is now¹ available to viewers within the coverage of transmitters as follows:

During this year Czech Television is going to initiate the building of broadcasting networks 1 to launch multiplex public service, which will consist of all four CT channels and several Czech Radio channels. The first transmitters of network 1 will be Pilsen 1 – Krašov (34th channel), České Budějovice – Kleř (49th channel), Sušice (49th channel), Prague – Cukrák (53rd channel), Prague – the city (53rd channel), Ustí nad Labem – Buková hora (33rd channel) and subsequently other transmitters throughout the Czech Republic.

The procedure arises from the systematic methodology of Czech Television when covering the Czech Republic with the terrestrial digital broadcasting DVB-T signal. It deals with the possibility of preserving terrestrial reception of CT1 and CT2, which has been mainly analogue up to the present. This is connected with the need to switch off analogue terrestrial broadcasting of CT2 in some

of the regions concerned (Ceske Budejovice, Prague) at the same time when launching broadcasting of the digital terrestrial multiplex of public service. The channel here will be available only digitally. Analogue terrestrial broadcasting CT1 will remain available until the full analogue broadcasting switch off by all broadcasters in the country.

Satellite broadcasting

Satellite broadcasting of all Czech programmes has been digital from the very beginning when using DVB-S standard. Czech Television was standing by at its beginning in 1997 and has broadcast all four programmes from Astra 3A satellite. CT24 is freely accessible, channels CT1, CT2 and CT4 are encrypted due to the copyrights for broadcast programmes. A satellite dish, a digital satellite receiver with CryptoWorks module and a conditional access card, are needed to receive them. It is possible for the Czech television viewers, timely and properly providing statutory TV-fee, to buy and activate the card for free at one of two distributors of CA cards to CS Link packet. Programmes can be received from other two satellite transponders, the broadcasting being provided by other commercial providers.

Cable television

All the cable broadcasters in cable network in the Czech Republic are legally obliged to include all Czech television

programmes freely accessible from terrestrial analogue or digital broadcasting in the territory to their basic programme offer. By law they have to ask for the approval from Czech Television.

The same way the terrestrial broadcasting changes from analogue to digital transmission, also cable providers have started switching over from analogue to digital distribution, known as DVB-C. This makes it similar to the changes and benefits of terrestrial digital broadcasting DVB-T.

IPTV

Broadcasting of all CT channels is also available in digital data cable networks IPTV. Specifically, for example, the network of Telefónica O2 is involved, broadcasting CT1, CT2, CT24 and CT4 in a standard definition picture quality and ongoing at the same time HDTV broadcasting experiment with spatial up converted signal CT1 to HD definition.



CT24

A new stage of digital television broadcasting in the Czech Republic was launched on 2 May 2005 when this first ever Czech purely news channel came into being. It started a new era of digital broadcasting in the Czech Republic, thus contributing considerably to its general development, CT24 provides a round-the-clock news service via digital terrestrial broadcasting, satellite distribution, cable networks of commercial distributors, IPTV and the Internet. The channel is accessible to 35.0% of Czech homes, i.e. 1,387,000 households in absolute number. Some 476,000 viewers over the age of 15 tune in each day, with considerably higher numbers in the case of special events, such as vote of confidence in the government, President George Bush's visit to Prague or Jiri Cunek's affair. Economically and socially active residents of large urban centres, who want to be informed, are included among CT24 audience.

CT4

The dedicated sports channel CT4 marked its first anniversary on 10 February 2007.

It provides room for a wide range of sports including those coverage of which was rather low in the past, such as golf, chess, badminton, bowling, etc. Since the beginning, the intention has been to highlight Czech sport or sporting events with Czech participation.

The channel focuses on live transmissions from domestic top and regional events and offers a lot of retrospectives, forums, magazines and documentaries as well.

Available to 32.8% of Czech households, i.e. 1,300,000 homes, CT4 is daily watched by an average of 289,000 viewers aged over 15. The channel can be received via digital terrestrial broadcasting or digital satellite broadcasting as well as from some cable providers and IPTV.

¹ Data current as per 1 January 2008

² Data for the month of January 2008. The value known as a reach or a hit equals an absolute number of adult viewers who were watching the channel for at least 3 minutes continually.

CZECH TV PARTNER IN INTERNATIONAL COOPERATION

Czech Television 8 prepares projects, arising with a financial contribution of the European Commission.

International cooperation in the field of technology

Czech Television co-operates with the top technical institutions of the European Broadcasting Union (EBU). It participates not only in the activities of the Technical Committee of the EBU, but also takes active part in the activities of the Production Technology Management Committee, the Delivery Technology Management Committee and the Spectrum Management Committee.

Being a part of the Union, Czech Television also participates in developing the European regulation of new media (EC Audiovisual Media Services Directive), the regulation of frequencies (cooperation with the International Telecommunication Union (ITU) and the European Commission), the status of public service television in digital age, the attitudes towards the revisions in preparation of framework EC directives for telecommunications networks and services etc.

It pays attention to global development of the transmission of audiovisual contents in the Internet and to the introduction of High Definition Television (HDTV).

Equally important foreign activity of Czech Television includes international cooperation with the European

group for terrestrial digital broadcasting DigiTAG (Digital Terrestrial Action Group) in the field of transition to digital broadcasting, and the cooperation with the International Association of BFA (Broadcasting Fee Association) in the field of interdisciplinary activities (such as technical legislative activities).

The connection of Czech Television with European technological projects represents mainly the participation in so-called framework programmes of FP European Commission for Technology Development. The major projects include, in particular, the international project for interactive television in the field of education ELU (Enhanced Learning Unlimited), with the aim to create development environment to produce interactive educational applications for mass media, such as digital television. Six reference applications from different areas of education, illustrating the use of a relatively new delivery system, will be verified at the premises of Czech Television. Having participated in a new framework programme of the European Commission FP7 for 2007-2013, and with a positive assessment of the project proposal by the European Commission, CT has been guaranteed support and co-financing of the following interactive television project, registered under the name of VM (Vital Mind). The project, being aimed at cognitive training, has been scheduled to be started at the beginning of 2008.

ITF GOLDEN PRAGUE

Since its inception in 1964 the International Television Festival Golden Prague, organised by Czech Television, has become the world's most important television festival dedicated to music and dance on television. It ranks among the oldest and most renowned events of its kind: among television festivals, only Prix Italia (founded in 1949), Monte Carlo and Montreux festivals (both founded in 1961) can boast a longer tradition.

Today the ITF Golden Prague is a unique and prestigious showcase of TV production, presenting the world's best music and dance programmes of all musical genres. It has become a place of inspiring meetings for programme-makers, producers, experts and the general public, a place where you can discover, compare and see in competition the best of what has been produced in the field of music and dance programmes. For the first time this year, the festival is open to high-quality programmes of all musical genres, i.e. not only classical music, but also rock, pop and world music. The festival offers plenty of interesting supplementary programs again, such as Nights of the world's television, Tribute to..., World Music Session, opening and closing concerts and the Day of Czech Television.

An international jury decides about prize-winners by secret voting after the projections having been finished. The main prize of the festival, Grand Prix GOLDEN

PRAGUE, is awarded to the winning programme, three CZECH CRYSTALS to winning programmes in individual categories, i.e. Music on the Screen (music and dance programmes, including records of concerts), Documentaries about Music and Dance, Music Drama (opera, operetta, musical, dance, ballet etc.). The Director General of Czech Television awards the **CZECH TELEVISION PRIZE**. Since 2007 a new **AUDIENCE AWARD** has been awarded, voted on by visitors to the ITF GP Video Library or at public projection at ITF.

The festival's popularity is ever-increasing. Last year it welcomed 600 accredited guests from 24 countries all over the world. A prologue of the festival, the entertainment Day of Czech Television devoted to the whole family, to young and older lovers of different music genres, welcomed more than 1500 visitors.

In 2008 the International Television Festival Golden Prague enters its 45th edition. This anniversary is an exciting challenge for the organisers of the festival. We plan to raise the standard with new ideas and projects in keeping with the ever-changing worlds of music and television.

TELEXPOR

Telexport is a specialized unit of Czech Television handling sales of licences for the programmes made by Czech Television and former Czechoslovak Television for all existing media, such as TV broadcasting, theatrical distribution, exploitation on DVDs and CDs, via Internet, VOD etc., both on the domestic market and internationally.

Telexport attends major international film and TV markets, such as MIP TV, MIPCOM, the European Film Market Berlin, Discop, FILMART Hong Kong. The products available for international licensing are listed on the website www.ceskatelevize.cz/sales

In 2007 the best-selling titles were fairy-tales *Anděl Páně* (The Angel of the Lord), *O Ječmínkovi* (The Barley Boy), feature film *Horem pádem* (Up and Down), archive series *Arabela* (Arabella), *Arabela se vrací* (Return of Arabella) and *Chalupáři* (Cottagers).

The most significant role of Telexport is to represent Czech TV programmes at international film and television festivals worldwide, including all festivals held in Czech Republic.

In 2007 family film *Maharal* was the most successful title with the audience and professional jury, as well, and won a number of festival awards; a film by Věra Chytilová *Hezké chvílky bez záruky* (Pleasant Moments)

belonged to most successful, and Karin Babinska's debut *Pusinky* (The Dolls), which festival audience of almost all continents could enjoy.

In the context of a unique project, the Golden Fund, bringing the Czech audience their favourite titles on DVDs, series *Taková normální rodinka* (Such an Ordinary Family), *Arabela* (Arabella), *Chalupáři* (Cottagers), *Sanitka* (The Ambulance), *Nemocnice na kraji města* (Hospital at the End of the City), *F.L. Věk, Létající Čestmír* (Flying Čestmír), *My všichni školou povinní* (All We Schoolchildren) were gradually released.

Concerning CD titles, Karel Svoboda's melodies and Karel Gott's CDs are the bestsellers at home.

At the end of 2007 Czech Television launched its own video-on-demand service called "Videopůjčovna CT" on its website www.videopujcovnaCT.cz

It offers a wide range of programmes to the audience. The most successful were the titles *Saturnin, Sametové vrazi* (Velvet Murderers), *Swingtime* and *Brouk v hlavě* (A Bee in his Bonnet).



TV EDITION (publishing, merchandising)

In February 2006 Czech Television launched its own publishing division called Czech Television Publishing. An organizational part of CT, it publishes titles directly linked with creative activities and personalities of CT. The editorial plan includes dozens of titles. Thus, viewers have the possibility to recall their favourite programmes as books.

CT Publishing, in collaboration with its franchise partners, has placed a wide range of toys and other consumer goods with the motives from television programmes on the market.

CZECH TV AND FILM

Czech Television is an important co-producer and producer of films (feature films) in the Czech Republic. Since 1992, during the sixteen years of its existence, Czech Television participated in production of over 180 movies, including Kolya (Oscar Winner 1996), Divided we Fall (Oscar Nominee 2001), Zelary (Oscar Nominee 2003) and Nicolas Winton Power of Good (Emmy Award 2001). In 2007, 9 feature film premieres in co production with CT were introduced to the cinemas. In 2007 other 11 film projects were developed, first run of which coming in 2008, and 9 film projects, supposed to be completed in 2009.



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