

Review of Slovenian media system

(with a detailed focus on four media outlets: Delo, Slovenske novice, RTV Slovenija and POP TV)

Report

Part of the basic project Political and Media Populism: “Refugee crisis” in Slovenia and Austria

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1 The development of media markets

1.1 Brief historical reflection of the general media market trends (since the 1990s)

Two main processes overlap in Slovenian media sphere in the 1990s. On the one hand a formation of a (capitalist) media *market* after the dissolution of Yugoslavian socialism and on the other hand a set of practices indicating numerous statist interventions that strongly influenced a newly constituted, re-arranged and re-regulated media field of a new independent state (Slovenia). Those two processes presuppose a few interlinked trends: proliferation of the media (actors, companies, regulation etc.), formation of a commercial broadcasting sector and extensive liberalization (of newspaper industry and emerging broadcasting market). Legislation regulating and prescribing the transformation of ownership structure (Mass Media Act adopted in 1994) postponed rampant privatization in newspaper industry, even ensuring media workers a majority of ownership shares in their media outlets¹ (Bašić Hrvatin, Kučić and Petković, 2004, p. 53). However a process of trading and exchanging ownership shares of state-owned companies from 1995 to 2006 entails a final outcome: a consolidation of ownership, where a small number of »domestic« (Slovenian) owners ensure the horizontal and vertical concentration of ownership via numerous interlinked and cross-owned companies (Bašić Hrvatin and Milosavljević, 2001; Bašić Hrvatin and Petković, 2007; Petković and Bašić Hrvatin, 2019). Legal framework and media legislation (i.e. Mass Media Act, Media Act (adopted in 2001), RTV Slovenija Act (adopted in 1990, amended in 1994)) regulating a developing broadcasting sector was mostly reactive, adopted *post festum* and it merely legalised and reaffirmed already ongoing processes of commercialised media market. Inefficient and ineffective regulatory bodies (for example Slovenian Broadcasting Council or Journalistic Honorary Arbitration) could not ensure the materialisation of public interest in the media (Bašić Hrvatin and Milosavljević, 2001, p. 14). In a year span, from 1993 to 1994, during a governmental moratorium, all relevant broadcasting (regional and national) frequencies to new commercial radio and television media outlets were distributed in a rapid and non-transparent fashion (Bašić Hrvatin and Milosavljević, 2001, p. 14).

Four daily newspapers (Delo, Večer, Dnevnik, Slovenske novice) controlled and dominated more than 90% of the daily newspaper market in the 1990s (ibid: 16) while public broadcaster Radio Televizija Slovenija (RTV) had no significant competition in the Slovenian television market (Bašić Hrvatin and Petković, 2007, pp 120–122). Entrance of commercial programmes in the mid-1990s, especially commercial television POP TV (in 1995) reoriented its programmatic direction as well as the direction of the entire Slovenian media field (Bašić Hrvatin and Milosavljević, 2001, pp. 48–56; Bašić Hrvatin and Petković, 2007, pp. 120–122).

¹ Mass Media Act dictated that ownership structure of newspapers is to be divided into two main parts: 40% of former socialised companies were to be owned by three Slovenian Funds: Kapitalski sklad pokojninskega in invalidskega zavarovanja (KAD) 10%, Slovenski odškodninski sklad (SOD) 10% and Sklad RS za razvoj, d. d. 20%. Remaining 60% of the company was stipulated to be owned by the employees of the company (their family members, former employees and the readers of the newspaper) (Bašić Hrvatin, Kučić and Petković, 2004, p. 53).

1.2 Newspaper market

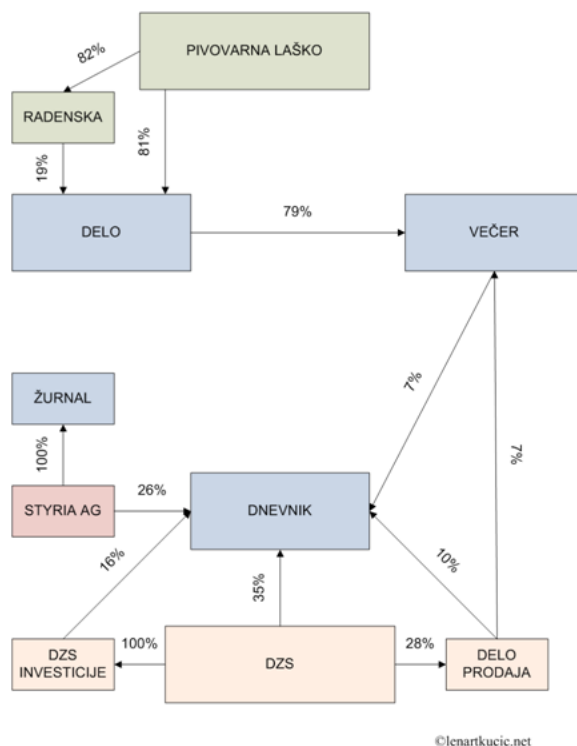
In 2019 seven daily newspapers were published in Slovenia: analysed newspapers daily Delo and tabloid Slovenske novice, sports daily Ekipa, financial daily Finance, and three regional newspapers Dnevnik, Večer and Primorske novice. Due to some structural anomalies in the Slovenian daily newspaper market (i. e. cross-ownership), market shares are difficult to calculate. Because of their historical longevity and the established control of production and distribution networks four daily newspapers (Delo, Večer, Dnevnik, Slovenske novice), as mentioned before, controlled and dominated more than 90% of the daily newspaper market during the 1990s (Bašić Hrvatin and Milosavljević, 2001, p. 16).² From 2000 to 2012 publishing house Delo d. d. had a dominant share on the daily newspaper market. For the first half of the first decade that share was estimated to be around 45% (Bašić Hrvatin and Kučić, 2005, p. 194). From 2007 to 2012 the company had 59,36% market share (Delo had 23,7% and Slovenske novice had 35,66% of daily newspaper market share) (Pregled medijske krajine v Sloveniji 2014, p. 22).³

Period from 1990 to 2007 marks the process of privatization and consolidation of ownership in newspaper industry. Boards and directors of state funds (KAD and SOD) sold newspapers' shares to selected owners in nationalised companies, close to political parties, while the employees, who were majority owners, sold their shares to the highest bidders (Bašić Hrvatin, Kučić and Petković, 2004, pp. 55–75; Bašić Hrvatin and Petković, 2007, pp. 28–52). After the consolidation, in the period from 2008 to 2014 (when Delo sold its entire 79,25% share it owned in the daily Večer) two major owners controlled the majority of daily newspapers, published in Slovenia (see picture 1; coloured blue): one of the largest brewing companies in Slovenia Pivovarna Laško (coloured green) and a publishing company Državna založba Slovenije (or DZS; coloured pink).⁴

² Three daily newspapers established after the dissolution of Yugoslavia (*Slovenec*, *Republika* and *Jutranjik*) did not manage to maintain a sustainable competition: due to high entrance costs, programmatic political partisanship, their narrow editorial policies and low readership they ceased their publishing by 1998, *Slovenec* disappeared after 5 years, *Republika* after 4 and *Jutranjik* merely one month after its first edition (Bašić Hrvatin and Kučić, 2005, p. 195).

³ From 2007 to 2012 daily newspaper Dnevnik had 18,66% of a newspaper market share, daily newspaper Večer had 16,50% and financial daily newspaper Finance had 5,47% (ibid.). Market share of Delo d. d. was even larger because of company's cross-ownership of other daily newspapers. Delo, d. d. also had a 20% ownership share in daily newspaper Večer and 6,5% ownership share in daily newspaper Dnevnik (Bašić Hrvatin and Kučić, 2005, p. 194). In 2008 Delo d. d. increased its ownership share in Večer to 79,25% (however that entire share was sold in 2014) and controlled 10% of Dnevnik via its distribution company Delo Prodaja (see picture 1).

⁴ Business oriented daily newspaper Finance was the only daily newspaper in Slovenia that was separated from the ownership structure of the duo Laško Brewery and DZS, since Finance newspaper is owned by the Swedish media group Bonnier (Kučić, 2014).



Picture 1: Cross-ownership of daily newspapers in Slovenia (source: Kučić, 2014)

The period of 2007 to 2014 could be termed »crisis« period: i. e. crisis period for media industry in general and newspaper industry specifically. Various social and economic factors indicate a severity of a crisis in the newspaper market a) decreasing circulation and reach b) decreasing incomes of daily newspapers c) decreasing advertising revenues, d) increasing unemployment. Circulation of daily newspapers decreased for 25% on average per year from 2007 to 2012 (Razvid medijev, 2014, p. 21; see below), by the end of 2012 circulation of Delo decreased by 28% (circulation dropped by 16.000 sold copies per published edition), Dnevnik by 29%, Večer by 31% and Finance by 23% (Kučić, 2014). From 2008 to 2013 advertising revenues decreased by 6% every year, from 157.783.125 € in 2008 to 117.127.481 € in 2013. In 2012 advertising revenues decreased by 13% when compared to the advertising revenues received in year 2011 (Razvid medijev, 2014, p. 25). In 2012 after years of rising unemployment in the newspaper industry the employment was 19% lower (1253 employees) than in 2007 (1544 employees) (ibid: 28).

Indebted and overburdened Delo company was sold in 2015 after 4 years of unsuccessful acquisition attempts (see below).⁵

⁵ In august 2018 publishing companies that produce, distribute and sell dailies Večer and Dnevnik stated their intentions to merge both companies (Grgič and Lipnik, 2018). Slovenian competition Protection Agency (Agencija za varstvo konkurence) officially affirmed the merger in July 2019 (Škerl Kramberger, 2019).

1.3 Overview of print media selected for the analysis: Delo and Slovenske novice

Publishing House Delo, d. o. o, a public limited liability company, is the biggest company in a consortium group that (among other companies) owns a company Slovenske novice, d. d (established in June 1991). Among 20 publications Delo, d. o. o. thus publishes both daily newspapers selected for the analysis, i. e. daily newspaper Delo (and its 4 magazine supplements) which was established in 1959 and daily tabloid Slovenske novice, first published in 1992⁶. The company operates, owns and controls its own production (biggest printing house in Slovenia Tiskarna Delo) and distribution network (biggest company that distributes and sells newspapers Prodaja Delo) (Bašić Hrvatin, Kučić and Petković, 2004, p. 76).

Transformation of TOZD⁷ Delo was concluded in April 1991 when Delo, d. o. o was registered as a socially owned independent company in Ljubljana. Ownership structure of Delo, d. o. o. was in the 1990s divided into two main parts: 40% of company were owned by three Slovenian Funds⁸ while other 60% of the company were owned by the employees of the company (their family members, former employees and the readers of the newspaper). With the second official consent of Agency for privatisation (Agencija za privatizacijo) it was transformed again and established as a public limited company Delo d. d. in 1995. In 1999 Delo d. d. was listed on the stock exchange, first media company in Slovenia to do so and a process of privatisation and consolidation of ownership of Laško Brewery (Pivovarna Laško) started (Bašić Hrvatin in Petković, 2007, pp. 28–31). Percentage of employees' ownership shares decreased dramatically: first to 36,85% (December 2000) and under 10% in 2002. Laško Brewery became the biggest single owner of the company with 24,99% in December of 2003, while companies SOD, ID Maksima, KAD and Infond ID were other major owners with a significant share of ownership (those four companies owned a combined 37,07% of the company). In May 2007 Laško Brewery and soft drink company Radenska owned 94% of Delo d. d. and in July 2007 at the shareholders meeting the company statute was changed which finally determined the removal of the company's shares from the securities market. All shares of minority owners were transferred to Pivovarna Laško, which became a sole owner of Delo (Bašić Hrvatin and Petković, 2007, p. 37). In 2008 a takeover of Publishing house Delo was finalised: new-old owner became Pivovarna Laško Group (its owner being Atka Prima, a company owned by Laško CEO Boško Šrot). Economic and financial crisis in Slovenia (2009-2013) revealed the financial machinations of Boško Šrot and speculative bubble surrounding Laško Brewery ownership, which faced a severe liquidity crisis. It was revealed that Delo, d. d. is financially indebted and economically exhausted, its profits, revenues and incomes mainly serving a repayment of enormous banking loans (Jurančič, 2013; Kučić, 2014).

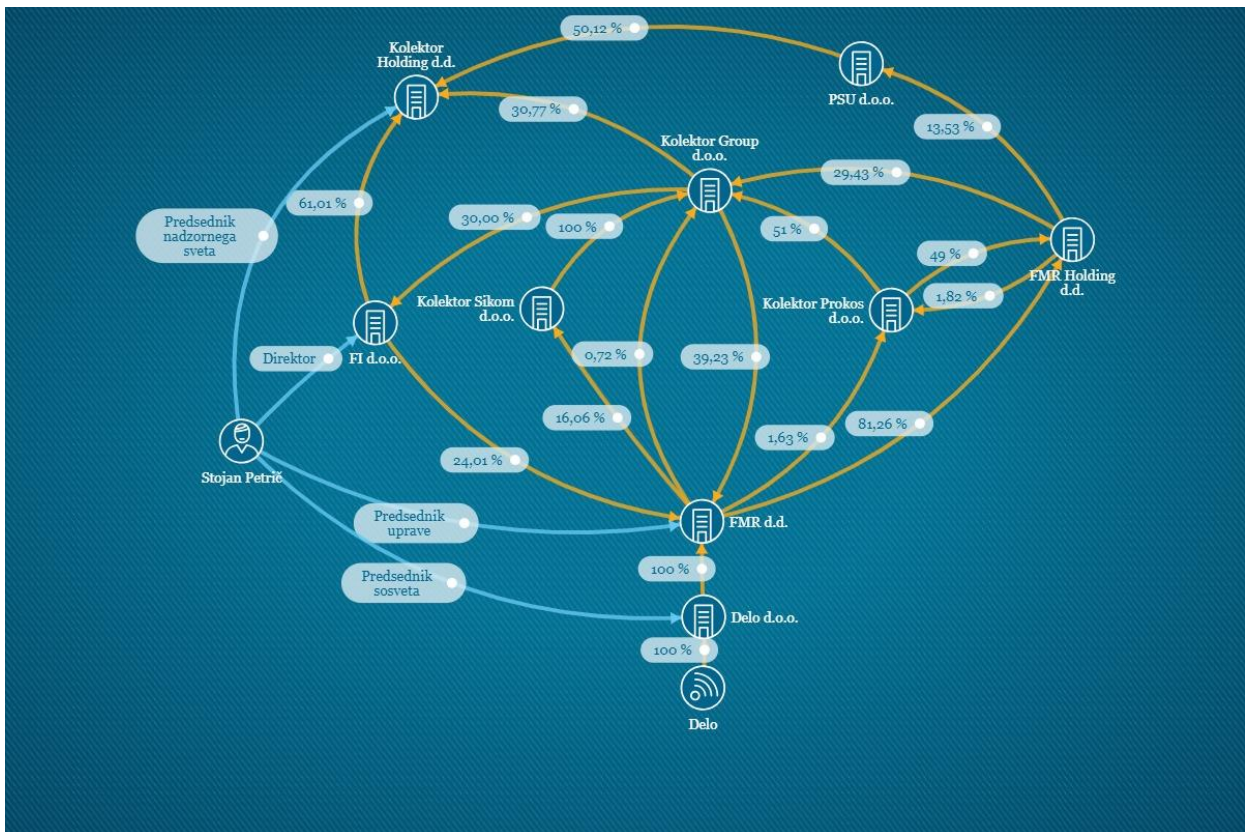
⁶ Company Delo, d. o. o. also runs both newspapers' internet portals Delo.si and Slovenskenovice.si and makes their news available online.

⁷ TOZD is a short abbreviation for Temeljna organizacija združenega dela (in English: Basic Organisation of Associated Labor), self-managing economic organisations, cooperatives and companies in socialist Yugoslavia.

⁸ Kapitalski sklad pokojninskega in invalidskega zavarovanja (KAD) 10%, Slovenski odškodninski sklad (SOD) 10% and Sklad RS za razvoj, d. d. 20%.

In 2015 Delo d. d. was finally sold to company FMR, which became its sole (100%) owner (its formal status was changed again: to Delo, d. o. o.) Present ownership of Delo Publishing House is thus intertwined in a group of companies centred around companies Kolektor group, FMR and Fond financial company (Fond finančna družba), that are intertwined in a cross ownership network (where those companies own one another). FMR is owned by FMR Holding, while the latter is owned by three companies Kolektor Sikom, Kolektor Prokos and Kolektor Group. It is thus difficult to reconstruct present ownership of Delo, d. o. o. however it is clear that ownership is centralised in a circle of a few businessmen of a single company: Kolektor, a mechanical engineering and industrial company from Slovenian town of Idrija. Central figure in the ownership structure is Stojan Petrič, former president of Kolektor and current president of supervisory board of Fond financial company (Zwitter, 2017; Zwitter, 2018; see picture 2).

Picture 2: Cross-ownership of Delo, d. o. o. from 2015 onwards (source: Zwitter, 2017)



1.3.1 Circulation and reach of daily newspapers Delo and Slovenske novice

Table 1 shows the fluctuation of circulation of two analysed daily newspapers Delo and Slovenske novice in the period from 2007 to 2017. Each row shows the average number of newspaper editions published and sold daily (6 editions per week and app. 25 editions in a month).

Table 1: average circulation of daily newspapers Delo and Slovenske novice (sold copies per published edition per year)

	Delo	Slovenske novice
2007	64.191	88.937
2008	59.116	87.843
2009	54.880	80.217
2010	51.726	78.092
2011	47.736	76.663
2012	43.474	71.433
2013	38.020	67.277
2014	34.330	64.181
2015	31.584	61.646
2016	29.099	58.211
2017	27.118	53.401

Table 2 shows the readership of two analysed daily newspapers. Data for the period ranging from 2008 to 2012 was published in Pregled medijske krajine v Sloveniji (2014, p. 26) and is based on yearly research and measurements of Slovenian Advertising Chamber. After years of declining readership Table 2 shows a significant increase in numbers for both newspapers in 2013/2014. Calculations of Slovenian Advertising Chamber show an increase in readership for both newspapers despite the decrease in the circulation⁹.

Table 2: Readership and reach of Delo and Slovenske novice

	Delo	Slovenske novice
2008	155.000	350.000
2009	134.000	318.000
2010	130.000	318.000
2011	114.000	311.000
2012	114.000	305.000
2013/2014	157.000	336.000
2015	141.000	314.000

⁹ That is the case because their methodologists updated and improved their measurements in 2013, and decided to move away from measurements of readership to calculating *projections of reach* (part of the reason being increasing digitalisation of newspaper content; new measurements consequently included various web formats and platforms as well as technical devices (mobile phones, tablets etc.) where newspaper content is presently available).

2018	153.900	306.300
2019	179.600	337.200

1.4 Overview of television stations selected for the analysis

1.4.1 Public broadcaster RTV Slovenija

Public broadcaster Radio Televizija Slovenija (RTV Slovenija) is a long standing media institution that experienced numerous material, technical, cultural and historical transformations. It started as a Radio station Ljubljana (in 1928) and transformed into Radio Television (RTV) Ljubljana in 1958 (its first broadcast on 11th October 1958 is also an official beginning of television broadcasting in Slovenia). It broadcasted regularly from that year onward as a part of Yugoslavian common broadcasting programme, which represented 30% of Yugoslavian television broadcasting. RTV Ljubljana transformed and changed its name to RTV Slovenija with the independence of Slovenia and the adoption of RTV Slovenija Act (Zakon o RTV Slovenija) in 1990. RTV Slovenija Act also determined that RTV Slovenija has a status of public social working organization (Bašić Hrvatin and Petković, 2007, p. 130) and that its founder is the Republic of Slovenia¹⁰.

As stipulated in RTV Slovenija Act RTV Slovenija broadcasts two nation-wide programmes, a (third) parliamentary programme (broadcasting parliamentary sessions), three nation-wide radio programmes, regional TV and radio programmes in Koper and Maribor, radio and TV programme for Italian and Hungarian community in Slovenia, radio and TV programmes for ethnic Roma community, radio and TV programmes for Slovenians in neighbouring countries and Slovenians living abroad, radio and TV programmes for foreign publics, its service Teletext, its website (MMC or Multimedijski center) and mobile portal (RTV Slovenija, 2019, p. 3). In order to produce, distribute and archive its content RTV Slovenija employs more than 2.200 people, it employed 1.925 full time employees at the end of 2014, 1.948 at the end of 2015, 2.128 at the end of 2016, 2.239 at the end of 2017 and 2.279 people at the end of 2018¹¹ (RTV Slovenija, 2019, p. 63). All regularly employed workers are officially classified and employed as public workers, change solidified with the implementation of the Public sector pay Act in 2002 (Bašić Hrvatin, 2002, p. 76). Working positions are classified and systematically asserted into wage grades applicable to other public institutions, local organisations, public funds, agencies and bodies in Slovenia (Bašić Hrvatin and Petković, 2007, p. 142). The majority of the financial budget intended for its production, distribution, technical, financial and archive operations, derives from legally prescribed levy (or license fee) which presents approximately 70–80% of RTV Slovenija's entire revenues (in 1999 amendments to RTV Slovenija Act stipulated that license fee is mandatory for every electric utility user (Bašić Hrvatin and

¹⁰ Its central mission and normative role as a (Slovenian) public service broadcaster is to produce and distribute programme that guarantees the widest audiences access to information (geographical universality and universal accessibility, universality of appeal, universality of payment, economic and political independence, education, catering for minorities, serving the public (interest), quality of programme instead of quantity, educational and entertainment content and managing as well as maintaining the space for and of a reasoned public debate (Bašić Hrvatin, 2002, pp. 11-13; Bašić Hrvatin and Petković, 2007, pp. 138-139).

¹¹ Number of employees at RTV remained similar across decades. For comparison: RTV Slovenija had 2.173 employees in 2005 and 2.134 in 2006 (in that year it employed 700 part-time workers) (Bašić Hrvatin and Petković, 2007, p. 142)

Milosavljević, 2001, p. 56)). Commercial revenues present around 20–25% of entire revenues of the institution (advertising represents app. 10% and other commercial revenues app. 10% of entire revenues)¹², the rest of the share is attributed to financial revenues (5%) and the smallest part of revenues comes from the national budget in the form of co-financing (1%) (see RTV Slovenija, 2015, p. 102).

1.4.2 POP TV (and Pro Plus)

Public broadcaster Radio Televizija Slovenija (RTV) had no significant competition until the mid-1990s, when its biggest competitor entered the field. In 1995 US corporation Central Media Enterprises (CME) invested¹³ 16 million (US) dollars in a Slovenian production house Pro Plus, mainly responsible for managerial, production, technical and financial aspects of a local TV broadcaster and programme POP TV. CME acquired a 58% stake of ownership share via its local branch CME Slovenija, while two Slovenian companies MMTV and Tele 59 held a 21% share each. After 18 months MMTV sold its entire share to Pro Plus for 20 million (US) dollars, bringing an ownership share of American owner CME to 78%. POP TV officially became a trademark (a marketing brand) however in reality it was a television programme of the production company Pro Plus, broadcasted on three (CME owned) regional TV stations: MMTV (Maribor), Tele 59 (Ljubljana) and TV Robin (Nova Gorica).¹⁴ After the adoption of the Media Act (Zakon o medijih) in 2001 and abolition of ownership limitations, production house Pro Plus started to broadcast television programme POP TV on frequencies of regional TV stations MM TV, Tele 59 and TV Robin (Bašić Hrvatin, 2002, p. 67; Bašić Hrvatin and Petković, 2007, pp. 120–122). While POP TV remained the most important brand and trademark brand of Pro Plus, production company later diversified its media production and solidified its dominant position in the media market: from 2002 Pro Plus is a sole owner of the second biggest commercial television in Slovenia Kanal A (established in 1989), a set of popular website portals, the most popular and visited website in Slovenia 24ur.com, as well as zadovoljna.si and vizita.si who rank among 10 most visited websites in Slovenia, and in September 2011 company introduced its video-on demand service Voyo as well as its exclusive pay-TV package (offering 6-programmes) named Pop Non Stop (Milosavljević, 2012, p. 17).

¹² License fee presented 72% share of entire revenues of RTV Slovenija while commercial revenues presented 23,7% share of entire revenues in 2014, in 2015 license fee presented 73,4% share of revenues and commercial revenues 21,8%, in 2016 license fee presented 79,4% and commercial revenues 20,3% of entire revenues, and in 2017 license fees presented 76,8 % share and commercial revenues 18,9% share of entire revenues. In 2018 license fee presented 76,3% share of revenues and commercial revenues presented 19,6% of entire revenues (RTV Slovenija, 2019, p. 63).

¹³ Due to legal restrictions it was formally a loan. At that time CME owned 8 television stations in five Central and Eastern European countries: Croatia (Nova TV), Romania (PRO TV and Acasa), Slovakia (Markiza TV) and Ukraine (Studio 1+1). In 2019 CME owned 36 TV channels across Central and Eastern Europe, reaching approximately 50 million viewers (Šter, 2017, p. 12).

¹⁴ Pro Plus became a 33% owner of all three television. Mass Media Act of 1994 stipulated that a single owner, whether Slovenian national or foreign citizen, an individual or a legal entity, could not own more than 33% of a broadcasting company. CME was allowed to hold 80% share of Pro Plus in 1996, since the stipulation did not apply for production companies and consequently Tele 59, MMTV and TV Robin broadcast Pro Plus's programmes produced under POP TV's trademark (Bašić Hrvatin, 2002, p. 67).

Table 3 (below) shows slightly higher ratings for RTV Slovenija 1 than its competitor, commercial POP TV in the period from 2013 to 2018.

Table 3: Ratings for period 2013-2018 (POP TV and two TV Slovenija programmes)

	POP TV	RTV SLO 1	RTV SLO 2
2013	3,00%	3,00%	1,40%
2014	2,70%	2,80%	1,60%
2015	2,60%	2,70%	1,30%
2016	2,40%	2,70%	1,50% ¹⁵
2017/2018	2,30%	2,80%	1,50% ¹⁶

Table 4 shows gradually declining audience shares for both TV broadcasters over the years, for POP TV as well as for programmes broadcasted on two RTV Slovenija's channels TVSLO 1 and TVSLO 2 (numbers in table 4 represent the share attracted by a channel as a proportion of the total audience watching television).

Table 4: Audience share 2003, 2009-2018 (POP TV and two TV Slovenija programmes)

	POP TV	RTV SLO 1	RTV SLO 2
2003 ¹⁷	29,70%	25,40%	9,30%
2009	24,37%	20,71%	8,09%
2010	23,58%	19,08%	9,28%
2011	24,36%	17,05%	6,21%
2012 ¹⁸	23,33%	17,26%	7,22%
2013	23,30%	17,00%	8,00%
2014	20,20%	16,00%	9,00%
2015	19,50%	14,00%	7,00%
2016	21,30% ¹⁹	14,00%	8,00% ²⁰
2017/2018	21,30% ²¹	15,00%	8,00% ²²

¹⁵ Source: RTV Slovenija 2016 (2017, p. 52).

¹⁶ Source: RTV Slovenija 2018 (2019, p. 33).

¹⁷ Source: Bašić Hrvatinić and Kučić (2005, p. 233).

¹⁸ Source: Pregled medijske krajine (2014, p. 52) cites numbers for period from 2009-2012.

¹⁹ Source: CME (2016) for years 2015 and 2016. Extracted from AGB Nielsen Media Research (target age group 18–54).

²⁰ RTV Slovenija 2016 (2017, p. 53) extracted from AGB Nielsen Media Research (panel sample of 450 households, viewers older than 4 years, timeframe from 7.00 am until 23.00 pm).

²¹ Source: CME (2018).

²² Source: RTV Slovenija (2019, p. 33).

2 Political parallelism

To insure the influence and democratic will of the public(s), RTV Slovenia Act introduced an independent management body that supervises the operation of RTV Slovenia, its public service tasks and is accountable to the public(s). Political and economic actors continuously exerted its influence on management and overseeing bodies of RTV Slovenija. RTV Council (Svet RTV) later renamed into Programming Council (Programski svet), is from its inception constituted by the representatives of civil society organisations who represent the citizens, overview the independence of the RTV and are supposed to secure its independence from political influences (Bašić Hrvatin, 2002, p. 24, 27). RTV Slovenija Act (adopted in 1994) determined that 15 of 25 members of the council are appointed by various civil society organisations, associations and universities. RTV Council is susceptible to the influence of governmental and party coalitions, especially from 2005 onward, when Slovenian parliament appoints 21 of 29 members of the Programming (RTV) council (Programski svet RTV): 5 of those 21 are representatives of political parties and other 16 are representatives of viewers, listeners and organisations of civil society and universities proposed by the publics and appointed (i. e. approved) by the parliament (Bašić Hrvatin and Petković, 2007, p. 133). Authority that overviews RTV's financial operations is termed nadzorni odbor (or supervising board). It was constituted by 7 members from 1994 to 2005: 5 were appointed by the parliament (2 out of those 5 were appointed by the government from 2001 onward) and 2 members were appointed by the employees (ibid: 135).

RTV Slovenija Act adopted by the right-wing government in the parliament in 2005 was the most systematic and rigorous (and successful) attempt to transform Slovenian public broadcaster and ensure political influence of political parties in the RTV, its governing bodies and its editorial structure. Beside the transformation of RTV Council composition, right-wing government amended the RTV Slovenija Act and also determined that general manager of RTV had the authority to intervene and decide on programming content that was approved by the RTV Council - stipulation absent from the Act from 1994 until 2005 (Bašić Hrvatin and Petković, 2007, p. 133). Supervising board (nadzorni odbor) was expanded to 11 members: 5 are appointed by the parliament, 4 are appointed by the government and 2 are appointed by employees (ibid: 135).

Newspapers were initially socialised (workers were majority owners) and nationalised (state funds were minority owners) in Slovenia and then state significantly intervened in the processes of privatization of newspapers. Newspapers were privatized when boards and directors of state funds (KAD and SOD) sold newspapers' shares to selected owners in nationalised companies, close to political parties. Local radio stations and newspapers were sold to functionaries and municipal authorities (Hrvatin and Petković, 2007, pp. 21–27). Government of Slovenia became a single owner of Slovenian press agency (Slovenska tiskovna agencija)²³ in 1994 (ibid: 27).

²³ In May 2007 Alenka Paulin, former P.R. advisor in P. M.'s office, was appointed acting general director of the agency (Hrvatin and Petković, 2007, p. 61).

Politicians' (or state) influence in newspapers was exerted via selection and appointment of supervisory boards, managerial boards as well as editors and editorial boards. Changes of legislation and selection of managerial and editorial boards consequentially led to significant formal and informal pressures on journalistic autonomy: changing of media statutes, changing of programmatic direction of newspapers, ignoring journalistic collectives' opinions and decisions on editors, ignoring journalists' rights to conscientious objections etc. (Bašić Hrvatin and Petković, 2007, pp. 53–65; Kučić, 2014).²⁴

3 Journalistic professionalism

From 1990s journalists and media workers in Slovenia established few institutions and implemented numerous mechanisms to formally ensure their autonomy, secure the implementation of professional norms and guarantee the public service orientation of their media institutions.

Professional organisation with the longest historical and institutional tradition in Slovenia (its history begins in 1905) is Slovene Association of Journalists (Društvo novinarjev Slovenije). It was transformed internally before the end of socialism and in 1991 established a strong link with the Slovenian Union of Journalists (Sindikat novinarjev Slovenije), which was established in 1990, many journalists sharing membership in both institutions (Bervar, 2008). Next year, in November 1991, Slovene Association of Journalists adopted its Code of Journalists of Slovenia (Kodeks novinarjev Republike Slovenije) and in December 1991 Slovenian Union of Journalists signed a collective bargaining agreement with employers in media industry (this was first collective bargaining agreement in Slovenia) (Petković and Bašić Hrvatin, 2019, p. 190). Slovene Association of Journalists and Slovenian Union of Journalists established an honorary court of arbitration in 1997. Novinarsko častno razsodišče, self-regulatory body that examines and assesses official complaints pointing to violations and breaches of the Code of Journalists of Slovenia has 11 members (5 appointed by the Slovene Association of Journalists, 4 by the Slovenian Union of Journalists, 2 members represent the public) (see Bervar, 2010). Second association of journalists in Slovenia was established in 2000. Journalists and media workers linked to Catholic Church established an Association of Catholic Journalists (Društvo katoliških novinarjev). Second largest association of journalists Association of journalists and

²⁴ See Nahtigal (2006) for important and significant cadre changes in Slovenian newspapers from 1990 to 2006. Danilo Slivnik, president of Delo, d. d. nominated Peter Jančič as a senior editor of newspaper Delo in February 2006, both were vocal proponents of right-wing government of Janez Janša (2004-2008). Active of employees rejected his nomination with 125 votes to 17. Supervisory board confirmed his nomination and appointed Jančič as a new editor-in-chief, he resigned from the post after a year (Bašić Hrvatin and Petković, 2007, p. 60). Delo's correspondents from Vienna (Matija Grah) and Zagreb (Rok Kajzer) were re-positioned back to Ljubljana, after the complaints about their work vocalised by Slovenian Minister for foreign affairs, regular columnist of the newspaper at that time (ibid: 62). Jurij Giacomelli (president) and Romana Dobnikar Šeruga (senior editor) were "selected" and appointed to Delo by Prime Minister Borut Pahor (2008-2011) in 2009 (Kučić, 2014), they both resigned in 2012.

publicists (Združenje novinarjev in publicistov), with strong links to right-wing political parties in Slovenia was established in 2008 (Bervar, 2008).²⁵

Mass Media Act (1994) that stipulated that ownership structure of media companies (mainly newspapers) were to be owned by the majority of employees (60%) was according to Brankica Petković and Sandra Bašić Hrvatin an enormous (and eventually eroded) potential to achieve structural security of status and guarantee socio-economic rights of journalists and media workers in Slovenia (Petković and Bašić Hrvatin, 2019, p. 190).

4 State intervention

State intervened in the legal framework regulating the ownership of commercial media and RTV Slovenija. Ownership limitations were liberalised when parliamentarians reregulated the legislature in 2001. During first years of Slovenian independence Mass Media Act of 1994 stipulated that a single owner, whether Slovenian national or foreign citizen, an individual or a legal entity, could not own more than 33% of a broadcasting company. After the adoption of the Media Act (Zakon o medijih) in 2001 those ownership limitations were abolished (which as we have shown, significantly influenced the position of Pro Plus and its brand POP TV). From 1994 until 2001 (according to Mass Media Act adopted in 1994) legislation explicitly prohibited political parties and religious groups to operate, own or manage radio and television programmes in Slovenia (Hrvatin in Petković, 2007, pp. 118–119). Media Act (Zakon o medijih) in 2001 eliminated those barriers and removed the prohibition.

Slovenian public broadcaster's status is regulated systemically: with the aforementioned RTV Slovenija Act which had been amended six times from 1990 to 2005, when right-wing government led by Prime Minister Janez Janša (SDS) introduced and implemented an Act that (with some modifications and amendments) remains in place today. Slovenian parliamentarians regulated the position, organisation and operation of RTV Slovenija via other adopted legal acts as well: adopted Mass Media Act (1994) and Mass Media Act (adopted in 2001 and amended in 2006) among many others.

Both adopted RTV Slovenija Acts (the one adopted in 1994 and in 2005) determined that Slovenian government determines the sum of RTV license fee. Proposals from various public bodies, journalistic professional associations and agencies that RTV license fee is automatically adjusted with inflation are continuously rejected. Some researchers thus estimated that because of the refusal to adjust the fee to inflation RTV Slovenija lost approximately 65 million euros between 1999 and 2006 (Bašić Hrvatin and Petković, 2007, p. 137). RTV Slovenija estimates that it lost 4,5 million euros per year from 2012 to 2017 because the license fee (determined by

²⁵ There are some smaller thematically specific associations in Slovenia as well, for example Association of journalists-sportsmen (Društvo novinarjev-športnikov) and Association of sports journalists (Združenje športnih novinarjev) etc. (Bervar, 2008).

the government in 2012 and monthly fee priced at 12,75 eur per month) was not adjusted for inflation.²⁶

As mentioned in point 2 b) political and economic actors exerted its continuous influence on management and overseeing bodies of RTV Slovenija, however they managed to systematically weaken its position in the media market as well. State-owned telecommunication company Telekom Slovenija competes against the public broadcaster in the media market from 2012 onwards as a part-owner of a television broadcaster Planet TV. TS MEDIA (company owned by Telekom Slovenia) and Greek company Antenna Group each share a 50% ownership stake in Planet TV (Petković and Bašić Hrvatin, 2019, p. 187).

5 Media consumption

According to Eurobarometer estimations (2016, p. 13) 32% of Slovenian citizens read the written press every day (EU average was 29%) in 2016, 30% read it once, two or three times a week (EU average 32%), 23% read it once, two or three times a month (EU average 18%) while 15% of local population never read the written press (below EU average at 20%). In 2017 33% of Slovenian citizens read the written press every day (EU average was 28%), 31% read it once, two or three times a week (EU average 32%), 23% read it once, two or three times a month (EU average 18%) while 15% of local population never read the written press (below EU average at 20%) (Eurobarometer, 2017, p. 12). 61% of citizens used Internet every day or almost every day - an EU average - in 2016 (Eurobarometer, 2016, p. 17), while 64% used it in 2017 (Eurobarometer, 2017, p. 15). 37% of citizens used social networks every day or almost every day, also EU average (38%) in 2016 (Eurobarometer, 2016, p. 19), that percentage increased to 39% in 2017 (Eurobarometer, 2017, p. 18).²⁷

According to Eurobarometer (2017, pp. 5–7) 74% of Slovenian citizens watched television (on a television set) every day or almost every day, slightly below EU average (81%), 18% watched it two or three times a week, slightly above EU average (13%), only 9% of citizens watched television over the Internet every day and another 12% watched it over the Internet once, two or three times a week.²⁸ Average television watching time was estimated to be 181 minutes (for men) and 206 minutes (for women) in 2012 and 196 minutes (for men) and 224 minutes (for women) in 2016 according to AGB Nielsen (AGB Nielsen in Jontes, 2019, p. 129). According to Nielsen 63,8% of households in Slovenia own or possess one TV set, 26,4% of households possess two and 6,8% possess three. 3% of households in Slovenia do not have a television set (Nielsen, 2019). According to Nielsen average TV watching time in Slovenia was estimated to

²⁶ Since the sum of license fee is not adjusted for inflation and right-wing government did not increase the price of license fee during its term (2004–2008), share of fee revenues in the entire revenue pie decreased from 70,7% (in 2004) to 66,5% (in 2006), and commercial revenues constituted almost a third of RTV Slovenija's revenues.

²⁷ We overviewed the report for media use in 2016 and 2017, however numbers for Slovenia were almost identical; for year 2017 see Eurobarometer (2017).

²⁸ For year 2016 see Eurobarometer (2016, pp. 5–7), numbers for that year are similar, practically identical.

amount to 306 minutes in December 2018 (share of television viewership is highest in winter months, app. 24%). In average viewers devoted 88 minutes to TV Slovenija 1 programme and 64 minutes on average to TV Slovenija 2 programme (RTV Slovenija, 2019, p. 33).

52% of Slovenian citizens tended to trust the media in 2016 (59% was EU average), a 12% increase (biggest in the EU) from autumn 2015. Surveys registered that trust in media institutions had fallen by ten points between autumn 2014 and autumn 2015 (Eurobarometer 2016, p. 25). 41% of citizens tended to trust the written press (EU average was 46%), while 37% trusted the Internet (36% was EU average) and 22% online social networks, an EU average (ibid: 27–29). 53% of Slovenian citizens tended to trust the radio in 2017 (43% tended not to trust it), 50% tended to trust television (47% tended not to trust it), 41% the written press (55% tended not to trust it), 38% trusted the Internet (45% tended not to trust it) and 22% online social networks (57% tended not to trust it) (Eurobarometer, 2017, pp. 22–28). 43% of citizens had low or no trust in the media, while 23% had high trust in the media in Slovenia in 2017 (ibid: 29).

6 Conclusion

Slovenian state continued to exert its influence as an important player in the media field after the independence in 1991. Privatised newspapers, interlocked in cross-ownership relations, gradually shifted editorial and managerial influence and decision-making from employees to the economic actors in state-owned companies with close links to political field. For two decades successive political (governmental and party) coalitions exerted its influence on editorial composition of Slovenian biggest daily newspaper Delo, with significant ownership shares in its “competitors”, Slovenske novice, Večer and Dnevnik (Kučić, 2014). Crisis of newspaper industry helped eliminate Delo’s ownership share in its (daily) newspaper competition, however daily newspaper industry as a whole experienced continuous decline in circulation, readership and advertising revenues, with parallel processes of digitalisation and convergence of newsrooms (Vobič, 2011; Vobič, 2015).

Political and economic actors continuously exerted its influence on management and overseeing bodies of RTV Slovenija (RTV Council, supervisory board and general managers) and amendments that legislated its status and operative capacities. Corporation CME and its company Slovenian production house Pro Plus continuously outmanoeuvred Slovenian legislation (on ownership) and followed aggressive competitive practices (“advertising wars, cheap commercial imported content etc.) to establish and ensure its dominant position in the media market. Average television watching time in Slovenia remains high (196 minutes (for men) and 224 minutes (for women) in 2016), however both analysed broadcasters (POP TV as well as two RTV Slovenija) are challenged by gradually declining audience shares over the years (see Table 4). Trust in the media remains below EU average in Slovenia, 52% of Slovenian citizens tended to trust the media in 2016, while 43% of citizens had low or no trust in the media and only 23% of citizens affirmed their high trust in the media in Slovenia in 2017.

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