



Subcommittee on Innovation, Information Society and Social Policy

27- 28.02.2011

BROADCASTING COUNCIL OF REPUBLIC OF MACEDONIA



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**BC published the Analysis
of the Broadcasting Market for 2010**

Key findings:

Television industry: 78 television stations

- MRT – Public Broadcasting Service
- 77 commercial stations, including:
 - 5 nationwide through terrestrial transmitter (one of them no longer broadcast television program)
 - 13 satellite (of which 10 broadcast programs)
 - 49 at the local level

Key findings from the operation of TV stations in 2010

Revenues:

- Total revenues for all TV stations (excluding A1) – 27 mio. EUR

Expenditures:

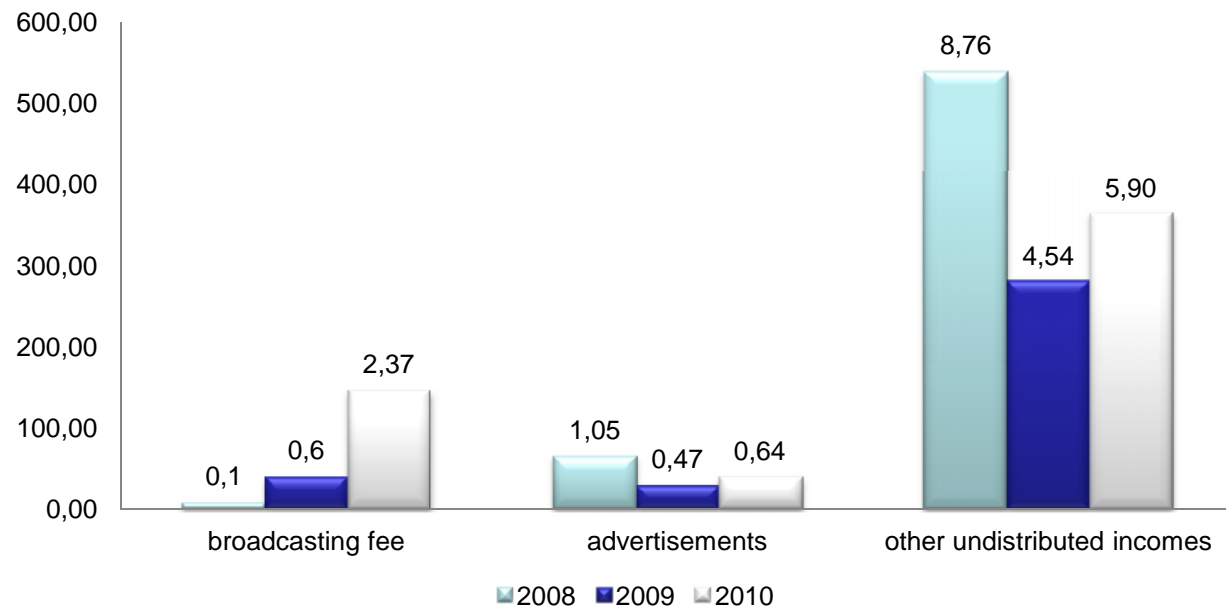
- Total spending on television at the state level - 13.79 mio. EUR
- Most of the expenditures have been spent on programming production.
- Best financial results have been achieved by Sitel TV.
- Three satellite TV's reported financial gains.



Financial activities of the PBS MRT

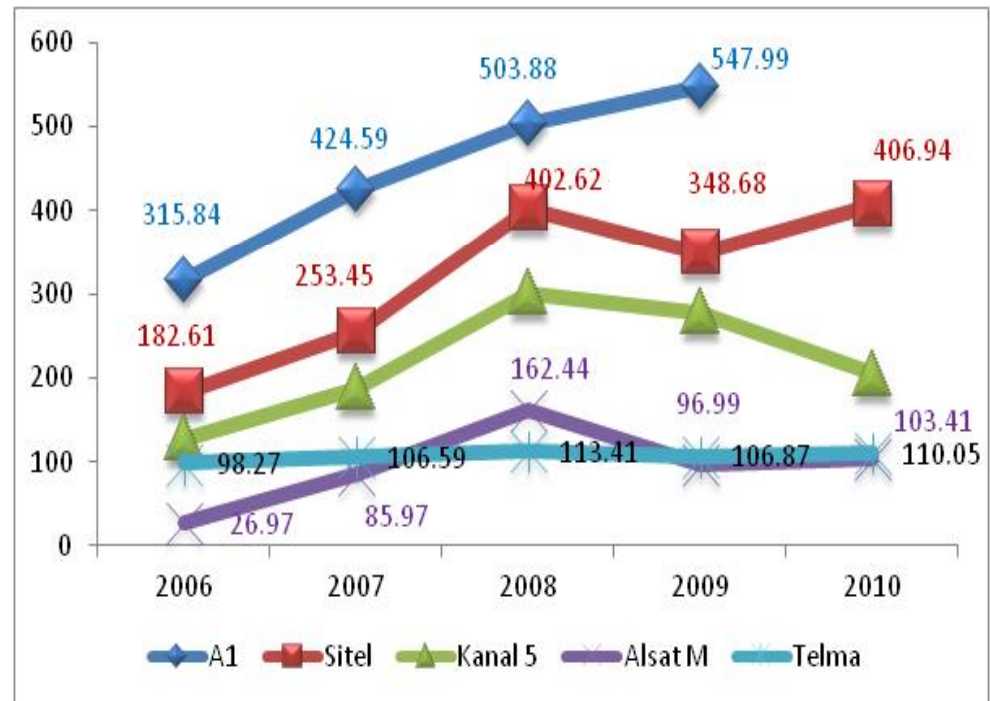
Revenue sources:

Incomes within the last three years (in mio EUR)



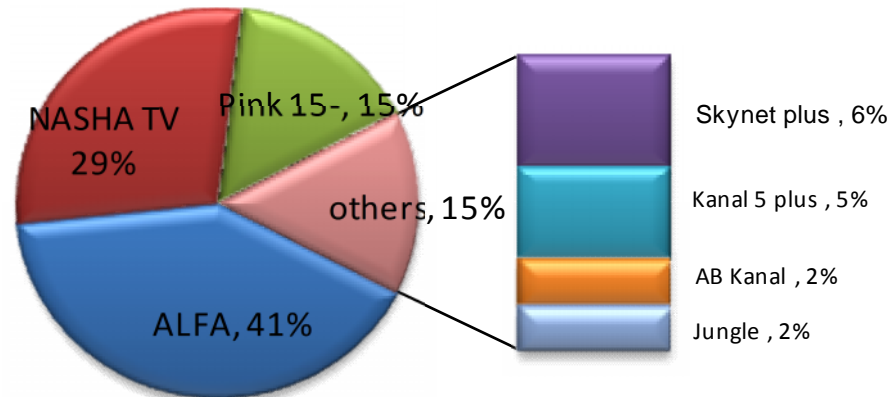
Comparative data on the revenues of commercial terrestrial TV stations statewide in 2010

- A1: 8.91 mio EUR;
- Sitel: 6.61 mio EUR;
- Kanal5: 1.68 mio EUR;
- Alsat-M: 1.78 mio EUR;
- Telma: 1.68 mio EUR;



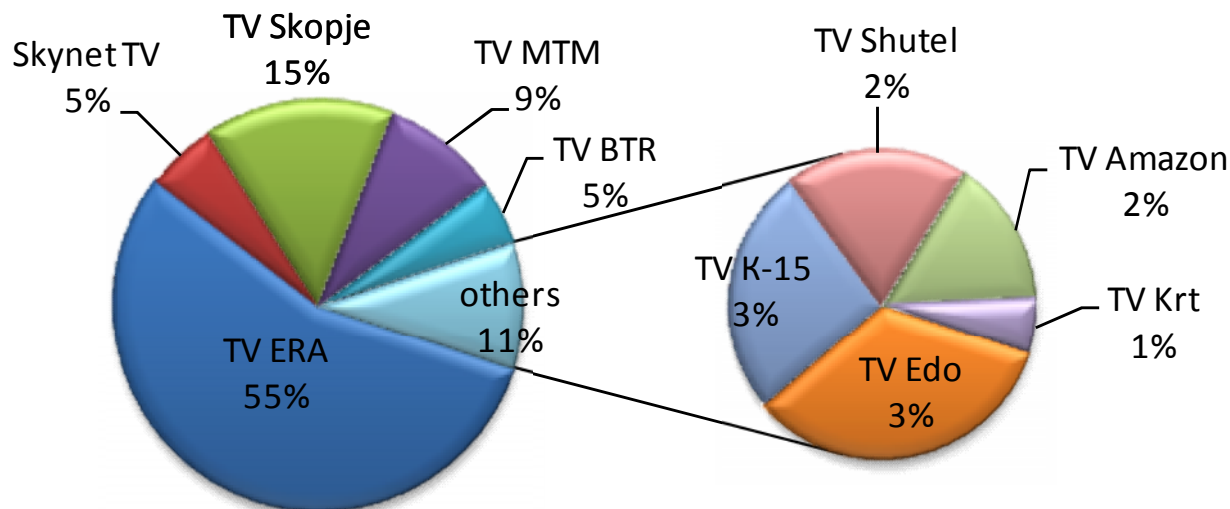
Comparative data on the incomes of satellite TV stations

share of total incomes of satellite televisions



- Total revenues of satellite TV stations that submitted data to the BC amounted to 1.60 mio EUR
- Of these, 85% is income realized by only three broadcasters: TV Alfa, Nasha TV and Pink Minus 15

Comparative data on the incomes of regional TV stations



- Total revenues: 1.39 mio EUR
- Two TV stations (TV Era and TV Skopje) make 70% of the total revenues.

Radio industry: in total 72 radio stations

- Public broadcasting service – Macedonian Radio
- 3 non profit broadcasting institutions
- 68 commercial radio stations out of which:
 - 3 radio stations on a state level
 - 16 radio stations on a regional level
 - 49 radio stations on a local level

Key findings from the work of the radio stations in 2010

Revenues:

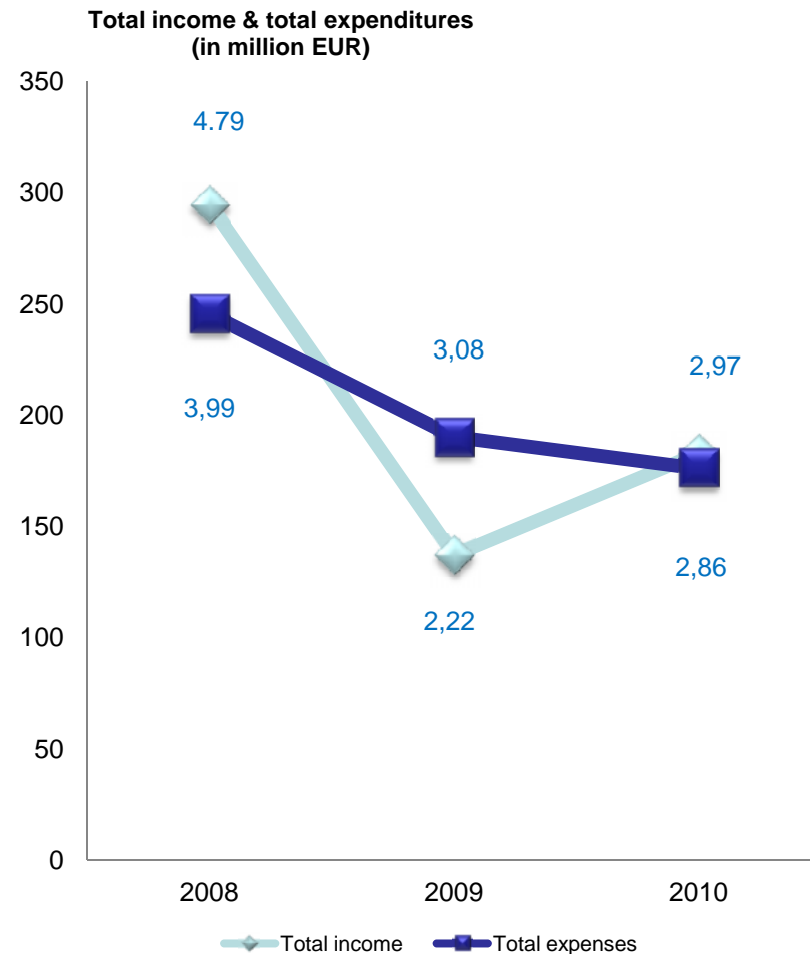
- Total revenues of all radio stations – 5.50 mio. EUR

Expenditures:

- Total expenditures of the radios on a national level – 0,72 mio. EUR
- The biggest part of the expenditures was used for program production.

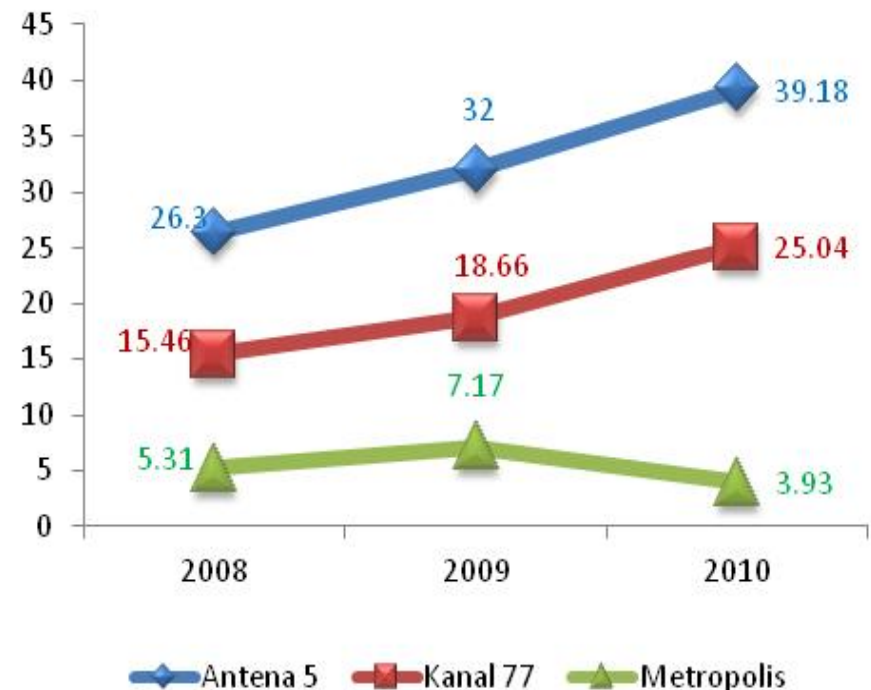
Macedonian Radio: Revenues and expenditures

- Revenues: broadcast fee, advertising & teleshopping, revenues categorized as „other uncategorized revenues“.
- Expenditures: salaries and allowances and purchase of programming



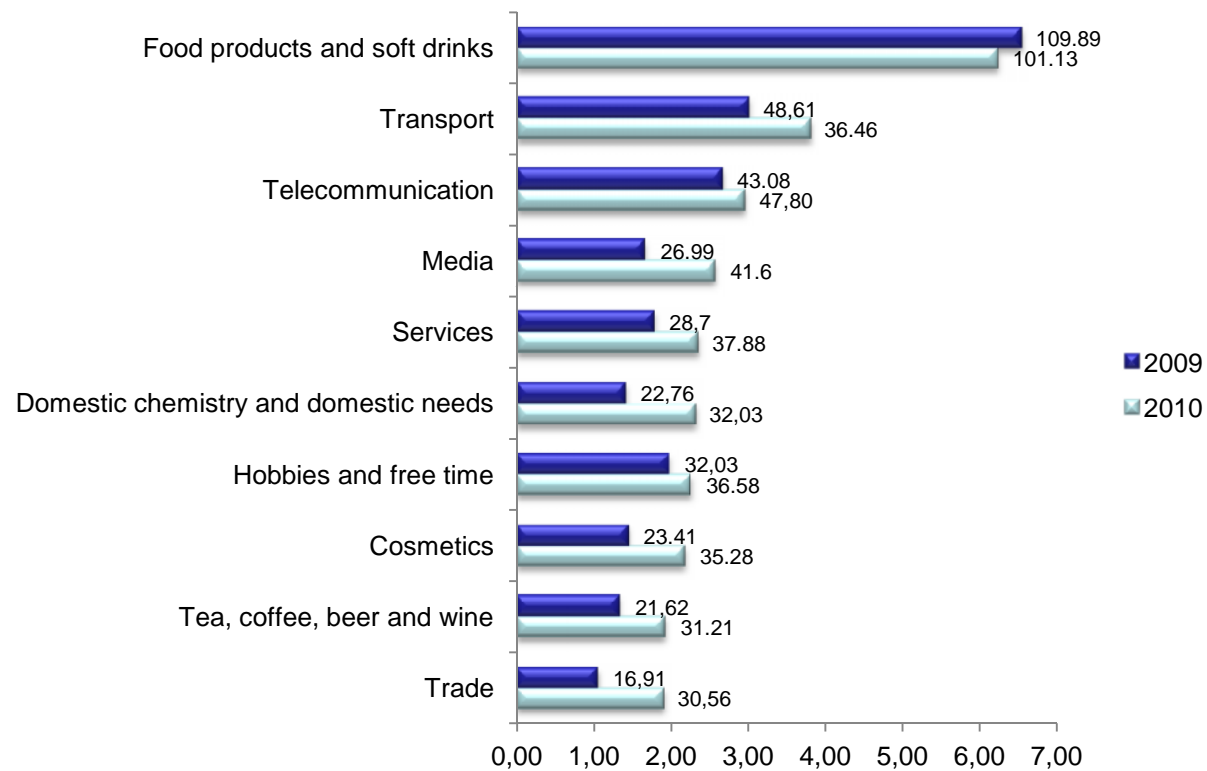
Comparative data about the total revenues of the commercial radio stations on a national level

- Continuous revenues growth of Antena 5 and Kanal 77
- Main revenue source: advertizing (2/3 of the total revenues)





Main advertising industries in the TV sector



Values in mio EUR

Top 5 advertisers for 2010

1. One (Telecom operator)
2. Vreme (Daily newspaper)
3. Coca Cola
4. Procter&Gamble
5. VIP (Telecom operator)

Copyright protection

- Joint activities with the Government's Coordination Body for Copyright Protection
- Regular registration of programme packages of operators of public communication networks

Monitoring of the broadcasters' ownership structure and prevention of illegal media concentration

- Law infringements have been noticed with TV Kanal5, TV Sitel, TV Shutel, Radio Kanal77 and Radio Classic FM
- TV Shutel, Radio Classic FM changed the ownership structure according to the law
- BC requested from all broadcasters to send a statement with an up-to-date ownership structure
- BC noted 5 cases of illegal media concentration and all of them have been solved in within the legal deadlines

Implementation of the AVMS Directive & introduction of DTT

- BC is giving active contribution in the process of drafting of the new media law
- BC is giving active contribution in the process of introduction of DTT-services; Public awareness raising activities on DTT, funded by IPA (Transational) will be implemented during 2012
- BC is ready to prepare the by-law legislation, which would ease the implementation of the AVMSD provisions after the media law is adopted

Activities planned for 2012 in direction of more effective implementation of the Broadcasting Law

NPAA2012: Various quarterly, bi-annual and annual analysis of the market monitoring: media ownership structure, copyright protection, child protection, monitoring of the aired programming, effectiveness of the imposed sanctions against broadcasters and operators etc.

IPA:

- TAIB 2008: In-depth Study on the Capacities (BC & AEC) **COMPLETED**
- TAIB 2009: Enhancing the administrative capacities of telecom and media authorities for efficient regulation of new digital and multiple play services (BC & AEC)
- TAIB 2011: Freedom of Media (BC, MRT, AJM & CPC)
- Transnational 2009: SEE DigiTV (international SEE) **IN PROGRESS**