

The Broadcasting Sector in Croatia

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**1. Table of Contents**

1. **Table of Contents2**
2. **Executive Summary4**
3. **Croatia Overview5**
	1. Economic Profile6

3.1.1. Real GDP growth rate6

3.1.2. Balance of trade6

3.1.3. Croatia unemployment rate 7

3.1.4. Croatia government debt to GDP 7

3.1.5. Croatian inflation rate 8

3.1.6. Croatia interest rate 8

3.1.7. Foreign direct investment in Croatia 9

3.1.8. HRK/EUR Exchange rates 9

3.2. Economic Environment Overview 10

3.3. Croatian Economic Environment SWOT Analysis 11

3.4. CROATIA SWOT 12

**4. Overview of the Broadcasting Sector 13**

**5. Digital Conversion** **14**

**6. Television Broadcasting** **14**

6.1. DVB-T Television 15

6.2. DVB-T Allotment Regions Table 16

6.3. Map of DVB-T Allotment Regions 17

6.4. OiV 17

6.5. IPTV, Cable and Satellite Television 18

6.6. Television Stations Audience Shares 19

**7. Public station – HRT (Hrvatska Radio Televizija)** **19**

**8. Commercial TV stations broadcasting nationwide** **20**

**9. Croatian Regional and Local TV Stations** **21**

9.1. Multiplexes24

**10. Radio Broadcasting** **24**

10.1. Radio stations with nationwide coverage 25

10.2. Most popular radio stations in Croatia26

**11. Market Regulation** **26**

11.1. Croatian Post and Electronic Communications Agency – HAKOM 27

11.2. Agency for Electronic Media – AEM 28

**12. Language Localization28**

**13. The Croatian Audio-visual Centre28**

**14. List of Contacts30**

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](http://www.worldlibrary.org/articles/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 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.

If you are looking to getting involved to the broadcasting sector, you would be advised to consult the last part of this report where you will be able to consult a list with contacts details you might be interested in contacting before opening a business in Croatia.

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

1. **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 the transition process to 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](http://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.

**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**

**Population:** 4,464,844 (July 2015 est.)

**Main cities:** Zagreb (Capital), Split, Rijeka, Osijek

**National currency:** Kuna

**GDP:**€43.921billion (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.

**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](http://www.heritage.org/index/country/croatia)

* 1. **Economic profile**
		1. **Real GDP growth rate**

****

The Gross Domestic Product (GDP) in Croatia advanced 0.6 percent in the first quarter of 2016 over the previous quarter, 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 4.20 percent in the first quarter of 2008 and a record low of -3.70 percent in the first quarter of 2009. GDP Growth Rate in Croatia is reported by the Croatian Bureau of Statistics.

* + 1. **Balance of trade**

****

Croatia recorded a trade deficit of 4146.70 HKR Million in May of 2016. Balance of Trade in Croatia averaged -3541.99 HKR Million from 1993 until 2016, reaching an all-time high of 502.62 HKR Million in August of 1993 and a record low of -8379.31 HKR Million in April of 2008.The Balance of Trade in Croatia is reported by the Croatian National Bank.

* + 1. **Croatia unemployment rate**

****

Unemployment Rate in Croatia decreased to 13.60 percent in June of 2016 from 14.40 percent in the previous month, reaching to the lowest level since December 2008. Unemployment Rate in Croatia averaged 18.18 percent from 1996 until 2016, reaching an all-time high of 23.60 percent in January of 2002 and a record low of 12.20 percent in July of 2008. Unemployment Rate in Croatia is reported by the Croatian Bureau of Statistics.

* + 1. **Croatia government debt to GDP**

****

Croatia recorded a Government Debt to GDP of 86.70 percent of the country's Gross Domestic Product in 2015. Government Debt to GDP in Croatia averaged 52.70 percent from 2000 until 2015, reaching an all-time high of 86.70 percent in 2015 and a record low of 35.50 percent in 2000. Government Debt to GDP in Croatia is reported by the Croatian National Bank.

* + 1. **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 cost 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. Inflation Rate in Croatia averaged 2.50 percent from 1999 until 2016, reaching an all-time high of 8.43 percent in July of 2008 and a record low of -1.80 percent in May of 2016. Inflation Rate in Croatia is reported by the Croatian Bureau of Statistics.

* + 1. **Croatia interest rate**

****

The benchmark interest rate in Croatia was last recorded at 2.50 percent. 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 2.50 percent in October of 2015. Interest Rate in Croatia is reported by the Croatian National Bank. Croatia recorded a Government Debt to GDP of 86.70 percent of the country's Gross Domestic Product in 2015. Government Debt to GDP in Croatia averaged 52.70 percent from 2000 until 2015, reaching an all-time high of 86.70 percent in 2015 and a record low of 35.50 percent in 2000. Government Debt to GDP in Croatia is reported by the Croatian National Bank.

* + 1. **Foreign direct investment in Croatia**

****

Foreign Direct Investment in Croatia decreased by 547.60 EUR Million in the fourth quarter of 2015. Foreign Direct Investment in Croatia averaged 409.56 EUR Million from 2000 until 2015, reaching an all-time high of 2127.10 EUR Million in the second quarter of 2014 and a record low of -547.60 EUR Million in the fourth quarter of 2015. Foreign Direct Investment in Croatia is reported by the Croatian National Bank.

* + 1. **HRK/EUR Exchange rates**

****

Croatian currency is kept stable in relations to Euro by Croatian National Bank. Typically, relatively larger fluctuations happen with seasonal changes, in summer due to touristic season and during winter due to energy prices. Daily exchange rate is reported by Croatian national bank.

Source: www.tradingeconomics.com/croatia/indicators

* 1. **Economic environment overview**

Croatia's economy has experienced deep transformation since 1992 when the country got its independence. From that time, it went through structural reforms, becoming a market economy. After fulfilling 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 telecoms company. But the underlying budget deficit remains around 3% of GDP. The State still plays a significant role in the local economy and unemployment (9% according to ILO criteria) is high.

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](http://ec.europa.eu/europe2020/pdf/csr2016/cr2016croatiaen.pdf)

* 1. **CROATIAN ECONOMIC ENVIRONMENT SWOT ANALISYS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **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. |
| **FINANTIAL MARKETS** **AND DEVELOPMENT** |  | Low venture capital availability. | Easier loan access for entrepreneurial activities and investments. | External vulnerability. |
| **TECHNO-****LOGICAL 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.

* 1. **CROATIA SWOT**



Source: www.weforum.org/docs/WEF\_GCR\_Report\_2011-12.pdf

1. **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](http://www.worldlibrary.org/articles/DVB-T) television channels, and more than 30 other channels either produced in the [Republic of Croatia](http://www.worldlibrary.org/articles/Republic_of_Croatia) or produced for the Croatian market and broadcast via [IPTV](http://www.worldlibrary.org/articles/IPTV), [cable](http://www.worldlibrary.org/articles/Cable_television) or [satellite television](http://www.worldlibrary.org/articles/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](http://www.worldlibrary.org/articles/Standard-definition_television), [MPEG-2](http://www.worldlibrary.org/articles/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](http://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](http://www.hakom.hr)), which issues [broadcast licenses](http://www.worldlibrary.org/articles/Broadcast_license) and monitors the market. The DVB-T and satellite transmission infrastructure is developed and maintained by the state-owned company [*Odašiljači i Veze*](http://www.worldlibrary.org/articles/Oda%C5%A1ilja%C4%8Di_i_veze) *d.o.o.* (OIV: [www.oiv.hr](http://www.oiv.hr)).

Television in Croatia, as all the other media in the country, are criticized for lack of balance of 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 that of variable quality, television is important in the society because it offers a way for [non-governmental organizations](http://www.worldlibrary.org/articles/Non-governmental_organization) to communicate their concerns to the public and to criticize the [government](http://www.worldlibrary.org/articles/Government_of_Croatia) and other aspects of [politics of Croatia](http://www.worldlibrary.org/articles/Politics_of_Croatia).

Source: [www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia](http://www.worldlibrary.org/articles/list_of_television_stations_in_croatia)

1. **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](http://www.worldlibrary.org/articles/eng/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](http://www.worldlibrary.org/articles/eng/DVB-T) format was first introduced in early 2002.

The nine nationally broadcasting [free-to-air](http://www.worldlibrary.org/articles/eng/Free-to-air) channels (HTV1, HTV2, HTV3, HTV4, RTL, Nova TV...) were carried via a network of nine main transmitters built by the state-owned company [Transmitters and Communications Ltd](http://www.worldlibrary.org/articles/eng/Oda%C5%A1ilja%C4%8Di_i_veze). (*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](http://www.worldlibrary.org/articles/eng/Istria) and [Rijeka](http://www.worldlibrary.org/articles/eng/Rijeka) in January and ending with [Zagreb](http://www.worldlibrary.org/articles/eng/Zagreb) on 5th of October 2010 when the entire country was converted to the DVB-T digital format.

1. **Television Broadcasting**

Television is the most widespread source of information in Croatia—on average 57% of the [population of Croatia](http://www.worldlibrary.org/articles/Population_of_Croatia) uses television as their primary source of information. That percentage varies significantly by [geographic region](http://www.worldlibrary.org/articles/List_of_regions_of_Croatia)—from 43% in Zagreb and areas surrounding the capital to 79% in [Slavonia](http://www.worldlibrary.org/articles/Slavonia)—but in every region it surpasses all other sources of information, the second most widely used source of information being the [Internet](http://www.worldlibrary.org/articles/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](http://www.novatv.dnevnik.hr)) and RTL Television ([www.rtl.hr](http://www.rtl.hr)) operating two channels each and the remaining two operated by the Croatian Olympic Committee ([www.hoo.hr](http://www.hoo.hr)) and Author Ltd. companies and the government’s Central State Administrative Office for e-Croatia ([www.e-hrvatska.hr](https://www.linkedin.com/redirect?url=http%3A%2F%2Fwww%2Ee-hrvatska%2Ehr&urlhash=523Z)).

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](http://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](http://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](http://www.worldlibrary.org/articles/Croatian_diaspora), national minorities in Croatia, preservation of [cultural](http://www.worldlibrary.org/articles/Cultural_heritage) and [natural heritage](http://www.worldlibrary.org/articles/Natural_heritage), protection of the environment, promotion of democracy and [civil society](http://www.worldlibrary.org/articles/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](http://www.dzs.hr)

www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia

* 1. **DVB-T Television**

DVB-T (Digital Video Broadcasting - Terrestrial) is a standard developed for broadcasting of 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.

* 1. **DVB-T Allotment Regions Table:**

|  |  |
| --- | --- |
| **Marks** | **Regions**  |
| **D1** | * Osijek-Baranja, Vukovar-Srijem, Brod-Posavina
 |
| **D2** | * Brod-Posavina, [Požega-Slavonia](http://www.worldlibrary.org/articles/Po%C5%BEega-Slavonia_County), [Virovitica-Podravina](http://www.worldlibrary.org/articles/Virovitica-Podravina_County), Bjelovar-Bilogora, Sisak-Moslavina
 |
| **D3** | * Bjelovar-Bilogora, [Koprivnica-Križevci](http://www.worldlibrary.org/articles/Koprivnica-Kri%C5%BEevci_County), [Varaždin](http://www.worldlibrary.org/articles/Vara%C5%BEdin_County), [Međimurje](http://www.worldlibrary.org/articles/Me%C4%91imurje_County)
 |
| **D4** | * Sisak-Moslavina, Krapina-Zagorje, Zagreb, Karlovac
 |
| **D5** | * Istria, Primorje-Gorski Kotar, Lika-Senj
 |
| **D6** | * Primorje-Gorski Kotar, Lika-Senj
 |
| **D7** | * Zadar, [Šibenik-Knin](http://www.worldlibrary.org/articles/%C5%A0ibenik-Knin_County)
 |
| **D8** | * Split-Dalmatia, Dubrovnik-Neretva, [Pelješac](http://www.worldlibrary.org/articles/Pelje%C5%A1ac), [Korčula](http://www.worldlibrary.org/articles/Kor%C4%8Dula), [Lastovo](http://www.worldlibrary.org/articles/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](http://www.worldlibrary.org/articles/Vara%C5%BEdin) and [Čakovec](http://www.worldlibrary.org/articles/%C4%8Cakovec) |
| **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](http://www.worldlibrary.org/articles/%C5%A0ibenik) |
| **d82**  | Split, Trogir, [Omiš](http://www.worldlibrary.org/articles/Omi%C5%A1), the island of [Šolta](http://www.worldlibrary.org/articles/%C5%A0olta) and a large part of the island of [Brač](http://www.worldlibrary.org/articles/Bra%C4%8D) |
| **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](http://www.oiv.hr/broadcasting/terrestrial/dtv/files/hdtv.pdf).

Sources:

[www.oiv.hr](http://www.oiv.hr)

www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia

* 1. **Map of DVB-T Allotment Regions:**



Source:

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

* 1. **OIV**

The terrestrial television infrastructure in Croatia is operated by [*Odašiljači i Veze*](http://www.worldlibrary.org/articles/Oda%C5%A1ilja%C4%8Di_i_veze) *d.o.o* (OiV: [www.oiv.hr](http://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-Transmitters and Communications Ltd. 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](http://www.oiv.hr)

[www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia](http://www.worldlibrary.org/articles/list_of_television_stations_in_croatia)

* 1. **IPTV, cable and satellite television**

[Cable television](http://www.worldlibrary.org/articles/eng/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](http://www.worldlibrary.org/articles/eng/Internet_protocol_television) (IPTV) is also gaining ground in recent years, with most [ISPs](http://www.worldlibrary.org/articles/eng/Internet_service_provider) 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, trailing only 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.worldlibrary.org/articles/T-Hrvatski_Telekom) ([www.t.ht.hr](http://www.t.ht.hr)) with its MaxTV service, while the biggest cable provider is B.net, established in 2007, which is available in [Osijek](http://www.worldlibrary.org/articles/eng/Osijek), Rijeka, [Solin](http://www.worldlibrary.org/articles/eng/Solin), Split, [Velika Gorica](http://www.worldlibrary.org/articles/eng/Velika_Gorica), [Zadar](http://www.worldlibrary.org/articles/eng/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](http://www.worldlibrary.org/articles/Dubbing_%28filmmaking%29) or [subtitles](http://www.worldlibrary.org/articles/Subtitle_%28captioning%29). 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](http://www.worldlibrary.org/articles/eng/Televizija_OBN), [FTV](http://www.worldlibrary.org/articles/eng/Radiotelevision_of_Bosnia-Herzegovina) and [Hayat](http://www.worldlibrary.org/articles/eng/NTV_Hayat), Serbian [RTS SAT](http://www.worldlibrary.org/articles/eng/Radio_Television_of_Serbia), Slovenian [SLO1 and SLO2](http://www.worldlibrary.org/articles/eng/Radiotelevizija_Slovenija), Italian [Rai 1](http://www.worldlibrary.org/articles/eng/Rai_1) and [Rai 2](http://www.worldlibrary.org/articles/eng/Rai_2), Austrian [ORF1](http://www.worldlibrary.org/articles/eng/ORF1) and [ORF2](http://www.worldlibrary.org/articles/eng/ORF2))
* Selection of local TV stations (OTV, Z1, ČKTV, STV, TV Jadran, etc.)

Sources:

[www.worldlibrary.org/articles/Media\_of\_Croatia](http://www.worldlibrary.org/articles/Media_of_Croatia)

[www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia](http://www.worldlibrary.org/articles/list_of_television_stations_in_croatia)

* 1. **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>

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

HRT, the Croatian Radio Television, is the national radio television. Former affiliation was Yugoslav 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 rest 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](http://www.hrt.hr/23183/povijest/the-evolution-of-croatian-radio-and-television)

Study of ICT sector in Croatia:

www.awex.be/fr-BE/Infos%20march%C3%A9s%20et%20secteurs/Infossecteurs/Documents/PECO/ICT%20sector%20in%20Croatia.pdf

1. **Commercial TV stations which broadcast nationwide**
* **RTL Television** ([www.rtl.hr](http://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](https://en.wikipedia.org/wiki/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 and 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](http://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](https://en.wikipedia.org/wiki/Reality_show). Nova TV is also notable for its [live](https://en.wikipedia.org/wiki/Live_television) broadcasts of various [sporting](https://en.wikipedia.org/wiki/Sport) events.

Dnevnik Nove TV (Nova TV Daily News) is the main [news](https://en.wikipedia.org/wiki/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](https://en.wikipedia.org/wiki/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](http://www.domatv.dnevnik.hr)), specialized TV channel for entertainment.

* **SPTV (Sportska Televizija:** [www.sptv.hr](http://www.sptv.hr)**)**

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

* **CMC (Croatian Music Channel:** [www.cmc.com.hr](http://www.cmc.com.hr)**)**

CMC is the first and only specialised music television 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 CMC festival, one of the most important music events in Croatia.

1. **Croatian Regional and Local TV Stations**
* **Vinkovačka Televizija (VTV:** [www.vtv.hr](http://www.vtv.hr)**)**

This regional TV station is covering the areas of Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County within the broadcasting range of 500,000 people. This TV channel is also available on cable TV (Max TV and B-Net) nationwide. It airs news, TV shows from foreign production, documentary shows from domestic production and reports from the region.

Source: [vktv.tv](http://www.vktv.tv)

* **Televizija Slavonije I Baranje / Slavonska Televizija (STV:** [www.stv.hr](http://www.stv.hr)**)**

This regional TV station is covering Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County while 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](http://www.stv.hr)

* **Osječka TV** ([www.osjecka.com](http://www.osjecka.com))

This regional TV station is covering Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County while 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](http://www.osjecka.com)

* **Slavonsko – Brodska Televizija (SBTV:** [www.sbtv.hr](http://www.sbtv.hr)**)**

This regional TV station is covering Vukovar-Srijem County, Osijek-Baranja County and Brodsko-Posavina County while nationally available on cable TV. It airs themed shows (agriculture, culture, music, etc.) and news.

Source: [sbtv.hr](http://www.sbtv.hr)

* **Srce TV** ([www.srce.hr](http://www.srce.hr))

This regional TV station is covering Međimurje County, Varaždin County and Koprivnica-Križevci County. With transition to digital broadcasting it also became available in part of Bjelovar - Bilogora County and Krapina-Zagorje County, which makes for a broadcasting range with half of million people in it. This TV station airs news, themed shows, music programmes and promotional TV sales.

Source: [www.srce.tv](http://www.srce.tv)

* **VTV Televizija** ([www.vtv.hr](http://www.vtv.hr))

Regional TV station covering 70% of Northeastern Croatia with its signal, airing 24 hours a day various internally produced TV shows, sport shows, news and documentaries.

Source: [www.vtv.hr](http://www.vtv.hr)

* **Jabuka TV** ([www.jabuka.tv](http://www.jabuka.tv))

This regional TV station is covering Zagreb, Zagreb County and cities bordering Zagreb County with one million and a half potential viewers. Its mission is to air alternative TV schedule through shows covering different topics (politics, show business, sport etc.), news and entertainment.

Source: [jabukatv.hr](http://www.jabukatv.hr)

* **Mreža TV** ([www.mreza.tv](http://www.mreza.tv))

Joint project of two formerly separate TV stations (Nezavisna Televizija and TV Dalmatia) covering 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](http://www.mreza.tv)

* **Kanal RI** ([www.kanal-ri.hr](http://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](http://www.kanal-ri.hr)

* **TV Istra** ([www.tvistra.hr](http://www.tvistra.hr))

Regional TV station covering area with 500,000 people based in Pazin. Concession for airing 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](http://www.tvistra.hr)

* **TV Nova** ([www.tvnova.hr](http://www.tvnova.hr))

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

Source: [tvnova.hr](http://www.tvnova.hr)

* **Televizija Jadran** ([www.tvjadran.hr](http://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](http://www.tvjadran.hr)

* **Dubrovačka Televizija (DuTV:** [www.dutv.hr](http://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](http://www.dutv.hr)

* **Z1** ([www.Z1.com.hr](http://www.Z1.com.hr))

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

Source: [www.z1.com.hr](http://www.z1.com.hr)

* **Televizija 4 Rijeke (TV4R:** [www.tv4rijeke.com](http://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](http://mojtv.hr) ; [www.tv4rijeke.com](http://www.tv4rijeke.com)

* **Televizija Šibenik** ([www.tvs.hr](http://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](http://www.tvs.hr)

* **Televizija Zapad** ([www.zapad.tv](http://www.zapad.tv))

This local TV station is based and is covering the area of Zaprešić town. Its program consists of news and locally themed mosaic shows.

Source: [www.zapad.tv](http://www.zapad.tv)

* 1. **Multiplexes**

There are three active [multiplexes](http://www.worldlibrary.org/articles/Multiplex_%28TV%29) (MUX) in Croatia. MUX A and MUX B are reserved for nationwide channels, and MUX D is used for channels broadcast locally and nationwide. MUX A broadcasts 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 channel.

Source : [www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia](http://www.worldlibrary.org/articles/list_of_television_stations_in_croatia)

1. **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 programme 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 13.0%, out of which the programmes in the state-owned radio stations reached 20.5%, in regional ones 15.9% and in local ones 11.8%. The share of advertising spots in all radio stations was 5.0% 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 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 of listeners wants 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 margin. 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 is 100EUR.

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/](http://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](http://www.dzs.hr)

* 1. **Radio stations with nationwide coverage**
* **Hrvatski Radio (Croatian Radio :** [www.radio.hrt.hr](http://www.radio.hrt.hr)**)**

Part of national television broadcasting company HRT, has three channels (**HR1, HR2, HR3**) that air nationwide and eight regional stations: [**Radio Dubrovnik**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Dubrovnik)**,** [**Radio Knin**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Knin)**,** [**Radio Osijek**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Osijek)**,** [**Radio Pula**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Pula)**,** [**Radio Rijeka**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Rijeka)**,** [**Radio Sljeme**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Sljeme)**,** [**Radio Split**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Split) and [**Radio Zadar**](https://hr.wikipedia.org/wiki/HRT_%E2%80%93_Radio_Zadar).

**HR1** is the primary national-level station, mainly serious programming. It airs news every full hour with oldies and local pop music. **HR2** airs entertainment programming including [popular music](https://en.wikipedia.org/wiki/Popular_music), with news followed by [traffic reports](https://en.wikipedia.org/wiki/Traffic_report) at the half-hour mark. **HR3** [airs classical music](https://en.wikipedia.org/wiki/Classical_music) and radio drama.

* **Narodni radio (People's Radio:** [www.narodni.hr](http://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](http://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](http://www.hkr.hr)**)**

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

Source:

Croatian Agency for Electronic Media: [pmu.e-mediji.hr](http://www.pmu.e-mediji.hr)

* 1. **Most popular radio stations in Croatia**
* **NARODNI RADIO – Most popular nationwide** ([www.narodni.hr](http://www.narodni.hr))



Narodni radio is one of the six national radio stations, daily listened to by half million to 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 by 250,000 listeners on daily average, while another 180,000 listens the program monitored over the Internet. Narodni radio is the bearer of the prestigious title of Croatia’s Superbrands.

Source: [www.narodni.hr](http://www.narodni.hr)

* **Antena Zagreb- Most popular in Zagreb** ([www.antenazagreb.hr](http://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.

1. **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**.

* 1. **Croatian Post and Electronic Communications Agency – HAKOM** ([www.hakom.hr](http://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.

The Croatian Post and Electronic Communication Agency 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 the 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 protection of minors, restricts depictions of violence, sexual intercourse, profanity, use of intoxicating substances and tobacco and other scenes which may be harmful to development of minors between seven in the morning and nine, ten or eleven in the evening, depending on rating of 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 communications - 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](http://www.hakom.hr)

[www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia](http://www.worldlibrary.org/articles/list_of_television_stations_in_croatia)

* 1. **Agency for Electronic Media – AEM** ([www.e-mediji.hr](http://www.e-mediji.hr))

Concessions for broadcasting are given by Agency for Electronic Media (AEM).

The Electronic Media Council manages the ELECTRONIC MEDIA 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 nonprofit producers of Audio-visual and / or radio programmes.

For further information, consult the website of the Agency for Electronic Media ([www.e-mediji.hr](http://www.e-mediji.hr)) on which you will find more detailed information about the agency and its services.

Sources:

[www.e-mediji.hr](http://www.e-mediji.hr)

[www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia](http://www.worldlibrary.org/articles/list_of_television_stations_in_croatia)

[www.hakom.hr](http://www.hakom.hr)

1. **Language localization**

National legislation requires that all television programmes broadcasts in Croatia are made in [Croatian language](http://www.worldlibrary.org/articles/Croatian_language) or with appropriate translations, either using [dubbing](http://www.worldlibrary.org/articles/Dubbing_%28filmmaking%29) or [subtitling](http://www.worldlibrary.org/articles/Subtitle_%28captioning%29). In general, all foreign programming is subtitled, except for cartoons, narrated parts of [documentaries](http://www.worldlibrary.org/articles/Documentary_film) and similar programmes.

An attempt to change this was made by Nova TV in 2006, when a [soap opera](http://www.worldlibrary.org/articles/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](http://www.worldlibrary.org/articles/Mutual_intelligibility) languages. That led to formal requests made by the Electronic Media Council demanding [language localization](http://www.worldlibrary.org/articles/Language_localisation) of television programmes made in [Serbian language](http://www.worldlibrary.org/articles/Serbian_language). Ultimately, that issue was resolved through subtitling using [teletext](http://www.worldlibrary.org/articles/Teletext) service normally used for [closed captioning](http://www.worldlibrary.org/articles/Closed_captioning).

Source: [www.worldlibrary.org/articles/list\_of\_television\_stations\_in\_croatia](http://www.worldlibrary.org/articles/list_of_television_stations_in_croatia)

1. **The Croatian Audio-visual Centre** ([www.havc.hr](http://www.havc.hr))

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

The aims of the HAVC are 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 national film archive.

The agency is currently operating with the 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 films 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. The projects such as Feature Films, Documentaries, Short Films, Television Drama and Animation can derive a benefit of 20% of their qualifying expenditure up to 2.6million 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>

1. **List of contacts**

**Government Agencies**

**Hrvatski Audiovizualni Centar (HAVC)**

***Croatian Audio-visual Centre***

Nova Ves 18, 10000 Zagreb

Tel. +385 1604 1087 Fax. +385 1466 7819

E-mail: promotion@havc.hr

Web: [www.havc.hr](http://www.havc.hr)

**Hrvatska Regulatorna Agencija za Mrežne Djelatnosti (HAKOM)**

Roberta Frangeša Mihanovića 9, 10110 Zagreb

Tel. + 385 1700 7007 Fax. + 385 1700 7070

E-mail: e-pisarnica@hakom.hr

Web: [www.hakom.hr](http://www.hakom.hr)

**Agencija za Elektroničke Medije (AEM)**

**Agency for Electronic Media**

Jagićeva 31, 10 000 Zagreb

Tel. +385 1488 2610 Fax. +385 1488 2614

E-mail: info@e-mediji.hr

Web: [www.e-mediji.hr](http://www.e-mediji.hr)

**Odašiljači I Veze d.o.o.**

**Transmitters and Communications Ltd.**

Ulica grada Vukovara 269d, 10000 Zagreb

Tel. +385 1618 6000 Fax. +385 1618 6100

E-mail: oiv@oiv.hr

Web: [www.oiv.hr](http://www.oiv.hr)

**Public TV and Radio Station**

**Hrvatska Radio Televizija (HRT)**

* **HRT1, HRT2, HRT3, HRT4**

**Croatian Radio Television**

Prisavlje 3, 10 000 Zagreb

Tel. +385 1634 2634  Fax. +385 1634 3712

E-mail : hrt@hrt.hr

Web : [www.hrt.hr](http://www.hrt.hr)

**Nationwide Broadcasting TV Stations**

**RTL Hrvatska d.o.o.**

* **RTL, RTL2, RTL Kockica**

Krapinska 45, 10000 Zagreb

Tel. + 385 1366 0000 Fax. + 385 1366 0009

E-mail: rtl@rtl.hr

Web: [www.rtl.hr](http://www.rtl.hr/)

**Nova TV d.d.**

* **Nova TV, Doma TV**

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Tel. +385 1600 8300 Fax. + 385 1600 8333

E-mail: novatv@novatv.hr

Web: [novatv.dnevnik.hr](http://www.novatv.dnevnik.hr)

**Autor d.o.o.**

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Tel. +385 1290 0800

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Web : [cmc.com.hr](http://cmc.com.hr)

**HOO TV d.o.o.**

* **Sportska Televizija (SPTV)**

Kneza Ljudevita Posavskog 48, 10000 Zagreb

Tel. +385 1555 3800

E-mail : info@sptv.hr

Web : [www.sptv.hr](http://www.sptv.hr)

**Regional and Local TV Stations**

**VTV d.o.o. (Vinkovačka Televizija)**

Trg dr. Franje Tuđmana 2, 32100 Vinkovci

Tel. +385 3249 2111

E-mail : direktor@vktv.tv

Web : [vktv.tv](http://vktv.tv)

**Televizija Slavonije i Baranje d.o.o.**

Istarska 2, 31000 Osijek

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E-mail : stv@stv.hr

Web : [www.stv.hr](http://www.stv.hr)

**0AR d.o.o. (Osječka televizija)**

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Tel. +385 3140 0000 Fax. +385 3140 0020

E-mail: info@ostv.hr

Web: [osjecka.com](http://osjecka.com)

**Slavonskobrodska televizija (SBtv)**

Mile Budaka ¼, 35000 Slavonski Brod

Tel. +385 3521 0250 Fax. +385 3541 0920

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Web: [www.sbtv.hr](http://www.sbtv.hr)

**SrceTV**

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Web: [www.srce.tv](http://www.srce.tv)

**VTV Televizija**

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Web: [www.vtv.hr](http://www.vtv.hr)

**Otvorena Televizija Zagreb d.d. - Jabuka TV**

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Tel. + 385 1789 9900 Fax. +385 1789 9945

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**Mreža TV - Mreža TV Zagreb, Mreža TV Split**

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E-mail: zagreb@mreza.tv; split@mreza.tv

Web: [mreza.tv](http://mreza.tv)

**Kanal Ri**

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E-mail: info@kanal-ri.hr

Web: [www.kanal-ri.hr](http://www.kanal-ri.hr)

**TV Istra**

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E-mail: tvistra@tvistra.hr

Web: [www.tvistra.hr](http://www.tvistra.hr)

**TV NOVA**

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E-mail: uprava@tvnova.hr

Web: [tvnova.hr](http://www.tvnova.hr)

**Televizija Jadran**

Ruđera Boškovića 22, 21000Split

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Web: [www.tvjadran.hr](http://www.tvjadran.hr)

**Dubrovačka Televizija d.o.o. (DUTV)**

Kralja Tomislava 1, 20000 Dubrovnik

Tel. +385 91300 3007 Fax. +385 2035 8778

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Web: [www.dutv.hr](http://www.dutv.hr)

**Radio 047 d.o.o. - Televizija 4 Rijeke (TV4r)**

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E-mail: desk@trend.com.hr

Web: [www.tv4rijeke.com](http://www.tv4rijeke.com)

**Z1 Televizija**

Kneza Ljudevita Posavskog 48, 10000 Zagreb

Tel. +385 1660 0571 Fax. +385 1668 8555

E-mail: tv@z1-tv.hr

Web: [www.z1-tv.tv](http://www.z1-tv.tv)

**Televizija Šibenik (TV Šibenik)**

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E-mail: tvs@tvs.hr

Web: [tvs.hr](http://tvs.hr)

**Televizija Zapad**

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Web: [www.zapad.tv](http://www.zapad.tv)

**Satellite, Cable and IPTV**

**Hrvatski Telekom d.d. (Max TV)**
Roberta Frangeša Mihanovića 9, 10110 Zagreb

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E-mail: info@t.ht.hr

Web: [www.t.ht.hr](http://www.t.ht.hr)

**VIPnet d.o.o. (VIP TV, VIP SAT TV)**

Vrtni put 1, 10000 Zagreb

Tel. +385 1469 1091 Fax. +385 1469 1099

E-mail: office@vipnet.hr

Web: [www.vipnet.hr](http://www.vipnet.hr)

**HP d.d. (EVO TV)**

Jurišićeva 13, HR-10000 Zagreb

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E-mail: info@posta.hr

Web: [www.posta.hr](http://www.posta.hr)

**Private Nationwide Broadcasting Radio Stations**

**OTVORENI RADIO d.o.o.**

Cebini 28/III, 10010 Zagreb-Sloboština

Tel. +385 (1) 66 23 700 Fax. +385 (1) 66 23 800

E-mail: otvoreni@otvoreni.hr

Web: [www.otvoreni.hr](http://www.otvoreni.hr)

**RADIO CROATIA d.o.o. (Narodni Radio)**

Avenija Većeslava Holjevca 29, 10010 Zagreb

Tel. +385 1668 9580 Fax. +385 1668 8100

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Web: [www.narodni.hr](http://www.narodni.hr)

**Hrvatski Katolički Radio**

Voćarska c. 106, 10000 Zagreb

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**Private Regional Broadcasting Radio Stations**

**RADIO KAJ ZAGREB**
Haendelova 4, Prečko

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**Radio Dalmacija d.o.o.**

Kralja Zvonimira 14/II, 21000 Split

Tel. +385 2140 5222 Fax. +385 2140 5205
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**Primorski radio d.o.o. (Totalni FM Rijeka)**

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 **Obiteljski radio d.o.o. (Antena Zagreb)**

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Web: [www.antenazagreb.hr](http://www.antenazagreb.hr)

**Radio 101 d.o.o.**

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**Soundset Radio Group**

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**Radio Istra**

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**ROCK FM d.o.o. (Gold FM)**

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**Radio Koprivnica d.o.o.**Zagrebačka bb, 48000 Koprivnica

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**HRVATSKI RADIO VUKOVAR** **d.o.o. (HRV)**

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**Županijski radio Šibenik d.o.o.**

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E-mail: marketing@radioslavonija.hr

Web: [www.radioslavonija.hr](http://www.radioslavonija.hr)

**Novi radio-Zadar d.o.o. (Novi Radio)**

Zrinsko frankopanska 13, 23000 Zadar

Tel. +385 2330 2840 Fax. +385 2330 2847

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**Broadcasting Equipment Retail and Wholesale**

**RADIOCOMM**

N.Verona 10, 52420 Buzet

Tel. +385 5269 4116 Fax. +385 5266 2758

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**Audion d.o.o.**
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Web: [www.audion.hr](http://www.audion.hr)

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**Foto Video Svijet j.d.o.o.**

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Web: [fotosvijet.hr](http://www.fotosvijet.hr)

**M-Computers**
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**EURODOM d.o.o.**

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**Provox d.o.o.**

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**Smart Audio-Visual d.o.o.**

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**Kapetanović Sistemi d.o.o.**

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**Kino Europa**

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Web: [www.kinoeuropa.hr](http://www.kinoeuropa.hr)

**Kino Karaman**

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**Kino Sloboda**

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**Kino Urania**

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**Kino Valli**

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**Kino Tuškanac**

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**Kino Metropolis, Zagreb; Art-kino Grič,**

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**Zagreb; Kino Novska, Novska;**

**Kinoteka Zlatna vrata, Split**

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**Blitz-Cinestar**

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**Cineplexx**

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**Dokukino Croatia**

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**Authors' Rights Societies and Organizations**

**Association for Protection, Collection and Distribution of Phonogram Producers’ Rights (ZAPRAF)**

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Web: [www.zapraf.hr](http://www.zapraf.hr)

**State Intellectual Property Office of the Republic of Croatia (DZIV)**

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Tel. +385 1610 6410 Fax. +385 1611 2017

E-mail: info@dziv.hr

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**Croatian Composers’ Society, Collecting Society (ZAMP)**

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Tel. +385 1638 7000 Fax.+385 1638 7001

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**Croatian Performers’ Right Collecting Society (HUZIP)**

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Web: [www.huzip.hr](http://www.huzip.hr)

**Association for Protection of Audio-visual Works**

Josipa Ruđera Boškovića 7/2, 10 000 Zagreb

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Fax. +385 1233 0332

E-mail: apawcro@zg.t–com.hr

**Production of Broadcasting Content**

**Plavi Film**

Ulica mladosti 39, 10010 Zagreb

Tel. +385 16658705 Fax. +385 16658706

E-mail: contact@plavifilm.com

Web: [www.plavifilm.com](http://www.plavifilm.com)

**Plavi Mjesec**

Križnog puta 69, 10000 Zagreb

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E-mail: dragan@plavi-mjesec.hr

Web: [www.plavi-mjesec.hr](http://www.plavi-mjesec.hr)

**Petikat**

Poljana B. Hanžekovića 57, 10000 Zagreb

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Web: [www.petikat.com](http://www.petikat.com)

**Petnaesta umjetnost**

Domagojeva 14, 10000 Zagreb

E-mail: 15art@15art.hr

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**Plan 9 produkcija**

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Web: [www.plan9.hr](http://www.plan9.hr)

**Project 6 Studio**

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**Propeler Film**

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E-mail: info@propelerfilm.com

Web: [www.propelerfilm.com](http://www.propelerfilm.com)

**RC Anima Studio**

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Web: [www.rcanima.hr](http://www.rcanima.hr)

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**Restart**

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**Revolver studio**

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**Spiritus movens**

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**Studio devet**

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**Sekvenca**

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**Shadow Casters**

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**Studio dim**

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**Studio Guberović**

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**Studio MNC**

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**Udruga Ninanana**

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**Tout va bien! productions**

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