

Slovenian Media Landscape and Regulation

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Slovenia basics

2 million people
on 20.273 km²

2 official minorities:
Italian and Hungarian

EU member since 2004

Eurozone since 2007

diversified territory



Media market

Advertising market in 2011:

180 – 220 million € (estimated net value)



1 PSB, diversified offer of national and local TVs, radios

1 strong commercial TV player



1 strong commercial radio network



8 daily newspapers (6 national, 1 regional, 1 sports) **DELO**

numerous local or specialized broadcasters

TV market

700.000 TV households, most of them digital

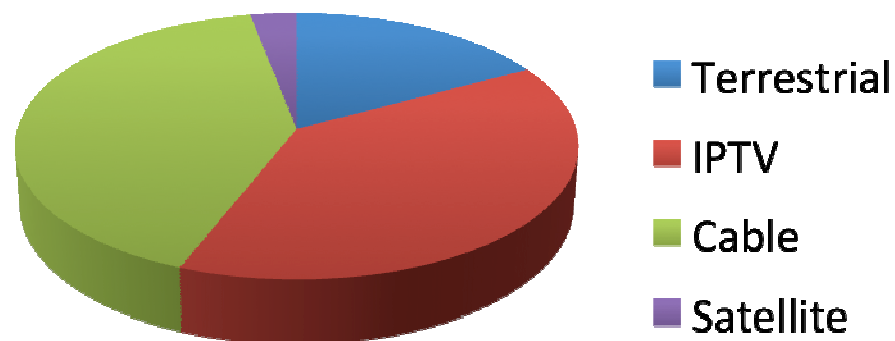
DSO completed end of 2010, further shrinking of DTT expected

8 FTA channels on 1 national mux
(5 national, 3 regional)

TV advertising market
dominated by 1 player

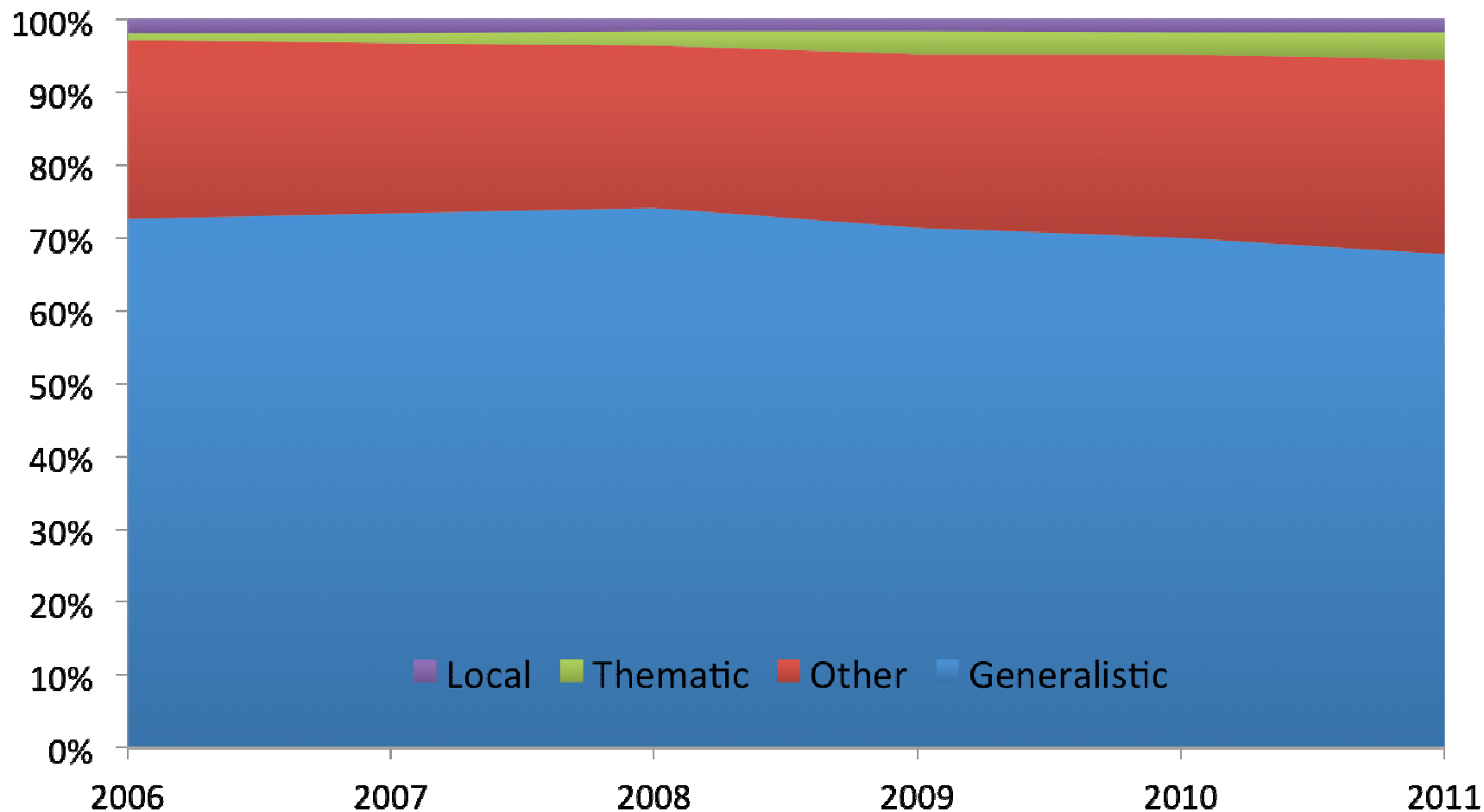
State owned telecom
launching generalist
TV channel in autumn

TV Reception



Source: AGB Nielsen, spring 2011

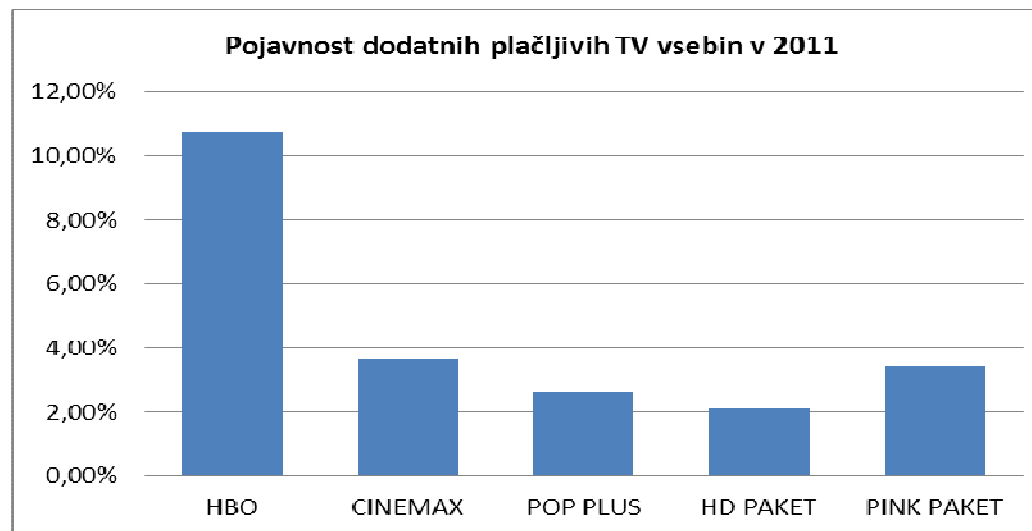
Viewership shares



Source: AGB Nielsen, 2012

On-demand and Pay TV

Pay TV shares



Source: AGB Nielsen, 2011

VOD on cable, IPTV and web based Voyo
(supported by Phillips and Samsung TV sets)

low presence of PVRs

growth of online viewing

93 radio stations

7 public, 6 local, 10 regional, 1 student

listening to commercial radio since 2007 constantly growing

listening to public programs slightly decreasing

96% of listeners use classical radio set or car radio,

increasing share of listening via the Internet and mobile phones

problems:

less advertising money, particularly

for local advertising,

uncontrolled resale of radio frequencies,

deadlock in digitization of radio



Converged authority since 2001

75 staff members

Fields of regulation

Electronic Communications

- Market regulation (SMP, USO)

- Spectrum Managing & Numbering

- Dispute resolution

- Network security & integrity

- Compliance

Electronic Media (AVMS + Radio)

- Licensing

- Monitoring

- Local „PSBs“

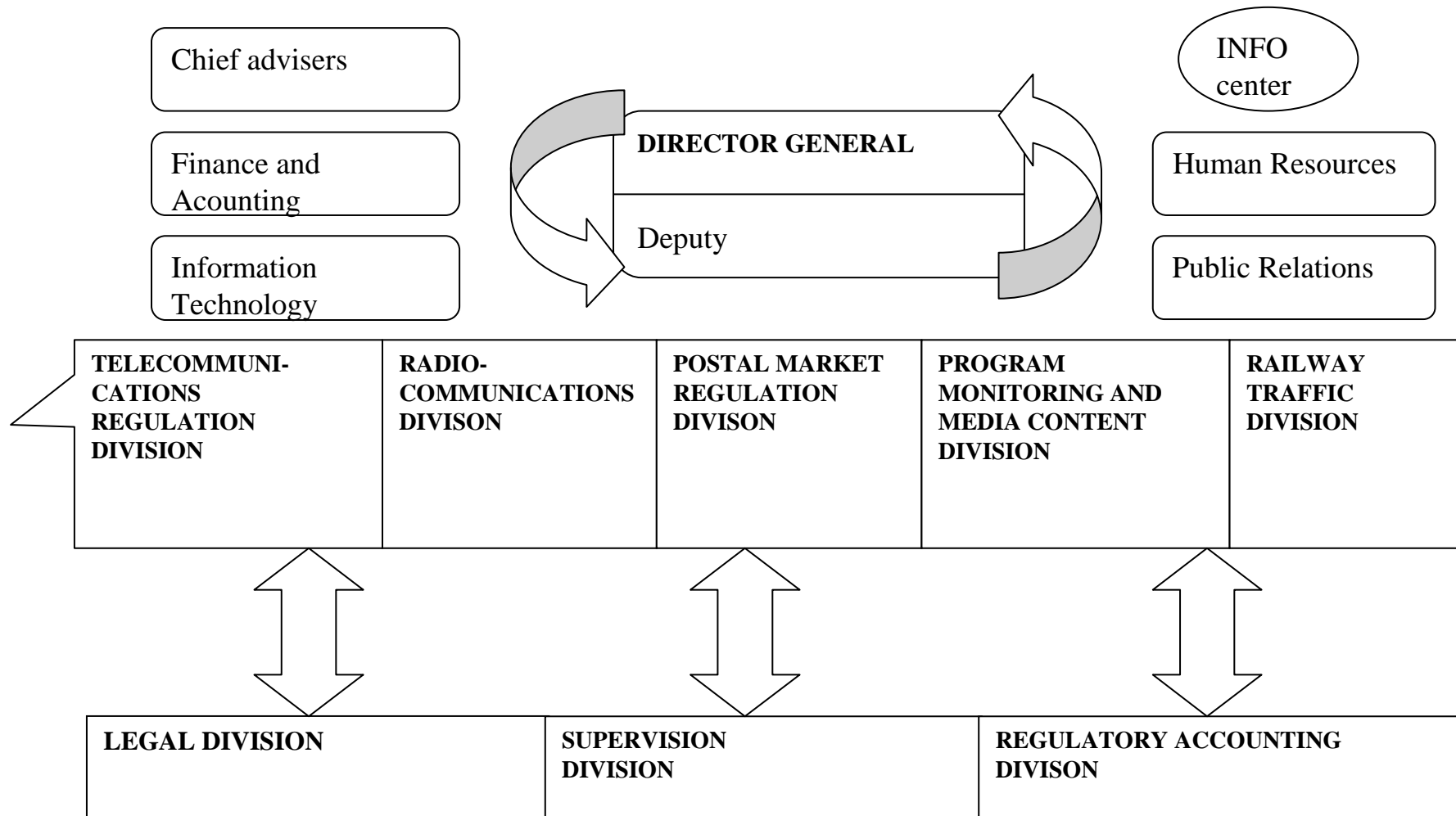
Postal services (market access, USO)

Railway traffic (appeal body for Railway Agency, monitoring of competition development in the market)

Regulation



Organization



Funding

Fees collected from stakeholders

EC operators/service providers
(under general authorisation, EC Act)

Frequency license holders (EC Act)

Numbering license holders (EC Act)

Postal services providers (Postal Services Act)

TV and VOD providers (AVMS Act)
no financial resources, the mechanism not fully implemented yet

Transfer from State budget for Railway Regulation
(only a temporary solution)



Current projects

Implementation of AVMSD
(drafting secondary legislation,
adapting the monitoring
system)

National Broadcasting Strategy

Digital Dividend Policy Paper

Introduction of LTE



Thank you for your attention!