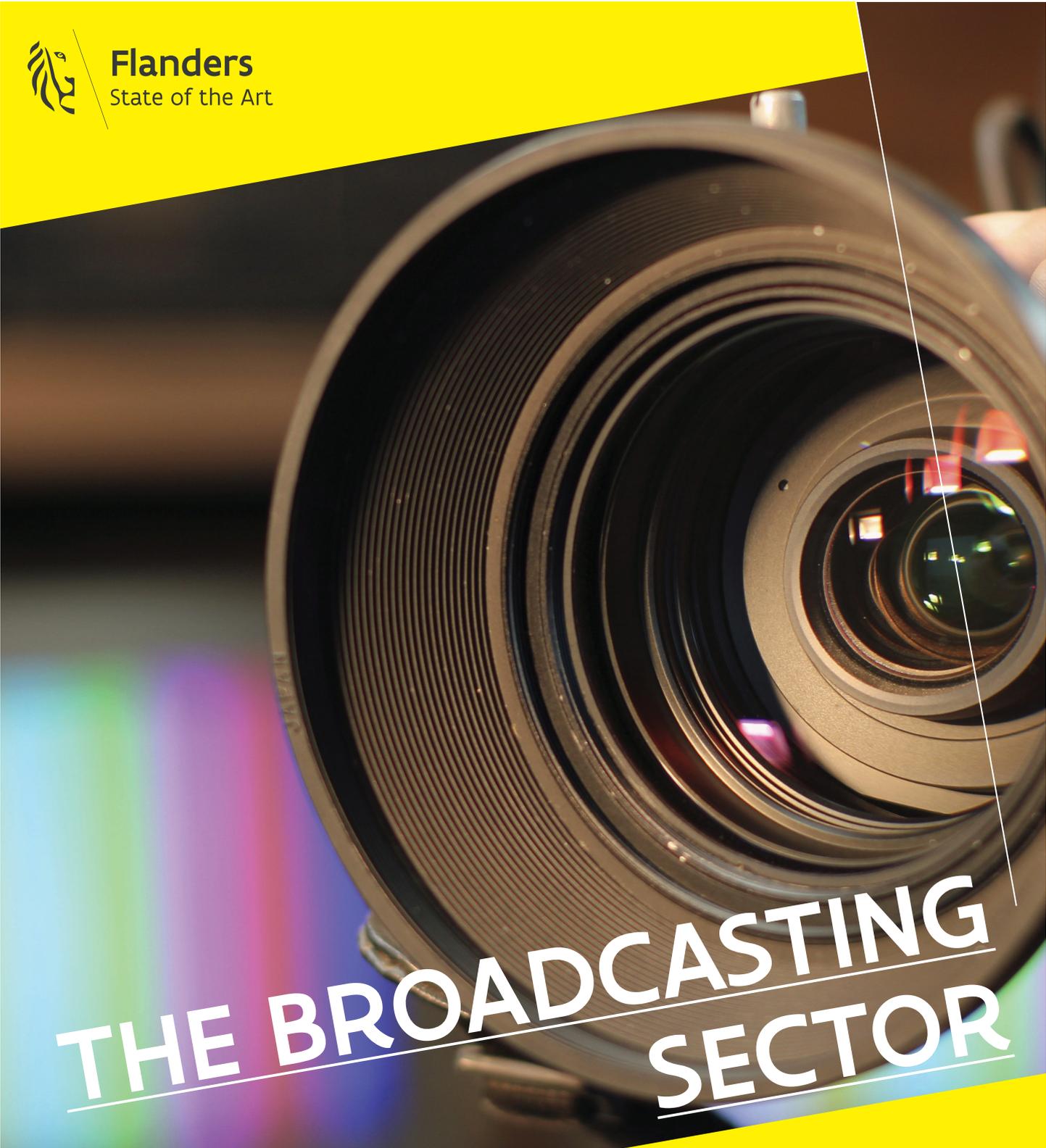




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**THE BROADCASTING
SECTOR**

IN CROATIA

FLANDERS INVESTMENT & TRADE MARKET SURVEY

The Broadcasting Sector in Croatia

December 2016

c/o Embassy of Belgium

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1 Executive Summary

This report is aimed at providing a wide view of the current situation of the broadcasting sector in Croatia. As you may know, Croatia was among the first countries in Central and Eastern Europe to establish a radio station. Radio Zagreb broadcast the first words live in the air on the 15th of May 1926, marking the beginning of radio broadcasting in Croatia. Thirty years later, Croatian television made its appearance.

The broadcasting sector in Croatia is thus divided into two branches: radio broadcasting and television broadcasting. The Croatian Radio Television, the public broadcasting company, operates several radio and television channels.

Introduced by some statistical data and basic information about the Republic of Croatia, these numbers are going to provide you with an overview of the local market and its tendencies.

In the second part of this report, you will find an overview of the television broadcasting sector in Croatia, a description of the ways of TV broadcasting delivery and a list of the different TV stations (public, commercial, local or regional). Television is the most widespread source of information in Croatia—on average 57% of the population of Croatia uses television as their primary source of information.

The next section deals with radio broadcasting and provides a list of different radio stations in Croatia. Radio broadcasting is listened by 55.5% of Croatian people, while 91.2% of them listens to the radio on a weekly basis.

According to the territorial coverage, radio stations and TV broadcasters can cover the whole country, i.e. their programmes can be received on the whole territory of the Republic of Croatia, in a particular narrow area. According to status, radio stations and TV broadcasters can be public, non-profit and independent, while television channels can be public and independent.

In the 4th part, you will find information about the market regulation and the different centres that regulate broadcasting in Croatia.

For further information about broadcasting sector in Croatia, please do not hesitate to contact us: office@beltrade-croatia.com

2 Croatia overview



As Communism collapsed throughout Eastern Europe and Yugoslavia began to unravel along ethnic and religious lines, Croatia declared its independence in 1991. Years of conflict between Croats and Serbs ended formally in 1995 with the Dayton Peace Accords. From that time, the country underwent a transition process to a market economy. Croatia became a member of NATO in April 2009, completed accession negotiations with the European Union in June 2011 and entered the EU in July 2013.

Source: www.vlada.hr

Geography

Area: 56,542 sq. km (22,830 sq. mi)
Border countries: Bosnia and Herzegovina 932 km, Hungary 329 km, Serbia 241 km, Montenegro 25 km, Slovenia 455 km.
Climate: Mediterranean and continental; continental climate predominant with hot summers and cold winters; mild winters, dry summers along coast
Terrain: geographically diverse; flat plains along Hungarian border, low mountains and highlands near Adriatic coastline and islands.
Natural resources: oil, some coal, bauxite, low-grade iron ore, calcium, gypsum, natural asphalt, silica, mica, clays, salt, hydropower.

Political profile

Government: Parliamentary Democracy
Head of State: Kolinda Grabar-Kitarović
Membership of International Organizations: United Nations, Organization for Security and Co-operation in Europe, Council of Europe, Regional Cooperation Council, International Monetary Fund, World Bank, World Trade Organization, European Bank for Reconstruction and Development, Partnership for Peace, NATO
Accession to the European Union: 1st July 2013 – 28th Member State

Source: www.heritage.org/index/country/croatia

People

Population: 4.46 mio (July 2015 est.)
Ethnic groups: Croat 89.6%, Serb 4.5%, other 5.9% (including Bosniak, Hungarian, Slovene, Czech, and Roma) - (2011 census).
Religions: Roman Catholic 87.8%, Orthodox 4.4%, other Christian 0.4%, Muslim 1.3%, other and unspecified 0.9%, none 5.2%
Languages: Croatian 96%, other 4% (including Italian, Hungarian, Czech, Slovak, and German)
Literacy: age 15 and over can read and write total population: 98.1%. Male: 99.3%. Female: 97.1%

General data

Main cities: Zagreb (capital), Split, Rijeka, Osijek
National currency: Kuna
GDP: € 43.921 billion (2015 est., source – Croatian National Bank)
GDP per capita: €10.364
GDP - composition, by sector of origin:

- agriculture: 4.3%
- industry: 26.7%
- services: 69.1% (2015 est.)

VAT: 25%
Unemployment rate: 16,3%
Major export countries: Bosnia and Herzegovina, Slovenia, Italy, Serbia.

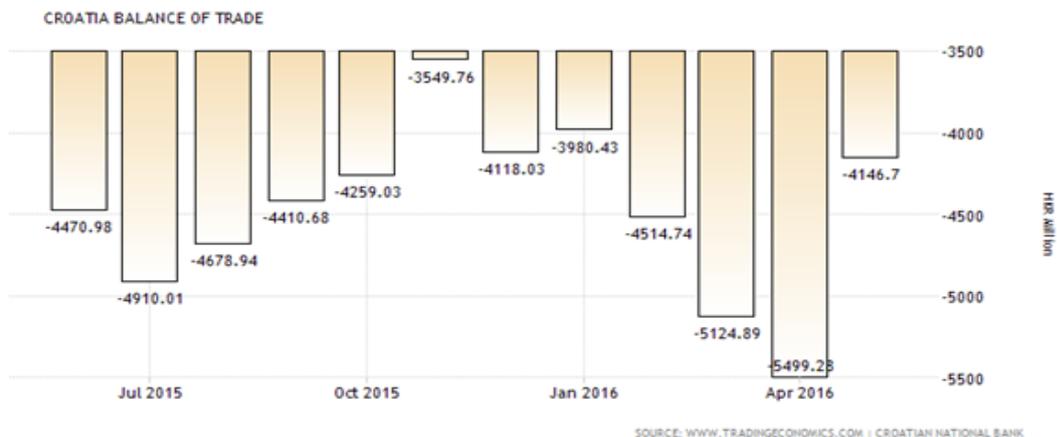
2.1 Economic profile

Real GDP growth rate



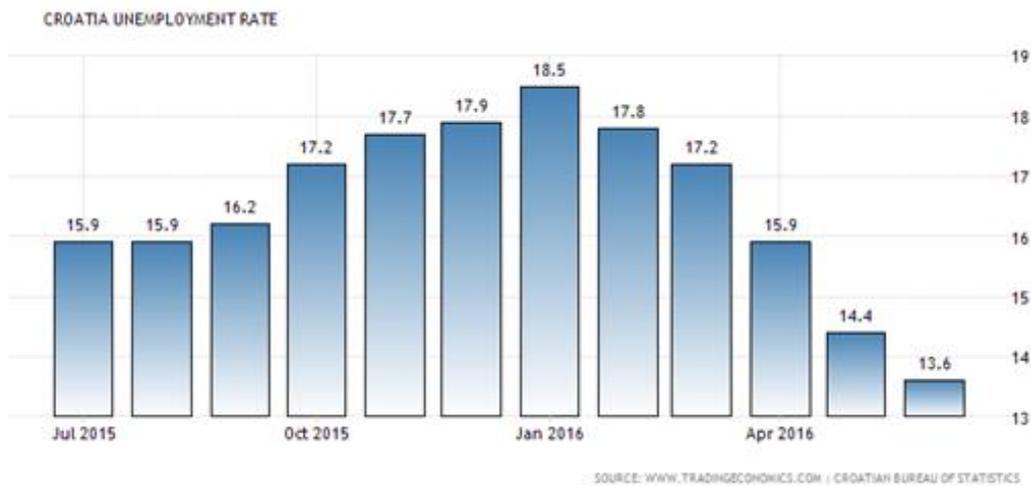
The Gross Domestic Product (GDP) in Croatia advanced 0.6 percent in the first quarter of 2016, compared to a downwardly 0.6 percent contraction in the previous period. GDP growth rate in Croatia averaged 0.35 percent from 2001 until 2015, reaching an all-time high of 4.2 percent in the first quarter of 2008 and a record low of -3.7 percent in the first quarter of 2009. GDP Growth Rate in Croatia is reported by the Croatian Bureau of Statistics.

Balance of trade



Croatia recorded a trade deficit of 4146.70 HKR Million in May 2016. The trade balance in Croatia averaged -3541.99 HKR Million from 1993 until 2016, reaching an all-time high of 502.62 HKR Million in August 1993 and a record low of -8379.31 HKR Million in April 2008.

Croatia unemployment rate



The unemployment rate in Croatia decreased to 13.6 percent in June 2016 from 14.4 percent in the previous month, thus reaching the lowest level since December 2008. The unemployment rate in Croatia averaged 18.18 percent from 1996 until 2016, reaching an all-time high of 23.6 percent in January of 2002 and a record low of 12.2 percent in July of 2008.

Croatia government debt to GDP



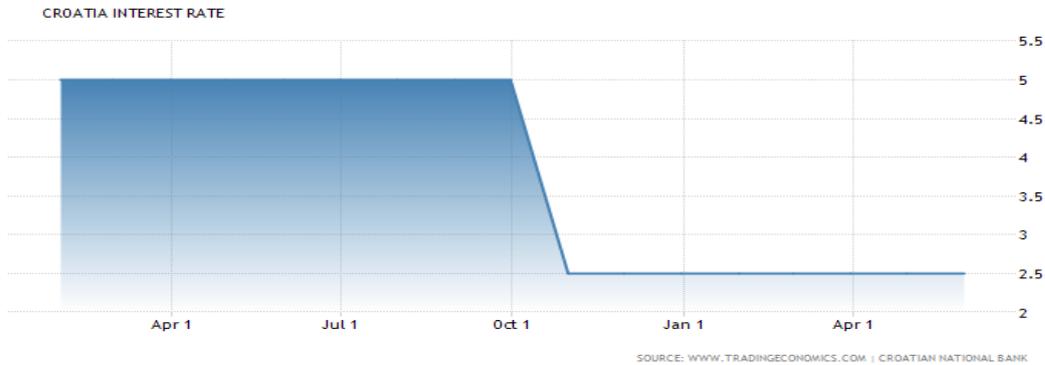
Croatia recorded a government debt of 86.7 percent of the country's Gross Domestic Product in 2015. Government Debt to GDP in Croatia averaged 52.7 percent from 2000 until 2015, reaching an all-time high of 86.7 percent in 2015 and a record low of 35.5 percent in 2000.

Croatian Inflation Rate



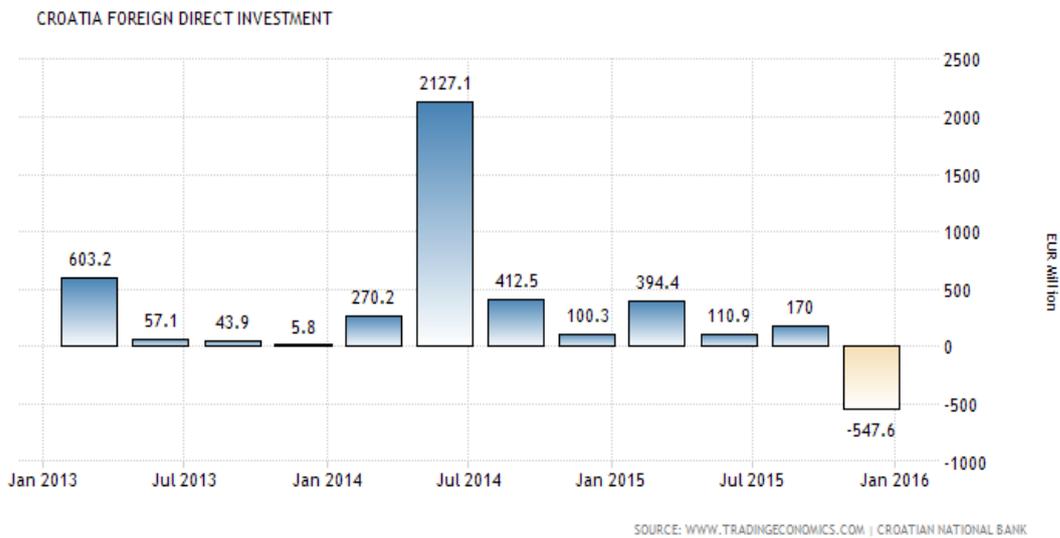
Consumer prices in Croatia went down 1.6 percent year-on-year in June of 2016, following a 1.8 percent decrease in the previous month. Prices fell the least since February, as prices declined at a slower pace for housing and utilities (-2.6 percent from -3.3 percent in May) and transport (-6.2 percent from -7.7 percent in May). In contrast, prices of food and non-alcoholic beverages (-0.4 percent from -0.3 percent in May) dropped further. On a monthly basis, consumer prices edged down 0.1 percent. The inflation rate in Croatia averaged 2.5 percent from 1999 until 2016, reaching an all-time high of 8.43 percent in July of 2008 and a record low of -1.8 percent in May of 2016.

Croatia interest rate



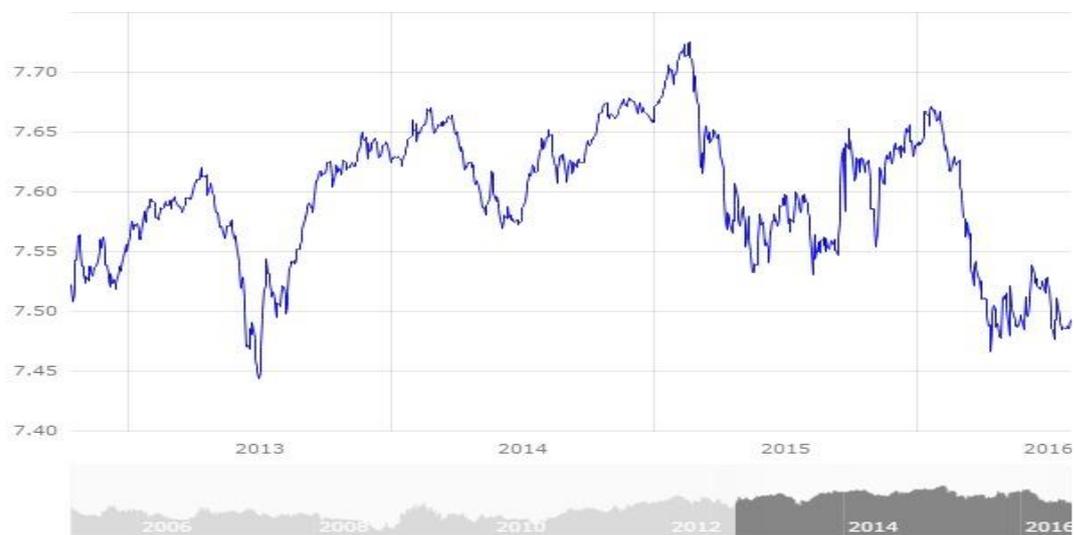
The benchmark interest rate in Croatia was last recorded at 2.5 percent. The interest rate in Croatia averaged 93.36 percent from 1992 until 2016, reaching an all-time high of 4290.85 percent in September of 1993 and a record low of 2.5 percent in October of 2015.

Foreign direct investment in Croatia



Foreign Direct Investment in Croatia decreased by € 547.6 Million in the fourth quarter of 2015. Foreign Direct Investment in Croatia averaged € 409.56 Million from 2000 until 2015, reaching an all-time high of € 2127.1 Million in the second quarter of 2014 and a record low of - € 547.6 Million in the fourth quarter of 2015.

HRK/EUR Exchange rates



The exchange rate of the kuna in relation to the Euro is fairly stable. Typically, relatively larger fluctuations happen with seasonal changes, in summer due to the touristic season and during winter due to energy prices.

Source: www.tradingeconomics.com/croatia/indicators

2.2 Economic environment overview

Croatia's economy has experienced a deep transformation since 1992 when the country got its independence. From that time, it went through structural reforms, becoming a market economy. After fulfilling the requirements, Croatia became a member of the European Union in 2013. Until the global economic recession, the economy enjoyed macroeconomic stability with relatively high growth, low inflation, a stable exchange rate and falling unemployment. The budget operated a surplus of HRK3.6bn in 2007, largely thanks to proceeds from the privatization of the state-owned telecom company. But the underlying budget deficit remains around 3% of GDP. The State still plays a significant role in the local economy and unemployment is high (9% according to ILO criteria).

In 2015, Croatia finally came out of its six-year long recession. Between 2008 and 2014, GDP shrunk by more than 12 % in real terms and unemployment surged from below 9 % to more than 17 %. The situation started to improve at the end of 2014, and in the course of 2015 real GDP growth surpassed expectations. Economic activity expanded by 1.8 % in 2015. The external sector performed strongly, and Croatia recovered some of the lost market shares. Growth was however mainly driven by the rebound in consumption and, to some extent, investment.

The recovery is set to strengthen over the next couple of years, but risks remain. By 2017, GDP growth is forecast to attain 2.1 % and unemployment to contract to below 14 %, while the current account surplus should stabilize at around 3 % of GDP. The external sector is expected to continue to contribute to this positive performance, but the main driver of growth will be internal demand. Investments, in particular, are set to start growing more robustly, on the back of an increased absorption of EU structural and investment funds.

Nevertheless, growth is projected to remain subdued for a catching up economy and it will take several years before output returns to pre-crisis levels. In a low inflation environment, high government and private debt, jointly representing more than 200% of GDP in 2014, public and private investment as well as household consumption will continue being constrained. Eventually, however, the economy is set to return to its long-term potential growth, currently estimated at below 1 %.

Source: ec.europa.eu/europe2020/pdf/csr2016/cr2016croatiaen.pdf

2.3 CROATIAN ECONOMIC ENVIRONMENT SWOT ANALYSIS

	STRENGTHS	WEAKNESSES	OPPORTUNITIES	THREATS
GOVERNMENT INSTITUTIONS	Low costs and threat of terrorism, crime and violence.	Wasteful budgetary spending, low public trust in politicians, lack of transparency, regulative burden on business freedom.	Improving the ethics, increasing transparency, introducing informatics systems.	Political changes.
INFRA-STRUCTURE	Well-developed highway roads and telecommunications.	Underdeveloped local roads, lack of sustainable planning.	Increasing investments in ports, railways, airports and other transportation infrastructure.	
MACRO-ECONOMIC ENVIRONMENT	Low annual inflation rate.	Low GDP growth rate, slow recovery from global crisis.	Decreasing accumulated government debt, decreasing trade balance deficit.	Volatile external environment, fiscal vulnerability.
HIGHER EDUCATION AND TRAINING	Competitive advantages are mathematics and science education.	Low availability of research and training services.	Educational reform focused on flexible skills based curriculum.	
GOODS MARKET EFFICIENCY	Short business registration period, relatively low profit taxation.	Expensive agricultural policy, overregulated business environment, weak local competition.	Reducing standard VAT rate, developing business climate, protection against monopolies and cartels, implementing privatization.	
LABOR MARKET EFFICIENCY		„Brain drain“.	Increasing labour market flexibility by easy rule on hiring and firing workers.	Political changes.
FINANCIAL MARKETS AND DEVELOPMENT		Low venture capital availability.	Easier loan access for entrepreneurial activities and investments.	External vulnerability.
TECHNOLOGICAL READINESS		Low technology absorption in firms.	Increasing foreign direct investment for new technologies.	
BUSINESS SOPHISTICATION		Low number of quality local suppliers, low production process sophistication.	Cluster development, specialization, establishing economic diplomacy.	
INNOVATION	Quality of scientific research institutions.	Low level of university-industry collaboration in research.	Developing closer ties between industry and university.	

Source: elaborated by the authors.

2.4 CROATIA SWOT

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - stable exchange rate and relatively low inflation - liberalised access to the EU market - favourable geographic location - preserved natural environment - high quantities of water resources - relatively low level of GHG emissions - increasing number of SMEs over the past years - investment in business related infrastructure - Croatia perceived as desirable tourist destination - rich cultural and historical heritage - preserved environment and nature - landscape diversity - raising efficiency in the health sector - improved social service decentralisation - inclusion of private profit and non-profit actors in social services provision - employment rate increase and unemployment rate decrease during the last couple of years - experience in employment policy's active measures programmes - increasing number of entrepreneurs - strong awareness about importance of human resources development among the relevant stakeholders - expertise and decision-making regarding public administration reform located in one place - judiciary and public administration reform in progress 	<ul style="list-style-type: none"> - persistent fiscal deficit , high current account deficit and growing external debt - slow privatization process and implementation of structural reforms - unbalanced development of infrastructure due to emphasis on road infrastructure development - undeveloped ICT networks, services and their penetration in rural and lagging regions - insufficient level of environment protection and integration in sectoral policies - underdevelopment of waste and water infrastructure and management services - high dependency on non-renewable energy sources and on energy import, and low level of energy efficiency - unbalanced regional growth and development, and growing regional disparities - underdeveloped entrepreneurial activities in the disadvantaged counties - insufficiently utilised tourist potentials of the continental part of the country with unfavourable structure of total quality and type of accommodation - extensive damage of cultural and historical heritage in the disadvantaged regions - R&D and high tech sectors lag behind European and other international competitors - low level of productivity, innovative, high quality and high added value production of SMEs - the majority of investment in science and research allocated by public sector - underdeveloped social services market - disparities among standards of public health care and poor quality of basic public health care standards - high share of long term unemployed facing social exclusion - relatively low level of labour productivity - insufficiently developed educational, employment and civil society intersectoral networks - suboptimal efficiency of public administration and judiciary - inadequate skills and career management paths of human resources in public administration and judiciary - corruption practices in political and socio-economic life
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - broad political consensus about the need for the fiscal consolidation - Croatia's EU accession makes investments more attractive - development of more environmentally friendly means of transport, and waste and water infrastructure - SME associations and networks, clusters and cluster initiatives, business supporting infrastructure - more focused support of SMEs on growth of productivity, quality and higher added value production - potential for exploitation of renewable energy sources and increase of energy efficiency - historical and natural characteristics of the regions for tourism - potential for sustainable long-term development of the regions - attracting external development financing in the form of FDI - civil society strengthening - accelerated transfer of knowledge through a common approach to the market - improvement of institutional and administrative capacity leading to enhanced implementation of national developmental policies 	<ul style="list-style-type: none"> - occurrence of global economic crises and spill over effect on the real sector of the domestic economy - rising oil prices and insecurity of gas supply - deterioration of transport infrastructure due to insufficient sources of financing and depopulation - unsustainable development of economy through neglect of environment aspects - trend of continuous loss of biodiversity and loss of habitats - imports of pollution - loss of competitive position on European market - growing differences in basic socio-economic characteristics at regional level - continuation of the process of depopulation of regions lagging behind - high dependence on tourism revenue - aging population and poor demographic structure as well as drain of highly qualified workforce abroad - insufficient cooperation between universities, research institutions and the business sector - political will for the necessary structural reforms - fatigue with long-lasting institutional and administrative reforms

Source: www.weforum.org/docs/WEF_GCR_Report_2011-12.pdf

3 Overview of the Broadcasting Sector

The first television signal broadcast in Croatia occurred in 1939 during the Zagreb Fair. The first regular broadcasts started in 1956. At that moment, Television Zagreb was established as the first TV station in the Yugoslav Radio Television system. Colour broadcasts began in 1975.

By the 2000s, there were four channels with nationwide coverage in Croatia. DVB-T signal broadcasts began in 2002, and in 2010 a full digital switchover was completed.

By 2011, 60.7 percent of households received DVB-T television only; the remainder were subscribers to IPTV, cable and satellite TV. As of 2012, there are 10 nationwide and 21 regional DVB-T television channels, and more than 30 other channels either produced in the Republic of Croatia or produced for the Croatian market and broadcast via IPTV, cable or satellite television.

Today, DVB-T is broadcast in three multiplexes, while the territory of Croatia is divided into nine main allotment regions and smaller local allotments corresponding to major cities. The DVB-T transmissions in Croatia are all standard-definition, MPEG-2. MUX A is available to more than 98.5 percent of the population of Croatia, and both MUX A and MUX B are available to more than 95 percent of population in each multiplex-allotment region. MUX D is available to approximately 90 percent of the population of Croatia, and at least 70 percent of the population in each of the allotment regions.

High-definition television (HDTV) is broadcast only through IPTV, although HDTV DVB-T test programming was broadcast from 2007 to 2011. A DVB-T2 test broadcast was conducted in 2011.

State owned *Croatian Radio Television (Hrvatska Radio Televizija: www.hrt.hr)* is required to produce and broadcast educational programmes, documentaries, and programmes aimed at the diaspora and national minorities in Croatia.

The electronic communications market in Croatia is regulated by the Croatian Post and Electronic Communications Agency (www.hakom.hr), which issues broadcast licenses and monitors the market. The DVB-T and satellite transmission infrastructure is developed and maintained by the state-owned company *Odašiljači i Veze d.o.o.* (OIV: www.oiv.hr).

Television in Croatia, as all the other media in the country, are criticized for the lack of balance between global issues and trends on one hand and national topics covered on the other. Even though social impact of television in Croatia is considered to be imperfect and of variable quality, television is important in the society because it offers a way for non-governmental organizations to communicate their concerns to the public and to criticize the government and other aspects of politics of Croatia.

Source: www.worldlibrary.org/articles/list_of_television_stations_in_croatia

4 Digital Conversion

Analogue terrestrial television was switched off in Croatia on 5th October 2010 for national TV stations, although some local stations still broadcast analogue signal.

HRT first started transmitting in digital programming in 1997 (in DVB-S) and has since entirely switched its TV channels (HTV1, HTV2, HTV3 and HTV4), and three radio stations (HR1, HR2 and HR3) to digital format. The DVB-T format was first introduced in early 2002.

The nine nationally broadcasting free-to-air channels (HTV1, HTV2, HTV3, HTV4, RTL, Nova TV...) are carried via a network of nine main transmitters built by the state-owned company Transmitters and Communications Ltd. (*Odašiljači i Veze* d.o.o. or OIV; formerly a branch of HRT), completed in 2007 and covering about 70 percent of the country.

The analogue switch-off process took place gradually - region by region - during 2010, starting with Istria and Rijeka in January and ending with Zagreb in October when the entire country was converted to the DVB-T digital format.

5 Television Broadcasting

Television is the most widespread source of information in Croatia—on average 57% of the population of Croatia uses television as their primary source of information. That percentage varies significantly per geographic region—from 43% in Zagreb and areas surrounding the capital to 79% in Slavonia—but in every region it surpasses all other sources of information, the second most widely used source of information being the internet, averaging at 19%. There are 1.584 million registered television receiving sets in the country.

In 2015, data on 25 TV broadcasters were presented. By status, there was one public and 24 independent TV broadcasters.

As of December 2012, there are ten nationwide free-to-air DVB-T television channels, with HRT's four channels, Nova TV (www.novatv.dnevnik.hr) and RTL Television (www.rtl.hr) operating two channels each and the remaining two operated by the Croatian Olympic Committee (www.hoo.hr) and Author Ltd. companies and the government's Central State Administrative Office for e-Croatia (www.e-hrvatska.hr).

All ten DVB-T television channels are free-to-air and privately owned, except for HRT's channels (which are publicly owned broadcasters).

HRT 1, Nova TV and RTL Television channels' programmes are not specialized and comprise news, a variety of scripted and unscripted entertainment, as well as documentaries. HRT 2, Doma TV (www.domatv.dnevnik.hr) and RTL 2 channels carry similar type of programmes, except for absence of news.

There are 21 regional (or local) DVB-T television channels operating in Croatia in MUX D. The number of channels broadcasting in individual regions varies from one to four, while

some local DVB-T television local-allotment regions are vacant as of December 2011. Four regional (or local) television channels are broadcast in more than one allotment region. All regional and local channels are free-to-air. As of January 2012, *Z1 Televizija* (www.z1.com.hr) is measuring its audience with the Nielsen Company's people meters for terrestrial, cable and satellite TV.

In addition, Croatian Radio Television (HRT) is legally required to produce and broadcast programmes covering education of youths, aimed at the Croatian diaspora, national minorities in Croatia, preservation of cultural and natural heritage, protection of the environment, promotion of democracy and civil society, and support national production of films, television program and music. Other nationwide channels are specialized providing informational programmes, covering sports or music.

In 2015, as compared to 2014, the total number of in-house broadcasted hours of programme (without satellite transmissions) increased by 0.4% and the satellite transmission increased by 11.2%. The share of TV repeats in the total programme (without satellite transmissions) also increased, by 8.7%. The share of information and documentary programmes of all TV broadcasters was 22.3%, out of which TV broadcasters that cover the whole territory of the Republic of Croatia participated with 19.6%, regional TV broadcasters with 24.4% and local ones with 24.9%. The share of commercial programme and non-programme contents of all TV broadcasters was 22.2%, out of which the state TV broadcasters participated with 12.2%, the regional ones with 31.3% and the local ones with 28.1%.

Sources:

<http://mavise.obs.coe.int/country?id=30>

www.dzs.hr

www.worldlibrary.org/articles/list_of_television_stations_in_croatia

5.1 DVB-T Television

DVB-T (Digital Video Broadcasting - Terrestrial) is a standard developed for broadcasting digital terrestrial television. The system is more resistant to various interferences than the analogue one and enables TV signal reception in much higher quality than possible in current analogue terrestrial TV.

The first trial broadcasts of DVB-T signals began in May 2002 in Zagreb, and in 2008 the government developed an Analogue to Digital Television Broadcasting Switchover Strategy for the Republic of Croatia. In July 2008, the government of Croatia announced that 106 million HRK (14.1 million EUR) were earmarked for the purpose.

In Croatia, there are nine main regions of digital TV allotments (encompassing larger portions of Croatia) and additional, geographically small allotment areas designed for local broadcasters (typically covering a single city). The main DVB-T television allotment regions are assigned markings D1-D9.

5.2 DVB-T Allotment Regions Table:

Marks	Regions
D1	Osijek-Baranja, Vukovar-Srijem, Brod-Posavina
D2	Brod-Posavina, Požega-Slavonia, Virovitica-Podravina, Bjelovar-Bilogora, Sisak-Moslavina
D3	Bjelovar-Bilogora, Koprivnica-Križevci, Varaždin, Međimurje
D4	Sisak-Moslavina, Krapina-Zagorje, Zagreb, Karlovac
D5	Istria, Primorje-Gorski Kotar, Lika-Senj
D6	Primorje-Gorski Kotar, Lika-Senj
D7	Zadar, Šibenik-Knin
D8	Split-Dalmatia, Dubrovnik-Neretva, Pelješac, Korčula, Lastovo
D9	Dubrovnik-Neretva

Source: elaborated by the authors.

There are also 12 local DVB-T television allotment regions, covering specific cities and their immediate surroundings.

Marks	Regions
d11	Osijek
d21	Slavonski Brod
d31	Varaždin and Čakovec
d44	Zagreb and Velika Gorica
d45	Jastrebarsko
d46	Karlovac and Duga Resa
d53	Rijeka, Crikvenica, Novi Vinodolski and most of the island of KRK
d54	Pula and Rovinj
d71	Zadar
d72	Šibenik
d82	Split, Trogir, Omiš, the island of Šolta and a large part of the island of Brač
d91	Dubrovnik

Source: elaborated by the authors.

There are 897,496 households (60.7 percent) in Croatia receiving DVB-T television only. DVB-T system also enables the introduction of new services and features like electronic program guide (EPG), multi-channel audio, interactive services, conditional access, PayTV, and further development of high definition television - HDTV.

Sources:

www.oiv.hr

www.worldlibrary.org/articles/list_of_television_stations_in_croatia

5.3 Map of DVB-T Allotment Regions:



Source:

https://en.wikipedia.org/wiki/Television_in_Croatia#/media/File:Croatia_DVB-T_Map.svg

5.4 OIV

The terrestrial television infrastructure in Croatia is operated by *Odašiljači i Veze d.o.o* (Oiv: www.oiv.hr). The company was established as an independent entity in 2002, when a division developing and maintaining electronic communications infrastructure was removed from the HRT corporate system.

With more than 80 years of tradition and experience, Oiv operates in the core of broadcasting and telecommunication industries providing services, network solutions and infrastructure behind television or radio, as well as fixed and mobile telecommunications. This company also helps owners to launch new TV; they provide transmission for all national and most regional Croatian TV and radio broadcasters using analogue and digital (DVB-T, DAB and DRM) transmissions. In addition, they have satellite services.

As of January 2012, OIV operates and maintains 222 television transmitters and broadcast relay stations.

Sources:

www.oiv.hr

www.worldlibrary.org/articles/list_of_television_stations_in_croatia

5.5 IPTV, cable and satellite television

Cable television (CATV) is also a popular method of programming delivery in Croatia, and is available in several large cities throughout the country.

Internet protocol television (IPTV) is also gaining ground in recent years, with most ISPs offering a wide selection of channels very similar to cable packages. IPTV is recording rapid market growth; between 2009 and 2010, the number of households subscribed to an IPTV service grew by 23 percent to nearly 300,000.

In terms of IPTV density, Croatia is the fifth-ranked market in the world, only trailing behind Singapore, Hong Kong, Cyprus and Estonia. The number rose further by the third quarter of 2011 to a total of 349,138 households, representing 23.6 percent of Croatian households. At the same time there were 144,439 households with cable television connections and 104,635 households with satellite television reception (representing 9.8 and 7.1 percent of households in Croatia, respectively).

The leading IPTV provider in Croatia is [T-Hrvatski Telekom](http://www.t.ht.hr) (www.t.ht.hr) with its MaxTV service, while the biggest cable provider is B.net, established in 2007, which is available in Osijek, Rijeka, Solin, Split, Velika Gorica, Zadar and Zagreb. As of 2010 some 250,000 households are subscribed to B.net's cable packages.

Since 2009, some providers offer HDTV reception of IPTV channels. The IPTV and satellite-TV providers normally carry all channels otherwise available in DVB-T, with additional channels (produced in Croatia and abroad) available through various subscription plans. A significant proportion of the foreign channels are localized through dubbing or subtitles. The two largest IPTV and cable TV providers offer 31 channels produced in Croatia (or specifically for Croatia), in addition to those broadcasting in DVB-T. Viewership of cable and satellite TV channels broadcast by HRT, RTL Televizija, Nova TV and Z1 Televizija is measured by Nielsen Company people meters.

A basic cable or IPTV package in Croatia traditionally includes:

- Major Croatian channels (HTV1, HTV2, HTV3, HTV4, Nova TV and RTL)
- Mix of major networks from neighbouring countries (Bosnian OBN, FTV and Hayat, Serbian RTS SAT, Slovenian SLO1 and SLO2, Italian Rai 1 and Rai 2, Austrian ORF1 and ORF2)
- Selection of local TV stations (OTV, Z1, ČKTV, STV, TV Jadran, etc.)

Sources:

www.worldlibrary.org/articles/Media_of_Croatia

www.worldlibrary.org/articles/list_of_television_stations_in_croatia

5.6 Television Stations Audience Shares

The three main players in television broadcasting sector in Croatia are the following:

- The Public Service Broadcaster **HRT** with a total audience share of 28.5% in 2014, which pushed it above the commercial operator Nova TV.
- The private broadcaster **Nova TV** (owned by Central European Media Enterprises) with 4 channels and total 28.3% of the daily audience share.
- The private broadcaster **RTL Group** with 6 channels (including 4 thematic channels) and with 21.1% audience share.

Source: <http://mavise.obs.coe.int/country?id=30>

6 Public TV Station – HRT (*Hrvatska Radio Televizija*) (www.hrt.hr)

HRT, the Croatian Radio Television, is the national radio television.

It is a national public service broadcaster, mainly financed by viewer/listener license fees and advertising. From 2002, 70% of HRT's funding comes from broadcast user fees (each house in Croatia is required to pay 80 HRK, per month for a single television), the remainder is made up from advertising. HRT has well exceeded a million radio and television listeners/viewers.

Croatian Radio-Television has three organizational units, three sister companies - the Croatian Radio (*Hrvatski Radio*), the Croatian Television (*Hrvatska Televizija*) and Music Production (*Glazbena Proizvodnja*).

HRT has seven regional radio stations and five regional TV centres. It has three national and seven regional radio channels, two terrestrial TV channels and one satellite TV channel broadcasting in Croatian. Since 1997, HRT radio and television programmes have been also broadcast digitally via satellite throughout Europe. The two international programmes, "Voice of Croatia" on radio and "Picture of Croatia" on television, are broadcast throughout Europe and overseas, notably in countries with large Croatian communities, such as Australia and the Americas. HRT TV has four TV channels (HRT 1, HRT 2, HRT 3, HRT4), all of which broadcast nationwide.

Since January 1993, Croatian Radio-Television has been an active member of the European Broadcasting Union (EBU) - the largest organisation of Public Service Broadcasters in the world.

Popular TV programmes of HRT are:

- "Dnevnik HRT" ("Daily News"), popular midday, evening and midnight news program.
- "Nedjeljom u Dva" ("Sundays at two o'clock"), weekly talk show.
- "Dobro Jutro, Hrvatska" ("Good morning, Croatia"), mosaic morning show.
- "Hrvatska Uživo" ("Croatia live"), mosaic afternoon show.

Sources:

www.hrt.hr/23183/povijest/the-evolution-of-croatian-radio-and-television
[Study of ICT sector in Croatia:](#)

7 Commercial TV stations which broadcast nationwide

- **RTL Television** (www.rtl.hr)

RTL Television is a Croatian commercial broadcaster with national availability that has been broadcasting since 30 April 2004. RTL Television is 99.9% owned by the RTL Group. It was launched as the second network concession in Croatia, the first being Nova TV.

Since going on air, RTL Television has been broadcasting its own daily news programmes and its own content. RTL Television has also broadcasted several foreign TV series. It has three channels: RTL, RTL 2 and RTL Kockica.

RTL Direct is an informative news show which gained the highest popularity and number of viewers in Croatia. It is aired on RTL and it is moderated by Zoran Šprajc.

- **Nova TV** (www.novatv.dnevnik.hr)

Nova TV is a Croatian commercial television network launched in November 2000. As the first Croatian commercial television network, Nova TV made the Croatian TV viewers familiar with reality shows. Nova TV is also notable for its live broadcasts of various sporting events.

Dnevnik Nove TV (Nova TV Daily News) is the main news program of the Croatian Nova TV, broadcast daily at 19.15. As of 2008, it was the second most popular news program in Croatia, closing in on Dnevnik HRT (Daily News of HRT), its main competitor. The show overtook Dnevnik HRT in 2010, becoming the most watched news programme in Croatia.

Media Group Nova TV also owns **Doma TV** (www.domatv.dnevnik.hr), a specialized TV channel for entertainment.

- **SPTV (Sportska Televizija)**: www.sptv.hr)

SPTV is the first specialized sport television in Croatia owned by the Olympic Committee. It covers all levels of Croatian sports and is highly backed by the International Olympic Committee.

SPTV's mission is to give information about Croatian and international sports to educate and entertain, while offering a program which will satisfy the whole family.

- **CMC (Croatian Music Channel)**: www.cmc.com.hr)

CMC is the first and only specialised music television channel in Croatia. Its content consists of Croatian music but also specialized shows like Top 40 Foreign, which airs foreign music. CMC TV is founder of the CMC festival, one of the most important music events in Croatia.

8 Croatian Regional and Local TV Stations

- **Vinkovačka Televizija (VTV: www.vtv.hr)**

This regional TV station is covering the areas of Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County and has a broadcasting range of 500,000 people. This TV channel is also available on cable TV (Max TV and B-Net) nationwide. It airs news, foreign TV shows, domestically produced documentary shows and regional news. Source: vktv.tv
- **Televizija Slavonije I Baranje / Slavonska Televizija (STV: www.stv.hr)**

This regional TV station is covering Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County while being nationally available on cable TV. Its airing program is regionally themed and mostly produced by STV and includes cooking shows, news, health and recreation themed shows. Source: www.stv.hr
- **Osječka TV (www.osjecka.com)**

This regional TV station is covering Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County while being nationally available on cable TV. It is the most viewed regional TV in Slavonia and Baranja (Eastern Croatian Region) and it covers the widest range of viewer's interest in 20 thematic shows. Source: osjecka.com
- **Slavonsko – Brodska Televizija (SBTV: www.sbtv.hr)**

This regional TV station is covering Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County while being nationally available on cable TV. It airs themed shows (agriculture, culture, music, etc.) and news. Source: sbtv.hr
- **Srce TV (www.srce.hr)**

This regional TV station is covering Međimurje County, Varaždin County and Koprivnica-Križevci County. With the transition to digital broadcasting it also became available in parts of Bjelovar - Bilogora County and Krapina-Zagorje County, which makes for a broadcasting range of half of million people. This TV station airs news, themed shows, music programmes and promotional TV sales. Source: www.srce.tv
- **VTV Televizija (www.vtv.hr)**

Regional TV station covering 70% of Northeastern Croatia with its signal, airing 24 hours a day a mix of domestically produced TV shows, sport shows, news and documentaries. Source: www.vtv.hr
- **Jabuka TV (www.jabuka.tv)**

This regional TV station is covering Zagreb, Zagreb County and cities bordering Zagreb County and has one million and a half potential viewers. Its mission is to air an

alternative TV schedule through shows covering different topics (politics, show business, sport etc.), news and entertainment.

Source: jabukatv.hr

- **Mreža TV** (www.mreza.tv)

Joint project of two formerly separate TV stations (Nezavisna Televizija and TV Dalmatia) covering the two most populated regions in Croatia (Zagreb County and Split-Dalmatia County). On average, it airs 18 hours a day and 60% of its program is from its own internal production. It airs news, movies, TV shows, TV series and documentaries.

Source: mreza.tv

- **Kanal RI** (www.kanal-ri.hr)

This regional TV station is based in Rijeka from where it airs news, documentaries, mosaic shows and local reports.

Source: www.kanal-ri.hr

- **TV Istra** (www.tvistra.hr)

Regional TV station based in Pazin covering an area with 500,000 people. Its broadcasting concession covers Istria County, Primorsko-Goranska County and Lika-Senj County. It airs 15 hours of program daily, of which is 10 hours of its own internally generated production.

Source: www.tvistra.hr

- **TV Nova** (www.tvnova.hr)

This regional TV station is based in Pula and is covering Istria County, Primorsko-Goranska County and Kvarner Islands with a total of 500,000 people. It airs program 14 hours every day covering local topics through mosaic shows and news.

Source: tvnova.hr

- **Televizija Jadran** (www.tvjadran.hr)

Regional TV station based in Split covering Split-Dalmatia County, Dubrovnik-Neretva County and islands: Korčula, Lastovo and Pelješac, with its concessions. It is also available nationwide on cable TV.

Source: www.tvjadran.hr

- **Dubrovačka Televizija (DuTV)**: www.dutv.hr

This regional TV station is based in Dubrovnik and is covering Dubrovnik-Neretva County. It airs local news and TV shows of local content.

Source: www.dutv.hr

- **Z1** (www.z1.com.hr)

This local TV station is covering the city of Zagreb. It airs mostly informative programs (local news, Croatian and world news as well as sports news), entertainment and educative programs.

Source: www.z1.com.hr

- **Televizija 4 Rijeke (TV4R: www.tv4rijeke.com)**
This local TV station is based in Karlovac and is covering the area of Karlovac town. Its program consists of news and locally themed mosaic shows.
Source: mojtv.hr ; www.tv4rijeke.com
- **Televizija Šibenik (www.tvs.hr)**
Local TV station based in and covering the area of Šibenik. Its program consists of news and locally themed mosaic shows.
Source: www.tvs.hr
- **Televizija Zapad (www.zapad.tv)**
This local TV station is based in and covers the area of Zaprešić town. Its program consists of news and locally themed mosaic shows.
Source: www.zapad.tv

8.1 Multiplexes

There are three active multiplexes (MUX) in Croatia. MUX A and MUX B are reserved for nationwide channels, and MUX D is used for channels broadcasting locally and nationwide. MUX A broadcasts the HRT 1, HRT 2, Nova TV, RTL and *Moja Uprava* channels. MUX B broadcasts RTL2 and Doma TV. MUX D broadcasts three nationwide channels— *Sportska Televizija*, *Kapital Network* (KN) and CMC—in addition to local TV channels.

Source: www.worldlibrary.org/articles/list_of_television_stations_in_croatia

9 Radio Broadcasting

Croatia has 136 radio stations (out of 180 theoretically possible frequencies), 4 of which air nationwide. Others are regional or local ones. According to their status, 17 stations are public, nine are non-profit and 110 are independent. In 2015, as compared to 2014, the total broadcast of own programmes expressed in hours decreased by 0.8%, out of which the broadcast of state-owned radio stations increased by 1.6%. Regional stations increased broadcasting by 1.2%, while the local ones decreased theirs by 1.4%. The average share of news and information in the own programmes of all radio stations was 13%, out of which the programmes of the state-owned radio stations reached 20.5%, regional ones 15.9% and local ones 11.8%. The share of advertising spots in all radio stations was 5% on average, out of which this kind of programmes in the state-owned radio stations reached 2.5%, in the regional ones 4.4% and in the local ones 5.4%.

Radio broadcasting is listened to by 55.5% of Croatian people, while 91.2% of them listens to radio on weekly basis. Daily and weekly listening is marking a mild increase. On average, 78.6 minutes is spent listening to radio daily. Listening to internet radio (although available) isn't widespread and most of the listeners cling to FM broadcasting. Data for Zagreb states that there are 100,000 active listeners in the area (they turn on the radio to listen) while others listen to radio stations while in traffic. One third listens to Antena Zagreb, one fifth listens to Radio *Slijeme*, followed by HR1 and HR2, 10% is loyal to Radio 101 and somewhat less to Radio *Soundset*. *Antena Zagreb* (most popular radio in Zagreb

area), is the first content formatted radio station in Croatia founded in image of Antena Bayern, whose content is based on research on what the listeners want via regular surveys.

Although radio stations in Croatia mark an increase in number of listeners, their profits are falling and most of them are operating below profit margins. Retailers advertise most: during 2015 they spent 18.6 million on radio advertisements. Followed by media (15.5 million), entertainment industry (15 million), automotive (10.3 million) and financial industry (10.2 million). Advertisers favour „drive-time“; from 7:00-9:00 am and 15:00-17:00 pm when people drive to work or home. Typical advertisement is 30 seconds long while referential price for that amount of air time on well listened station amounts to € 100.

Sources:

Article about radio broadcasting („Jutarnji List“, published 13.11.2015):

www.jutarnji.hr/globus/pregled-hrvatskog-etera-hrvatska-ima-153-radijske-postaje-vise-nego-njemacka-slusanost-je-veca-nego-ikad.-no-prihodi-padaju/186949/

Croatian Bureau of Statistics:

www.dzs.hr

9.1 Radio stations with nationwide coverage

- **Hrvatski Radio (Croatian Radio : www.radio.hrt.hr)**

This division of the national television broadcasting company HRT has three channels (HR1, HR2, HR3) that air nationwide and eight regional stations: **Radio Dubrovnik, Radio Knin, Radio Osijek, Radio Pula, Radio Rijeka, Radio Sljeme, Radio Split and Radio Zadar.**

HR1 is the primary national-level station, that offers mainly serious programming. It airs news every full hour and oldies and local pop music. HR2 airs entertainment programs including popular music, with news followed by traffic reports at the half-hour mark. HR3 airs classical music and radio drama.

- **Narodni radio (People's Radio: www.narodni.hr)**

This Croatian radio station is broadcasting nationally and plays exclusively domestic music. It was the most listened-to radio station in the country in 2014.

- **Otvoreni Radio (Open Radio: www.otvoreni.hr)**

This radio station is based in Zagreb. Its program is mostly based on foreign popular music of various genres. It is fairly popular with younger generations.

- **Hrvatski Katolički Radio (Croatian Catholic Radio: www.hkr.hr)**

This is a non-profit radio in ownership of the Catholic Church.

Source:

Croatian Agency for Electronic Media: pmu.e-mediji.hr

9.2 Most popular radio stations in Croatia

- NARODNI RADIO – Most popular nationwide (www.narodni.hr)



Narodni radio is one of the six national radio stations, daily listened to by half a million to a million listeners, making it the most listened to radio on Croatian nationwide level.

It also broadcasts via satellite in Europe, North America and Australia, where it is

listened to by 250,000 listeners on daily average, while another 180,000 listen to the program over the Internet. Narodni radio is the bearer of the prestigious title of Croatia's Superbrands.

Source: www.narodni.hr

- Antena Zagreb- Most popular in Zagreb (www.antenazagreb.hr)

This county wide broadcasting radio station is the most listened to in Zagreb and

Zagreb County and takes the share of one third of all active listeners in the area.



10 Market Regulation

The main legislative act that regulates broadcasting in Croatia is the Electronic Media Act (2009). There are two regulatory bodies relevant to the audio-visual market: **The Agency for Electronic Media of the Republic of Croatia (AEM)** and the **Croatian Post and Electronic Communications Agency (HAKOM)**.

10.1 Croatian Post and Electronic Communications Agency – HAKOM (www.hakom.hr)

The television industry in Croatia is regulated by the Croatian Post and Electronic Communications Agency (HAKOM). HAKOM was established by the Electronic Communications Act of 26 June 2008; pursuant to Article 5 of the act, HAKOM is tasked with promoting and safeguarding market competition and the interests of service users in the field of electronic communication services and infrastructure, while contributing to the development of the internal market of the European Union.

HAKOM has its seat in Zagreb. It is the National regulatory agency for the pursuit of regulatory and other jobs. HAKOM is an independent, non-profit entity with public authorization.

HAKOM's work is public. The founder of HAKOM is the Republic of Croatia; the Croatian Parliament holds founding rights as entrusted by the Croatian government.

According to the law HAKOM is governed by 7 members of the board. The president and vice-president are suggested by the Croatian government and chosen by the Croatian Parliament for office duration of 5 years.

HAKOM's goals include ensuring sustainable development of the electronic communications market at affordable prices for consumers, providing fair conditions for return on investment in the market and contributing to the quality of life in Croatia.

Further regulation of television is performed by the Electronic Media Council, which enacts mandatory regulation applying to both state-run and privately owned broadcasters based in Croatia. One such regulation, aimed at the protection of minors, restricts depictions of violence, sexual intercourse, profanity, use of intoxicating substances and tobacco and other scenes which may be harmful to the development of minors between seven in the morning and nine, ten or eleven in the evening, depending on the rating of a specific program – advising that the program is not suitable for persons under 12, 15 or 18 years of age respectively. The restriction does not apply to educational, documentary, science or news programming.

HAKOM grants, evaluates and revokes broadcast licenses for all forms of electronic communications in Croatia, approves mergers of communication industry companies, imposes fines on those who are found to be in breach of applicable regulation and conducts constant supervision of the industry.

Sources:

<http://mavise.obs.coe.int/country?id=30>

www.hakom.hr

www.worldlibrary.org/articles/list_of_television_stations_in_croatia

10.2 Agency for Electronic Media – AEM (www.e-mediji.hr)

Concessions for broadcasting are given by the Agency for Electronic Media (AEM). The Electronic Media Council manages the Agency and carries out the duties of a regulatory body in the area of electronic media.

The Council has seven members, one of which is the president of the Council. The president and other members of the Council are appointed for a five-year term by the Croatian Parliament upon the proposal of the Government of the Republic of Croatia.

Television and radio media service providers are registered in the register of providers of media services, electronic publications and non profit producers of audio-visual and / or radio programmes.

For further information, consult the website (www.e-mediji.hr) on which you will find more detailed information about the agency and its services.

Sources:

www.e-mediji.hr

www.worldlibrary.org/articles/list_of_television_stations_in_croatia

www.hakom.hr

11 Language localization

National legislation requires that all television programmes broadcasts in Croatia are made in or with appropriate translations, either using dubbing or subtitling. In general, all foreign programming is subtitled, except for cartoons, narrated parts of documentaries and similar programmes.

An attempt to change this was made by Nova TV in 2006, when a soap opera was dubbed, but the move provoked negative response from viewers and critics, causing the experiment to be abandoned. The legislation does not provide for mutually intelligible languages. That led to formal requests made by the Electronic Media Council demanding language localization of television programmes made in Serbian . Ultimately, that issue was resolved through subtitling using teletext service normally used for closed captioning.

Source: www.worldlibrary.org/articles/list_of_television_stations_in_croatia

12 The Croatian Audio-visual Centre - HAVC (www.havc.hr)

This is a main public funding audio-visual agency in Croatia, which has the overall responsibility for the growth of Croatia's audio-visual industry.

HAVC aims to stimulate a successful, vibrant audio-visual industry and to promote the widest possible enjoyment and understanding of audio-visual works throughout Croatia.

Through the system of public subsidies, the Croatian Audio-visual Centre is supporting development, production, distribution, exhibition, marketing and promotion, supporting professional training and supporting the national film archive.

The agency is currently operating with an annual program budget of around 7.1 million euros.

This public funding is available for development and production support and for other film related activities such as:

- The production of Croatian feature films and international film co-productions
- The production of high-quality and distinctive documentary filmmaking as well as documentary co-productions
- The production of short experimental films
- The production of animation (Croatia received awards recently in this art form)

The average production budget is 1 million euro.

Hosted by the Croatian Audio-visual Centre, the Creative Europe desk Croatia – Media Office is a promotion and information office for the European Commission’s Creative Europe Program and Media sub-program. It offers advice and answers enquiries from Croatian film and TV professionals.

Here you can find basic data about distribution and exhibition:

Major film distributors (90% of the market share)	-Blitz Film and Video -Continental Film
Film titles dominant on the market	US and UK titles
Number of commercial screens operating in 2014	154 (multiplexes as well as multi-screen or single screen venues)
Market share of national films	2%
Cinema attendance	Decrease of 6% in 2014 in comparison to 2013
Admission’s share for domestic films	Decrease from 11% in 2013 to 2% in 2014
Public Film supporting institutions	Croatian Audio-visual Centre, City of Zagreb, City of Rijeka and City of Split

Croatian Incentive for Film and Television Production:

The Incentive is available since January 2012. Projects such as feature films, documentaries, short films, television drama and animation can derive a benefit of 20% of their qualifying expenditure up to 2.6 million euros per project.

Source: Croatian Audio-visual Centre’s Little Black Book:

http://media.filmingincroatia.hr/havcfic/document_translations/doc/000/000/087/Little_20Black_20Book_202015_20web.pdf?1454407526