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Media Influence Matrix: Slovakia

Technology, Public Sphere
and Journalism

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TABLE OF CONTENTS

TECHNOLOGY, PUBLIC SPHERE AND JOURNALISM

Technology Overview	5
Role of Technology in Media and Journalism	11
Overview and Key Players	11
Operational Aspects	11
Technology Companies and the Government	18
Technology Companies and the Media	20

Slovakia has been a fast adopter of new technologies. During the past decade, internet and mobile penetration in the country has exploded, significantly changing news consumption and access to information. The country has a mobile penetration of over 130%, one of the highest in Europe, as many Slovaks use more than one mobile SIM card.

Changing lifestyle and more affordable services allow Slovaks to boost their media diet on mobile devices. Unlike a decade or so ago, post-paid mobile subscriptions, allowing online surfing at leisure, at home or abroad, are now dominant. Nearly 83% of Slovaks are online via a mobile device. Internet services have also become one of the main drivers for growth on the Slovak electronic communications market contributing more than 17% to this market in 2016, a jump from 10% five years before. However, the turnover in the electronic communications market is constantly declining, which is a sign of both saturation and dwindling prices due to increased competition. That is likely to affect first and foremost local telecoms and internet service providers, the key infrastructure operators and distributors of content and communication services.

On the internet content market, foreign players are dominant: Google is the leader on the browsing and searching market and Facebook is by far the most popular social network, with nearly 45% of Slovaks using it. However, two local players, Azet.sk and Zoznam.sk, with a profile similar to Google (in local language) pose significant competition. Unlike Google, they are also producers of news content (though a lot of it is tabloid fare), which gives them a big advantage in the news media market.

Ringier Axel Springer, a Swiss-German publisher, is increasingly powerful in the digital news market. It owns Azet.sk, but also the news portal Aktuality.sk, the fourth most visited website in Slovakia.

Although the remit of regulators does not cover companies like Google and Facebook, the position of international technology companies in Slovakia is highly endangered. Authorities have showed in the past couple of years their commitment to make them pay taxes on all advertising revenue generated in Slovakia. They also want Facebook and other foreign technology companies to open a local office in Slovakia (as Google has done already) if they want to pull in revenues from Slovak customers.

A younger generation of Slovak professionals, coming from the IT and digital services sector, is emerging and changing the industry. New associations of creative industry people and outspoken technology entrepreneurs are gaining more clout in society and even politics. Several IT professionals and entrepreneurs, including the head of Google Slovakia, Rasto Kulich, support Progressive Slovakia (Progresívne Slovensko), a progressive political party launched in late 2017.

Generally, in spite of usual lobbying practices for commercial gains, the technology sector in Slovakia is apolitical. None of these companies has ownership links with politicians and political parties. Only one of them, O2 Slovakia, has ownership connections with a powerful financial group operating in Central and Eastern Europe, namely PPF, which is led by Czech magnate Petr Kellner.

Although news media have a relatively low outreach on social networks, all of them rely on social media, particularly Facebook, to distribute their products. However, an experiment run by Facebook in 2017, which included the removal of posts generated by professional media from its main feed, clobbered news media in Slovakia. Some of them experienced day-to-day declines of 60% in their user interaction (which is how Facebook defines likes, shares or comments).

Out of all foreign technology companies, only Google got involved directly in supporting Slovak journalism. Through its grant-making project Digital News Initiative (DNI), it has given some €1.16m to locals to develop journalism projects in Slovakia. While that helps one or two projects get off the ground, it hardly influences the news market in the country.

Technology Overview

New technologies are rapidly spreading in Slovakia, while old, analog forms of communications are abandoned. Slovaks have become increasingly mobile during the past decade. The number of fixed telephone lines continued their slump: between 2011 and 2017, Slovakia lost nearly 240,000 fixed telephone lines. In parallel, the Voice over Internet Protocol (VoIP) has become a more popular form of communication. The number of VoIP subscriptions nearly trebled between 2010 and 2018. In mid-2017, some 40% of all of the fixed lines in Slovakia were VoIP subscriptions, according to data from the Slovak transport and construction ministry.

Slovak voice business, old-school

Fixed-line telephony in Slovakia, 2011-2017

Indicator	2011	2012	2013	2014	2015	2016	2017*
Total number of fixed telephone lines (FTLs), including VoIP	948,801	875,048	880,554	841,809	797,417	762,045	709,982
of which residential	724,776	684,424	646,324	625,315	600,512	595,501	559,026
FTLs per 100 inhabitants (%)	17.6	16.2	16.3	15.5	14.7	14.0	13.1
Percent of households with FTLs (%)	38.1	36.9	34.9	33.7	32.4	32.2	30.2
Number of VoIP subscriptions	127,878	145,566	175,633	225,338	274,778	335,874	314,779
of which residential	99,700	117,046	144,023	183,569	222,012	274,151	262,465

*Data for June 2017

Source: Ministry of Transports and Construction Slovakia

Slovaks have fully embraced mobile communications in the past two decades. The mobile penetration was a stonking 130.1% in mid-2017, which meant that many Slovaks had more than one mobile subscription. As mobile services have become more affordable, Slovaks increasingly take up post-paid mobile subscriptions, which allow them to browse or make calls at leisure, giving them also more freedom to consume content on the internet. In 2017, some 70% of Slovakia's mobile market consisted of post-paid subscriptions. Friendlier roaming rates have also boosted the number of mobile subscriptions that allow people to use their phones abroad. That led to an increase in the use of mobile phones and growing consumption of online content.

A mobile nation

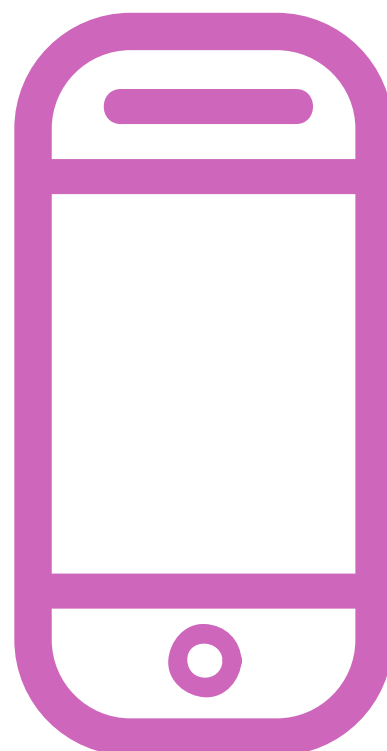
Mobile telephony in Slovakia, 2011-2017

Indicator	2011	2012	2013	2014	2015	2016	2017*
Mobile subscriptions**	5,983,059	6,094,466	6,208,412	6,378,095	6,675,553	6,989,902	7,076,500
Mobile subscriptions per 100 inhabitants (%)	110.7	112.6	114.6	117.6	123.1	128.6	130.1
Mobile subscriptions: prepaid	1,929,921	1,859,802	1,831,444	1,823,330	1,889,334	2,041,848	2,157,248
Mobile business subscriptions	1,358,446	1,430,854	1,493,329	1,570,100	1,643,902	1,708,612	1,727,160
Mobile cellular subscriptions: post-paid	4,053,138	4,234,664	4,376,968	4,554,765	4,786,219	4,948,054	4,919,252
Mobile cellular subscriptions with roaming	4,993,690	5,390,107	5,168,697	5,236,507	5,443,698	5,699,034	5,754,462
Mobile cellular subscriptions with M2M***	-	-	-	421,411	512,508	591,504	620,402

*Data for June 2017; **Total (including post-paid + prepaid); ***M2M stands for Machine-to-Machine equipped SIM cards allowing devices and sensors to communicate with each other and with other Internet-enabled devices.

Source: Ministry of Transport and Construction Slovakia

Access to internet has also increased significantly in the past decade. The internet market in Slovakia is dominated by mobile. At the end of 2017, mobile internet had a penetration of nearly 83%. The number of mobile broadband subscriptions more than trebled between 2011 and 2017. Fixed broadband internet has also saw steady growth, but at a much slower speed than mobile.



Slovak internet universe

Number of internet subscriptions in Slovakia, 2011-2017

Indicator	2011	2012	2013	2014	2015	2016	2017
Fixed broadband Internet subscriptions	953,098	1,045,490	1,109,060	1,191,216	1,273,812	1,336,541	1,404,973
Fixed broadband Internet subscriptions per 100 inhabitants (%)	17.6	19.3	20.4	21.9	23.4	24.6	25.8
Total numbers of mobile broadband Internet subscriptions	1,746,406	1,915,242	2,729,679	3,331,968	3,685,683	4,300,524	4,501,833
Mobile broadband Internet subscriptions per 100 inhabitants (%)	32.3	35.4	50.4	61.5	67.7	79.1	82.7

Note: data for end of year

Source: Ministry of Transport and Construction Slovakia

The electronic communications market has been declining for more than five years. Between 2011 and 2016, the revenue generated by electronic communications services plummeted by nearly 15% to €1.68bn. The share of the country's electronic communications market in the national GDP has also dipped during the period to 2.1%.

Revenue in both fixed telephone services and mobile communications declined, but mobile communications clearly dominate the market with a turnover of €975m, which represented in 2016 nearly 58% of the total electronic communications market. Internet plays a major role in revenue generation. Income from sales of internet services accounted for less than a third of the total mobile communications market in 2016, but the segment has been growing steadily while post-paid services, the biggest revenue generator, have continuously lost share since 2011.

Monetizing technology

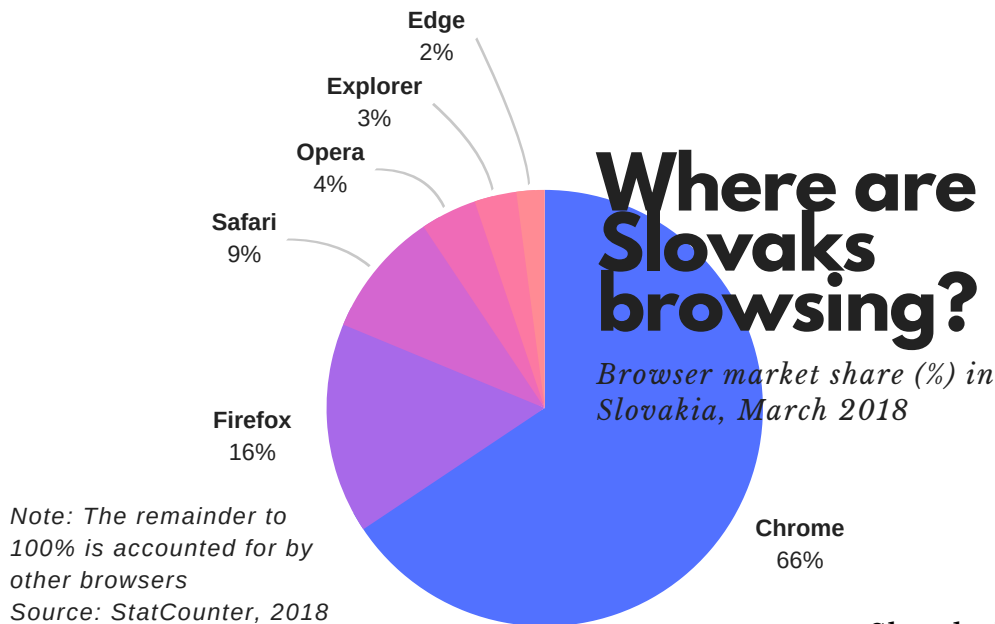
Revenue in the Slovak electronic communications market, in € '000*, 2011-2016

Indicator	2011	2012	2013	2014	2015	2016
Revenue from all electronic communication services	1,949,183	1,870,295	1,771,582	1,688,879	1,659,472	1,684,360
Share of electronic communication revenue in GDP (%)**	2.8	2.6	2.4	2.2	2.1	2.1
Revenue from fixed telephone services including VoIP, of which:						
Revenue from residential subscribers	198,889	168,479	150,208	136,871	125,681	115,976
Revenue from telephone calls, in that:						
local calls	77,589	69,022	61,805	54,380	49,990	45,954
national long distance calls	11,985	9,703	7,569	5,391	3,677	2,617
Revenue from subscription charges	8,321	6,782	5,288	3,736	2,529	1,785
Revenue from connection charges	3,657	2,921	2,278	1,655	1,148	833
Revenue from outgoing calls - national	102,870	93,557	85,284	78,215	72,821	68,665
Revenue from incoming calls - national	580	372	356	301	288	503
Revenue from outgoing calls - international	24,571	20,645	18,219	15,345	12,113	10,438
Revenue from incoming calls - international	8,836	5,948	4,018	1,939	1,950	1,803
Interconnection charges	11,816	9,167	8,163	5,980	3,839	3,131
Revenue from mobile communications, of which:						
Revenue from connection charges	1,271,021	1,211,388	1,105,936	1,026,499	1,017,929	975,622
Revenue from prepaid services	7,556	2,287	1,733	1,376	1,325	1,272
Revenue from post-paid services	145,200	146,335	129,535	117,218	109,092	107,930
Revenue from outgoing calls - international	1,059,352	1,021,044	936,330	878,634	865,973	866,420
Revenue from incoming calls - international	44,584	37,059	39,017	35,702	29,320	27,967
Text and multimedia services	19,978	21,812	21,262	13,966	9,911	7,230
Revenue from Internet	115,756	109,119	100,906	102,539	102,655	100,074
Revenue from leased lines	212,189	217,344	224,477	235,124	267,943	299,497
Revenue from data transmission	35,950	38,061	41,145	37,757	28,749	49,903
Revenue from CATV services	71,027	69,420	77,455	81,012	65,901	68,416
Revenue from satellite services	47,044	47,752	46,694	45,947	37,816	70,221
Revenue from audiotex	37,625	46,116	45,508	44,952	45,265	44,331
Revenue from any other el. comm. services	7,949	7,404	9,069	14,694	10,121	6,321
	56,522	54,159	62,532	59,214	60,067	54,072

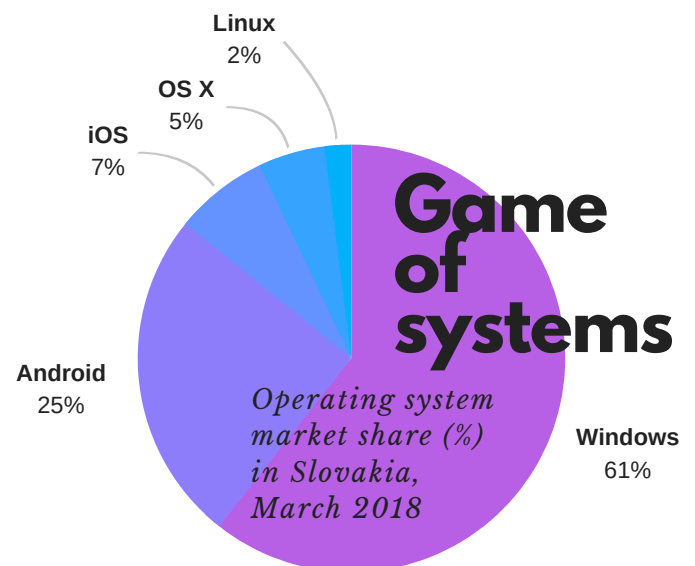
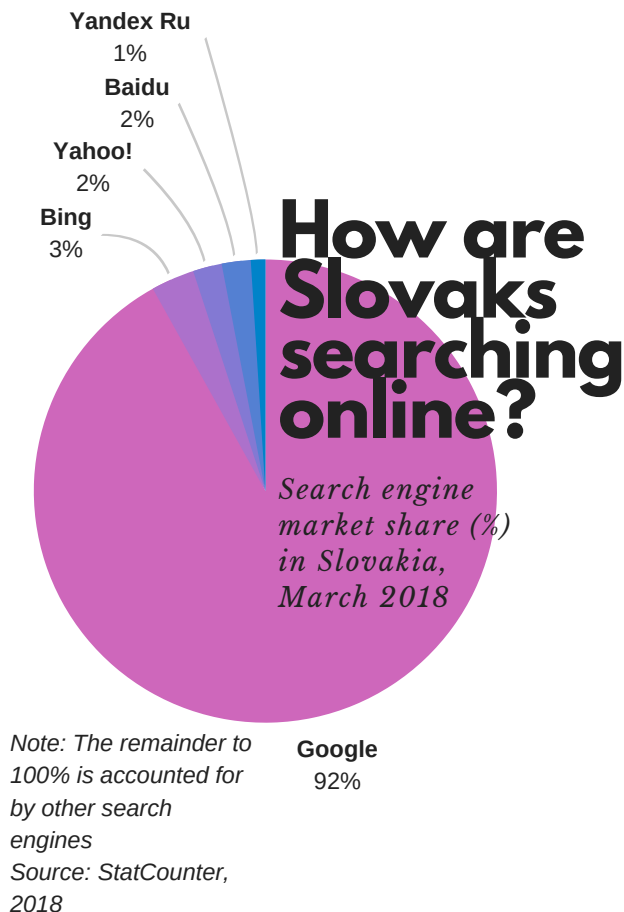
*VAT not included; **in current prices

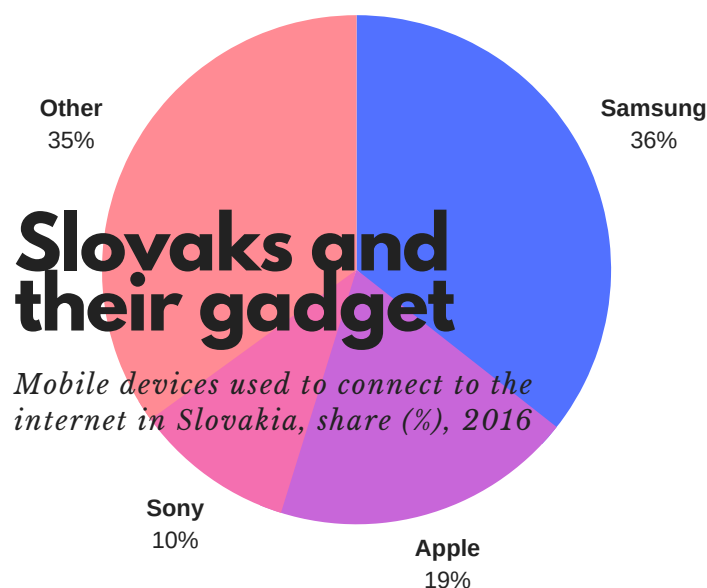
Source: Ministry of Transports and Construction Slovakia

Google dominates the Slovak online browsing and search market. Google's browser Chrome has a two-third market share in Slovakia, according to data from StatCounter. In the search market, Google has an even stronger position, accounting for some 91% of the online searches carried out in Slovakia.



Slovaks largely use Windows on their devices. Microsoft has a share of 60% of the operating system market in Slovakia. It is followed by Android with some 25%. Samsung is estimated to control more than a third of the mobile phone handset market in Slovakia, according to data from Gemius, a research agency. That figure is corroborated by data from the four main telecom operators in Slovakia.





Source: Gemius, 2018

Where are Slovaks socializing?







Facebook is by far the most popular social media in Slovakia with a market share of nearly 69% in 2018, according to data from StatCounter.

However, its popularity has rapidly declined in the past few years. Some five years ago, it was preferred by over 90% of the Slovaks and faced only weak competition from Pinterest, Tumblr and Twitter. While Twitter and Tumblr have grown only sluggishly in the past two-three years, Pinterest and YouTube have significantly boosted their share of the Slovak social media market.

YouTube in particular has grown from zilch to over 9% during this period.

Some 2.4 million Slovaks were on Facebook in 2017, according to data from a source at Facebook in Dublin who would not want to be named in the report. That is nearly 45% of the Slovak population and over half of all Slovak internet users.

Social media use in Slovakia, market share (%)*, 2015-2018

						
2015	90.71	3.85	0.16	1.54	2.12	0
2016	83.63	8.79	0.23	2.40	3.16	0.36
2017	65.54	13.40	8.47	3.50	1.73	3.59
2018**	68.59	13.33	9.25	2.79	2.33	2.13

*data for end of year; **March

Note: Those accounting for the missing percentage to 100% include Reddit, StumbleUpon, Google+, VKontakte and LinkedIn








Source: StatCounter, 2018

INTERNET & MOBILE



The big players in internet and mobile

Key players in the Slovak internet and mobile market, breakdown by services

	Email service	Messaging and VoIP	Mobile ecosystems	Search	Social network & blog	Video & photo
	✓	✓	✓	✓		
	✓					
		✓			✓	✓
	✓		✓	✓		✓
	✓	✓		✓		
SAMSUNG			✓			
					✓	✓
	✓			✓		

The main internet and mobile ecosystems companies present in Slovakia are mostly international players. Google dominates the search market locally, Samsung and Apple are the largest players in the mobile ecosystems market and Facebook is the largest player in social media.

They, however, are facing stiff competition from local players, namely Azet.sk and Zoznam.sk, the largest internet portals in Slovakia. Of all those players, Microsoft, Apple and Samsung are not involved directly in production and distribution of news media content.

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. (For more, see Methodology in this report)

Source: Company data



The internet portal Azet.sk was operated by an eponymous Zilina-based company until 2016 when the Swiss-German publisher Ringier Axel Springer purchased the portal. According to the latest available data published by the company, Azet.sk pulled in sales revenues of over €14m in 2015, according to data from the Slovak Trade Registry. The company had a constant growth in revenue during the past decade, which was the key reason why Ringier Axel Springer bought the company. Azet.sk is now part of Ringier Axel Springer's portfolio of print and online assets. The publisher does not release financial information specifically about Azet.sk.

Azet is a generalist portal, in Slovak, equipped with a search engine and offering news aggregated from all Slovak media, an email service, and pages with information in a broad range of topics and categories. They include real estate portals, a dictionary, recipes, websites to find flights and holidays. Milan Dubec, the CEO of Ringier Axel Springer is also the head of Azet.sk.

The local internet leader

Key financial data for Azet.sk, 2008-2015

	2008	2009	2010	2011	2012	2013	2014	2015
Sales revenues (€ '000)	4,125	7,028	8,688	8,713	10,744	11,352	12,510	14,025
Net profit (€ '000)	594	1,359	1,723	1,773	1,715	1,823	1,840	7,151

Source: CMDS based on data from the Slovak Trade Registry



Facebook does not have a presence in Slovakia and its name is not registered as such in the local trade registry. Some tasks related to content in Slovak are handled from Facebook's Warsaw office for Central and Eastern Europe, which was launched in 2016. Robert Bednarski was the office's first director. Bednarski worked for Ringier Axel Springer Polska, the Polish subsidiary of Ringier Axel Springer. Until 2015, when he took over the job at Facebook, he was the CEO of Grupa Onet.pl, the most popular portal in the country, owned by Ringier Axel Springer.

One of Facebook's employees in charge of Slovakia, among other countries and topics, was Andy Krasny. He said in 2016 that Facebook did not plan to open a local operation in Slovakia, preferring to run its Slovak business from Poland.

In an interview in 2016 with Biznisklub, a business network in Slovakia, Krasny dodged a question about how queries received by Facebook from Slovak users were handled: by robots or humans. “If you report something, it is not guaranteed that the content will be removed because it may not violate our policies,” Krasny said. “Our content reviewers may ask you why you think [a respective] post violates the policy.”⁽¹⁾

He added that Slovakia was a “key market” for Facebook in the region. Before the opening of the Warsaw office, many of the tasks related to Central and Eastern European countries were handled by the Facebook office in Dublin. Some of the Slovakia-related services in Facebook are still handled from Ireland.



Fully owned by Google International, Google Slovakia has an office in Bratislava. The two executive managers of Google's Slovak subsidiary are Kenneth Hohee Yi, a lawyer working for Google in America, and Paul Terence Manicle, a Dublin-based Google employee, according to data extracted by CMDs from corporate documents.

The Google office in Slovakia is led by Rasto Kulich, a Harvard-educated Slovak, who helped co-found the company locally. Along with other businessmen and IT professionals, Kulich has been supporting Progressive Slovakia (Progresívne Slovensko), a social-liberal, progressive and pro-European political party launched in late 2017.⁽²⁾ Most of the leaders driving the growth of Progressive Slovakia are young businessmen, innovators and IT professionals. Ivan Stefunko, the party's president, is a technology entrepreneur who studied political science in Banská Bystrica and Paris. Zora Jaurova, one of the party's vice-presidents, is an expert in creative industries and cultural policies. She manages the Creative Industry Forum, Slovakia's creative industry professional association.

Google Slovakia constantly increased its revenues in the past five years to nearly €1.3m in 2017, according to data from the trade registry in Slovakia. That is much less than the tax Slovak authorities claim Google should pay in Slovakia. The company has finished in the black every year between 2011 and 2017. Google Slovakia has a staff of four.

¹“Rozhovor s Andym Krasnym: Čo pripravuje Facebook na Slovensku a ako funguje?” (Interview with Andy Krasny: What is Facebook planning for Slovakia and how does it work?), 20 Dec 2016, available online at <https://biznisklub.sk/rozhovor-s-andym-krasnym-co-pripravuje-facebook-na-slovensku-a-ako-funguje>
² Dusan Mikusovic, “Progresívne Slovensko môže mať prvého poslanca, do hnutia smeruje Martin Poliacik” (Progressive Slovakia can have its first MP, Martin Poliacik is heading the movement), DennikN, 5 Dec 2017, available online at <https://dennikn.sk/963197/progresivne-slovensko-bude-mat-prveho-poslanca-do-hnutia-vstupuje-martin-poliacik/?ref=list>

The global behemoth

Key financial data for Google Slovakia, 2011-2017

	2011	2012	2013	2014	2015	2016	2017
Sales revenues (€ '000)	706	1,739	2,103	1,862	1,501	1,271	1,299
Net profit (€ '000)	42	59	89	74	48	49	48

Source: CMDS based on data from the Slovak Trade Registry



There is no information about Twitter in Slovakia. According to journalists consulted for this report, the company has not established any local presence in the country to date.



Zoznam.sk is the true pioneer of the Slovak internet. It launched in 1997 as the first Slovak search engine. Its founders were Ivan Debnar and Ivo Lukacovic (who also founded the sister site Seznam.cz in the Czech Republic). The site Zoznam.sk was purchased in 2005 by Slovak Telekom.⁽³⁾ The financial group Penta Investments is said to have interest in buying the portal, but the firm's representatives would not comment on that.⁽⁴⁾

Similar to Azet.sk in terms of content, aggregation methods and services, Zoznam.sk lost its leading position to Azet.sk in 2008. Zoznam.sk is also financially weaker with some €9.2m in revenues in 2016. It finished in the black every year since 2011; however, its net profit is significantly smaller than the net earnings reported by Azet.sk.

³ "Slovak Telecom kúpi portál Zoznam.sk" (Slovak Telekom buys the portal Zoznam.sk), Lupa.cz, 21 Jul 2005, available online at <https://www.lupa.cz/clanky/slovak-telecom-koupi-portal-zoznam-sk/>

⁴ "Penta má zájem o druhý slovenský server Zoznam.sk" (Penta has interest in the second largest Slovak server Zoznam.sk), Mediaguru.cz, 20 Nov 2014, available online at <https://www.mediaguru.cz/clanky/2014/11/penta-ma-zajem-o-druhy-slovensky-server-zoznam-sk/>

The Slovak internet pioneer

Key financial data for Zoznam.sk, 2011-2016

	2011	2012	2013	2014	2015	2016
Sales revenues (€ '000)	5,539	5,904	6,519	6,823	7,797	9,219
Net profit (€ '000)	122	342	79	20	123	159

Source: CMDS
based on data
from the
Slovak Trade
Registry

TELECOMMUNICATIONS



The Slovak telecom and internet market is dominated by three players, Slovak Telekom, Orange Slovensko and O2 Slovakia, the only telcos in Slovakia with annual sales in excess of €100m. Their combined sales exceed €1.2bn.

By far the largest player in the market is Slovak Telekom, the former state-owned telecom monopoly, which is controlled by Deutsche Telekom. Most of the big players on the telecommunications market are in foreign hands. The biggest Slovak-owned player is Swan-Benestra. The two companies announced their merger in May 2017. Together they formed the largest domestically owned alternative operator in Slovakia.⁽⁵⁾

⁵ "Slovakia will have a new telecoms operator", *The Slovak Spectator*, 3 April 2018, available online at <https://spectator.sme.sk/c/20795267/slovakia-will-have-a-new-telecoms-operator.html>

The sales battle

Sales revenues of prominent telecommunication operators and internet service providers in Slovakia (ranked by 2016 sales), 2013-2017

COMPANY	OWNERSHIP	COUNTRY OF OWNERSHIP
Slovak Telekom	Deutsche Telekom Europe (100%)	Germany
Orange Slovensko	Atlas Services Belgium (100%)	Belgium
O2 Slovakia	O2 Czech Republic (100%)	Czech Republic
Towercom	ST Networks Holdings (100%)	Luxembourg
Swan	DanubiaTel (100%)	Slovakia
Benestra	Carduelis (100%)	Netherlands
UPC Broadband Slovakia	UPC Slovakia Holding I and II (50% each)	Netherlands
Slovanet	SNET Group (100%)	Slovakia
Digi Slovakia*	Slovak Telekom (100%)	Germany
Energotel	Four local power providers	Slovakia
Antik Telecom	Igor Kolla (70%), Miroslav Antal (30%)	Slovakia
Swan Mobile	DanubiaTel (100%)	Slovakia
Marlink	Marlink (100%)	Norway
DSi Data	Jaroslav Dravecky (50%), Rastislav Dravecky (50%)	Slovakia
Satro	Frantisek Kaduch (25%), Frantisek Kaduch (50%), Marek Michalik (12%), Iveta Michalikova (12%)	Slovakia
Vnet	Locally owned	Slovakia
RadioLAN	Filip Krizko (51%), Juraj Hajtas (20%), Juraj Petrula (29%)	Slovakia

COMPANY	SALES REVENUE (€ '000)				
	2013	2014	2015	2016	2017
Slovak Telekom	782,510	700,106	707,056	668,756	n/a
Orange Slovensko	n/a	580,156	560,623	427,419	n/a
O2 Slovakia	197,751	198,984	205,668	208,889	n/a
Towercom	52,697	54,056	55,395	55,845	49,687
Swan	n/a	n/a	4,440	48,430	48,775
Benestra	45,913	45,137	46,274	45,145	41,491
UPC Broadband Slovakia	45,682	45,124	44,249	44,825	n/a
Slovanet	3,648	42,931	34,252	42,408	37,531
Digi Slovakia*	28,043	29,553	33,437	35,283	36,024
Energotel	12,718	13,269	13,735	13,188	12,035
Antik Telecom	9,056	9,505	10,239	11,213	13,032
Swan Mobile	62,340	72,901	54,975	7,127	14,758
Marlink	5,202	5,277	6,014	5,541	6,199
DSi Data	4,435	4,252	4,107	3,960	n/a
Satro	4,435	4,252	4,108	3,960	3,795
Vnet	2,672	3,044	3,325	3,653	n/a
RadioLAN	1,332	1,842	2,924	3,495	n/a

Yoy: year-on-year; n/a: not available; *Sales of Digi Slovakia are included also in Slovak Telekom's financial report

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. (For more, see Methodology in this report)

Source: CMDS based on company data and data from Slovak Trade Registry

Orange Slovensko is the most profitable company in the Slovak telecommunications market. The company netted €81.7m in 2016, according to data from the Slovak Trade Registry. That was €20m and €40m, respectively, more than the net earnings of Orange's main rivals, Slovak Telekom and O2 Slovakia.

Smaller players have been faced with financial difficulties in recent years, which were reflected in their bottom line. Since 2015, an increasing number of operators, particularly smaller ones, have seen deepening losses. Swan, for example, lost over €14m combined in 2016-2017. Benestra finished in the red for five years in a row between 2013 and 2017, accumulating losses of over €16m during that period.

Of telecoms and profits

Net profit of prominent telecommunication operators and internet service providers in Slovakia (ranked by 2016 earnings), 2013-2017

COMPANY	NET PROFIT (€ '000)				
	2013	2014	2015	2016	2017
<i>Orange Slovensko</i>	114,516	103,062	88,249	81,700	n/a
<i>Slovak Telekom</i>	47,686	40,682	68,744	61,232	n/a
<i>O2 Slovakia</i>	34,971	32,624	43,308	41,705	n/a
<i>Digi Slovakia*</i>	-3,247	4,110	4,693	5,824	5,023
<i>Energotel</i>	996	1,728	2,348	1,562	1,293
<i>Marlink</i>	170	224	208	325	423
<i>Vnet</i>	29	44	12	118	n/a
<i>DSi Data</i>	200	74	26	48	n/a
<i>RadioLAN</i>	27	-120	2	27	n/a
<i>Satro</i>	225	30	-153	-177	-180
<i>Slovanet</i>	162	1,070	502	-312	246
<i>Antik Telecom</i>	1,142	1,153	438	-393	1,278
<i>UPC Broadband Slovakia</i>	-2,693	2,712	-1,118	-938	n/a
<i>Towercom</i>	11,193	6,525	-2,560	-1,604	-5,486
<i>Benestra</i>	-3,810	-4,463	-3,669	-2,177	-2,014
<i>Swan</i>	n/a	n/a	-600	-6,581	-7,613
<i>Swan Mobile</i>	467	940	42,671	-18,686	-18,235

Source: CMDS based on company data and data from Slovak Trade Registry

Technology Companies & Government

The technology sector is so far a politics-free industry. Technology companies, especially telecoms, invest significant time and money in lobbying regulators, but there are no ownership links between large players and politicians. Large financial groups such as J&T or Penta Investments have not expanded into technology yet. One exception is PPF Group, controlled by Czech magnate Petr Kellner, which controls the telecom operator O2 Slovakia via O2's mother company located in the Czech Republic.

There is no specific regulatory regime for online content in Slovakia. The Council for Broadcasting and Retransmission (RVR), Slovakia's broadcast watchdog, started to regulate online content, but its remit is limited to audiovisual products posted online. The RVR does not regulate social media, but it is gradually expanding its regulatory remit to include technology companies. In its latest report, the list of entities regulated by RVR included telecom operators such as Orange Slovensko and Slovak Telekom. (*See Internet regulators in Government space in this report*)

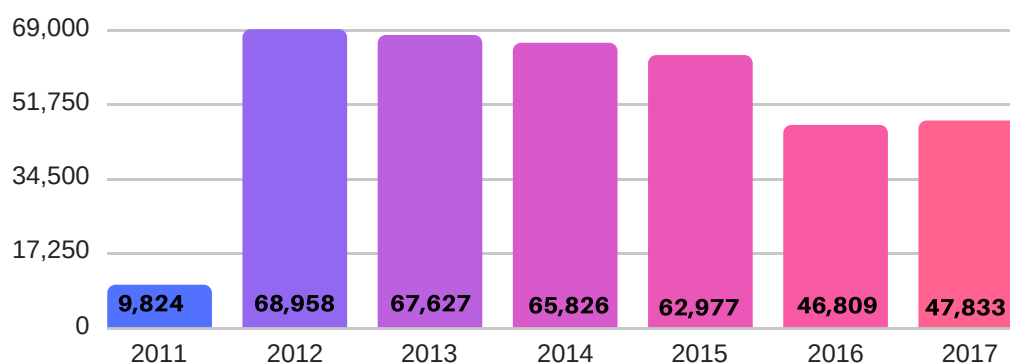
But in spite of this regulatory vacuum, when it comes to social media, state authorities are increasingly targeting technology companies, especially foreign ones. Finance minister Peter Kazimir from Smer-SD party said that the government is planning to tax IT giants like Google and Facebook.⁽⁶⁾ Mr Kazimir claims that the two companies generate together as much as €80m in ad revenue in Slovakia, but fail to pay due taxes on that amount. According to Juraj Valis, a tax expert interviewed by Hospodarske Noviny,⁽⁷⁾ Google and Facebook pay taxes on local expenses instead of locally generated income. But without international cooperation (mainly help from tax offices in other countries), it will be hard for the Slovak tax watchdog to assess how much these companies should pay, Valis said.

According to a report from the European Commission, Google now pays a tax of roughly 0.82% of its revenue in the European Union (EU).⁽⁸⁾ The Commission plans this year to start taxing IT companies. Much support for it comes from France and its president Emmanuel Macron.⁽⁹⁾

Google Slovakia paid a total tax of nearly €48,000 in 2017 on revenues of some €1.3m, according to data from the local trade registry. Facebook is processing its taxes on income generated in Slovakia through its Ireland-registered office. According to Dave Wehner, a financial director with Facebook, the company is planning to pay more taxes in the country where the revenue is generated. However, that is likely to happen from mid-2019 on and only in the 30 countries where Facebook has a local office, including Germany, France, Italy, Poland and Sweden.⁽¹⁰⁾

A tax heaven?

Income tax(€) paid by Google Slovakia, 2011-2017



Source: CMDS based on data from the Slovak Trade Registry

6 Olivia Lacenova, Kristina Votrubova, "Kažimír proti gigantom. Zdaní Google a Facebook" (Kazimir against giants. He wants to tax Google and Facebook),

7 "Slovakia may tax Google and Facebook", *The Slovak Spectator*, 9 Jan 2018, available online at <https://spectator.sme.sk/c/20734333/slovakia-may-tax-google-and-facebook.html>

8 Alicia Gonzalez, "Europe's tax war with the tech giants", *El Pais*, 2 Mar 2018, available online at https://elpais.com/elpais/2018/03/01/inenglish/1519908569_345579.html

9 Bjarke Smith-Meyer, "Commission eyes €5 billion annual windfall with new digital tax", *Politico*, 21 Mar 2018, available online at <https://www.politico.eu/article/commission-eyes-e5-billion-annual-windfall-with-new-digital-tax/>

10 Mark Scott, "Facebook to overhaul how it pays tax worldwide", *Politico*, 18 Dec 2017, available online at <https://www.politico.eu/article/facebook-tax-digital-europe-revenue-sales-corporate-ireland-david-wehner/>

In January 2018, a new law on digital service providers took effect in Slovakia. Companies like the ride-sharing operator Uber, the short-term lodging platform Airbnb or the hotel booking platform Booking.com have new obligations related to their operations in Slovakia, according to the country's finance ministry. They will all have to pay taxes on revenue generated from services they charge for in Slovakia. All these companies have to establish an office in Slovakia if they offer transports or accommodation services in the country.⁽¹¹⁾

If these companies do not open an office in Slovakia, a so-called "withholding tax" will be charged on them. That means that the government will increase its charge on the fee paid by local entrepreneurs to use these foreign-owned digital platforms from 19% to 35%. The government plans to adopt this year similar legislation to tax IT giants, bitcoins and other cryptocurrencies.⁽¹²⁾

In a separate legal development, Slovak authorities approved provisions, slated to take effect in May 2018, forbidding Facebook to accept registrations on its network from teenagers under 16 years of age without their parents' consent. The provisions are part of the law on protection of personal data, which was approved by the Slovak Parliament in November 2017.⁽¹³⁾ Internet companies will be legally obliged to verify that parents' consent was given to teenagers who want to register on Facebook. It is not yet clear how they are supposed to do that.

11 "Kazimír: Uber, Airbnb či Booking.com budú musieť u nás platiť dane" (Kazimír: Uber, Airbnb or Booking.com will have to pay taxes in our country), *Sme*, 5 Jan 2018, available online at <https://ekonomika.sme.sk/c/20731817/kazimir-uber-airbnb-ci-booking-com-budu-musiet-u-nas-platit-dane.html>

12 "Finance minister plans to start taxing bitcoin", *The Slovak Spectator*, 8 Jan 2018, available online at <https://spectator.sme.sk/c/20733083/financial-minister-plans-to-start-taxing-bitcoin.html>

13 "Parlament rozhodol: Na facebook do 16 rokov len so súhlasom rodičov" (Parliament decided: on 16-year old on Facebook only with the consent of the parents), *Noviny.sk*, 30 Nov 2017, available online at <https://www.noviny.sk/slovensko/283348-parlament-rozhodol-na-facebook-do-16-rokov-len-so-suhlasom-rodicov>

Technology Companies & Media

LOCAL PORTALS

Ringier Axel Springer and Slovak Telekom are the key players involved in both production and distribution of news content online. They control the two largest online portals, Azet.sk and Zoznam.sk, respectively, which both carry a significant amount of aggregated content.

Ringier Axel Springer is steadily growing its influence in Slovakia's digital news media ecosystem. The company owns Azet.sk, the largest online portal in the country. Ringier Axel Springer also retains a major role in news content production. Although it plans to sell some of its print media titles, Ringier Axel Springer maintains a solid presence in the internet news content production. Its news portal Aktuality.sk is the fourth most visited website in Slovakia after the two giants Azet.sk and Zoznam.sk, and the website of the daily Sme. Following the assassination in February 2018 of the investigative journalist Jan Kuciak, who worked for Aktuality.sk, the site's audience has skyrocketed, making it in some days the most read news portal in the country.

Besides the internet portal Zoznam.sk, Slovak Telekom also runs Topky.sk, a tabloid portal funded mostly through advertising. Topky.sk covers a broad range of topics, including domestic affairs, international news, sports, economy and culture. Topky.sk ranks among the most visited sites in Slovakia with 1.56 million users in 2018. However, its traffic has been declining in the past four years. Zoznam.sk, which is a much bigger platform, publishes news content primarily from Topky.sk, helping thus beef up Topky's traffic.

FOREIGN INTERNET GIANTS

Social media play an important role in news distribution in Slovakia. The biggest social media by number of users is Facebook. It is widely used by Slovak news media outlets to share content and increase exposure.



FACEBOOK

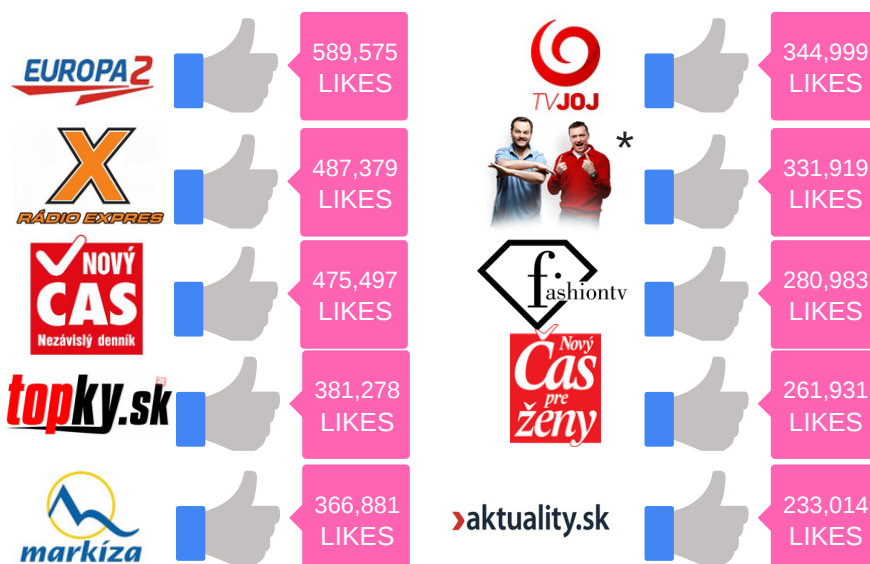
However, the popularity of news media on Facebook is nowhere close to celebrities or human interest and practical advice websites. The top position belongs to Miroslav Stoch, a Slovak footballer, with 1.45 million fans, according to statistics from Socialbakers, a web analytics firm. It is followed by Dobré rady a nápady (meaning “good advice and ideas” in Slovak), a site publishing practical advice on health and beauty, home decoration and other family life-related topics. Dobré rady a nápady is published by the company iSITA, which operates a slew of human interest and practical advice websites, but also three local news websites, which cover Bratislava, Nitra and Zilina. iSITA has boosted its revenue from a couple of thousands of euros in 2014 to over €520,000 in 2017.

When it comes to media, two radio stations, Europa 2 and Radio Expres, dominate on Facebook with roughly 590,000 and 488,000 followers, respectively. They are followed by two tabloid titles and two TV stations.

The reach of Slovak news media on Facebook is low. Only two of the most popular media in Slovakia reach more than 20 in 100 Facebook users. Both of them are radio stations that attract people thanks primarily to their music-dominated output. The most popular serious news outlet on Facebook, Aktuality.sk reaches an average of 10 in 100 Facebook users.

Journalists interviewed for this report say that the reach of Slovak news media on Facebook is higher than the number of “likes” because news content is widely shared through networks of friends. Moreover, many users, even staunch readers of a specific news outlet, do not bother to click the “like” button.

Most liked media



Source: Socialbakers

*Junior a Marcel

Nevertheless, the traffic generated by Facebook is extremely important for the eyeballs-hungry news media in Slovakia, according to journalists interviewed for this report. No wonder then that Slovak journalists blew a gasket when Facebook, in a 2017 experiment that was run in six countries including Slovakia, removed professional media from Facebook's main news feed, limiting content on that feed to personal posts and paid ads.

The experiment badly hit news media in the six countries. Data from CrowdTangle, a Facebook-owned analytics site, showed that "interactions" on most of the Slovak media pages on Facebook tumbled by 60% overnight.⁽¹⁴⁾ Facebook defines "interactions" as engagements such as likes, shares or comments. Small media outlets and NGOs in particular were hit hard by the experiment as they cannot afford to buy ads. Slovak outlets survived, but in other countries where the test was run, like Guatemala, news media could hardly recover after this test.

That was a strong indicator of the power that Facebook exerts in local news markets. Filip Struharik, a journalist working for DennikN, who studied the impact of the 2017 Facebook experiment, says that the test should prompt news media to think differently about Facebook and change their strategy. Struharik explains that in spite of the decline in the Facebook reach, the traffic on the main news sites remained almost unchanged during the experiment. He says that the Facebook Pages are not as important as journalists thought. "What's important are influencers and people who share your stories."⁽¹⁵⁾

THE FAKE NEWS MARKET

Generally, the impact of Facebook on Slovak media and journalism is very negative, according to journalists interviewed for this report. Instead of supporting quality journalism, the network promotes extremist, lowbrow content able to generate clicks and shares. DennikN's Struharik found that the average number of interactions on the 50 largest Slovak media on Facebook fell by 52% and the average number of interactions on serious news pages declined by 39%. In contrast, the average number of interactions on disinformation sites and pages that promote hate speech declined by only 27%.⁽¹⁶⁾

That is a worrying trend especially in a country where disinformation is apparently thriving. The number of bogus websites has dramatically increased in Slovakia in the past five years. Most of them are flogging a nationalistic, pro-Russian, anti-EU/NATO/USA and anti-immigration worldview.

¹⁴ Alex Hern, "Downright Orwellian': journalists decry Facebook experiment's impact on democracy", *The Guardian*, 25 Oct 2017, available online at <https://www.theguardian.com/technology/2017/oct/25/facebook-orwellian-journalists-democracy-guatemala-slovakia>

¹⁵ Filip Struharik, "Facebook has hurt mainstream media more than fake news sites", *Medium*, 17 Dec 2017, available online at <https://medium.com/estadodelasredessociales2017/facebook-has-hurt-mainstream-media-more-than-fake-news-sites-113277bada8>

¹⁶ Filip Struharik, *cit.*

Some of these fake news websites are going to bat for right-wing, nationalist parties. For example, Hlavne Spravy (which means “Headline News” in Slovak), is known for supporting the far-right People’s Party-Our Slovakia (LSNS). The site writes stories based largely on fabricated data and misinformation. In 2017, Hlavne Spravy published a poll showing that Marian Kotleba, LSNS’ head, was going to win in the regional elections that took place in autumn 2017. It turned out that the company that carried out the poll, Visit BB, did not even exist. Kotleba lost in the 2017 elections, but recent polls showed that his party is the third-most popular in the country. More worryingly, it is the most popular party among Slovak youth.(17)

A high number of Slovaks, particularly young people, believe bogus websites, according to Tomas Cizik, a researcher at the Bratislava-based Center for European and North Atlantic Affairs, who studies bogus sites in Slovakia. Cizik, who teaches high-school students how to spot fake news, says that young people “are not aware that they’re reading fake stories and conspiracy theories.”(18)

One of the most problematic aspects of online disinformation in Slovakia is the tacit support of politicians. Journalist Andrej Matisak of DennikN says that the country’s former prime minister, Robert Fico encouraged disinformation by not saying anything that would irk Russia and its leadership. “From the annexation of Crimea and the war on Eastern Ukraine, Prime Minister Fico never, ever said something like, ‘Russian soldiers are fighting against Ukraine’.”(19)

The popularity of bogus websites has led to the emergence of a lucrative fake news market that feeds an increasing number of people and companies. One of the most profitable fake news websites in Slovakia is Zem a Vek, published by Tibor Eliot Rostas, a musician and visual artist who worked for the TV station Markiza in the 1990s.(20) In 2012, he founded the company Sofian, which is the publisher of Zem a Vek. Married with two children, Rostas turned the website into a profitable business to feed his family. Its turnover quadrupled from 2012 to more than €404,000 in 2017.

The website Hlavne Spravy is edited by Robert Sopko who runs the website through the company Heureka Evolution. Sopko runs this site from his flat in a block of flats in Kosice. His stories attract hundreds of thousands of readers. The MP Boris Kollar, founder of the party Sme Rodina (translated as “we are family”) in 2015, often cites the website. Sme Rodina won 11 seats in parliament in the 2016 elections.(21)

17 “Mladí najviac veria Kotlebovi. Takto by dopadli volby, ak by volili ľudia do 40 rokov” (Youth mostly trust Kotleba. That is how the elections would look like if people up to 40 years of age voted), *Hospodarske noviny*, 8 Dec 2016, available online at <https://slovensko.hnonline.sk/873190-mladi-slovaci-do-40-rokov-podporuju-najviac-kotlebovcov-ukazala-studia>

18 Michael Colborne, “How Fake News Helped Slovak Extremists Become Reality”, *Codastory.com*, 25 Oct 2017, available online at <https://codastory.com/disinformation-crisis/information-war/how-fake-news-helped-slovak-extremists-become-reality>

19 Emily Tamkin, “Fake News’ Fights Back”, *Foreign Policy*, 20 Dec 2017, available online at <http://foreignpolicy.com/2017/12/20/fake-news-fights-back/>

20 Jan Bencik, “Falošný lesk a morálna bieda Tibora Rostasa” (The fake luster and moral misery of Tibor Rostas), *DennikN*, 28 Dec 2014, available online at <https://dennikn.sk/blog/9518/falosny-lesk-a-moralna-bieda-tibora-rostasa/>

21 Vladimir Snidl, “Kto riadi proruský web Hlavné správy? Muž, ktorý neodmieta ani eurofondy” (Who leads the pro-Russian website Hlavne Spravy? The man who does not refuse EU funds either), *DennikN*, 2 Aug 2016, available online at <https://dennikn.sk/521950/kto-riadi-prorusky-web-hlavne-spravy-muz-ktory-neodmieta-ani-eurofondy-2/>

Hlavné Správy started as a one-man show led by Sopko, but in recent years it has increased its pool of contributors. Writers are paid €5 per article and an extra €1 when their article gets any 1,000 views over 5,000 views, according to an insider who worked for the website.(22)

Some of the bogus websites targeting the Slovak public generate revenues through advertising, but there are many such websites that are financing themselves through crowdfunding. Zvedavec.org, one of the oldest bogus portals in the region, established in 1999 by Vladimir Stwora, a Czechoslovak émigré residing in Canada, generates funding mainly through donations from readers. Stwora was sentenced in 2011 by a Prague court to six months in prison for publishing on his website an article that questioned the Holocaust. (23)

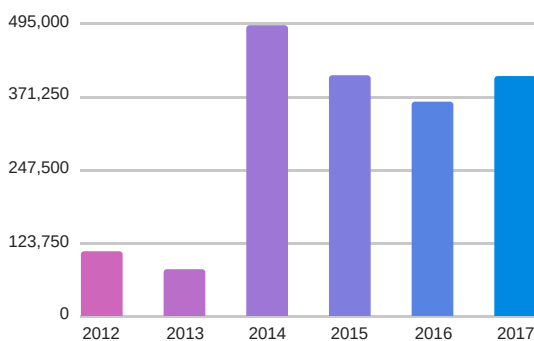
Fake news business

Key financial indicators for Sofian, 2012-2017

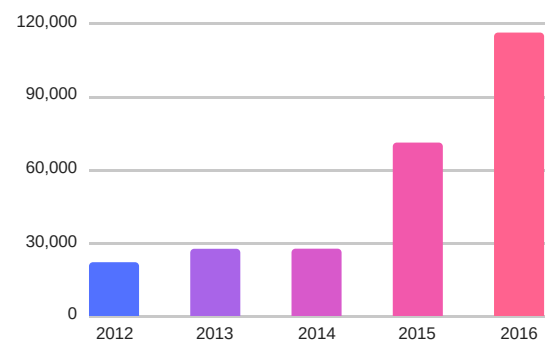
	2012	2013	2014	2015	2016	2017
Sales revenues (€)	109,278	78,931	490,747	406,292	361,761	404,927
Net profit (€)	-1	16,029	4,894	8,591	-10,075	897

Key financial indicators for Heureka Evolution, 2012-2016

Sales revenues (€)	22,001	27,497	27,538	70,947	115,959
Net profit (€)	-149	-1,705	-2,922	4,970	30,153



Sales revenues (€) for Sofian



Sales revenues (€) for Heureka Evolution

22 Ria Gehrero, "Undercover at a Slovak fake news website", NewsMavens, 15 Jan 2018, available online at <https://newsmavens.com/news/aha-moments/1041/undercover-at-a-slovak-fake-news-website>

23 "Soud pravomocně potrestal Čechokanadana za zpochybňování holokaustu" (Court definitively sentenced a Czech-Canadian man for questioning the Holocaust), 29 Sep 2011, available online at https://zpravy.idnes.cz/cechokanadan-vladimir-stwora-dostal-za-text-zpochybnujici-holokaust-definitivne-podminen-y-trest-ia9-/krimi.aspx?c=A110929_161338_krimi_zep

Some politicians now and then speak about fake news, but they have not taken any concrete steps to combat misinformation. Slovak President Andrej Kiska told the European Parliament in 2017 that the EU should be more active in fighting the Russian propaganda.⁽²⁴⁾ Journalists interviewed for this report are in agreement that, in fact, the government should not try to regulate fake news because that will give authorities carte blanche to meddle in content regulation, which is going to have a negative effect on independent reporting.

A strong response to misinformation though came from the digital advertising industry. The digital marketing agency Net Success in cooperation with Seesame, a competitor, established in 2016 the website Konspiratori.sk (meaning “conspirators” in Slovak) that keeps tabs on fake news websites targeting the Slovak market. A total of 38 organizations, mostly marketing and PR agencies, but also technology firms, support the project. The initiative is aimed at convincing advertisers, particularly large ones, to scotch their ads on dubious websites where content is “far from representing ethical and balanced news.”⁽²⁵⁾

Konspiratori.sk has a board that reviews on a regular basis websites reported via an online form by any concerned reader. The decision to include a website on the Konspiratori black list is made according to a set of rules that takes into account the score (from 1 to 10 where 10 indicates high likelihood that a website is bogus) that each board member gives to a site. Now, a list of 120 websites are featured on Konspiratori.sk as fake news sites.

The composition of the review board is diverse, consisting of people coming from a range of fields including political science, journalism, medicine and history. Publishers are also supportive of the initiative. Alexej Fulmek of the Slovak publishers association is an honorary member of the review board. According to the founders of Konspiratori.sk, the site is having growing impact. An increasing number of people are responding to their invitation to report fake news websites. Their readership is also growing thanks to a series of campaigns online aimed at dissuading advertisers from putting their money on fake news sites. In its first year, Konspiratori.sk ran a total of 17,000 online campaigns.⁽²⁶⁾ More importantly, the number of big advertisers joining the initiative has been rapidly growing. They include the oil refinery Slovnaft, carmaker Hyundai and the fashion retailer Alain Delon.⁽²⁷⁾

24 “Slovak President Kiska tells MEPs: EU needs strong leaders with passion for the cause”, *European Parliament News*, 15 Nov 2017, available online at <http://www.europarl.europa.eu/news/en/press-room/20171110IPR87823/slovak-president-kiska-eu-needs-strong-leaders-with-passion-for-the-cause>

25 “Začal sa boj proti konšpirátorským webom. Značky im odstrihnú inzerciu” (*The fight against conspiracy websites started. Brands to cut their advertising*), *Medialne.sk*, 18 Apr 2016, available online at <https://medialne.etrend.sk/marketing/zacal-sa-boj-proti-konspiratorskym-webom-znacky-im-odstrihnu-inzerciu.html>. See more about the initiative also at <https://www.konspiratori.sk/en/why-this-initiative.php>

26 “Konšpiratori.sk uviedli „Bullshit Detector“. Upozorní na pochybné weby” (*Konspiratori.sk launched Bullshit Detector. It warns about dubious sites*), *Medialne.sk*, 4 May 2017, available online at <https://medialne.etrend.sk/internet/konspiratori-sk-uviedli-bullshit-detector-upozorni-na-pochybne-weby.html>

27 “Konšpiratori.sk pridali ďalšie pochybné weby, tipy však prišli aj na Sme či Denník N” (*Konspiratori.sk added more dubious sites, but reports about Sme or DenníkN also came in*), *Medialne.sk*, 12 Jul 2016, available online at <https://medialne.etrend.sk/internet/konspiratori-sk-pridali-dalsie-pochybne-weby-tipy-vsak-prisli-aj-na-sme-ci-dennik-n.html>



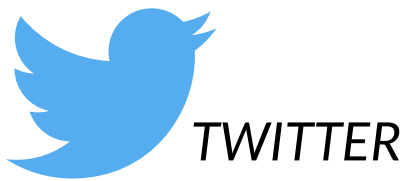
Google has a major influence in the Slovak news media through its own video-sharing platform YouTube, which is now the second most popular social network in Slovakia thanks to a rapid rise in only two years. However, the reach of news media on YouTube is very low. Only one media house in Slovakia, TV Joj, has more than 100,000 YouTube subscribers and over 414 million views. Second comes at a distance Markiza TV with less than 90,000 subscribers and 75 million viewed videos.

Most watched on YouTube

	NUMBER OF SUBSCRIBERS	TOTAL VIEWS OF UPLOADED VIDEOS
<i>Televizia Joj</i>	209,412	414,000,094
<i>Televizia Markiza</i>	89,797	74,830,833
<i>HBO CZ SK</i>	36,487	54,814,809
<i>Markiza-uputavky</i>	37,450	52,496,886
<i>RadioExpres</i>	55,178	45,363,456
<i>Fun Radio</i>	33,647	26,084,835
<i>TopSpeed.sk</i>	28,640	18,233,047
<i>Dennik N</i>	12,694	12,011,283
<i>Radio Europa 2</i>	6,116	5,746,883
<i>Aktualne.sk</i>	1,280	1,829,357

Ranking of the most popular media on YouTube in Slovakia, April 2018

Source: Socialbakers



In spite of its low reach compared to Facebook, Twitter is broadly used in the Slovak journalistic community. The most popular Slovak accounts on Twitter belong mostly to celebrities such as Peter Sagan, a Slovak bicycle racer, Marian Gaborik, an ice-hockey player, or Dominika Cibulkova, a tennis player. The most popular Slovak media outlet on Twitter is the daily Sme, which is the seventh most followed account in the country with over 161,000 followers.

The loudest tweets

	NUMBER OF FOLLOWERS
<i>Sme</i>	161,602
<i>Pravda</i>	17,195
<i>Trend</i>	15,746
<i>Hospodarske noviny</i>	14,804
<i>Radio FM</i>	14,559
<i>Dennik N</i>	14,527
<i>Ta3</i>	11,077
<i>Strategie SK</i>	6,986
<i>Novy Cas</i>	5,948
<i>Zive.sk</i>	5,143

**Ranking of the most popular media on Twitter
in Slovakia, April 2018**

Source: Socialbakers

FINANCIAL SUPPORT

Other than their potential as a distribution platform, foreign internet companies do not have any other form of direct cooperation with Slovak news media. An exception is Google, which has given funding to develop journalism projects in Slovakia through its Digital News Initiative (DNI) project. DNI has committed to spend over the course of three years a total of €150m to support creativity in digital journalism and business models development in Europe.

Launched in 2015, DNI awarded three grants in Slovakia by April 2018. Two were won by N Press, the publisher of DennikN, to develop an open-source tool for subscription business, and one went to vot.sk, a project aimed at creating a website and an app that would give readers context for news they are faced with every day. In total, Google awarded some €1.16m in Slovakia by April 2018. Most of it, nearly 96% of that, was given to N Press.



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