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ITU Case Studies
for
Bulgaria, Croatia, Macedonia and Slovenia

Mr Petko Kantchev
ITU Senior Broadcasting Expert



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Policy and Regulatory
Aspects

Bulgaria

- Law for the Radio and Television
November 1998, 25 Amendments
- Public Broadcasting Law, May 2009
- Law on Electronic Communications
- May 2007, 9 Amendments



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Policy and Regulatory Aspects

Croatia

- Electronic Media Act
- Croatian Radio-Television Act
- Electronic Communications Act, OG No. 73/2008
- Secondary Legislation: Ordinance on Analogue Switchover and Access to Multiplex, OG No. 148/2008



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Policy and Regulatory Aspects

Macedonia

- Broadcasting Activity Law, 29 November 2005 plus amendment December 2005
- Public Broadcasting Enterprises Law, OG No. 6/1998, amended OG No. 98/2000
- Electronic Communications Law, 18 February 2005



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Policy and Regulatory Aspects

Slovenia

- Media Act, 29 September 2006
- Act for Radio and TV Slovenia, 25 October 2005
- Digital Broadcasting Act, 02 November 2007
- Electronic Communications Act, 01 February 2007



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Market Share of Platforms

Bulgarian Population choices

- Cable TV 63%
- Terrestrial 30%
- Satellite 7%

Note: IPTV not included in the Strategy document - in its infancy



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Market Share of Platforms

Croatian Population choices

- Terrestrial 78,9%
- Cable TV 9%
- Satellite 7,8%
- IPTV 3,3 %.

Market Share of Platforms

Macedonian Population choices

- Cable TV 65%
- Terrestrial 26-28%
- Satellite 7 to 8 %
- IPTV at its infancy

Market Share of Platforms

Slovenian Population choices

- Terrestrial 40%
- Cable close to 60% (IPTV 17%)
- Satellite practically not used

Revenue for PSB

- Bulgaria- subscription fee 0,78 Euro hh/month on electricity bill and Treasury subsidies
- Croatia-fee 10,57 Euro hh/month
- Macedonia-fee 6/2 Euro hh/month
- Slovenia-fee 11 Euro hh/month

Advertisements Publicity and Sponsorship TV PSB Market Share

- Bulgaria-2,3 %
- Croatia-TBD
- Macedonia-10%^{PSB}
- Slovenia-73%

Analogue Switch-Off

- Bulgaria- December 2012 latest
- Croatia- December 2010 latest
- Macedonia-December 2015 latest
- Slovenia-December 2010 latest

Licensing / Authorization Schemes

Similar for all four countries:
Application for license to TV Programme Content Regulator, followed by application for bid/contest to Communications Regulator enabling authorization to broadcast terrestrially.



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Infrastructure Sharing for Multiplexes, Networks and Transmitters

- Bulgaria-legally possible, but separate public broadcasting infrastructure required by Public Broadcasting Law of May 2009
- Croatia-legally possible
- Macedonia-legally possible
- Slovenia-legally and operationally possible



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Multiplexes/Networks Planning

- Bulgaria- 6 national, 27 regional networks
- Croatia-6 national, 3 regional multiplexes
- Macedonia—6 national multiplexes
- Slovenia-7 national multiplexes, within which 3 SFN regional allotments

Spectrum Planning

- As per GE-06
- All four countries assign highest priority to international coordination
- Croatia signals coordination difficulties with two Administrations

HDTV

Thanks to MPEG-4 possibility exists to restructure SDTV into HDTV DTTV service in all DTTV multiplexes should the market be ready for it provided that :

- HDTV attractive programme content is in abundance;
- HDTV quality receivers with FPD screens bigger than 50 inch at affordable prices dominate the market;
- Terrestrial DHTV delivery remains attractive compared to satellite, cable or IPTV delivery;
- Blu-ray recorders and players widely in use;
- Quality of service and robustness of delivery remains outstanding; and
- Last but not least the business plans continue to be successful.

Digital Dividend

- All four countries have identical plans for transition to DTTV broadcasting with quality better than analogue and for
- Innovative introduction of new services

Consumer issues

- Approaches greatly vary from country to country and best is to refer to the plain text of every country's case study for reference.

Applicable Standards

- Decision for DVB-T MPEG-4 Part 10 (ITU-T Rec. H-264) taken by all four countries
- In addition Croatia will use MPEG-2 for legacy reasons.

Business Models and Plans

- Bulgaria-social assistance to population with lowest income, and Treasury of State involvement as per Public Broadcasting Law and The Law for Radio and Television.
- Croatia-one month subscription fee voucher to every household.
- Macedonia-state involvement for PSB Mux; promotional license/authorization/annual fees until 2012; month subscription fee voucher, cost of promotion campaign and strategy implementation.
- Slovenia-social assistance to population with lowest income.



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Most Influential Reason to Go Digital

- ATTRACTIVE PROGRAMMES
- BETTER TECHNICAL QUALITY,
- RELIABILITY, INNOVATION AND ENHANCEMENT OF SERVICES.

Lord Thomson used to say:

“Television is a license to print money!” –
Only time will tell if DTTV broadcasting
would make this possible again!



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For further reference please refer to the Case Studies and relevant Strategies/Legislation sources at the ITU web site under Development Sector!

**What else can ITU do for you?
I Thank You (ITU) for your kind attention!**

e-mail: petko.kantchev@ties.itu.int



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