

# MAXtv

The Croatian leader in Pay TV



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## MAXtv: Content at the core of T-HT strategy

Pay TV in Croatia	T-HT Pay TV
<ul style="list-style-type: none"> <li>▪ 619.000 Pay TV subs in Dec. 2012 and increase of 6% YoY</li> <li>▪ Pay TV household penetration at 41% still allows for growth (WE: 56%) <sup>(1,2)</sup></li> <li>▪ New entrant to the Pay TV market in Dec. 2012.</li> <li>▪ Croatia is the only regulated IPTV market in Europe</li> </ul>	<ul style="list-style-type: none"> <li>▪ MAXtv IPTV launched in 2006</li> <li>▪ Iskon IPTV launched in 2009</li> <li>▪ MAXtv SAT direct to home service launched in 2010</li> <li>▪ MAXtv To Go over the top service launched in 2011</li> <li>▪ Leader in VoD and PPV</li> <li>▪ MAXtv To Go Match Web PPV launched in 2012</li> <li>▪ Number of T- HT Pay TV customers has increased by 7% to 369.000 YoY</li> </ul>

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Source: (1) payTV connections per total households, (2) Analysys Mason

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## MAXtv : a range of combinations of Content, Technology and Services

**Linear Channels:** continuing to be the backbone of the Pay TV content offering

**Basic** - 90+channels (Kids, Movie, Documentary; Sport; Music, News etc)

**Extra** - 24+channels (Kids, Movie, Documentary; Music, News etc)

**Kids Pack** - 6+channels Dubbed Kids Channels

**Premium Sport Offer** - 12+channels (Arenasport 2,3,4, Sportklub, Golf, Fishing&Hunting; Nautical etc)

**Plus Package (adult + music)** - 10+channels

**Premium Movie Offer** - HBO, Cinemax, HBO On Demand

**HD Package Basic and Sport** - 16+channels

**Platforms and Services**

IPTV  
DTH  
3ple play  
OTT

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Variety of options covering a wide range of requirements and interest ranging from basic to very premium

**Additional Services**

PPV  
Npvr  
Catch up TV  
Betting IPTV  
VOD

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## Important developments since the last Business Breakfast (Nov. 2012)

**MAXtv To Go**

- Launch and development of MAXtv To Go over the top service
- Now available to all and included in selected mobile plans

**Sports Rights**

- Acquisition of UEFA Championship League, UEFA Europa League, Spanish Copa del Rey, EHF Champions League
- Acquisition of Croatian Football league rights

**MAXtv To Go MATCH**

- Launch of MATCH a Web Pay Per View service for premium sports content

**Interactivity**

- Live sports betting via MAXtv IPTV platform
- Social TV by Iskon TV

**Environment**

- Regulation of IPTV by Hakom
- New entrant to the market
- Consolidation moves by the competition

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## MAXtv To Go - a growing OTT driven by:



Premium Sports Content (also HD)

Basic and easy to use functionality

Simple and easy activation

Available to anybody any time without contract obligation

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## MAXtv To Go MATCH: There is a future for paid content on the web in Croatia



More than 10.000 registered users

Geolocked content

Different prices per Territory

Free additional features on Match service:

Live score

Largest sports community site

tribina.hr

Fantasy Football

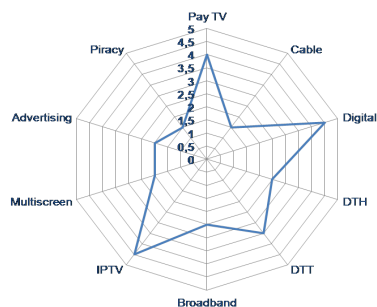
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## What to expect in next few years?

- Although growth in MAXtv IPTV service has slowed, there is still a lot of room for expansion
- High piracy rates make fighting piracy a priority topic for the whole Pay TV industry
- With broadband household penetration at 46%, significant growth opportunities remain in triple-play bundles and the OTT
- New entrants to the Pay TV market via OTT are certain (Content owners, FTA TV, etc.)
- Underdeveloped advertising market on Pay TV channels only starting to pick up pace
- Future strategy will involve bringing premium content to VOD and OTT distribution as market evolves with consumers demanding content on various devices at the same time

Croatia television market scorecard



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Thank you for your attention!

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