

The Romanian broadcasting sector is one of the stronger examples of how multichannel television can impact on the shares of the traditional broadcasters. The four main channels still maintain a lead over the others but no individual channel dominates. Pro TV (Central European Media Enterprises - CME) has the highest market share with 12.8% in 2008 (down almost 3% in the last two years). Antena 1 (Intact Media Group) had an audience share of 9.1% in 2008 (down from 13.5% in 2006). Acasa TV (also from CME) has more or less held its audience share, which in 2008 was 7.7%. This channel targets women and presents mainly entertainment with drama, tele-novelas and films. Hence CME has a total market share of about 21%. The most dramatic loss of audience share has been that of the public service broadcaster TVR1 with a share in 2008 of 5.1% (down from 16.7% in 2006). The share of TVR2 also declined from 5.3% to 2% between 2006 and 2008. There are four other channels with a share of around 4% in 2008, including the news channel Realitatea. The development of access to multi-channel television, whereby at the end of 2008 approximately 75% of households had cable or satellite television, is outlined below.

(Audience data source: Eurodata TV Worldwide / TNS / AGB International / Copyright: Armadata SRL).

As in other countries, the main channels have also expanded their families of channels in recent years. Most recently this includes the news channel of the public service broadcaster, TVR Info in 2008; and from the Romanian company Intact Media the channel Antena 2 in 2007. Realitatea TV launched three other channels for satellite pay TV in 2009 (CinesStar, ActionStar and ComedyStar). Foreign investors continue to play an important role in the market such as Central European Media Enterprises (see above), ProSiebenSat.1 Media AG (Prima TV and Kiss TV), News Corporation (B1TV), and the Dogan Media Group (Kanal D).

Cable is the most important reception mode in Romania (over 45% of households). The cable network is mainly split between two operators: RCS-RDS and UPC Romania. RCS-RDS has taken over as the main player in the market with 1.4 million subscribers in August 2009. In December 2008, UPC Romania had 1.10 million subscribers (down compared with 2006, when the platform had 1.37 million). The cable market has also become more strictly regulated following a scandal in early 2008 where it became apparent that many cable network operators, were distributing television channels without reaching a prior agreement with the programme providers. Operators were obliged by the CNA (Consiliul Național al Audiovizualului (National Audiovisual Council) to cease their transmissions after being penalised by the CNA until they had concluded contracts with the relevant television provider.

The satellite broadcasting market is developing rapidly with more than 30% of households subscribing to services at the end of 2008. There are currently five satellite platforms competing in the Romanian market. DigiTV (RCS-RDS) had 1.1 million subscribers in 2009 in Romania (the service also operates in Croatia, the Czech Republic, Hungary, Serbia and Slovakia). Dolce (Romtelecom) had 750000 subscribers in September 2009. The other three packages are: Akta TV (formerly Max TV) owned by DCS; Boom TV (DTH Television Group); and FocusSat (UPC), which had more than 155000 subscribers at the end of 2008.

Since 2005, digital terrestrial television trials have taken place in Bucharest and Paltinis. Romania has set 2012 as the date for the digital switchover. In July 2009, the Romanian government published its plan for the digital switchover. There will be 6 national DTT multiplexes and 1 regional. The first two multiplexes should cover 60% of the population by the end of 2010, and 90% by the end of 2011. In addition the Romanian government expressed its wish to launch DTT services by the end of 2009. In August 2009, the two main channels of the

public service broadcaster - TVR1 and TVR2 - were granted DTT licenses. By September 2009 a Multiplex tender had still not been launched.

In 2006, the first IPTV platform, Ines, was launched by the Ines group. In 2009, there were at least six other platforms available with all the telecommunications operators offering triple play services. The satellite packager Romtelecom also plans to introduce an IPTV package by the end of 2009.

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