

MAY 2020

# Media Influence Matrix: Slovakia

## Methodology

2nd updated edition

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This report is part of the [Media Influence Matrix](#) project initiated by the Center for Media, Data and Society (CMDS) and run as part of the [Media & Power Research Consortium](#).

The country reports in the Media Influence Matrix series aim to research the changing landscape of:

- **government and policy space**, with a focus on the changes in the policy and regulatory environment;
- **funding**, with a focus on the key funding sources of journalism and the impact on editorial coverage;
- **technology in the public sphere**, with a focus on how technology companies, through activities such as automation and algorithm-based content distribution, impact news media and journalism.

The project emphasizes news media in particular, including newly emerged players. The study is neither aimed at exhaustively mapping the entire media industry nor is it intended to target specific media sectors. Instead, it maps the most popular and most influential news media on a country-by-country basis and analyze their changing relations with politics, government and technology companies.

## DATA AND INFORMATION COLLECTION

The report is based on:

- Data and information collected in the period January-March 2018 and updated in October-December 2019, following a common set of research guidelines (*See Research Guidelines in Appendix below*)
- Monitoring of 25 news media outlets in Slovakia going back to 2010 (or as much as the search engine of the respective news outlet permitted), referred to as “Media Monitoring Slovakia 2018-2019” in the list of sources below)
- We conducted for this project interviews with 18 journalists and media experts based in Slovakia. The interviews were conducted via phone and email between November 2017 and August 2019. (Referred to in the list of sources below as “Media Influence Matrix Slovakia: Journalists Survey”)

# DETAILED SOURCES OF INFORMATION USED FOR THE SLOVAKIA REPORT:

## GOVERNMENT, POLITICS AND REGULATION

### LEGAL OVERVIEW

Legal analysis of key laws affecting news media and journalism

### REGULATORY AUTHORITIES

Analysis of the regulatory environment in Slovakia focused on the following research questions:

- What have been the key changes in regulation of news content in the past 5-10 years?
- Who are the key influencers and most powerful institutions in regulation of news content?
- How transparent is the regulatory process when it comes to news media?
- What impact do these influencers have on news media and journalism?

### Operational Aspects

#### Broadcast Media and Frequency Spectrum

##### *Remit and Tasks*

- Documents and reports from Council for Broadcasting and Retransmission (*Rada pre vysielanie a retransmisiu*, RVR) and the Regulatory Authority for Electronic Communications and Postal Services (*Urad pre regulaciu elektronickych komunikacii a postovych sluzieb*, RU)

##### *Board Composition*

- Documents and reports from Council for Broadcasting and Retransmission (*Rada pre vysielanie a retransmisiu*, RVR) and the Regulatory Authority for Electronic Communications and Postal Services (*Urad pre regulaciu elektronickych komunikacii a postovych sluzieb*, RU)

##### *Funding*

- Documents and reports from Council for Broadcasting and Retransmission (*Rada pre vysielanie a retransmisiu*, RVR) and the Regulatory Authority for Electronic Communications and Postal Services (*Urad pre regulaciu elektronickych komunikacii a postovych sluzieb*, RU)
- Reports of international think tanks
- Government budget records

## Internet Regulators

- Documents and reports from Council for Broadcasting and Retransmission (*Rada pre vysielanie a retransmisiu*, RVR)
- Analysis from Slovak think tanks
- Data from industry associations

## Data Protection Regulators

- Documents and reports from the Office for Personal Data Protection (*Uradu na ochranu osobnych udajov Slovenskej republiky*, UOOU SR)
- Government budget records

## Other Institutions with Regulatory Powers

- Documents and reports from the Ministry of Culture, Slovak Trade Inspection (*Slovenska obchodna inspekcia*, SOI), the Antimonopoly Office of the Slovak Republic (*Protimonopolny urad Slovenskej republiky*, PMU)
- Records from corporate documents
- Media Influence Matrix Slovakia: Journalists Survey

## Decision-Making Process

### Key Decision-Makers in Regulation and Policy-Making[1]

- Media Monitoring Slovakia 2018
- Media Influence Matrix Slovakia: Journalists Survey

### Transparency of Decision-Making in Media Regulation

- Documents and reports from Council for Broadcasting and Retransmission (*Rada pre vysielanie a retransmisiu*, RVR)
- Media Monitoring Slovakia 2018-2019

### Transparency of Decision-Making in Media Regulation

- Documents and reports from Council for Broadcasting and Retransmission (*Rada pre vysielanie a retransmisiu*, RVR), the Antimonopoly Office of the Slovak Republic (*Protimonopolny urad Slovenskej republiky*, PMU)

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[1] The content in this part of the report is based mostly on interviews with Slovak journalists and experts carried out for this report (See *Methodology in Media Influence Matrix: Slovakia*).

# INFLUENCERS

Analysis of the key influencers in the Slovak news media regulation.

## Local Influencers

### Industry Players

- Documents and reports from the Association of Independent Radio and TV Stations (ANRTS), Club of Advertising Agencies in Slovakia (KRAS), Association of Digital Marketing Agencies (ADMA), Slovak Press Publishers Association (AVT)
- Financial data extracted from the Slovak Trade Registry
- Financial data from corporate rankings carried out by the magazine Trend
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey
- Records from corporate documents

### Civil Society

- Analytical papers from international think tanks
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey
- Analysis from local NGOs
- Documents and reports from the Press-Digital Council of Slovakia (*Tlacova-digitalna rada Slovenskej republiky*, TRSR), IAB Slovakia-Association for Internet Advertising

## External Influencers

- Documents and reports from the European Court of Human Rights (ECHR), International Telecommunication Union (ITU), European Platform of Regulatory Authorities (EPRA), the Organization for Security and Co-operation in Europe (OSCE)
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey

# FUNDING JOURNALISM

## SOURCES OF FUNDING

Analysis of the key trends in funding journalism focused on the following research questions:

- a). What were the main changes in funding news media and journalism in the past 5-10 years?
- b). Who are the key funders and owners of news media and journalism?
- c). How big is the role of government in funding news media?
- d). How are sources of funding affecting independent reporting?
- e). Are there any policy implications for funding in news media?

### Popular News Media

- Industry reports and statistics: Eurostat, Eurodata TV Worldwide, Radioprojekt, ABC SR, AIMmonitor, TNS Infratest, PMT/TNS, Median SK, MML-TGI, Gemius
- Data extracted from the Slovak Trade Registry
- Corporate reports
- Documents and reports from RTVS
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey

### Influential News Media

- Industry reports and statistics: PMT/TNS
- Corporate reports
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey

### Key Funders

#### Non-Governmental Funders

- Industry reports and statistics: Carat, Kantar TNS
- Documents and reports from Media Development Investment Fund (MDIF), Media Impact Funders, OCCRP

#### Government Funding

- Government budget records
- RTVS Annual Reports and other documents
- Data from Central Registry of Contracts (Centralny Register Zmluv, CRZ)
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey

# TECHNOLOGY, PUBLIC SPHERE AND JOURNALISM

Analysis of the key trends in technology and journalism focused on the following research questions:

- a). What are the main changes in news content consumption driven by new technologies
- b). Who are the largest, most influential technology companies?
- c). How are the power relations between technology companies and government?
- d). How do technology companies influence news media and journalistic content?

## TECHNOLOGY OVERVIEW

- Data and statistics from the Ministry of Transports and Construction in Slovakia
- Web data and statistics from StatCounter, Gemius
- Data and information from sources at Facebook, Twitter and Google

## ROLE OF TECHNOLOGY IN MEDIA AND JOURNALISM

### Overview and Profiles of Key Players

#### Operational Aspects

**Methodology note:** In the categorization of technology companies in this section we have used the methodology of the [Ranking Digital Rights project](#), which divides companies in two groups. The first group, internet and mobile, includes the so-called “mobile ecosystems,” companies that create mobile devices and products. In the second category, telecommunications companies, we include service operators that offer connection and access services such as voice, data or cable connections.

- Data extracted from the Slovak Trade Registry
- Corporate reports
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey

#### Technology Companies & Government

- Documents and reports from Council for Broadcasting and Retransmission (*Rada pre vysielanie a retransmisiu, RVR*)
- Data extracted from the Slovak Trade Registry
- Media Monitoring Slovakia 2018-2019
- Media Influence Matrix Slovakia: Journalists Survey

#### Technology Companies & Media

- Data and statistics: Socialbakers, Crowdtangle
- Data extracted from the Slovak Trade Registry
- Data and information from sources at Facebook, Twitter and Google
- Media Monitoring Slovakia 2018
- Media Influence Matrix Slovakia: Journalists Survey

# APPENDIX

## Media Influence Matrix: Methodology and Research Guidelines

### GOVERNMENT, POLITICS AND REGULATION

#### LEGAL OVERVIEW

Based on desk research focused on legal reports, analysis of statutes and legal acts, collect information to describe the main laws that affect news media and journalism, identifying the positive and negative impact of these laws on independent media.

#### REGULATORY AUTHORITIES

##### Operational Aspects

##### Broadcast Media and Frequency Spectrum

###### Remit and tasks

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most media-relevant tasks of the regulators involved in broadcasting.

###### Board composition

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, as well as articles in news media, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members; and to profile the members of the current board.

###### Funding

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

##### Print Media Regulators

###### Remit and tasks

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most relevant tasks of the regulators covering print media operations.



### **Board composition**

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members and to profile the members of the current board.

### **Funding**

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

## **Internet Regulators**

### **Remit and tasks**

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most media-relevant tasks of internet regulators, focusing on rules on distribution of online content.

### **Board composition**

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members; and to profile the members of the current board.

### **Funding**

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

If such regulators do not exist, describe what other institutions carry out similar tasks. If there are not such examples, do desk research focused on articles in the media and reports from meetings with experts and interviews with experts, to summarize the key arguments in favor or against regulation of internet content and any describe any plans to do so in the near future.

## **Data Protection Regulators**

### **Remit and tasks**

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the most media-relevant tasks of the data protection regulators.

### Board composition

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, collect information to describe the composition of the main decision-making body, focusing on rules on the appointment and sacking of board members; and to profile the members of the current board.

### Funding

Based on desk research focused on annual reports of regulators and other regulatory documents, as well as articles in the media, collect financial data to present the annual budget of the regulator for the past five years (or as far back in time as possible), indicating the source of funding.

### Other Regulators with Powers in News Media

Based on desk research focused on annual reports of regulators, regulatory assessments and statutes of regulators, but also articles in the media and industry reports, collect information to describe other regulators that have competences in the news media segment. They could be antitrust regulators, retail industry watchdogs, advertising self-regulating bodies, etc.

### Key sources of information recommended:

#### For Remit/tasks and Board composition

*Statutes and legal acts*

*Legal studies*

*Annual reports*

#### For Funding

*Government budget documents*

*Articles in the media*

## Decision-Making

### Key Decision-Makers

Based on desk research that will include articles in the media, and reports by think tanks and policy institutes, as well as interviews with independent media experts and journalists, write short profiles of the key decision-makers in the media policy field, focusing on decision-makers working with the regulatory authorities described under the section Regulatory authorities. Focus on fact-based evidence of the power they exert in the policymaking area.

### Transparency in Decision-Making

Based on desk research that will include articles in the media, reports by think tanks and policy institutes, and academic articles and studies, as well as interviews with independent media experts and journalists, describe the main mechanisms in place to ensure transparency of the decision-making process and how they function in practice.

## Impact

Based on desk research that will include articles in the media, academic articles and studies, and existing surveys, as well as interviews with representatives of media companies, present case studies of regulatory decisions that directly or indirectly had an impact, both negative and positive, on media and journalism.

### Key sources of information recommended:

#### For Decision-making and Transparency

*Articles in the media, academic studies, reports by think tanks and policy institutes  
Interviews with local experts and journalists*

#### For Impact

*Articles in the media, academic studies, surveys  
interviews with representatives of media companies*

## INFLUENCERS

### Internal

Based on desk research that will include articles in the media and investigative reports as well as interviews with independent media experts and journalists, describe the main influencers in the media policy field, focusing on the following categories (others can be included if relevant in the country), explaining also the key motivations for their interest in the regulatory process:

#### Industry Players

Companies (news media operators and media-related companies such as advertising and PR agencies and companies totally unrelated to media that exert influence on media regulators)

#### Civil Society

Civil society groups, including NGOs, professional associations, academic institutions and think tanks, religious groups, community media that influence the regulatory process

#### Personalities

Journalists, bloggers, artists or other celebrities that have an influence in the media policy and regulation

### External

Based on desk research that will include articles in the media, academic articles and studies, reports by think tanks and policy institutes and research conducted by International bodies, describe international bodies, including intergovernmental organizations that can influence the media policy in the country and present cases where they concretely used this influence.

### Key sources of information recommended:

#### For Internal

*Articles in the media, investigative reports*

*Interviews with independent media and political experts, and journalists*

#### For External

*Articles in the media, academic studies and articles, reports by think tanks and policy institutes, reports by international bodies*

## FUNDING JOURNALISM

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### SHIFTS IN JOURNALISM FUNDING

#### Consumption Trends

Based on data from reports and statistics issued by trade and professional bodies, describe the forms of media most used to consume news content (focusing on the shifts between television, radio, print and online consumption). Use data for the past five years or as far back in time as possible. The information collected here is used to find causal links between the shifts in consumption patterns and shifts in funding.

#### Popular News Media

In the first part of the chapter, based on data from reports and statistics issued by trade and professional bodies, articles in the media, and content analysis studies, a). **present** the media outlets in a table with audience data for the past five years (or as far back in time as possible) starting with the most popular form of media identified under Consumption trends; b). **analyze** the main shifts in audience share; and c). **describe** the main media channels in the country, focusing on their ownership and type of content, and highlighting any relevant biases, particularly ideological.

In the second part of the chapter, present the turnover and profit of the main media groups under each category (television, radio, print and online) for the past five years (or as far back in time as possible). You can collect these data from:

- Local trade registry or other economic databases in the country
- Annual reports of each company
- Direct requests made to the media companies
- Interviews with company representatives.

If data can't be found through any of these methods, researchers should look for other financial data (such as tax returns) that could help calculate the turnover and profit information.

Based on the financial data, and using more information from corporate annual reports and articles in the media, **analyze** the financial performance of the media companies focusing on their profitability, focusing on changes in the share of various funding sources (i.e. advertising, subscriptions, grants, donations, etc.) in the total budget.

## Influential News Media

Based on data from reports and statistics issued by trade and professional bodies, articles in the media, and content analysis studies, a). **identify** news media that exert influence among specific groups of people, professions and communities (policymakers, business elites, community leaders, religious communities and any other relevant community in the country); and b). **present** and **analyze** them following the same guidance as in Popular news media.

## KEY FUNDERS

### Non-Governmental

Using data from advertising agency reports, surveys by industry bodies and professional associations, annual reports of philanthropic organizations and political parties, and articles in the media, present the total amount of funding spent in the media in the past five years (or as far back in time as possible) by non-governmental sources, including advertising (overall spend and largest advertisers), philanthropy (overall spend and largest contributions), donations (by political parties or other organizations), and other sources relevant in the country.

### Government

Using data from state budget documents and analyses, reports by the national audit authorities, annual reports of public or state media, present the total amount of state expenditure in the media in the past five years (or as far back in time as possible), describing a). **the forms** in which the funding was allocated (i.e. license fees, allocations for public service media, state advertising or state subsidies); b). the institutions and people in charge of **deciding** whom to fund and the criteria used in selecting the recipients of public funding; c). **the main recipients** of the funding, with a focus on their editorial strategy.

### Key sources of information recommended:

**For Consumption patterns, Popular news media and Influential news media**  
*Reports by trade and professional bodies, company annual reports, articles in the media*  
*Interviews with media experts and representatives of media companies*

### For Key funders

*State budget documents and analyses, reports by the national audit authorities, annual reports of public or state media, advertising agency reports, surveys by industry bodies and professional associations, annual reports of philanthropic organizations and political parties, articles in the media*

## TECHNOLOGY, PUBLIC SPHERE AND JOURNALISM

### TECHNOLOGY OVERVIEW

Using local statistical offices and international organizations collecting such information, a). **present** data for the past five years (or as far back in time as possible) on telephone and internet penetration, and use of computer platforms, mobile phones, operating systems, browsers and social media, and b). **analyze** the main shifts in the use of technologies for media and communication.

### PROFILES OF KEY PLAYERS

Based on data from technology companies, technology market reports, trade registry data and articles in the media,

a). present the main communication tech companies in two categories as following:

**Internet and mobile** (marking the services they offer according as in the following table)

Company	Email service	Messaging and VoIP	Mobile ecosystems	Search	Social network & blog	Video & photo
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**Telecommunications** (companies offering telecommunications services such as mobile telephony and internet connection services)

b). **profile** these companies under each category focusing on their: **audience** (number of users, products offered, etc.); **ownership** and **funding** (including data on turnover and profit for the past five years); and **local operations** (key staff, history of operations, etc.).

### TECH AND GOVERNMENT

Based on policy reports and analysis from think tanks and policy institutes, legal studies, articles in the media as well as interviews with social media and government representatives, describe the relation of the key tech companies (identified under *Profiles of key players*) with the government, referring to issues such as (but not limited to): a). **compliance** with local legislation and regulations; b). cooperation with government over **data handling**; c). **ownership** links between officials and government bodies and tech companies, and assess the impact of these interactions on news media and journalism.

### TECH AND JOURNALISM

Based on academic studies, market reports, heuristic analysis of social media data as well as interviews with social media representatives and journalists, **describe** the relation of the key tech companies (identified under *Profiles of key players*) with media and journalists, referring to issues such as (but not limited to): a). mutual support or other forms of cooperation with media outlets; b). automation methods including algorithms used in distribution of media content (with a main

focus on disinformation); c). **financing** of media outlets by tech companies; d). **ownership** links between media outlets and tech companies; e). tech companies **policies** and **practices** related to access to content such as zero-rating, f). **content distribution**, with a focus on the most followed media outlets on key social platforms used in the country, and **assess** the impact of these issues on news media and journalism.

#### **Key sources of information recommended:**

##### **For Technology Overview**

*Data from local statistical offices or international organizations (ITU, World Bank).*

##### **For Profiles of key players**

*Data from global social media, local technology market reports, trade registry data, articles in the media*

##### **For Tech and government**

*Policy reports and analysis from think tanks and policy institutes, legal studies, articles in the media*

*Interviews with representatives of social media and government*

##### **For Tech and journalism**

*Academic studies, market reports, heuristic analysis of social media data*

*Interviews with social media representatives and journalists*



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