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Structural Media Pluralism

## Between a Rock and a Hard Place? Market Concentration, Local Ownership and Media Autonomy in the Czech Republic

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This article examines, by means of a case study, recent trends in media ownership in the Czech Republic and their impact on media pluralism and journalistic autonomy. The analysis focuses mainly on the ever-intensifying processes of ownership concentration and conglomeration, as well as on the presence and rising significance of local media owners, many of whom belong to the Czech business and industry elites. In this context, the article investigates both the allegations and the growing evidence of political and business instrumentalization of the media in the hands of these "industry tycoons." The author argues that this kind of coupling of business, media, and political sectors constitutes an ever more prominent feature of the Czech media system, and can be regarded as an indicator of its gradual "Italianization." Contributing to the debates about the risks of concentrating foreign ownership in the post-transformation media markets, this case study also demonstrates that the increasing power of local media owners certainly does not represent a trouble-free alternative either.

*Motto:*

*There can be no better prerequisites for an owner of Czech newspapers and magazines than a Czech origin and an American relationship towards the media. (Michal Klíma, director general of Economia, following the selling of the company to Zdeněk Bakala in August 2008)*

In the summer of 2008, the Czech news media had been closely monitoring and commenting on what was regarded as one of the most important events on the national media scene in a couple of years—the selling of the publishing house Economia, which had belonged to the German company Verlagsgruppe Handelsblatt since 1992. The largest publisher of economic and business journals in the

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Czech Republic, including *Hospodářské noviny* (financial daily) and *Ekonom* (financial weekly), was an object of interest of several investors, both local and international. However, by far the closest attention was devoted by the media to the proclaimed interest of the Czech publishing house *Mladá fronta*, which has a rather non-transparent ownership structure and which some believe is controlled by Russian capital. This alleged (but never confirmed) "Russian link" also dominated the media reporting about the final stages of the competition for *Economia*, with the reporters and commentators manifestly or latently raising concerns about the potential consequences of such an alliance for *Economia* and the quality of the Czech print media in general. When *Economia* was eventually sold to the Czech coal baron and multi-billionaire Zdeněk Bakala (for an estimated price of €100 million), many welcomed it as the best possible outcome of the competition, safeguarding the principles of ownership transparency and editorial independence, which the successful businessman, having studied in the United States and internalized there the values of press freedom, will undoubtedly never undermine. Nevertheless, some commentators have raised questions concerning precisely this issue, pointing both to the silent disappearance of certain business-related topics from the political weekly *Respect*, following its acquisition by Bakala in 2006, as well as to Bakala's obvious interest in pushing a certain political agenda and influencing the Czech political scene. Whatever the true motives and aims behind this transaction were, this case is in many ways illustrative of recent trends within the Czech media toward an increasing amount of cross-media ownership and the simultaneous growth of multimedia enterprises owned by local business tycoons, both of which pose serious risks for media pluralism and the functions of media in a democratic society.

The aim of this article is to examine both of these processes more closely and analyze the Czech media market in a broader context of the theoretical debates about the impact of ownership concentration and internationalization on media pluralism and performance, as well as in relation to the issues and trends in media ownership in other European countries. Particularly, I will focus on the phenomenon of the so-called "media moguls" and the related problem of media *instrumentalization*,<sup>1</sup> which is usually associated with the concentration of communication power into the hands of a single owner. Despite a relatively high popularity of this topic among both the critical scholars and the general public, and despite general awareness of the existence of this problem in the post-communist countries of Central and Eastern Europe, it has so far escaped systematic research attention within this region. The following case study should therefore be regarded as a first probe into this rather new territory, hopefully opening space for further empirical investigations.

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<sup>1</sup> In this paper, media instrumentalization is understood as a form of control exercised over the media in order to achieve particular economic and/or political goals. Hallin and Mancini (2004) use the concept of instrumentalization to describe "the control of the media by outside actors—parties, politicians, social groups, or economic actors seeking political influence, who use them to intervene in the world of politics" (p. 37). However, the authors quickly add that the media "can also be 'instrumentalized' for commercial purposes," opening the door for a broader understanding of this concept, which was also adopted in this study.

### **Media Ownership, Market Concentration and Democracy**

The question of "who owns the media" has always occupied a prominent place in discussions concerning journalistic freedom, media performance and their social roles. As Dennis McQuail reminds, the argument about a causal link between media ownership and the nature of their operation is not necessarily grounded in Marxist philosophy but can be regarded a "commonsense axiom" summarized in Herbert Altschull's "second law of journalism" stating that "the contents of the media always reflect interests of those who finance them" (McQuail, 2000, p. 198). Even if the will of the owners is only one factor determining the content and performance of the media (Gross, 2004), the issue of media ownership has always been considered of crucial importance for a democratic society. Media ownership usually has direct implications for the character and extent of media pluralism, which is largely believed to be an essential condition for the functioning of a democratic public sphere. As Gillian Doyle puts it: "Pluralism is generally associated with diversity in the media; the presence of a number of different and independent voices, and of differing political opinions and representations of culture within the media" (2002, p. 11),<sup>2</sup> which most scholars translate into a formula that "a prerequisite for the diversity of content is a variety of owners, meaning that media pluralism can be only guaranteed by plural ownership" (Hrvatín & Petković, 2004, p. 12). Indeed, the relationship between media ownership and democracy has perhaps more often been analyzed in terms of the dangers resulting from ownership concentration, rather than from the perspective of the benefits of ownership diversification. According to McQuail (2000, pp. 200–201), media concentration raises three kinds of public policy issues: one relates to pricing (the more monopolistic the market, the greater the power of media owners to set prices); another one to competitors (who might be driven out more easily as a result of increasing production costs), and yet another to products (the question of adequate quality and choice for the audience). The last one is perhaps most often discussed among media theorists and critical commentators, pointing to a series of democratic risks stemming from concentrated media ownership. For Edwin Baker (2007), there are three "main reasons for opposing ownership concentration," namely a general need for a more democratic distribution of communicative power (corresponding to a republican ideal of egalitarian political participation); preventing a drift away from quality journalism and toward the "bottom line," which "tends to be most extreme among larger conglomerates" (Baker, 2007, p. 33), and of course the notorious reason to avoid what Baker terms the "Berlusconi effect"—the possibility of an individual creating his own media "empire" and exercising enormous and largely unchecked political power. On the whole, concentration of media ownership jeopardizes the media's control function of safeguarding basic principles of democracy:

Concentrated communicative power creates demagogic dangers for a democracy, reduces the number of owners who can choose to engage in watchdog roles, may reduce the variety in perspectives among the smaller group of people who hold ultimate power

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<sup>2</sup> Pluralism has usually been conceptualized as "external pluralism" (diversity of sources, i.e., ownership) and "internal pluralism" (diversity of content). For example, Edwin Baker (2007) argues for the superiority of external pluralism (content does not have to be diverse in order for the democracy to function), but most scholars advocate the importance of both, as does the Council of Europe (Doyle, 2002). For a more detailed theoretical elaboration of media pluralism, see Klimkiewicz (2005, 2009).

to choose specific (varying) watchdog projects, and multiplies the probable conflicts of interest that can muzzle these watchdogs. (Baker, 2007, pp. 120–121)

As the above quoted example of Italian Prime Minister Silvio Berlusconi suggests, many of these concerns have certainly been raised—or intensified—in response to recent developments and trends in media markets in the Western world, which have in the past two decades been characterized by increasing ownership concentration (of all three main types—horizontal, vertical, and diagonal)<sup>3</sup> as well as internationalization (McChesney, 1999; Bagdikian, 2000; Hesmondhalgh, 2002; Castells, 2009). Although processes of media concentration can be observed throughout the history of mass communication, particularly in the broadcasting and film industries, the revolution in communication technologies (especially the introduction of cable and satellite broadcasting, and digitization of information) as well as a paradigmatic shift in media policies leading to massive liberalization and deregulation of telecommunication sectors in the U.S. and Western Europe since the 1980s have created favorable conditions for an unprecedented wave of mergers, acquisitions, and international expansion of media and communication corporations (Castells, 2009). At present, the international media trade is largely dominated by a handful of multimedia conglomerates (most of which are U.S.-based), particularly Time Warner, News Corporation, Bertelsmann, NBC Universal, Viacom, CBS, and Sony, which some analysts term “global media oligopoly” (Herman & McChesney, 1997) or “the core of global media network” (Castells, 2009). Media corporations based in Europe have in the same time experienced significant growth and concentration as well, with the “big” companies like Lagardère Media, Axel Springer Verlag, Central European Media Enterprise (CME), Ringier, and Westdeutsche Allgemeine Zeitung (WAZ) getting ever “bigger” through one or more types of ownership concentration mentioned above, raising questions about the state and preservation of media diversity and pluralism in Europe by academics as well as professional organizations (Williams, 2002; European Federation of Journalists, 2005).

### **CEE Media Systems Transformation and the Impact of Foreign Ownership**

The processes of media internationalization and concentration have quickly spilled over to the post-communist countries of Central and Eastern Europe, which have since 1989 undergone a complex and often complicated transition from authoritarian regimes and state-controlled economies toward democratic and party-pluralistic political system, civil society and market economy. As part of these systemic changes, the media landscapes of these countries have also experienced substantial transformation, which included privatization of previously state- or party-owned/controlled media, introduction of a dual system of broadcasting, and the opening of the media market to foreign investors (Jakubowicz, 2007). All of these processes, together forming what David Hesmondhalgh (2002) has

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<sup>3</sup> As it is commonly understood, horizontal concentration (or integration) refers to the mergers between direct competitors within one industry sector; vertical concentration describes the process of expansion into various stages of the “supply chain” (i.e., a publishing company acquiring a print distribution company), and diagonal concentration “when firms diversify into new business areas” outside of their own sector (Doyle, 2002, p. 5).

termed a "third wave of marketization" of the media and telecommunication sectors across the world, have resulted in the massive inflow of both foreign audiovisual content and capital investment.

While the audiovisual imports were primarily of U.S. origin, the first Western media companies to explore and "colonize" the newly opened Eastern European markets were mostly newspaper and magazine publishers from the region's neighboring countries Germany, Austria, Switzerland, and Scandinavia—which were clearly able to take advantage of their geographical proximity (Krone, 2008) and the fact that most CEE countries have adopted very liberal policies concerning foreign media ownership (Peruško & Popović, 2008). Having started in the relatively more economically developed and politically stable countries like Czech Republic, Poland, and Hungary, Western media companies have stretched their empires during the 1990s across most of the post-communist CEE media landscape and, as various reports and studies repeatedly confirm (European Federation of Journalists, 2003; Hrvatin & Petković, 2004; European Federation of Journalists, 2005; Peruško & Popović, 2008; Lauk, 2008), have been dominating their markets since then, particularly the sectors of newspaper and magazine publishing, where companies like WAZ, Ringier, Sanoma, Bonnier, ORKLA, and Passauer Neue Presse are among the most significant players.<sup>4</sup>

The ownership change domestic media into the hands of foreign media owners during the first decade of CEE media system transformation raised both hope as well as concern. The established Western corporations were believed to secure greater autonomy of the local media from state and domestic political pressures (which the foreign owners were supposed to be more immune to), set up Western-style managerial practices and nurture journalistic values and democratic media culture, and—last but certainly not least—to provide greater financial resources, modern technologies, and know-how for the qualitative improvement of media output (Sparks, 1998; European Federation of Journalists, 2003; Peruško & Popović, 2008; Lauk, 2008). As Slavko Splichal noted:

In many countries in East-Central Europe it was argued that without foreign investment into the media it would have been impossible to improve newsprint and printing quality, modernize editorial offices, and most importantly, to establish and equip radio and television stations. (2001, p. 46)

However, concerns about the negative effects of foreign ownership have been perhaps equally strong, and grew simultaneously with the disillusionment from the increasing commercialization and tabloidization of the media scene and the journalistic practices brought by the transnational companies. In its report from 2003, the European Federation of Journalists stated that there had been "strong indications that aggressive commercial policies are being pursued at the expense of journalistic standards, threatening pluralism and undermining journalists' professional and social rights" (European Federation of Journalists, 2003, p. 4). While acknowledging that investment into new technologies had a positive impact on the presentation of journalistic material, commentators were much less convinced about the effects of

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<sup>4</sup> For a comparative overview of the presence of Western/transnational media companies in the Central and Eastern European markets, see Peruško and Popović (2008), Krone (2008), or Huber (2006).

foreign ownership on the quality of journalism as such. According to Peter Gross, "there is no indication that the Eastern European media outlets that came under Western European ownership have, in any way, measurably improved their journalism" (Gross, 2004, p. 125). Perhaps the most often discussed problem related to the domination of large international companies in the CEE region has been the increasing concentration of media markets, particularly in the sector of local press, resulting in many countries in an effective duopoly, as in Poland or Hungary, or even monopoly, as in the Czech Republic or Slovakia (Dobek-Ostrowska & Głowacki, 2008, p. 18). In this article, I will examine these trends in a more detailed way in relation to the current media market of the Czech Republic.

### **Barons, Moguls and the Perils of Media Instrumentalization**

Before coming to the Czech case study, I would like to briefly outline another issue that is closely related to the problem of media concentration and the subsequent risks for democracy, media pluralism and journalistic independence, and which belongs to important features of contemporary media markets across Europe. This issue concerns the presence and impact of what Jean Chalaby (1997) describes as a "specific mode of ownership," namely the concentration of a large number of media outlets (and the decision-making power affecting them) not just within one single corporation but in the hands of one person, usually titled by the academics as well as newspaper commentators as a "baron," "mogul" or "tycoon." A "media mogul" is defined as "a person who owns and operates major media companies, who takes entrepreneurial risks, and who conducts these media businesses in a personal or eccentric style" (Tunstall & Palmer, 1991, p. 105).<sup>5</sup> Although that definition is probably most often associated today with magnates such as Rupert Murdoch or Silvio Berlusconi, the figure of "press baron" is well-known from the history of journalism, particularly British and American journalism. According to Chalaby, the Anglo-American press barons emerged as a new and specific type of media owners at the end of 19<sup>th</sup> century, characterized by their "ability to invest capital in the field of press; their capability to make profit out of it; and their aptitude for building press conglomerates" (1997, p. 621). Typically, press barons had a successful journalistic career prior to their entrepreneurial triumph, and were deeply involved in a day-to-day management of their outlets, including their editorial policies. Such was the case of probably the most famous press barons of the late 19<sup>th</sup> and early 20<sup>th</sup> centuries—Hearst and Pulitzer of the U.S., and Northcliffe, Beaverbrook and Rothermere of the UK (Tunstall & Palmer, 1991).

Even though there are disputes about the extent to which these first newspaper empires—along with pursuing economic profit—were driven by the political interests of their owners (see Chalaby, 1997; Curran & Seaton, 2003), it was certainly their unprecedented agenda-setting power and ability to influence public opinion that made them "favorite bogeymen" (Curran & Seaton, 2003, p. 38). Even today, "it is the media moguls' political connections and electoral support which lead to the greatest public controversy, the greatest anxiety among politicians, and the greatest disputation as to the relevant facts" (Tunstall & Palmer, 1991, p. 107).

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<sup>5</sup> Although Tunstall and Palmer (1991) tried to explicitly distinguish the terms "mogul" and "baron" (the latter being defined as a manager of one of the mogul's divisions or companies), in this paper, I tend to use these terms as synonyms, as seems to be the common praxis in the public discourse.

In their systematic analysis of the rise (and in some cases fall) of Western media moguls in the 20<sup>th</sup> century, Tunstall and Palmer distinguish between two basic types of moguls. The “pure” or “classic” type is the mogul who confines his business activities largely to the media sector, which is also his dominant (if not only) source of revenue. This was the common characteristic of the first press barons, as well as most of the later ones, including the first German mogul, Alfred Hugenberg (inter-war daily press publisher with interests in film production, news agencies and advertising); Robert Hersant (publisher of daily papers *Le Figaro* and *France-Soir*, but active in television and radio broadcasting as well; portrayed by his critics as the French epitome of Citizen Kane); Axel Springer (publisher of several German dailies including *Bild* and *Die Welt*; target of radical student’s protests in the 1960s); and of course the majority shareholder and director of News Corporation, Rupert Murdoch, named by the authors for the extent of his business activities across all media sectors as “the most complete mogul” (Tunstall & Palmer, 1991).

The other type of mogul, the “impure” or “media/industrialist mogul,” encompasses “entrepreneurs who are primarily captains in some other industrial field, but in addition own and operate major media interests” (Tunstall & Palmer, 1991, p. 105–106). Typical examples of this kind of mogul can be found in Greece and particularly in Italy, which, according to Tunstall & Palmer (1991, p. 113), provides a base for a “distinctive school of political moguls.” Summarizing the main characteristics of Italian media moguls, Mazzoleni (1991, p. 169) observes that they 1) acquired money elsewhere and invested it in media, considering particularly daily press “a strategic investment” and a way of getting closer to the political parties; 2) have been more concerned with owning (rather than with actually running) the media (with the notable exception of Berlusconi); and 3) maintain close ties with the political establishment, directly or indirectly supporting politicians in return for their help in further media expansions.<sup>6</sup>

For Hallin and Mancini (2004), the extensive instrumentalization of media used by their owners to assert influence in the political world represents one of the significant features of the Mediterranean (or polarized-pluralist) model of the relation between media and political systems, as opposed to the two other models—North American (liberal) and North/Central European (democratic-corporatist)—characterized by a higher level of journalistic autonomy.

However, while the phenomenon of “mogulization”—establishing of media moguls—and consequent political instrumentalization of the media under their control might have been relatively well documented and analyzed in Western media markets, much less attention has been devoted to similar

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<sup>6</sup> In their overview of the most influential Italian industrialists who have established or acquired their own media companies, Hallin and Mancini (2004, p. 114) quote Enrico Mattei, founder of *Il Giorno* and president of the state-owned oil company ENI; Giovanni Angelli (Fiat), controlling *La Stampa*; fashion mogul Cesare Romiti, controlling *Il Corriere della Sera*; Carlo de Benedetti (Olivetti), controlling *L’Espresso* and *La Repubblica*; and of course Silvio Berlusconi, initially a real estate entrepreneur who used his political connections to build a commercial television empire in the 1980s and since has extended his empire into other media (*Il Giornale*), sports (AC Milan) and other business sectors.

occurrences in Central and Eastern Europe. Despite the so far rather fragmented evidence, there are strong indications that those occurrences are not just circumstantial or limited to the least developed markets. Reviewing the situation across the media landscape in post-communist Europe, Hrvatin and Petković have clearly observed frequent "interplay of economic, political and media power concentrated in the hands of a single owner" (2004, p. 20), or the presence of "significant individuals," local media owners with strong political and/or economic ties and influence. Hrvatin and Petković describe three basic types of these owners. The first group, corresponding in Tunstall and Palmer's above quoted typology to the "media/industrialist moguls," consists of "owners or co-owners of big companies from fields other than the media industry, e.g., oil trade, construction, real estate, banking, even the arms trade." The second group includes "media owners with distinct political affiliations, [and] past or present positions within political parties, governments or parliaments," The third group, closest to Tunstall and Palmer's "pure" mogul type, is composed of media owners who do not have either significant out-of-media business interests or political ambitions; their activities are concentrated within (and across) various segments of the media market (Hrvatin & Petković, 2004, pp. 28–29). Regardless of the particular group or type, the negative effects of the coupling of media, economic and political power are obvious, and find their expression through media content and programming aimed at supporting favored politicians and parties, or the moguls' own economic and business interests. In the next part of this article, I will try to illustrate some of these issues through selected examples from the Czech media scene.

#### **Opening the Gates: Internationalization of the Czech Media Landscape**

The first phase of internalization of the Czech media market was launched by the adoption of the new Press Act in 1990 (amending the 1966 Press Act),<sup>7</sup> abolishing censorship and allowing for privately owned print media, including foreign ownership. It is important to note that within this act, no restrictions on either foreign ownership or concentration were imposed, which, as some commentators have described, set a very liberal "status quo" (Šmíd, 2004), making it more difficult for any potential future political attempts to strengthen regulation.

According to Milan Šmíd (2004), the neoliberal ideology of "the invisible hand of the market," promoted by the government, was also inscribed in the 1991 Broadcasting Law,<sup>8</sup> which left the issue of both foreign and cross-media ownership untouched. Only the 1991 Economic Competition Protection Act<sup>9</sup> set general rules concerning market concentration, stating that one entity may control no more than 30% of the "relevant market"; any acquisitions or mergers would have to seek approval from the Antimonopoly Office.

With such a liberal regulatory framework being established, media entrepreneurs from abroad soon began to enter the market. The first signs of internationalization occurred in the press market, with

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<sup>7</sup> Act Nr. 86/1990 Coll., amending and completing the Act Nr. 81/1966 on periodical press and other mass information media (adopted March 28, 1990).

<sup>8</sup> Act Nr. 486/1991 Coll., on radio and television broadcasting (adopted November 30, 1991).

<sup>9</sup> Act Nr. 63/1991 Coll., on the protection of economic competition (adopted January 30, 1991).



German and Swiss publishers among the most active players, either buying existing titles that had been privatized by their editorial teams only months earlier, or starting copies of the titles published in their home markets. Following the model of *Blitz/Bild Zeitung*, Swiss publisher Ringier established the first Czech tabloid, *Blesk*, in 1992, a year after its entry into the Czech press market with publication of the economic weekly *Českomoravský profit*. In 1991, German fashion and lifestyle publishers Hubert Burda Media Holding and Heinrich Bauer Verlag established their branches in Czechoslovakia (see Benda, 2006). The broadcasting sector soon followed suit, when in 1993, the French conglomerate Lagardère Media established the first Czech commercial radio station *Evropa2*. That same year a broadcasting license was granted to CET21 Ltd., a joint venture with a majority stake held by Central European Media Enterprises (CME), for *TV Nova*, the first national commercial TV station in the entire CEE region (Peruško & Popović, 2008).

The first signs of market concentration were also visible from early on, particularly in the regional press, where the Vltava-Labe-Press company (owned by the German Verlagsgruppe Passau) beginning in 1991, bought one regional daily after another, up to the point of creating an effective monopoly at the beginning of the 21<sup>st</sup> century. However, that situation was not assessed by the Antimonopoly Office as an infringement of the law, as it decided that the "relevant market" consisted of national and regional dailies counted together (Waschková Císařová & Metyková, 2009).

The originally liberal regulatory regime has been maintained for the most part of the two decades since it was first introduced; only the new Broadcasting Act, adopted in 2001,<sup>10</sup> set limits on horizontal and cross-media concentration, as it declared that a single entity cannot hold a license to more than one nationwide TV or radio station (defined as reaching more than 70% of the population). But no limits on cross-media concentration involving potential mergers between press and broadcasting sectors have been imposed.<sup>11</sup>

### **From Internationalization to Concentration**

Concerning the above summarized development of the regulatory framework, it is perhaps no surprise that at the beginning of the 21<sup>st</sup> century, the share of foreign ownership of media in the Czech Republic was one of the highest among the CEE countries (European Federation of Journalists, 2003, p. 29), and the situation remains similar today. The foreign/transnational companies, mostly based in

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<sup>10</sup> Act Nr. 231/2001 Coll., on radio and television broadcasting and on changes in other laws (adopted on May 17, 2001).

<sup>11</sup> The 2001 Economic Competition Protection Act (Act Nr. 143/2001 Coll., on the protection of economic competition and on changes in some laws; adopted April 4, 2001) raised the limit for the "non-dominant position" in the market from 30% to 40%. However, for the actual assessment of the dominant position, the act specified more criteria, including the economic and financial power of the respective company, market structure, shares of its immediate competitors, etc. (Šmíd, 2004, p. 146).

Germany, Switzerland, France, Scandinavia, and the USA, control the largest share in both the print and audiovisual markets.<sup>12</sup>

In the national television sector, the dominant position is held by the commercial *TV Nova*, owned by the multinational company Central European Media Enterprises (CME), registered in Bermuda and backed with U.S. capital.<sup>13</sup> CME has an average 40% market share in the Czech Republic (2007) and controls TV stations in Croatia, Slovakia, Romania, and Bulgaria as well. For several years, this company had lost control over *TV Nova* after the station had been "hijacked" in 1999 by then director general Vladimír Železný, who managed, through a series of legal and financial tricks, to take control from his American partner. However, CME launched a long-lasting international legal battle with Železný as well as with the Czech Republic (suing the country for breach of investment rights), at the end of which the state had to pay CME about €500 million and CME bought the station back again in 2005 from the Czech financial group PPF.

The other national commercial channel, *TV Prima*, which in terms of audience shares competes with the public service television for second place in the market, is controlled by another international company, Modern Times Group (MTG). This company is owned by the Swedish-based investment group Investment AB Kinnevik and is active in more than 30 countries, mostly in the television sector. MTG controls 50 % of stock in *TV Prima* (the other half being owned by the local financial group GES MEDIA EUROPE), however MTG appoints the chief executive of the company and has management control of the business.

With only two national commercial and two public service stations, the television sector in the Czech Republic displays a very high level of ownership concentration—actually the highest among all television markets in Central and Eastern Europe.<sup>14</sup>

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<sup>12</sup> The main difference with other CEE countries seems to be the fact that there is only limited presence of the world's largest media conglomerates in the Czech media market. "Global" companies like News Corporation or Bertelsmann, which have a significant position in Bulgaria, Hungary, and Croatia, have not entered the Czech audiovisual market yet (Peruško & Popović, 2008, p. 173).

<sup>13</sup> In March 2009, the world's largest media conglomerate, Time Warner, bought a 31% stake in CME.

<sup>14</sup> As measured by the C3 indicator of concentration of the three strongest players in the market (Peruško & Popović, 2008, pp. 176–177).

**Table 1. Ownership Structure of the Czech National Terrestrial TV stations (2009).**

TV Station	Audience Share 2008 (15+)	Majority Owner	Ownership share
TV Nova	38 %	CME (USA/Bermuda) (1994-1999; 2005- )	100%
TV Prima	18 %	MTG Broadcasting AB (SWE) (2005- )	50 %
		GES MEDIA EUROPE (2000- )	50 %
ČT1	22 %	<i>Public service TV</i>	
ČT2	8 %		

Source (audience share): ATO—MEDIARESEARCH. Retrieved September 9, 2009, from <http://www.ato.cz>

Source (ownership): Author's research

In the national radio sector, the market leader *Radio Impuls* is controlled by the German-based consortium Eurocast GmbH Radio Venture & Management, while the second and third stations, *Evropa2* and *Frekvence1*, belong to the French conglomerate Lagardère (which is also active in the Czech press market through its subsidiary Hachette-Fillippacchi, publishing exclusive and lifestyle magazines). The public service radio stations claim fourth and fifth place in terms of audience figures.

**Table 2. Ownership Structure of the Czech National Radio Stations (2009).**

Radio Station	Projected Audience Jan. 2009–April 2009	Majority Owner	Ownership Shares
Radio Impuls	1,084,000	Eurocast GmbH Radio Venture & Management (GER)	66.7%
Evropa 2	977,000	Lagardère Media (FRA)	100%
Frekvence 1	911,000	Lagardère Media (FRA)	100%
ČRo 1 –Radiožurnál	794,000	<i>Public service radio</i>	
ČRo 2 – Praha	343,000		

Source (audience): Radio Projekt. Retrieved October 20, 2009, from

[http://www.median.cz/docs/RP\\_2009\\_2+3Q\\_zprava.pdf](http://www.median.cz/docs/RP_2009_2+3Q_zprava.pdf) Source (ownership): Author's research.

The daily press is dominated, in terms of copies sold, by the Swiss firm Ringier, controlling around 40% of the market. Its presence is most visible in the tabloid press, as it publishes both of the Czech tabloids (*Blesk* and *Aha!*), and the only Czech sports daily (*Sport*). Ringier is followed by the German-based Verlagsgruppe Passau (24%), controlling through the local publisher Vltava Labe Press the

entire regional dailies market (with the daily *Deník*, being published in 73 different regional versions), and MAFRA (23%), which belongs to Rheinisch-Bergische Druckerei- und Verlagsgesellschaft and publishes two out of four Czech quality papers—*Mladá Fronta DNES* and *Lidové noviny*. Until 2008, the only remaining daily newspaper with a predominant Czech ownership was the left-wing *Právo*, owned by its editor-in-chief, Zdeněk Porybný. With the above mentioned purchase of the publishing house Economia by Zdeněk Bakala in summer 2008, the financial daily *Hospodářské noviny* is now published under a Czech owner as well.

*Table 3. Ownership Structure of the Czech Daily Press (2009).*

<b>National Dailies</b>	<b>Avg. Paid circulation (Sept. 4, 2009)</b>	<b>Readership (Sept. 4, 2009)</b>	<b>Publisher</b>	<b>Majority Owner</b>	<b>Ownership Shares</b>
<i>Blesk</i> *	407,686	1,442,000	Ringier*	Ringier (SUI)	100 %
<i>Aha!</i> *	112,589	260,000	Ringier*	Ringier (SUI)	100 %
<i>Sport</i>	62,814	296,000	Ringier	Ringier (SUI)	100 %
<i>MF Dnes</i>	257,131	975,000	MAFRA	RBVG (GER)	93 %
<i>Lidové noviny</i>	59,655	202,000	MAFRA	RBVG (GER)	93 %
<i>Právo</i>	138,936	457,000	Borgis	Zdeněk Porybný (editor-in-chief)	91 %
<i>Hospodářské noviny</i>	54,370	186,000	Economia	Zdeněk Bakala	80 %
<b>Regional Dailies</b>					
<i>Deník</i> (73 regional dailies)	247,730	1,003,000	Vltava-Labe-Press, a.s.	Verlagsgruppe Passau (GER)	80 %
<b>Street Papers</b>	<b>Net Press Run</b>				
<i>Metro</i>	264,361	405,000	MAFRA, a.s.	RBVG (GER)	60 %
<i>E15</i>	(not monitored)	58,000	Mladá fronta	European Financial Services (USA)	100 %

\* *Tabloids*

Source: (circulation + readership): Media Projekt. Retrieved October 20, 2009, from [http://www.median.cz/docs/MP\\_2009\\_2+3Q\\_zprava.pdf](http://www.median.cz/docs/MP_2009_2+3Q_zprava.pdf)

Source (ownership): Author's research

With an estimated reach of almost 4 million readers, Ringier also has a leading position within the entire sector of the print media (accounting for daily press, magazines and supplements). Vltava Labe Press, publishing—apart from the network of regional dailies—the most-read Czech television program guide, *TV Magazin*, holds the third spot with nearly 2.9 million readers. The second and fourth positions in the market are held by companies publishing predominantly lifestyle and fashion magazines—Bauer Media (Heinrich Bauer Verlagsgruppe, Germany) and Sanoma Magazines (Sanoma WSOY, Finland). MAFRA

occupies fifth place (1.9 million), however it leads the print market in terms of advertising share (15.8 %).<sup>15</sup>

In summary, based on the number of copies sold, international owners control 88% of the Czech dailies. Ownership concentration is also very high, as in the segment of national daily press, Ringier alone has a 50% market share and together with the two other publishers it accounts for 85% of the entire daily press sector. In the segment of regional dailies, Vltava Labe Press (subsidiary of Verlagsgruppe Passau) controls 100% of regional dailies (and it publishes more than 60% of the total number of regional press titles, regardless of their periodicity). Additionally, titles published by foreign-owned companies account for 90% of weeklies, 90% of bi-weeklies and around 70% of monthlies.

Of course, processes of internationalization and concentration are not limited to the “traditional” media, but are visible in the sector of new media as well. In 2007, the second- and third-most-visited Web portals, *Centrum.cz* and *Atlas.cz*, were bought by a U.S. investment fund Warburg Pincus, one of the largest global private equity firms. The same company is believed to be one of the prospective buyers of the market leader, *Seznam.cz*, which still belongs to its Czech founder, Ivo Lukačovič. The deal, which would bring the three largest Czech Web portals under the roof of one single company, has not been completed.

Apart from the above-reviewed horizontal concentration, the diagonal (or cross-media) integration is another intensifying trend in the contemporary Czech media market, which has witnessed significant growth of media conglomerates in recent years (defined as corporations consisting of companies dealing with different products or services—see Hesmondhalgh, 2002, p. 59). By far the largest conglomerate, in terms of the number and variety of different media outlets, and at the same time a textbook type of diagonally integrated company, is MAFRA, which is owned by the German publishing house Rheinisch-Bergische Druckerei- und Verlagsgesellschaft. Starting as a publishing company, MAFRA has evolved to control not only national dailies (*Mladá Fronta DNES* and *Lidové noviny*) and magazines (lifestyle monthly *Filter*)<sup>16</sup> but also two local radio stations (*Rádio Classic FM* and *Expresrádio*, broadcasting in Prague); a music cable TV station *Óčko TV* (modeled after the successful German music station *VIVA TV*), which attracts more than 250,000 viewers a day, and has a license for digital broadcasting; Internet news portals (with *iDnes.cz* being the market leader in this sub-segment); and a 25% stake in the press distribution company PNS, which has more than 75% of the distribution market share.

Other companies have been trying to follow suit and expand diagonally as well, with the Internet being the most demanded domain of interest. CME, the owner of *TV Nova*, announced that in 2008 it was going to focus predominantly on developing its Internet portfolio. And it held true to its promise, as it launched its own news server *tn.cz* (offering, among others, the so-called “naked news”) but also purchased the company *Jyxo*, which is the owner of the largest blogging server in the country, *blog.cz*.

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<sup>15</sup> According to the 2009 Czech Publisher Association Yearbook. Retrieved October 30, 2009, from <http://www.rocenkaunievydavatelu.cz/2009/index.php>

<sup>16</sup> Publishing of *Filter* was ceased in December 2009.

### **Building Local Empires: The Rise of Media/Industry Moguls**

This intensifying cross-media ownership concentration is complemented by yet another new tendency on the Czech media scene, which could be regarded as standing in opposition against the (still predominant) ownership internationalization or globalization. This process is perhaps not yet so visible when focusing only on the media with the highest readership or audience shares, but it is definitely important nonetheless. It concerns an emergence of powerful local companies with major interests outside the media sector (banking, insurance, coal mining, petroleum, real estate), but increasingly investing in the media sector, particularly in the segment of elite, political-economic press. Another common factor within this trend is that these companies are in most cases owned and/or controlled by individuals who belong to the Czech business elite, and some of them seem to have clear ambitions of influencing political affairs. In other words, the Czech media scene—or at least a significant part of it—has been in the last five to ten years witnessing the emergence of “media/industry moguls” (Tunstall & Palmer, 1991) as known from other parts of Southern and Eastern Europe and described in the previous section of this article.

The label certainly seems to fit Zdeněk Bakala, multi-billionaire and majority shareholder in NWR, the largest Czech coal-mining company (since 2008 indexed at the London stock exchange), who in 2006 bought a majority stake in the political weekly *Respekt* (the remaining 44% is still in the hands of the previous owner, Czech ex-minister of foreign affairs Karel Schwarzenberg), and in 2008 bought 88% of the publishing house *Economia* from Verlagsgruppe Handelsblatt. *Economia*, which belongs among the top five publishing houses in the country (measured by advertising revenue), publishes the financial daily *Hospodářské noviny*; influential economic weekly *Ekonom*; 18 other magazines (mostly in the B2B segment), and operates an Internet news service *iHned.cz*.<sup>17</sup> Bakala has never openly talked about his political preference or ambitions, but it is a public secret that he has been close to ex-president Václav Havel and the political circles surrounding him, directly or indirectly supporting for example the Green Party and the 2008 presidential candidacy of Jan Švejnar in his (eventually unsuccessful) challenge of president Václav Klaus. Most recently (in summer 2009) Bakala expressed an intention to financially help the newly formed liberal-democratic party TOP 09, of which his long-term business partner Karel Schwarzenberg is a leader, in the upcoming national elections. This information, revealed by Schwarzenberg himself, caused lots of controversy on the political and media scene and led to accusations of Bakala's media becoming a mouthpiece for this political party.

Another member of the Czech business elite with significant media ambitions is Petr Kellner, the richest Czech businessman (estimated wealth of \$6 billion) and owner of the investment company PPF Group, which has financial interests in several Central and Eastern European countries. In 1998, Kellner was involved in establishing the publishing house Euronews with its flagship *Euro* (an influential economic weekly). Although he was formally a minority shareholder, nobody doubted the extent of his influence was

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<sup>17</sup> In winter 2008, Bakala expanded internationally, as he purchased the Slovak publishing house Ecopress, publishing several B2B magazines in Slovakia. He also intended to take part in the privatization of the Polish publishing house *Przedsiębiorstwo Wydawnicze Rzeczpospolita* (PWR), publishing, through its 49% ownership in the *Presspublica* company, the daily *Rzeczpospolita*; however, in February 2009, he withdrew from the bid.

far higher than his actual stake in it; eventually his PPF Group attained full financial control over Euronews, in 2009. In 2002 he bought majority share (85%) in *TV Nova* but sold it back to the initial owner CME only two years later; however, as part of the deal, he acquired 8.55% of shares in CME itself, making it clear that he was not going to withdraw from the television business completely. In the last several years, his media activities have further grown internationally. In 2006, he established the company East West Media BV as a base for future media expansion in the post-socialist countries, and in 2007 he bought the Ukrainian cable and Internet provider UKR CATV.<sup>18</sup> In April 2009, his PPF Media division announced an ambitious plan to launch a network of "hyperlocal media" in the Czech Republic (under a joint brand *Naše adresa*), consisting of a combination of an Internet portal and printed weeklies for local communities, complemented by newsrooms with cafés in selected counties, as well as by educational and training programs.<sup>19</sup>

Karel Komárek is another example of an industry baron (majority owner of the KKCG Investments Holding, active in oil, the energy industry, and the travel agency business) aiming to build his own media house. The first step toward achieving this goal came in 2001 when he purchased the publishing house Stanford, publishing economic weeklies *Profit* and *Czech Business Weekly*.<sup>20</sup> In 2004, he bought the cable television station Top TV, with the aim of applying for a digital license, which he eventually got. Although this project ended unsuccessfully in 2007, and Top TV disappeared from the screen, it certainly demonstrated Komárek's determination to get involved in the television business.<sup>21</sup>

As a last example of the growing number of alliances between media and off-media industries, consider Sebastian Pawlowski—a German-born entrepreneur with Swiss citizenship who has lived in Prague since 1993. Pawlowski owns the publishing house Mediacop, which publishes an influential political weekly, *Týden*, as well as a lifestyle weekly, *Instinkt*. However, he has other business interests as well, namely the real estate business, mainly in Prague.

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<sup>18</sup> "István Lékó končí v Euru. A není sám." Retrieved November 14, 2008, from <http://www.aust.cz/2008-06-06/istvan-leko-konci-v-euru-a-neni-sam>

<sup>19</sup> "Roman Gallo: Hyperlokální média rozhybou trh." Retrieved November 18, 2008, from [http://www.tyden.cz/rubriky/media/roman-gallo-hyperlokalni-media-rozhybou-trh\\_117504.html](http://www.tyden.cz/rubriky/media/roman-gallo-hyperlokalni-media-rozhybou-trh_117504.html)

<sup>20</sup> Stanford ceased publishing the *Czech Business Weekly* in May 2010, with the alleged intention to focus more on Profit (according to "Czech Business Weekly po necelých šesti letech končí, Stanford chce zas posílit Profit." Retrieved April 30, 2010, from <http://www.mediar.cz/tisk/czech-business-weekly-po-necelých-6-letech-konci-stanford-chce-posilit-profit/>

<sup>21</sup> "Stanford buduje mediální dům." Retrieved November 14, 2008, from <http://www.aust.cz/2005-09-02/stanford-buduje-medialni-dum/>

**Table 4. Most Influential Media/Industry Barons in the Czech Republic (2009).**

	<b>Mother Company</b>	<b>Main Domain of Business</b>	<b>Media Companies</b>	<b>Media Outlets</b>
<b>Zdeněk Bakala</b>	New World Resources (NWR)	Coal mining, coking plants, energy production and distribution	Economia	<i>Hospodarske noviny</i> (daily) <i>Ekonom</i> (weekly) B2B magazines <i>iHned.cz</i> (news portal)
			Respekt Publishing	<i>Respekt</i> (weekly)
<b>Petr Kellner</b>	PPF Group	Private equities, real estate, insurance, banking	Euronews	<i>Euro</i> (weekly)
			PPF Media	<i>Naše adresa</i> (network of "hyperlocal" media)
<b>Karel Komárek</b>	KKCG Investments	Oil mining, energy production and distribution, travel agencies	Stanford	<i>Profit</i> (weekly) <i>Czech Business Weekly</i>
<b>Sebastian Pawlowski</b>	Copa Group	Real estate, development	Mediacop	<i>Týden</i> (weekly) <i>Instinkt</i> (weekly)

Source: Author's research

The above reviewed examples indicate a potentially disturbing situation, where a substantial proportion of Czech *elite* media— newspapers and magazines read by economic and political elites of the country— is controlled by only a handful of local business tycoons who can use the media in their portfolios as a platform for promoting their own economic or political interests, and willfully influence public opinion. This is not just an empty allegation— there already have been examples reported about the owners spinning the agenda of their media and suppressing editorial freedom in relation to certain topics.

Observers of the Czech media and political scene have repeatedly pointed to the close affiliations between one of the new moguls, Sebastian Pawlowski, and several top Prague municipality officials, particularly the former mayor of Prague, Jan Kasl, whose home political party, the Free Democrats, was being sponsored by Pawlowski. After the local elections in 2006, Pawlowski established a relationship with the new Prague major, Pavel Bém, leading to accusations that *Týden*—which likes to portray itself as a flagship of Czech investigative journalism—actively silences the agenda concerning the Prague political scene, and suppresses any criticism toward the current Prague mayor.<sup>22</sup>

Kellner's *Euro* has generated controversy as well, when its longtime editor-in-chief announced his plans to leave the office in July 2008, allegedly as a result of a dispute about editorial freedom. The actual

<sup>22</sup> "Economia na prodej aneb Mediální výchova pro pokročilé." Retrieved November 18, 2008, from <http://blog.aktualne.centrum.cz/blogy/milan-smid.php?itemid=4097>



matter of dispute has not been revealed, but according some observers it concerned the fact that *Euro* was not allowed to investigate economic activities of Kellner's own financial empire.<sup>23</sup>

Not surprisingly, similar concerns have been voiced in regard to the above described purchase of the publishing house *Economia* by Zdeněk Bakala in summer 2008. He issued mutually contradicting statements concerning his intentions with *Economia*; on the one hand he expressed his belief that his newly acquired print media have a great potential "to become first-rate quality and most respected press titles in the Czech Republic" and that people will be ready to pay more for quality; on the other hand he claimed that he sees it as an investment which he wants to profit from and eventually sell.<sup>24</sup> However, since profit is usually connected with downsizing and lowering of standards in today's media world, it remains unclear how he wants to achieve it, especially in the context of the Czech press market, where the elite-oriented media have never been profitable. Such contradicting statements only fuel the rumors that there have been more than purely economic reasons behind this move.

As the motto chosen for the beginning of this paper illustrates, the management as well as editors of *Hospodářské noviny* were quick to assure their readers that their new owner will certainly not interfere with the daily's agenda and will not limit their editorial freedoms, allegedly because such attempts would ruin the newspapers' credibility and consequently the economic profit Bakala expects to make from the investment.<sup>25</sup> Regardless of the fact that "credibility" is rarely in a direct association with the economic profit (as tabloids document more than sufficiently), the editors left completely unanswered the question why the billionaire whose primary business interests and activities concern totally different industry sectors entered the sphere of elite media at all.

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<sup>23</sup> According to Milan Šmíd, the editor-in-chief of *Euro* for example complained that he could not have covered fully the story about the purchase of the insurance company *Generali* by PPF, the owner of *Euro*. Retrieved November 18, 2008, from <http://blog.aktualne.centrum.cz/blogy/milan-smid.php?itemid=4097>. Apparently, the disputes were resolved, as the editor-in-chief remained in his seat and became vice-president of the board of management of *Euronews* in October 2009.

<sup>24</sup> "Bakala plánuje propojení *Economie* a *Respektu*." Retrieved November 11, 2008, from <http://www.ct24.cz/media/28367-bakala-planuje-propojeni-economie-a-respektu/>

<sup>25</sup> "Petr Šimůnek: Jaké budou HN s Bakalou." Retrieved November 14, 2008, from [http://ihned.cz/c4-10075650-27341840-000001\\_d-jake-budou-hn-s-bakalou](http://ihned.cz/c4-10075650-27341840-000001_d-jake-budou-hn-s-bakalou). It has to be noted that ever since the purchase by Bakala, *Hospodářské noviny* has adhered to a policy of transparency—at the bottom of each article referring to Bakala's activities there is a line reminding the reader that he is the owner of the newspaper. However, this editorial strategy can be read not just as a noble attempt to remain open about the newspaper's ownership situation but also as a hint for the readers on how to interpret the article; one could argue that if there really was no influence of the owner on the newspaper's content, there would be no need to repeatedly issue such a statement.

### **Conclusions: Further Toward Italianization?**

The above outlined tendencies shaping the structural features of the current Czech media market can be summarized as follows. On the one hand, there is a continuing presence of foreign, often transnational, owners which dominate the most important media sectors and, by diversifying and expanding both horizontally and diagonally, contribute to the processes of conglomeration (as the example of MAFRA clearly illustrates) and further concentration of the market. On the other hand, it is possible to detect growing interest of leading Czech businessmen and industrialists in establishing their own media empires and exercising through them their business PR and political influence, becoming thereby akin to the "media moguls" known particularly from the Southern European countries. Even though their activities remain focused predominantly on the sector of business and elite media (PPF's latest project of establishing a network of "hyperlocal media" being an exception), and their links with the political scene are far less prominent (or perhaps just more covered) than is the case in Italy, it can still be argued that this trend represents a small but significant indicator of "Italianization" of the Czech media system—a metaphor that has been used repeatedly to highlight certain structural tendencies emerging in the course of the transformation of Central and Eastern European media systems, albeit not explicitly in relation to media ownership structures (Splichal, 1994; Wyka, 2007, 2008).

From the point of view of maintaining journalistic autonomy, pluralism and democratic watchdog roles, the media in the Czech Republic seem to be trapped between a rock and a hard place. Although far from politically unbiased, the media, run by foreign/transnational corporations, appear to serve primarily their masters' business interests (Culik, 2004), with all the negative side effects known to media scholars: commercialization, tabloidization, ownership concentration, and subsequent undermining of internal pluralism. However, the other tendency recently observed on the market—local moguls instrumentalizing the elite media for their hidden business or political goals—certainly does not constitute an ideal option either, and potentially posits even greater dangers for the democratic functions of the media. With the continuing attempts of politicians and political parties to undercut the independence of public service media, and without the prospect for a system of community/alternative media emerging any time soon, it seems as though the need to safeguard a genuinely diverse media landscape and to promote journalistic autonomy in the Czech Republic is just as pressing 20 years after the "Velvet Revolution" as ever.

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