

Promise Fulfilled? The Slovak Media System 20 Years after the Fall of Communism

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Introduction

Slovakia can be characterized as having a lively, vivid and free news and media environment. However, this was not the case for the first five years of Slovak Republic's existence. Until 1989, Slovakia was often criticized by the international community for a lack of freedom and slow progress in the build-up of civic society. Most of the blame was pointed at the authoritarian Prime Minister Vladimír Mečiar. Freedom House had at that time rated Slovakia only as "partially free". Developments in Slovakia took a different shape as then opposition swept to power in the 1998 election and there was at least an effort to start a new era in communication among journalists, media managers and governmental officials. After 1998, Slovakia was constantly rated in Freedom House's media rankings as "completely free". The integrity of journalism and the media market is even more protected and stabilized after the country's 2004 entry into the European Union. However, political pressures, especially through libel suits and the controversial new Press law, came to existence.

In the 2006 election, a new government of social democrats (SMER), nationalists (Slovak National Party) and center-right HZDS of Vladimír Mečiar was formed under the leadership of Robert Fico. With the start of the new socialist government, politicians again tried to influence the press market. This is reminiscent of the government of Vladimír Mečiar. The current government, for example, is trying to gain leverage in the freedom of the press with stricter legal provisions (strict right for reply and/or correction

in the new Press law). Notwithstanding, even as there are considerable tensions between the new government and journalists, the free media environment is still functioning at its best.

Before the so-called Velvet revolution of 1989 in Czechoslovakia, there were 326 registered publications in Slovakia. As research shows, this number was rather stable. For comparison, at the beginning of Communist totalitarian rule, the number of periodicals was 232.¹ Of course, the content was heavily censored and newspapers were published either by the Communist party directly or through affiliated organizations. In 2007 there were around 1500 periodicals registered at the Ministry of Culture but since there is no control in place to determine if those are actually published, the real number of issued periodicals is lower. In 1989 seven daily newspapers were published: *Pravda*, *Práca*, *Smena*, *Új Szó*, *Roľnícke noviny*, *Šport* and *Smer*. For a short period in the 1990s, there was an explosion of new national dailies – at one point they reached as many as twelve. Notwithstanding, for comparison, during the first Czechoslovak Republic in 1920, there were 20 dailies in the region of Slovakia². At this moment, there are seven daily news publications: tabloids *Nový Čas* and *Plus 1 Deň*, mainstream *SME*, *Pravda*, Hungarian language *Új Szó*, sports *Šport* and financial *Hospodárske noviny*.

One of the paradoxes of post-communist Slovakia is the Press law, which was enacted in 1966, and there was a continuous lack of political will to agree to a new and modern version of newspaper law. Since 1990 there have been at least twenty new draft proposals but there was always a lack of political and general will to act. Governments, journalists and publishers at the end always admitted that it is better to have the old imperfect law than a new, bad one. This changed in 2008, when No. 167/2008 Act on periodicals and agency news service, the so-called Press law, was passed. The law advocates a larger control over content by the government-appointed authorities and more strict ethical regulations by state. It was criticized by journalistic organizations both at home and abroad. Journalists and publishers alike were especially reluctant to allow

¹ BREČKA, Samuel. 2007. Masmédiá na Slovensku. Vývoj a súčasný stav (2005-2006) (Media in Slovakia. Development and present situation 2005-2006) In *Vybrané kapitoly z masmediálnej a marketingovej komunikácie* (269-293). Trnava: Fakulta masmediálnej komunikácie Univerzity sv. Cyrila a Metoda v Trnave.

² TUŠER, Andrej. 1997. Systém a typológia periodickej tlače (System and Typology of Periodical Press). *Otázky žurnalistiky*, Bratislava: Mass Media Science – Slovak Academic Press, 39, p. 265.

the extensive “Right of Reply”. One of the Press Law’s proposals allowed citizens (and with that regard the government as well) to react even on front-pages of the respective newspapers – including cases when they have published truthful information. Print media feared that this could spark a chain reaction, which could damage the newspapers’ content. However, what is the most controversial is the part of the law that gives the Right of Reply to political elites, like the government. This could constrain the work of journalists in a major way³.

Let’s turn the attention to the area of broadcasting, where before 1989 only state-run *Czechoslovak TV* (Slovak respectively) existed, along with *Czechoslovak Radio* (Slovak).

The legislative framework of radio and television broadcasting started to form right after the Velvet revolution in 1989. In 1991 Czechoslovakia was (law No. 468/1991 about the Radio and Television Broadcasting Service) the first country from the so-called Eastern bloc to adopt a law allowing commercial TV broadcasting. However, it took Slovakia five more years until the first national terrestrial TV station went on the air. At the same time, the Slovak Republic (at that time still part of the Czechoslovak federation) was the first one in the post-Communist bloc to name its state-run TV service as “public broadcasting service.” This materialized in the Slovak Television Act⁴. In 2000, Slovak parliament enacted a new law on broadcasting and retransmission (No. 308) that is more specific in regulating media ownership, although ultimately not very effective. Law no. 308 had to harmonize Slovak legislative approach with that of the European Union. One of the latest legal documents that “regulates” television and radio broadcasting in Slovakia is the Law of Digital Broadcasting, enacted in 2007⁵.

In 2009 there were four national TV broadcasting companies – public *Slovak TV* with two channels (*Jednotka* and *Dvojka*), two mainstream commercial TV stations *Markíza* (with *Markíza*, digital/cable *Doma* and as part of CME with *MTV Czech* and

³ ONDRÁŠIK, Branislav. 2010. The Slovak Press Law: History and Its Impact on Free Media. Will be presented at the International Communication Association Conference in Budapest: Beyond East and West. Two Decades of Transformation After Fall of Communism, June 2008 (prepared for publishing for Media Research Journal, Croatia, June 2010).

⁴ ONDRÁŠIK, Branislav. 2005. Nová STV čelí nařčení z komercializace (New STV Being Accused of Commercialisation). In *Strategie, Prague*, 23. February 21, 2005, p. 23

⁵ ONDRÁŠIK, Branislav. 2007. Niekomu sa oplátilo čakať (For Some, It Was Worth To Wait). In *SME*, April 17, 2007.

Nova Sport) and *JOJ* (with *JOJ* and digital/cable *JOJ/Plus*) and one news-channel *TA3*. There were altogether 30 multiregional licensed TV stations and 117 licensed regional/local TV stations. In radio broadcasting, in 2008 there were six stations of public *Slovak Radio* and 45 private (multiregional, regional or local) broadcasters.⁶ A continuing problem for the last two decades have been political pressures on *Slovak Television*.

1. Media Market

1.1. Print Media

1.1.1. Dailies

After the fall of communism, between the years 1989 and 2000, the number of periodic publications increased. The biggest publishing house with more than 55 million euros in 2008 revenues is Swiss publisher Ringier. Ringier is horizontally integrated. First, it acquired publisher Euroskop in 1991, later acquired shares in Vydavateľstvo novín a časopisov with its daily tabloid *Nový Čas* and in 2004 bought the share of Gruner + Jahr publisher as well. In 1999 it unsuccessfully tried to acquire distribution company PNS. In 2007, Ringier sold its TV guide magazines to German publisher Bauer.

Another large group in the market is German Petit Press – partially owned by a Slovak investor and partially by German Rheinisch-Bergische Druckerei und Verlagsgesellschaft (Media Group Rheinische Post) with more than 34 million euros in revenues in 2008. This group is practically a monopoly publisher of regional dailies in Slovakia. It owns a vast majority of regional weeklies and dailies, except for one in Prešov (*Prešovský Večerník*). It publishes weeklies and two national dailies – *SME* and in Hungarian *Új Szó*.

⁶ COUNCIL FOR BROADCASTING AND RETRANSMISSION - RADA PRE VYSIELANIE A RETRASMISIU. 2009. *Správa o stave vysielania v Slovenskej republike a o činnosti Rady pre vysielanie a retransmisiu za rok 2008 (Report of the State of Broadcasting in Slovak Republic and Activities of the Council for Broadcasting and Retransmission)*. Retrieved January 18, 2010, from <http://www.rada-rtv.sk/sk/spravy/>.

In 2006, British publisher Daily Mail and General Trust acquired through its subsidiary Northcliffe International Ltd. Perex, the publisher of one of the leading mainstream dailies *Pravda*. *Pravda* has recorded the largest decrease in circulation. While in 2003 its average circulation was reaching 80 thousand sold copies, in 2009 it oscillated around 50 thousand. However, in the first quarter of 2010, DMGT sold Perex to not very-well known Czech enterprise Florena, indirectly connected to financial giant J&T that already operates a major TV station.

Spoločnosť 7 Plus is the second largest player in the market of tabloid press, it publishes a tabloid daily *Plus 1 Deň* and magazines of general and women's interest. Although *Plus 1 Deň* has impressive sales for a starter, it did not endanger its main competitor – tabloid *Nový Čas*, published by Ringier. However, *Plus 1 Deň* did threaten readership levels of two mainstream dailies, *SME* and *Pravda*, which are trying to find a way out with soft news coverage as well. Its ownership is split in equal thirds among three Slovak entrepreneurs: Jozef Dukes, Karol Bustin, and Štefan Šimák.

It is worth to mention two other publishers, Športpress of sports daily *Šport*, and Ecopress, which publishes financial daily *Hospodárske noviny* (which used to belong to German Holtzbrinck – Handelsblatt Group, and now constitutes part of the Czech group Economica, owned by Czech tycoon Zdeněk Bakala) and various trade magazines.

As can be observed, since the fall of communism, as a result of growing consolidation, the number of published national daily newspapers decreased. However, the diversity of published opinions increased significantly. Also, the number of newspaper readers is decreasing annually. This can be attributed to a general trend in Western societies. A continuous general decline during the last years is reflected in the sale structure of newspapers⁷.

⁷ BREČKA, Samuel and ONDRÁŠIK, Branislav. 2009. Das Mediensystem in der Slowakei. In: Internationales Handbuch der Medien. Hamburg: Nomos Verlag - Hans Bredow Institut, p. 615 – 617.

Table 1: Daily Newspapers Circulation in Slovakia 2003-2008 (in thousands)

	2008	2006	2004	2003
Publishing House/Title	Circulation	Circulation	Circulation	Circulation
Ringier	172	189	167	157
Nový Čas	172	189	167	157
Petit Press	112	127	140	130
SME	60	71	77	73
Új Szó	25	25	26	27
Korzár dailies	27	31	37	30
Perex	63	76	77	77
Pravda	63	76	77	77
Šport Press	NA	NA	50	50
Šport	NA	NA	50	50
Holtzbrinck/ Ecopress	18	18	NA	NA
Hospodárske noviny	18	18	NA	NA
Spoločnosť 7 Plus	64	57	–	–
Plus 1 Deň	64	57	–	–
Národná obroda/24 Hodín	–	–	13	17

Source: ABC SR, estimates

1.1.2. Weeklies and monthlies

There are around 80 national weekly magazines; most of the market is split among ten illustrated publications and family magazines of general and popular interest. Many of them are specifically focused on women's interests or publish TV guide listings. The market for the monthlies is very similar to the one for the weeklies - women's interest monthlies take center stage.

Table 2: Sold circulation of top weeklies

Title	Type/Target group	Publisher	Average number of circulation in 2008 (in thousands)
Nový Čas pre ženy	women's interest	Ringier Slovakia	213
Plus 7 dní	general interest	Spoločnosť 7 plus	166
Báječná žena	women's interest	Spoločnosť 7 plus	155
Život	family	Ringier Slovakia	129
Eurotelevízia	TV Guide	Bauer SK	103

Source: ABC SR

Table 3: Sold circulation of top monthlies

Title	Type	Publisher	Average circulation in 2008 (in thousands)
NČ Krížovky	crossword, puzzle	Ringier Slovakia	101
Záhradkár	garden	Spoločnosť 7 plus	99
Dobré jedlo	food	Spoločnosť 7 plus	83
EMMA	women's interest	Spoločnosť 7 plus	75
Nový Čas Bývanie	Living	Ringier Slovakia	64

Source: ABC SR

1.2. Book publishing

At the start of the 21st century, Slovak book publishing experienced some level of boom after the years of consolidation that followed the creation of independent Slovakia in the 1990s. It was after 2000 that major international players entered the market – e.g. Bertelsmann bought the main book publishing house Ikar. Sales of books were expanding; however, these good numbers plummeted in 2003 and 2004, when the sales fell by one third. It was believed this was in part because of the raise of value added

tax from 10 percent to 14 percent and higher. Notwithstanding, according to Market & Media & Lifestyle Research of the Median SK company, the reason for this is a decrease of interest in reading among Slovaks. Their data show that in 2005 only 40 percent of Slovaks bought at least a single book⁸.

1.3. Broadcasting

In the area of broadcasting, Slovakia was able to reach the level of their Western counterparts rather quickly. In 2007, along with public service broadcasters there were 30 radio stations, three national TV broadcasters and another 89 local TV stations.

1.3.1. Television

For a long time, the market of terrestrial broadcasting was controlled by main TV station *Markíza*. This has changed with the entrance of another commercial station into the market *TV JOJ*, but this is to the detriment of local TV stations.

Since 2005 audience ratings are measured electronically by the so-called peplemeters, which provide broadcaster with exact data and resulted in intensifying the competition – especially *JOJ* and *Slovak TV* became viable players against *Markíza*. However with the new digital law, all the present players try to preserve the status quo and “competition among the few”⁹.

From a social point of view, the TV market in Slovakia is experiencing a wave of commercialization. This process is characteristic not only of commercial broadcasters but public service providers as well. As is the case in western European countries, the crucial topic in contemporary discussions in Slovakia is the role of public service and public interest and how it can survive in a commercially driven environment. *Slovak Television*

⁸ ZÁBORSKÝ, Ján; HORVÁTHOVÁ, Jarmila & JESNÝ, Martin. 2006. Hľadanie strateného knižného trhu (In Search of Lost Book Publishing Market). *TREND Online*. Retrieved January 18, 2007 from <http://ekonomika.etrend.sk/>, March 7, 2006.

⁹ ONDRÁŠIK, Branislav. 2007b. *Globalization, Regulation and Concentration of Media Ownership (Effects on the Slovak and Central European Media Environment)* [Ph.D. Dissertation] – Department of Journalism. Faculty of Philosophy. Comenius University in Bratislava, p. 96-100

opted for a commercial approach to solve their financial problems under the management of former director of *TV JOJ* Richard Rybníček.

The first commercial TV stations that started to broadcast in Slovakia were *DC TV* and *VTV*. *Danubius Cable TV* was the first attempt by a private channel to reach a larger audience; it was aired via cable and satellite for a short period of time in 1995. Then, it was *VTV*, the first TV station to air its programming not only during prime-time (as *DC TV* did) but in off-prime as well. It lost its license in 2000 and went bankrupt due to debt. The follower of *DC TV* started to broadcast in 1999 as *TV Luna*. This project was also unsuccessful and the station stopped broadcasting in 2001¹⁰.

The first fully national TV license was awarded in 1995 to what was later known as *TV Markíza*. In August 1996 it started airing its programming and immediately was the most popular TV channel in Slovakia. From the business point of view, *Markíza* is the most successful TV project in Slovakia and in 2006 it booked 62 million euros in advertising revenues. Since its beginnings, the largest investor was the U.S. CME Group, a regional conglomerate. But its true face has been Pavol Rusko, its director and holder of the license. In 1998 his business dispute resulted in a very public fight over the television ownership¹¹. Now CME is the sole owner of the TV station, but global media conglomerate Time Warner entered the company with 31-percent share. CME deployed a dramatic digital broadcasting strategy in the region. In 2010, a women-oriented channel *Doma* started to be aired as did a Czechoslovak version of *MTV* (part of the portfolio) and earlier it was *Nova Sport* (sports channel of the group).

Another major commercial channel in Slovakia is *TV JOJ*, originally owned by Czech Nova TV group, later in the hands of Ivan Kmotřík Group, and now part of J&T Media Enterprises. It is a major commercial TV station without a foreign capital stake. It started to broadcast in 2002 as a follower of the project of regional TV stations network *Global* that had at its disposal lucrative terrestrial frequencies. Currently it transmits cable/digital channel *JOJ plus* as well.

¹⁰ ONDRÁŠIK, Branislav. 2008. Media Ownership, Regulation, Concentration, and Competition in the Slovak Republic. In: B. Dobek Ostrowska and M. Głowacki (eds.) *Comparing Media Systems. Between Politicization and Commercialization*. Wrocław: Wrocław University Press, p. 209-224

¹¹ BREČKA, Samuel and ONDRÁŠIK, Branislav. 2009. Das Mediensystem in der Slowakei. In: *Internationales Handbuch der Medien*. Hamburg: Nomos Verlag - Hans Bredow Institut, p. 623 – 626.

Table 4: Audience Shares of TV Stations Broadcasting on the Territory of Slovak Republic (%)

	1996	2000	2003	2004	2005	2008
Markíza	37.5	51.3	45.9	37.3	31.2	41
Jednotka (STV1)	23.6	14.2	15.7	20.1	19.3	with STV 2 26
Dvojka (STV2)	8.6	4.1	4.0	5.1	5.7	
TV JOJ (until 03/01/02 Global)		0.3	11.3	13.3	14.7	22
TA3			1.0	1.0	1.3	2
Other TV	30.3	30.1	22.0	19.6	27.8	

Source: 1996-2004 VISIO, diary , demographic 12-79 years, 2004 (15.10.-31.12.2004) -2005, PMT/TNS SK, electronic measurement, demographic 12+, data courtesy TV Markíza

1.3.2. Radio

The most popular radio network remains public *Slovak Radio* and the most popular commercial broadcaster is *Radio Expres*. *Expres* is owned by U.S. company Emmis. A major trend is the process of unification of content - European Hit Radio (music only) gains importance while news and information radio is almost insignificant. This phenomenon can be attributed to the rise of radio *Expres*¹².

There are three types of broadcasting in Slovakia: multiregional, regional, and local. Multiregional broadcasting has to reach no less than 30 percent and no more than 80 percent of Slovak population; regional broadcasting reaches less than 30 percent and local broadcasting reaches only certain communities within the vicinity of towns and

¹² ONDRÁŠIK, Branislav. 2007b. *Globalization, Regulation and Concentration of Media Ownership (Effects on the Slovak and Central European Media Environment)* [Ph.D. Dissertation] – Department of Journalism. Faculty of Philosophy. Comenius University in Bratislava, p. 100-101

cities (up to 200,000 people).¹³ The most successful commercial radio station in the last years have been: *Radio Expres*, *Radio FUN*, *Jemné Melódie* (Soft Melodies) and *Radio Okey* (part of French Lagardère group).

Table 5: Audience Shares of Top Radio Broadcasters

Broadcaster	2008 Audience share	2005 Audience share
Slovak Radio	ca. 27 %	40%
Expres	22.3%	19.2%
Fun Radio	13.5%	9.3%

Source: broadcasters, MML-TGI Research 2005-2006

1.4. Film

Since the fall of communism Slovak cinema and Slovak film have been in a state of continuous crisis. The system of state support collapsed and there are not too many investors eager to invest in this media sector. Negative implications for the state of Slovak film were brought on by the crisis in public service broadcaster, Slovak Television, which used to provide subsidies to filmmakers. Until 2006, only nine movies were shot through Slovak production, another 37 through international co-production. Most of the Slovak movies shot after 1989 did not attract a large number of viewers, not to mention the fact that they were left without any major success at the international level (Berlin, Cannes or the Academy Awards). However, after the Slovak entry into the European Union, the situation improved, as more funds for film have been provided from EU funds, and as a new grant program, AudioVízia, has been created. Funding provided

¹³ COUNCIL FOR BROADCASTING AND RETRANSMISSION - RADA PRE VYSIELANIE A RETRASMISIU. 2007. Správa o stave vysielania v Slovenskej republike a o činnosti Rady pre vysielanie a retransmisiu za rok 2006 (Report of the State of Broadcasting in Slovak Republic and Activities of the Council for Broadcasting and Retransmission). Retrieved January 18, 2007, from <<http://www.rada-rtv.sk/web/home/>>.

by this program rose six times in just three years; in 2006 alone it supported filmmaking with almost five million euros¹⁴.

1.5. Online

In concordance with a global practice, there is virtually no regulation of Internet media content. Web-based criminal activities like the spreading of child pornography are of course forbidden by criminal law.

Slovakia was one of the leaders in deploying the Internet within the Central European region. Already in 1990 the networks FIDO and EUNet were present in Czechoslovakia¹⁵. The first bundle that was connected with the bundle in Vienna was in Bratislava¹⁶. Since 1991, Czechoslovakia has been connected to the BITNET network. It did not take long for the idea of online newspapers to materialize. In 1994, the daily SME published its online edition on the portal of the Slovak Academy of Sciences. SME got its domain SME.sk in 1996 and two years afterwards other notable news websites of mainstream newspapers like Pravda.sk (of the daily *Pravda*) or HNX.sk (later HNonline.sk of the daily *Hospodárske noviny*) have been established. SME was one of the first news portals in Central Europe.

In 2005, according to the Statistical office of the Slovak Republic, 11.5 percent of Slovak households were connected to the Internet, while in 2007 the number jumped to 34.5 percent¹⁷. The use of the internet in Slovakia is increasing exponentially, as at the beginning of 2008 it was already at 58.5 percent and in 2009 at 62 percent. With the rise of broadband access, a dramatic rise in the number of online visitors of Slovak websites followed.

¹⁴ ULMAN, Miroslav. 2007. Správa o stave slovenskej audiovizízie v roku 2006 (Report of the State of Slovak Audio-Vision in 2006) Retrieved January 18, 2007, from <<http://www.mediadesk.sk/>>

¹⁵ ŠKOP, Martin. 2009. Internet. In: Brečka, S. (ed.) *Od tamtamov po internet*. Bratislava: Eurokódex - Bratislavská vysoká škola práva, p. 297

¹⁶ VRABEC, Vladimír. 2002. Pionýrské začátky českého Internetu. [Accessed 26 November 2009]. 10 September 2002. Available from World Wide Web <http://www.lupa.cz/clanky/pionyrske-zacatky-ceskeho-internetu/>.

¹⁷ BREČKA, Samuel and ONDRÁŠIK, Branislav. 2009. Das Mediensystem in der Slowakei. In: *Internationales Handbuch der Medien*. Hamburg: Nomos Verlag - Hans Bredow Institut, p. 626

The first media outlets present in the newly created Slovak cyberspace were ultimately the news media, foremost the print media. It was only later that the internet started to be used for marketing communication, advertising, campaigning and political communication in that regard.

News content has been present in the Slovak Internet environment since 1994, just one year after the independent Slovak Republic had been created and four years after the collapse of communism. The first newspaper which went online was SME and the most popular news-based portal in Slovakia is SME.sk, an online sister of the print newspaper SME. Through the years its readership more than doubled. While in 2005 it recorded 449,000 unique visitors, in 2007 the number had more than doubled and in 2008 the site was, on average, read by 970,000 people per month. Other news portals saw exponential growth as well. However, the starting positions were different. Pravda.sk had 212,000 visitors in 2007, today it is more than a double of that number – 460,000 in 2008. HNOnline of *Hospodárske noviny* had a readership of 40,000 unique visitors in 2005, by 2008 this number more than quadrupled, to 167,000. The list would not be complete without Bleskovky.sk (and their heirs Topky.sk and Cas.sk), which was a joint venture of the popular search engine Zoznam.sk and the most frequently read print tabloid *Nový Čas*. Bleskovky started with 444,000 unique visitors in 2008 and ended its presence on Slovak Web in 2008 with more than double this number – 890,000 unique visitors.

Zoznam.sk, which is primarily a search engine, is in the long-term the most visited website in Slovak internet since it came into existence in 1997, with its main competitor being Azet.sk.

Table 6: Top Sites in Slovak Internet in 2008

Portal	Parent company	Monthly unique visitors	Type of Media
Zoznam.sk	Zoznam, s.r.o.	1,406,616	Search/News
Azet.sk	Azet	1,352,723	Search/News/Chat
Atlas.sk	Centrum Holdings	1,139,895	Search/News
SME Online	Rheinisch-Bergische/Petit Press	964,723	News/Blog

Topky.sk	Zoznam s.r.o.	804,521	News
Centrum.sk	Centrum Holdings	705,319	Search/News
Aktuality.sk	Centrum Holdings	577,366	News
Markiza.sk	Time Warner/CME	526,456	News/TV
Pravda.sk	DMGT	462,254	News/
Profesia.sk	DMGT	384,561	JobServer
JOJ.sk	J&T Media Enterprises	375,371	News/TV

Source: AIMmonitor-MediaResearch

1.6. Advertising market

The structure of the advertising market in Slovakia has changed dramatically since the fall of communism. It started literally at zero, when there was virtually no advertising in broadcasting or newspapers before 1990 and in the early 1990s. But the second half of the 1990s, compared with the start of the new millennium, was very different as well.

Before 1996, when the first major national TV station – *Markíza* started to air its programming, there was a clear dominance of printed press, which controlled approx. half of the market and public *Slovak Television* got a third of the advertising revenues¹⁸. Data of the real value invested in advertising before 2000 is rather limited but it is clear that the market grew exponentially. For comparison: According to TNS-A Connect, which measures only estimates (not real revenues, which are considerably lower), in 1995 the monitored revenues were 54,5 million ECU, in 1997 they were already at 134 million ECU, and in 2000 at almost 222 million euros.

It is clear that the entry of *TV Markíza* reshaped the market completely. This TV station alone, which dominated the whole media market up until the new millenium,

¹⁸ MISTRÍKOVÁ, Zuzana, and ZMEČEK, Alexander (eds.). 2001. *Mediálna ročenka – Slovensko 1990-2000*. (Media Almanac – Slovakia 1990-2000) Retrieved January 18, 2007, from <<http://www.mi.sk/>>.

earned 60 percent of all advertisement revenues in 2000.¹⁹ The influence of the printed press diminished. However, not for a long time.

In the middle of the first decade of the 21st century the press started to gain ground again. In 2005, the printed press market was the strongest in advertising revenues.²⁰ In that year, advertising in printed press and television was split almost evenly, almost 87 million euros (real advertising revenues) going to printed press and slightly more than 90 million euros to TV stations. Both outdoor and radio advertising revenues were below a ten percent share, with outdoor getting approx. 18 million euros and radios around 14 million euros.

Table 7: Revenues of Top Radio Broadcasters

Broadcaster	2008	2006	2005
Slovak Radio	€ 27.62 mil.	€ 21.45 mil.	€ 18.93 mil.
Expres	€ 9.11 mil.	€ 8.56 mil.	€ 5.64 mil.
Fun Radio	NA	€ 4.3 mil.	€ 2.88 mil.

Source: TREND Analyses, broadcasters, includes all revenues (like license fees)

Table 8: Advertising Revenues Of National TV Broadcasters

	2008 SKK/EUR	2006 SKK/EUR	2003 SKK/EUR
Markíza	3.013 bn./100 mil.	2.308 bn./62.0 mil.	1.861 bn./44.8 mil.
Slovak TV	2.243 bn./74.5 mil.	589 mil./15.8 mil.	237 mil./5.7 mil.
TV Joj	2007: 1.07 bn./35.5 mil.	1.037 bn./21.9 mil.	248 mil./6.0 mil.
TA3	226 mil./7.5 mil.	147 mil./4.9 mil.	64 mil./1.5 mil.

Source: TREND Analyses, companies information, Slovak TV includes license fees and state support

¹⁹ MISTRÍKOVÁ, Zuzana, and ZMEČEK, Alexander (eds.). 2001. *Mediálna ročenka – Slovensko 1990-2000*. (Media Almanac – Slovakia 1990-2000) Retrieved January 18, 2007, from <<http://www.mi.sk/>>.

²⁰ CZWITKOVICS, Tomáš. 2006. Médiá 2005: Relatívny pokoj na tlačovom trhu sa končí (Media 2005: The Relative Calm in the Printed Press Market is Coming to an End). *Mediálne.sk*. Retrieved January 18, 2007 from <<http://medialne.etrend.sk/>>.

Table 9: Daily Newspapers Advertising Revenues 2004-2008

	2008	2006	2003
Publishing House/Title	Revenues SKK/EUR	Revenues SKK/EUR	Revenues SKK/EUR
Ringier	826 mil. Sk 27.42 mil.	757 mil. / 20.35 mil.	185 mil. / 4.46 mil.
Nový Čas	NA	NA	NA
Verlag Rheinisch-Bergische/Petit Press	650 mil. / 21.58 mil.	605 mil. / 16.26 mil.	412 mil. Sk / 9.93 mil.
SME	263 mil. Sk/ 8.73 mil.	266 mil./ 7.15 mil.	212 mil./ 5.11 mil.
Új Szó	32 mil./ 1.06 mil.	44 mil./ 1.18 mil.	32 mil./ 0.77 mil.
Korzar dailies	136 mil./ 4.51 mil.	80 mil./ 2.15 mil.	55 mil./ 1.33 mil.
Perex	278 mil. / 9.23 mil.	303 mil. / 8.15 mil.	173 mil. / 4.17 mil.
Pravda	259 mil. / 8.60 mil.	295 mil. / 7.93 mil.	173 mil./ 4.17 mil.
Economia/ Ecopress	ca. 200 mil./ 6.64 mil.	170 mil./ 4.57 mil.	168 mil. / 4.05 mil.
Hospodárske noviny	NA	NA	NA
Šport Press*	NA	114 mil. / 3.06 mil.	NA
Šport	NA	NA	NA
Spoločnosť 7 Plus	NA	NA	–
Plus 1 Deň	NA	NA	–
Národná obroda/24 Hodín	–	–	NA

Sources: TREND Analyses, estimates and calculations

Table 10: Advertising Revenues Of Top Websites In Slovakia 2005 and 2006

COMPANIES	Advertising revenues 2008	Advertising revenues 2005
Association of Internet Media members (published data)	741,9 mil. Sk € 24.6 mil. *	231 mil. Sk € 5.98 mil. *

Source: Association of Internet Media - AIM

2. Regulation and Ownership

As we have already mentioned, the newspaper industry is, in keeping with the Western tradition, virtually unregulated. Broadcasting is a different case - even as commercial broadcasters do not have any public service requirements (only in relation to the required share of European and independent production content). Current legislation in Slovakia has been unable to prevent concentration and consolidation in the area of media ownership. Media companies have been integrated in all three ways – horizontally, vertically and diagonally as well.

Slovak anti-competition and antitrust law is based on European law. There are several anti-cross-ownership rules, among them one saying that the owner of a national radio or TV station cannot own a national daily as well. Ownership restrictions between two or more national TV stations were relaxed by the 2006 digitalization law. In the Slovak media system, which we can describe as a mixed regulated model (some content restrictions, upper limits but generally leaning towards deregulation), there are three regulatory authorities. In the area of digitalization, frequencies use and cable retransmission, it is the Telecommunication Office. The general regulator of broadcasting is the Council for Broadcasting and Retransmission, and the authority in the area of economic competition is the Antimonopoly Office. The state interventionist in media regulation is the Ministry of Culture.

Despite some cases and allegations of evident concentration, the Broadcasting Council never used its powers to investigate ownership matters. The Antimonopoly

Office deals with media markets relatively often. However, it rarely finds any anti-competitive behavior because of the strict interpretation of competition law. The Antimonopoly Office cannot take into consideration the issue of pluralism and content diversity. Also, antitrust law does not function preventively. That means it is not prohibited to have a dominant market position. Concentration/mergers have to be controlled and approved by the Antimonopoly Office if, according to § 10 of the law, global turnover of the concentrated companies is 1.2 bn. SKK annually and at least two participants have had an annual turnover in the Slovak Republic of 360 mil. SKK or at least one participant had a turnover in Slovakia of 500 mil. SKK and one other has had a global turnover of 1.2 bn. SKK.

International conglomerates clearly have a strong position in the newspaper and publishing industry. Out of six of the biggest publishers, five are of foreign origin (Ringier, Passau, Economia, DMGT, Mediatel). When we take the whole circulation of daily press (including Šport Press) – approx. 80 percent of sold copies is controlled by foreign companies. In advertising sales, they control much more than half of all the printed press market in Slovakia.

There are no major international players in the distribution and printing industry segment. And this segment can be seen as the most problematic. Actually, there is only one monopoly company which has *de facto* control over all distribution in Slovakia, the Mediaprint Kapa Pressegrasso of Kmotřík Group. As in distribution, the most important player in printing is Kmotřík Group.

In broadcasting, U.S.-owned *TV Markíza* seems to be holding a dominant position. Markíza has for the last few years enjoyed a steady audience share of 45 to 50 percent (and an even larger advertising share, in 2005 more than 60 percent but two years ago it was almost 80 percent of the market. Markíza has held this dominant position since it started operating) (Košťálová & Ondrášik, 2005, p. 12-14). In retransmission of broadcasting, like cable and digital TV, the U.S.-owned cable TV company UPC was able to consolidate its power. It was even investigated by the Telecommunications Office and the Antimonopoly Office for misusing its dominant market position. However, with regard to new technologies, new telecommunications players present, like Orange of

France Telecom and T-Com of Deutsche Telekom, are more important and there have been considerable adjustments in this regard in 2007.

With the trend toward consolidation in the media markets, there seems to be a growing problem for the local content to be present. Petit Press/Verlagsgruppe Passau is dominant in the field of local and regional dailies and weeklies. It controls all the regional publications audited by the Slovak Audit Bureau of circulation. Local television and local news-gathering in television never really gained importance. However, there were two notable projects of local TV stations – *TV Sever* and *TV Naša*. Unfortunately, they did not last long. Radio broadcasting was for a long time defined as more local and regional than television. This status is changing with the more radical approach of some media groups as more of the formatted music content is gaining ground.

Here is a summary of distinct features of media ownership in Slovakia:

- In the past the market was dominated by local media moguls (like Rusko, Široký), at present, the dominant companies are regional transnational players (Ringier, CME...).
- Local news coverage suffers under the new concentrated ownership both in broadcasting and printed press.
- Generally, there are few, or only one, dominant players in various markets and a high level of concentration can be observed.
- Ineffective regulation, tending towards deregulation.
- Many media outlets had in the past problems with transparency of media ownership; however, the situation improved with foreign capital coming in²¹.

²¹ ONDRÁŠIK, Branislav. 2008. Media Ownership, Regulation, Concentration, and Competition in the Slovak Republic. In: B. Dobek Ostrowska and M. Głowacki (eds.) Comparing Media Systems. Between Politicization and Commercialization. Wrocław: Wrocław University Press, p. 209-224.

Table 11. Top 10 Media Companies

Company	Type of Media	Origin	Revenues 2008	Revenues 2005	Revenues 2003
1. Grafobal/ Ivan Kmotrík Group	TV, distribution publishing print	national	NA	NA	ca. 6 bn. Sk ⁷ € 145 mil.
2. CME/Time Warner/ TV Markíza	TV	Foreign – U.S.	3.01 bn. Sk € 100.01 mil.	2.15 bn. SK ⁹ € 55.7 mil.	1.86 bn. Sk ⁹ € 44.82 mil.
3. Slovak Television	TV	national	2.24 bn. Sk € 74.45 mil.	2.27 bn. Sk € 58.8 mil.	2.04 bn. Sk € 49.16 mil.
4. Ringier	printed press	Foreign - Switzerland	1.67 bn. Sk € 55.33 mil.	1.28 bn. Sk € 34.4 mil.	472 mil. Sk € 11.37 mil.
5. UPC Broadband Slovakia¹⁰/ Liberty Global	TV, retransmission	Foreign – U.S.	NA	ca. 1.15 bn. SK ¹¹ € 30 mil.	NA
6. Rheinisch Bergische/Petit Press (previously Passau)	printed press, online	Germany; Central Europe	1.04 bn. Sk € 34.41 mil.	1.0 bn. Sk € 25.91 mil.	749 mil. Sk € 18.05 mil.
7. Slovak Radio	radio	national	832 mil. Sk € 27.41 mil.	731 mil. Sk € 18.93 mil.	989 mil. Sk € 23.83 mil.
8. Spoločnosť 7 Plus¹³	printed press	national	NA	Only advertising 375 mil. SK ¹⁵ € 9.72 mil.	NA
9. Perex / DMGT - Florena	printed press, online	Foreign: UK, since 2010 domestic enterprise	437 mil. Sk € 14.51 mil.	471 mil. Sk € 12.20 mil.	334 mil. Sk € 8.05 mil.
10. MEDIATEL	commercial printed press	international	NA	340 mil. SK ¹⁵ € 8.81 mil.	NA

SOURCES: TREND Analyses, Strategie, companies information, Association of Newspaper Publishers in Slovakia, own estimates and calculations

3. Media Freedom

„Press freedom in Slovakia is constitutionally guaranteed and generally respected, and independent media outlets freely disseminate diverse views,“ has been the general conclusion of Freedom House’s Freedom of the Press reports since 1998. It is since that year that Slovakia was branded as “fully free” in relation to media freedom. Before that, Slovakia was considered only “partly free” by the Freedom House. This was due to the authoritarian rule of then Prime Minister Vladimír Mečiar, which led Slovakia to international isolation. Since 2002, its general score was between 20 and 22. The breakup of the score within the legal, political and economic framework has changed during the last years, with legal environment getting better marks while political influence on the media has grown. Economic pressure has remained stable during the researched period (Freedom House, 1993-2007).

Another international organization, Reporters Without Borders, which produces its own media freedom index, was very critical of the situation in Slovakia in 2009. “It is disturbing to see European democracies such as France, Italy and Slovakia fall steadily in the rankings year after year,” says Reporters Without Borders secretary-general Jean-François Julliard.²² In 2009, Slovakia was rated 11.00 (greater scores mean less freedom) on the 44. place, along with Cape Verde and Spain. In the Central-Eastern European region, Czech Republic, Hungary, Slovenia and Poland were ahead of Bratislava.

However, one of the biggest problems for journalistic work are politically motivated libel suits that at times existentially threaten some media. Although defamation was decriminalized in 2003, individuals still target media outlets in civil defamation suits that demand excessive compensation.

Since the creation of the independent Slovak Republic, there have been some notable cases of conflicts between the political elite and the media, organized crime and intelligence services. As we have mentioned, the most critical was the time until 1998, when the government of Vladimír Mečiar lead the country. Continuous pressure was exerted on journalists and public service media were misused. For example, in October

²² Reporters with Borders. 2009. Press Freedom Index 2009, Retrieved December 21, 2009, <http://www.rsf.org/en-classement1003-2009.html>.

1995 printing company Concordia-Danubiaprint (reportedly connected with political elite) refused to print government critical daily *SME*. The publisher had to find another printing company and eventually started its own printing activities.

In December 2003 and January 2004 it was alleged that editors of mainstream daily *SME* were tapped by the Slovak Intelligence Service (SIS) and political officials. *SME* called for an independent investigation. The truth behind this eavesdropping scandal, which was a source of intense political crisis, remains a mystery.

In other instances, journalists have been targeted by organized crime. In August 2007, a journalist of a popular magazine *Plus 7 dní*, Nad'a Šindelorová, had her house burned down in what she claimed to be a mafia-organized vendetta.

Slovak Television has been in a state of crisis; political pressures started under Mečiar and continued with different force under later governments of Mikuláš Dzurinda and Robert Fico. However, the most notable crisis occurred when many journalists left the public service broadcaster under the general directors Igor Kubiš (1996-1998) and Radim Hreha (2007). The problem of *Slovak Television* seems to be rooted in politically appointed and biased control councils.

Another disturbing development in broadcasting after 1989 was the start of commercial *TV Markíza*. Until 2005, its true face was Pavol Rusko, its director and holder of the license. The TV station with Rusko as its director or “leader” respectively has never been a stranger to politics. In the 1998 general election campaign it quite openly supported the new Party of Civic Understating of the future president Rudolf Schuster. Later they severed their connections. For the next 2002 election Rusko created his own party, Alliance of New Citizen. It was so openly supported by *Markíza* and even monitoring authorities declared its news coverage beyond journalistic ethics and it was fined several times by the Broadcasting Council. Rusko eventually became the vice-speaker of the parliament and later economy minister. He left his office in disgrace about his business practices and sold his share in *Markíza* in 2005. In 2007, the absolute majority owner of *Markíza* was CME.²³ In 2009 Time Warner acquired shares at CME.

²³ KOŠŤÁLOVÁ, Marína, and ONDRÁŠIK, Branislav. 2005. *Pád mediálneho magnáta (The Downfall of Media Mogul)*. In *Nový Čas Nedela*, 12-14, November 6, 2005.

And then there is the 2008 Press Law which was heavily criticized by the editors and journalists. Under the headline “Reply: Seven Sins of the Press Law” all Slovak dailies (except for the sports daily *Šport*) criticized:

1. the Right of Reply even when the published report is truthful and fact-based
2. that it allows to correct information that did not harm anyone
3. that it allows double sanctions – the Right of Correction and at the same time the Right of Reply
4. that the publisher is responsible for replies that are against the law or decency
5. that the Right of Reply is granted to state bodies as well, which opens an opportunity for misuse
6. that the editorial staff is not allowed to react and that can be deemed unconstitutional
7. that the publisher cannot refuse the reply, otherwise he can be sanctioned with a 5000 euro fine²⁴

Almost a year later, it can be concluded that the criticism and concerns materialized only partially. However, the loose formulation of the right to reply and the fact that it can be used to react to actual facts and views as well (not only for untruthful information, etc.) indeed opens space for misuse and it can contradict free speech. On the other hand, as of 2009, there was no evidence of wide-spread misuse of the new institutes. But newspapers did indeed report an increased use of the correction institute in comparison with other time periods. And dailies did not record requests from individuals – however, the government had argued that the law is mostly for them, reply or correction was requested mostly by politicians, administration and official authorities, local governments, law firms, interest groups and commercial businesses.²⁵

²⁴ SME. 2008. Odpoved: Sedem hriechov tlačového zákona. In: SME, 27 March, p. 1.

²⁵ ONDRÁŠIK, Branislav. 2010. The Slovak Press Law: History and Its Impact on Free Media. Will be presented at the International Communication Association Conference in Budapest: Beyond East and West. Two Decades of Transformation After Fall of Communism, June 2008 (prepared for publishing for Media Research Journal, Croatia, June 2010).

4. Political Communication

Slovak Republic is a parliamentary democracy with strong Prime Ministerial executive power. The President has a representative role, but has the power to name the person who will form the government after the general election, and also has the power to refuse to sign the law in the legislative process.

Since 1993, Slovakia has gone through several election cycles: in 1994 (won by HZDS with Vladimír Mečiar), in 1998 (won by opposition parties lead by center-right SDK), 2004 (won by the Christian-Democratic SDKÚ) and in 2006 (won by the social-democratic SMER). Slovakia has held direct presidential elections since 1999 (the first president Michal Kováč was elected by the parliament). In 1999 Rudolf Schuster (supported by the government) won the presidential election, in 2004 it was Ivan Gašparovič, an independent candidate.

The new election law for general parliamentary elections has been in place since 2004 (Law no. 333/2004). It completely redefined the approach towards campaigning and the use of media. The new law removed articles that limited campaigning. There is now no 48-hour campaign silence, as it used to be, and since 2006, the election campaign takes place until the last minute and even in front of polling stations. There is no limiting cap on financing either; before it used to be 12 million SKK (approx. 323.000 euros) per political party.²⁶ Since 2004, commercial media can broadcast political advertising as well, but the obligation for public media to air free political ads for all parties ceased to exist.

Slovak presidential elections and campaigning are held in accordance with the Law no. 46/1999. The official campaign takes place during the 13 days leading up to the election (Memo 98, 1999) and the official campaign financing is limited to 4.000.000 SKK (approx. 80.000 pounds) per candidate.

The hiring of pollsters, private political consulting companies and foreign experts to run campaigns is rather limited. However, some political parties and candidates do use

²⁶ MEMO 98. 2006. Prezentácia politických subjektov pred voľbami do NR SR 2006 (Presentation of Political Parties Ahead of the Parliamentary Elections in Slovakia in 2006) Retrieved January 18, 2007, from <<http://www.memo98.sk/>>.

friendly advice and expertise from their colleagues abroad. Especially the professionalization of the 2009 presidential race was a step forward.

While in 1999 there were only two televised debates among major presidential candidates, in 2009 there were already seven. Every relevant traditional medium – whether print or broadcast – devoted extensive portions of their news coverage to the presidential elections, including special supplements or news editions. There is an increasing importance of the Internet. The rising penetration of this multimediu is the reason that a large portion of the campaign and news coverage is taking place online. News portals (many of the traditional news outlets) have created special sub-portals for election news and all of the campaign teams try – to a minor or major degree – take advantage of the free Internet for the benefit of their respective campaigns. Community portals like Facebook or video-sharing services of YouTube are part of Slovak presidential campaigning as well. Noteworthy is the break-up of marketing tools used in the 1999-2009 campaigns. Traditionally, the Slovak presidential campaigns takes the shape of a war of outdoor billboards. While as recently as 1999, none of the three major presidential candidates used a professionally-run campaign, relevant consultants, domestic or foreign, this started to change in 2004. In 2009, the Slovak campaigning scene moved closer to the U.S. style of political marketing. All major candidates had transparent election teams, especially in Iveta Radičová's case, ones lead by media, PR and advertising professionals.²⁷

In the 2010 parliamentary election, a cooperation between the major social-democratic party SMER and U.S. political strategists has been rumored and reported.

²⁷ ONDRÁŠIK, Branislav. 2009. Political Marketing and its Professionalization: Ten Years of Campaigning for Slovak Presidency (1999, 2004 and 2009). *Slovak Journal of Political Sciences*, Trnava: Katedra politológie FF UCM, No. 3, Vol. IX., 2009, p. 2-30

5. Media and Journalism Education

Media and journalism education have a long tradition in Slovakia – in 2007 the Journalism Department of the Faculty of Philosophy at Bratislava's Comenius University celebrated 55 years of its existence. The department is the focal point of education for most of the journalists in Slovakia. Since then, especially after 1993, several other universities have created communication, media and journalism programs of their own. There is a Faculty of Mass Media Communication at the University of SS. Cyril and Methodius in the Western Slovak town of Trnava. This university focuses on media studies and communication. A specific place in journalism education is occupied by the Department of Journalism at the Faculty of Philosophy at the Catholic University in the northern town of Ružomberok. Its curriculum is focused on religious and Roman Catholic issues. A Department of Journalism constitutes part of the University of Constantine the Philosopher in Nitra too.

One of the newest media education universities in Slovakia is the privately-funded Bratislava School of Law – one of Slovakia's largest private university colleges. Its Faculty of Media offers courses taught by many international lecturers, both leading scholars and business practitioners: advertising agencies and media professionals, etc.

However, other universities have research and educational activities involving media and journalism within other departments of social sciences; we can at least mention the University of Matej Bel in the central Slovak town of Banská Bystrica and the eastern Slovak University of Prešov.

Notwithstanding, public journalism, communications and media education has for long been criticized by the people within the media business as being too out of touch with media practice and not incorporating new developments.

The Slovak Ministry of Education has also proposed media education classes for pre-university age students and since 2008 they are being offered as optional courses at both elementary and high schools.

Conclusions

In conclusion, it can be said that Slovakia and its media environment have gone through periods of turbulence since the fall of communism and the country's declaration of independence. There have been some persistent problems in the area of freedom of the press, especially during the period of Vladmír Mečiar's government from 1993 through 1998. As well, problems within the public service broadcasting and political pressures within these media have been widely reported since 1993, including under the governments of Mikuláš Dzurinda and Robert Fico.

Within the commercial broadcast media, the most challenging problem was the dominance of the market by TV Markíza and the way its former owner, Pavol Rusko, exploited it for political advantage. However, the situation improved when the U.S.-owned CME acquired a full control over the TV station. Markíza is keeping its dominant position but the public TV broadcaster and other private stations became viable players as well. Monopolistic positions could be observed in the field of cable TV retransmission, printing and publishing. In the area of printed press, the most pressing problem proved to be the dominance of one company in printing and distribution, as well as the diminishing presence of local press and local news coverage. Internet and online content as a new multimediuum is gaining strength from year to year.

For several years, most of the publishing houses and broadcasting companies used to have problems with ownership transparency. However, this changed with the influx of foreign capital into various media segments. Rising concentration has been reported with the growing presence of foreign capital, but there were virtually no cases of foreign investors trying to influence media coverage or pressure journalistic freedoms.

Since 1989 there have been several notable conflicts between the political elite and the media, organized crime and intelligence services. As we have mentioned, the most critical was the time until 1998, when the government of Vladimír Mečiar lead the country. It is since that year that Slovakia has been branded as "fully free" in relation to media freedom. Before that, Slovakia was considered only "partly free" by the Freedom House. The relations between the press and Prime Minister Fico were tense as well.

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