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Development of Digital TV in Europe

2000 Report

BELGIUM

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1. Digital TV market overview

1.1. Roll-out of digital services

1.1.1. Cable Digital Services

As is well known, the main characteristic of the mode of reception of TV signals in Belgium is doubtless the exceptionally high ratio of cable penetration: indeed, 95 % of TV households have access to TV programmes via the cable networks.

In this context it is hardly surprising that the priority development of digital television offers should have been via cable. In the north of the country (the Dutch-speaking area), CANAL + VLAANDEREN offers, via its subsidiary V2D, a group of digital services (*Canal Digitaal* and *Het Boeket*). In the south (the French-speaking area), the situation is rather more complex, since two operators market various digital services: since March 1998, CANAL + Belgique has been broadcasting in multiplex six digital versions (three in 4:3 format and three in 16:9 format) of its analogue service, and the same radio-broadcaster, but this time associated with the Walloon cable-operators, is offering a broader group of digital services, marketed under the *'Le Bouquet'* brand.

During the year 2000, we have observed a certain enhancement of the offer and a progressive modification of price structures.

- A certain enhancement of the offer

In Flanders, the digital offer has been broadened as much by the development of a 16:9 service, comprising films and documentaries broadcast on the *'premium'* channel of Canal +, as by the appearance in autumn 2000 of new thematic channels. On the other hand, the interactive offer has been enriched, since subscribers can now access a video games downloading service, *'Lunapark'*, developed in collaboration with INFOGRAMES.

In the French-speaking area, the enhancement of the 'Le Bouquet' content has been marked by the addition of cinema channels, *Ciné Classics* and *Ciné Cinémas I* and *II*, and by the digital broadcasting of *Eurosport* programme. Nevertheless, the enrichment of the content of *'Le Bouquet'* seems limited both by network capacity problems - for a long time *'Le Bouquet'* has only had the equivalent of three analogue channels - and by economic constraints: in fact, the question is to know to what degree the additional expenses linked to the addition of new services - possible rental of new channels, and remuneration of rights-holders - could be compensated by new subscriptions that this enlarged offer might attract. The assumption of an increase in the charge for subscription to the digital bouquet - already particularly high (BEF 1,495 per month) - seems in any case difficult to envisage.

- A progressive modification of price structures

In Flanders, we very clearly observe a progressive individualisation of price structures. As in the south, subscribers now have the possibility of choosing between the bouquet of thematic channels, digital services of the ‘premium’ channel of CANAL +, and a mix of the two. But they are also being offered various options (cinema, music, video games, etc.). Moreover, the ‘pay-per-view’ services, until now limited to multi-camera retransmissions of Formula 1 races will henceforth cover recent films, accessible in N.V.O.D., and X-films.

Again, the situation is slightly different in the south of the country, where the policy of segmentation seems less confirmed. Indeed, since the launch of *‘Le Bouquet’*, it is possible to subscribe to thematic channels only, but the number of options is limited - only a ‘cinema’ option has been available since June 2000 - , the operators considering that a multiplication of the number of options would hardly allow them to maximise their income, and would risk generating an increase in the demands of the rights-holders.

1.1.2. Terrestrial development

Concurrently, recent months have been marked by the announcement of various terrestrial digital television projects:

The RTBF has announced that it has issued a call for tenders for two terrestrial television transmitters, to enable them to digitally broadcast about ten services to a geographic zone of some twenty kilometres around Brussels.

The composition of the bouquet and the methods of marketing these services do not yet seem to have been decided. But is clear that in a first phase, the aim of the French-speaking public channel basically consists of allowing or facilitating the broadcast of French-speaking services to the communes of the outskirts of Brussels situated in Flemish territory.

Beyond this linguistic aspect, the aim of the RTBF obviously also consists of testing the constraints and potentials linked to the portability and mobility of terminal equipment.

In Flanders, the VRT has also made known its willingness to develop a terrestrial digital offer. But the timing of this seems less close. In addition, VTM, the main private radio-broadcasting service in the north of the country, has criticised the fact that the public broadcaster could continue to manage the whole of the terrestrial spectrum, and has drawn the attention of the regulator to this subject.

1.2. Market development

- A deepening rather than a broadening of the market

In the south as in the north of the country, viewers now have a choice between various options: digital broadcasting of Canal + services, a bouquet of thematic services, and a package of both offers.

In this situation, the vast majority of customers of digital services are opting for this mixed option. Thus, in the south of the country, 60% of digital subscribers have opted for the package (Canal Plus and Le Bouquet), at BEF 1,599 per month, 30% for Canal Numérique alone, and 10% for the bouquet of thematic services.

Table 1 : Structure of French-speaking subscribers to digital TV services (08.2000)

Canal Numérique alone		29 %	
Le Bouquet			71 %
of which			
	Canal Numérique and *Le Bouquet*		*61 %*
	Le Bouquet (digital) alone		*10 %*

At the present time, it thus appears clearly that in Belgium, the development of digital television is ending-up with an increase in expenditure devoted to television services by households which have already accepted the system of pay-TV, rather than by a significant increase in the number of households accepting the principle of paying for access to television services; moreover, overall, as much in the north as in the south of the country, the number of subscribers to pay-TV services hardly seems to be increasing.

It has to be said that until recently the pricing policy practised by the operators did not encourage households to subscribe to the only bouquet of thematic services, the difference between the price of the subscription to this (BEF 999 per month in the north of the country, for example) and the cost of subscribing to the digital version of the ‘premium service’ (BEF 1,399) being particularly small. Moreover, it was precisely in order to reach a new category of consumers and to increase the number of decoders in use that, mid-2000, the prices of *Het Boeket* were reduced in the north of the country (BEF 699 instead of BEF 999).

- Almost a quarter of subscribers to pay-TV services have opted for digital

In this context, digital is winning growing acceptance in households, which accept to pay (more than the basic cost) for access to television services.

While Belgium has a little over 330,000 households subscribing to pay television services (162,000 Dutch-speaking and 170,000 French-speaking households), 70,000 of them have already opted for digital services.

- A more dynamic market in the south than in the north of the country

Beyond these general trends, the dynamics of market development of digital television appear to be very different between the north and the south of the country. The French-speaking market - nevertheless traditionally less receptive to new communication services than the Dutch-speaking market - is experiencing much more vigorous growth in the field of digital television than that observed in Flanders.

Although developed more recently than the services of Canal Digitaal, the digital services of Le Bouquet and those of Canal + Belgique already have 40,000 subscribers (2.8% of French-speaking TV households), while the Flemish digital services only have 32,000 subscribers (1.4% of Dutch-speaking TV households).

We can observe three reasons behind this phenomenon:

- Firstly, as the digital offer of CANAL + BELGIQUE has undoubtedly benefited from advertising investments, the image and brand name of CANAL + FRANCE, and Le Bouquet has very probably benefited from the considerable marketing efforts made by the two main digital operators present in the French market, TPS and CANAL SATELLITE;
- Moreover, Le Bouquet, which broadcasts the most appreciated services of TPS and CANAL SATELLITE in the French market, may be considered as a particularly "up-market" digital offer;
- Finally, being broadcast by only a part of the cable network of the Flemish Region, Canal Digitaal has for a long time only made limited marketing efforts.

1.3. Details of services

1.3.1. Details of services

At the present time in Belgium we find four digital television offers (*Canal Digitaal* and *Het Boeket* in Flanders, *Canal Numérique* and *Le Bouquet* in French-speaking Belgium), marketed by three different operators (CANAL PLUS VLAANDEREN, CANAL PLUS BELGIQUE, and a partnership between this operator and the Walloon cable-distributors).

1.3.2. Details of the DTV offer

1.3.2.1. Canal Digitaal and Het Boeket

Since April 1998, respecting the commitments made previously by NETHOLD, CANAL PLUS VLAANDEREN (formerly CANAL PLUS TELEVISIE) broadcasts an offer of digital television services through the cable networks in the north of the country. This offer - in fact historically the first “Belgian” digital bouquet - comprises around fifteen services:

- the multiplex of the analogue channel in 4:3 format (Canal + and Canal + Blauw) and a service in 16:9 format, exclusively comprising films and documentaries ;
- a dozen thematic services, mainly originating from English-speaking countries (CNBC, Discovery, Animal Planet, The Cartoon Network, Fox Kids, etc.)[1] ;
- an E.P.G., now taking uncoded programmes from the main Flemish channels (TV1, Ketnet, Canvas, VTM, Kanaal 2, VT4) ;
- various interactive services, including Lunapark, a service for downloading video games ;
- and “kiosk”, a pay-per-view service.

Although, originally, viewers could only choose between the whole of the digital bouquet and access to the thematic channels only, it is now also possible for them to opt for a subscription to the only digital version of the ‘premium’ service of the pay-TV channel.

Moreover, subscribers are offered various options:

- *“Cinemaworld”*, a cinema offer, comprising a version of *CinéCinémas* developed for the Dutch-language markets, TCM, an AOL-TIME WARNER service, and *Hallmark*;
- *“Music World”*, a “package” of four channels of video-music ;
- and *“Music Choice”*, a group of around fifty audio services, free of advertising, with identification of the music broadcast.

The pay-per-view services, which until now had focussed only on multi-camera broadcasts of Formula 1 races, will now cover new types of programmes: a system of near-video-on-

[1] Moreover, in the majority of cases, these services are only available in the English language.

demand will thus offer a different film every week from autumn 2000. And a service for adults will be developed on a commercial basis half-way between pay-per-view and subscription.

Table 2 : Channel line-up

Offer	Price per month
Het Boeket	BEF 999 (BEF 699 from 01.10.00)
Canal + Kanalen	BEF 1.399
Canal + & Het Boeket	BEF 1.599
Options :	
Cinema World (CinéCinémas, TCM, Hallmark)	*BEF 300*
Music World (4 chaînes de vidéo-musiques)	*BEF 200*
Music Choice (47 services audio)	*BEF 200*
LunaPark (video games)	*n.a.*
Kiosk (pay-per-view: Formula 1, Film of the week, X Films)	BEF 150 (per view)

Table 3 : Major channel providers

Channels	Provider
Turner Classic Movies (T.C.M.) - The Cartoon Network	A.O.L. – Time Warner
Fox Kids	Fox Kids Netherlands
Animal Planet	D.C.I./BBC Worldwide
Discovery	D.C.I.
Muzzik	CanalSatellite
CNBC	N.B.C.

1.3.2.2. Canal + Numérique and Le Bouquet

To satisfy the needs of its new subscribers - the production of analogue decoders having been stopped early in 1998 - CANAL+ BELGIQUE, the only pay-TV channel in the French Community of Belgium (the Walloon Region + Brussels), started digital broadcasting on 1 March of the same year.

Presently this channel is offering, in digital, six multiplexed versions - three in 4:3 format and three in 16:9 format - of its analogue service. These services, directly injected into the cable from a digital platform located in Charleroi, are carried via a fiber-optic backbone managed by A.C.M. - a company comprising the Walloon cable-operators and various public or state-linked financial partners - to the head-end stations of nearly all the cable networks in the Walloon Region and to Brutélé in the Brussels region.

Table 4 : Channel line-up

Offer	Price per month
Canal Numérique (Canal Plus, Canal Jaune, Canal Bleu, 4 :3 and 16 :9)	BEF 1,495

Table 5 : Major channel providers

Channels	Provider
Canal Plus, Canal Jaune, Canal Bleu	Canal Plus Belgique

Besides, since January 1999, CANAL PLUS Belgique has been sharing in the development and marketing of a broader bouquet of digital services, operated in partnership with the Walloon cable-operators.

Le Bouquet comprises a selection of thematic services included, in France, in the offers of CANALSATELLITE or TPS, as well as some English-speaking channels. All these services are unscrambled and rescrambled using the so-called “transcontrol” technique. An audio offer also takes-up various services offered by MULTIMUSIC.

Moreover, since June 2000, a cinema option comprising the programmes of *Ciné Classics* and of *CinéCinémas*, is also offered to subscribers.

Table 6 : Channel line-up

Offer	Price per month
Multimusic	BEF 695
Le Bouquet	BEF 1.395
Le Bouquet + Canal Numérique	BEF 2.000
Cinema option	*n.a.*

Table 7 : Major channel providers

Channels	Provider
Canal J, Comédie, Forum Planète, Fox Kids, Muzzik, Pathé Sports, Planète, Voyage	CanalSatellite
Mezzo, M6 Music, Odyssée, Teletoon	TPS
AB Animaux, Automobile, Histoire, XXL	AB Sat
The Cartoon Network, TNT	AOL – Time Warner
National Geographic	National Geographic
Audio services	MultiMusic

1.4. Operators and market structure

1.4.1. Concentration of the pay-TV market

In 2000, the television programme distribution market in Belgium has experienced two major evolutions:

- Canal + shareholding modifications

Firstly, the capital structure of the activities of CANAL + in Belgium has been completely reorganised. In French-speaking Belgium, the shareholding of RTBF, the public television operator, that of Brutélé, the CATV operator, and that of DEFICOM, the holding group, have been disposed of. The GROUPE CANAL + is now the only shareholder in CANAL + BENELUX, which itself controls, at one and the same time, CANAL + BELGIQUE, CANAL + VLAANDEREN and CANAL + NETHERLANDS.

In point of fact, the shareholding of CANAL + BELGIQUE (which operates in the French-speaking area) and that of CANAL + VLAANDEREN (which operates in the Dutch-speaking area) are henceforth absolutely identical, which - even if the content of their 'premium' services and that of their thematic services remain different - is obviously such as to facilitate the development of technical and commercial synergies between these two companies.

- Telenet shareholding modifications

At the same time, but for totally different reasons, the shareholding of TELENET, the company responsible for managing telecommunication services and interactive services (access to the Internet) on the cable networks of the north of the country, has also been profoundly modified. Henceforth, the majority shareholding in TELENET is in the hands of the American company C.A.I. (CALLAHAN INTERNATIONAL), which is also present in the cable networks in France (along with CANAL + in *Numéricable*), and in Germany and Spain.

CALLAHAN has also taken an option on the majority of shares in the Flemish cable networks managed by mixed intercommunal groups, and its ambitions do not seem to be limited to Dutch-speaking Belgium. In fact, the hypothesis cannot be rejected that certain cable networks in Brussels or Wallonia - particularly those managed by ELECTRABEL - may shortly become the subjects of take-over bids by this American company.

1.4.2. Vertical integration and barriers to competition

In a market characterised by the dominant position of the cable network operators, which each have a *de facto* monopoly in their local market and which would like to benefit from the development of digital, either to obtain better remuneration for their relay services, or to increase value-added and to offer services other than simply relaying signals, the question of the access of digital television services to the networks obviously constitutes a burning issue.

The development of digital television has thus given rise to many discussions and some conflicts between bouquet-operators and cable-operators. Besides, we must remember that it took a court case to force the Brussels cable-operators Coditel and UPC to relay the digital service of Canal Plus.

Even today, only part of the networks are taking the digital offers:

- In Flanders, the digital services offered by Canal + VLAANDEREN are not taken-up by networks managed by purely intercommunal groups ;
- In Brussels, CODITEL does not relay any digital programmes, while UPC, awaiting multi-service decoders (telecommunications, Internet, digital TV) enabling them to launch their “triple-play” approach, only presently offers analogue bouquets aimed at the immigrant communities.

Table 8 : Access of digital services to cable networks in various Regions (100 = Belgian subscribers to cable networks)

	Number of subscribers to cable networks	**Number of subscribers with potential access to *Canal Digitaal* or to *Het Boeket***	**Number of subscribers with potential access to *Canal + Numérique***	**Number of subscribers with potential access to *”Le Bouquet”***
Flanders (Dutch-speaking area)	59.7 %	40.1 %	0.0 %	0.0 %
Brussels (French- and Dutch-speaking area)	9.8 %	0.0 %	9.8 %	2.1 %
Wallonia (French-speaking area)	30.5 %	0.0 %	30.5 %	30.5 %
Belgium	100.0 %	40.1 %	40.3 %	32.6 %

Source : LENTIC

In all likelihood, the growing concentration of the cable sector can only make yet more critical this question of the access of services to cable networks.

However, the situation is profoundly different to that observed in the Netherlands. Unlike UPC, TELENET does not intervene directly in the field of publishing television services. Besides, it is not certain that the offer of a second ‘premium’ service, alongside that of CANAL + VLAANDEREN, would be desirable given the present state of the market.

So everything leads us to believe that, as soon as the agreements between the Flemish cable networks and C.A.I. have been finalised, negotiations will begin between the present operator of digital television services, in Flanders (i.e. CANAL + VLAANDEREN), and the principle operator of Belgian cable networks.

In this respect, various possibilities can be envisaged, ranging from the marketing of several bouquets offered by various operators, on the same platform, to taking-up the offer of CANAL + in a new bouquet to be managed by TELENET.

In any case, the choice by TELENET of a terminal platform will be far from trivial, because the selection of a fundamentally different solution to that chosen by CANAL + would result in making obsolete the equipment already placed with the present subscribers of *Canal Digitaal*, customers who are undoubtedly able to afford an enhanced offer of pay-TV services.

1.5. Perspectives

1.5.1. Decoder issues

Given the limited size of the national market, the Belgian operators have little room for manoeuvre to determine the precise functionality of the *set-top boxes* intended for their subscribers. Unless they accept the absorption of major on-costs, they will obviously have to retain the configurations already adopted in the most important markets.

It is hardly surprising that the technical choices are almost the same in the north as in the south of the country: the decoders (*Mediaguard/Mediahighway* type) are in fact very similar to those used in France and Spain. So far they are manufactured by PHILIPS in Hasselt (Belgian Limburg).

These first-generation decoders - although equipped with an automatic scanning function - will be progressively replaced by '*net-top boxes*' developed by CANAL PLUS TECHNOLOGIES, which will have an enhanced memory and allow high-debit access to the Internet.

In any case, the rental of decoders is now included in the subscription price. This should remain the case as long as the technological offer is insufficiently stabilised and harmonised, particularly in such a way that a standard solution can be proposed to all Belgian households; this hardly seems to be an immediate prospect because the decoder chosen by UPC (Windows CE with *Cryptoworks*) will most likely not respect MHP standards.

Table 9 : Conditional access

	Available for sale	CA agreements	Technology
Canal Digitaal	No	None	Mediaguard Mediahighway
Canal + Numérique	No	None	Mediaguard Mediahighway
Le Bouquet	No	None	Mediaguard Mediahighway

1.5.2. 16:9

Several digital services are here and now offered in 16:9 format. This is the case mainly for the multiplexed services of the 'premium' channel of CANAL + Belgique, which is broadcast simultaneously in the 4:3 format (3 services) and in the 16:9 format (3 services).

In Flanders, at the end of 1999, a 16:9 channel, with programming comprising only films and documentaries, replaced *Canal + Geel*.

Table 10 : Number of TV households with 16:9 sets

	1996	1998	1998
Belgian households with 16:9 sets installed	147 440	229 140	301 450

Source : E.A.O.

1.5.3. Portable reception

No Herzian digital offer is presently operational in Belgium. The project likely to be finalised most rapidly is undoubtedly that proposed by the RTBF in the Brussels Region.

As mentioned above, one of the aims of this initiative is to test the interest of users for portability, particularly for niche markets (second TV set market, etc.).

1.6. Conclusion

Since 1998, there has been an undeniable enhancement of digital television services on the Belgian cable networks. Besides, digital is winning growing success among households accepting to pay (over and above basic costs) to access television services. Already, nearly a quarter of Belgian subscribers to pay-TV services have thus opted for digital.

Nevertheless, the development of the market for digital television is resulting more in an increase in expenditure devoted to television services by households having already accepted the pay-TV system, rather than in any significant increase in the number of viewers accepting the principle of paying for access to television services. However, significant enlargement of the market is considered as a priority, both by producers of the services and by the network operators. For the former it is indeed essential that the Belgian market should reach a sufficient size to allow the development of a local offer, whether of television services or of interactive services, these being notably absent from the Belgian digital landscape.

For the cable network operators, constrained by the technical limits of their infrastructure, the rapid development of the park of set-top boxes appears as an essential solution to the extension of their offer.

In this context, each participant is at present obviously trying to make its mark :

- The bouquet operators are reviewing their pricing policies in the hope of reaching new audiences. Thus, CANAL PLUS VLAANDEREN is now offering a digital bouquet at less than BEF 700 per month. In parallel with this, CANAL PLUS Belgique is envisaging the development of a mono-programme digital offer at a price barely higher than that for its ‘premium’ analogue service.

- Beyond this, there is a proliferation of initiatives aimed at developing multi-services platforms :
  - CANAL PLUS Belgique thus has a project to equip a major proportion of subscribers to cable-networks with a new-generation decoder giving access both to the Internet and to digital television services;
  - On the other hand, UPC and above all TELENET - the majority of the share capital of which has just been acquired by the American company CALLAHAN - are aiming to launch soon an integrated and multi-service platform, with the obvious objective of developing commercial, operational and technical synergies between the offers of telecom, interactive and audiovisual services. It is precisely in this context that TELENET has launched a call for tenders for some 2.5 million terminal kits.

Such a perspective - alongside which the hertzian digital project, initiated by the RTBF in the Brussels Region, appears very modest - would inevitably send back to the drawing-board the whole organisation of the digital television sector in Belgium. And within that framework, the question remains of knowing whether the Belgian public authorities, which so far - unlike their Dutch counterparts - have refrained from intervening in the relations between network-operators, bouquet-operators, and broadcasters, could maintain the same attitude.

2. Key figures for the Belgian market

2.1. Country fundamentals

	1993	1994	1995	1996	1997	1998	1999
Population (millions)		10,116	10,130	10,143	10,170	10,192	10,214
Households (millions)		3,921	3,952	3,983	4,020	4,104	4,120
GDP (Euros, in billions)		195,70	209,00	211,30	219,10	224,12	231,79

Source: OECD

2.2. Equipment

As of 31 of December	*1993*	*1994*	*1995*	*1996*	*1997*	*1998*	*1999*
TV households (millions)		3,740	3,771	3,806	3,845	3,938	3,955
TV households (% of total households)		95,4%	95,4%	95,6%	95,6%	95,9%	96,0%
TV Households with 2 TV sets or more (millions)		0,860	0,980	1,095	1,192	1,180	1,226
TV Households with 2 TV sets or more (% of TV Households)		23,0%	26,0%	28,8%	31,0%	30,0%	31,0%
TV Households with 16:9 Television sets (millions)		0,100	0,120	0,147	0,192	0,229	0,301
TV Households with 16:9 Television sets (% of TV Households)		2,7%	3,2%	3,9%	5,0%	5,8%	7,6%
VCR Households (millions)		2,301	2,385	2,485	2,536	2,717	2,975
VCR Households (% of TV Households)		61,5%	63,2%	65,3%	66,0%	69,0%	75,2%
Digital STB Households (millions)		0,000	0,000	0,000	0,000	0,023	0,048
Digital STB Households (% of TV Households)		0,0%	0,0%	0,0%	0,0%	0,6%	1,2%
IDTV Households (millions)		0,000	0,000	0,000	0,000	0,000	0,000
Digital TV Households (% of TV households)		0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Digital Households (millions)		0,000	0,000	0,000	0,000	0,023	0,048
Digital Households (% of TV households)		0,0%	0,0%	0,0%	0,0%	0,6%	1,2%

Source: E.A.O./L.E.N.T.I.C. estimation

2.3. Television market estimates

Millions Euros	*1993*	*1994*	*1995*	*1996*	*1997*	*1998*	*1999*
Analogue TV Market							
Licence fees		252,00	265,00	241,0	239,36	246,50	267,14
Advertising		246,00	288,00	302,00	345,80	389,20	432,60
Subscriptions		87,00	98,00	90,00	90,05	89,73	79,27
Total analogue TV		585,00	651,00	633,00	675,21	725,43	780,16
Digital TV Market							
Licence fees		0,00	0,00	0,00	0,00	0,00	0,00
Advertising		0,00	0,00	0,00	0,00	0,00	0,00
Subscriptions		0,00	0,00	0,00	0,00	0,25	13,65
Total digital TV		0,00	0,00	0,00	0,00	0,25	13,65
TV Market							
Licence fees		252,00	265,00	241,00	239,36	246,50	267,14
Advertising		246,00	288,00	302,00	345,80	389,20	432,60
Subscriptions		87,00	98,00	90,00	90,05	89,97	92,92
Total TV market		585,00	651,00	633,00	675,21	725,67	792,66

Source: E.A.O./L.E.N.T.I.C. estimation

2.3. Details of the subscription-TV market

Table 11 : Cable

	1993	*1994*	*1995*	*1996*	*1997*	*1998*	*1999*
Home passed (millions)		3,721	3,759	3,794	3,838	3,930	3,947
of which digital (millions)		0,000	0,000	0,000	0,000	3,158	3,162
Home passed (% of TV households)		99,5%	99,7%	99,7%	99,8%	99,8%	99,8%
of which digital (% of TV households)		0,0%	0,0%	0,0%	0,0%	80,2%	80,2%
Analogue Basic Subscribers (millions)		3,219	3,240	3,308	3,360	3,372	3,386
Digital package subscribers (millions)		0,000	0,000	0,000	0,000	0,023	0,048
Analogue Basic Subscribers (% of TV households)		86,1%	85,9%	86,9%	87,4%	85,6%	85,8%
Digital package subscribers (% of TV households)		0,0%	0,0%	0,0%	0,0%	0,6%	1,2%

Source: E.A.O./L.E.N.T.I.C. estimation

Table 12 : Satellite

	1993	1994	1995	1996	1997	1998	1999
Satellite households (millions)		0,040	0,050	0,060	0,070	0,080	0,085
Satellite households (% of TV households)		1,1%	1,3%	1,6%	1,8%	2,0%	2,2%
Satellite subscribers (millions)		0,000	0,000	0,000	0,000	0,000	0,000
Satellite subscribers (% of TV households)		0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
of which digital (millions)		0,000	0,000	0,000	0,000	0,000	0,000
of which digital (% of TV households)		0,0%	0,0%	0,0%	0,0%	0,0%	0,0%

Source: E.A.O./L.E.N.T.I.C. estimation