



# **Communications, Media and Internet Concentration in the Czech Republic, 2019–2022**

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### **This report has been prepared by:**

Petr Szczepanik (Charles University)

Jan Bergl (Charles University)

Petr Lelek (Charles University)

Jan Hanzlík (Charles University)

Martin Mišúr (Charles University)

**Contact author:** [Petr.Szczepanik@ff.cuni.cz](mailto:Petr.Szczepanik@ff.cuni.cz)

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# Contents

Executive summary.....	i
Introduction .....	1
Media Policy and Regulation .....	5
Methodology .....	7
Telecoms and internet access .....	9
Wireless .....	13
Internet Service Providers.....	16
Wireline .....	18
Multichannel Video Distribution .....	20
Telecoms and internet access grouped results .....	22
Online media and traditional media services .....	25
Broadcast television .....	26
Online Video Services .....	30
Radio Broadcasting .....	32
Film/TV/Online video distribution.....	35
Film Exhibition .....	37
Digital Games .....	39
Music Services .....	40
Newspapers.....	42
Magazines.....	44
Online News Media .....	46
Books .....	46
Online media and traditional media services grouped results .....	48
Core internet applications.....	51
Internet Advertising .....	51

Social Media Platforms.....	54
App Distribution .....	54
Core internet applications grouped results .....	56
Conclusion: The Czech Network Media Economy .....	58
Sources .....	66

# Figures and Tables

Figure 1: Wireless: Market share by revenue, 2019-2022 .....	15
Figure 2: ISP: Market share by revenue, 2019-2022 .....	18
Figure 3: Wireline: Market share by revenue, 2019-2022 .....	19
Figure 4: Multichannel video distribution: Market share by revenue, 2019-2022 .....	22
Figure 5: Total revenues: Telecom and Internet Access, 2019-2022 (mill. CZK) .....	23
Figure 6: CR3 scores for Telecom & internet access sectors, 2019-2022 (based on revenue) .....	24
Figure 7: HHI scores for Telecom and internet access sectors, 2019-2022 (based on revenue) .....	24
Figure 8: Broadcast TV: Market shares by revenue, 2019-2022.....	29
Figure 9: Online video services (SVOD): Market share by revenue, 2019-2022 .....	32
Figure 10: Radio broadcasting: Market share by revenue, 2019-2022 .....	34
Figure 11: Film TV OVS Distribution: Market share by revenue, 2019-2022.....	36
Figure 12: Film exhibition: Market shares by revenue, 2019-2022.....	38
Figure 13: Newspapers: Market share by revenue, 2019-2022.....	43
Figure 14: Magazines: Market share by revenue, 2019-2022.....	45
Figure 15: Books: Market share by revenue, 2019-2022.....	47
Figure 16: Total revenues for online media and traditional media services, 2019-2022 (CZK mill.).....	49
Figure 17: CR4 scores for online media and traditional media services, 2019-2022 (based on revenue).....	50
Figure 18: HHI scores for online media and traditional media services, 2019-2022 (based on revenue).....	50
Figure 19: Internet Advertising: Market shares by revenue, 2019-2022 .....	53

Figure 20: App distribution: Market shares by revenue, 2019-2022.....	55
Figure 21: C4 scores for Core internet applications, 2019-2022 .....	57
Figure 22: HHI scores for Core internet applications, 2019-2022 .....	57
Figure 23: Total revenues for the Czech Network media economy, 2019-2022 .....	58
Figure 24: HHI scores for network media economy, 2019-2022 .....	60
Figure 25: HHI scores for individual sectors of the Network media economy, 2022 .....	61
Figure 26: The biggest players in the Czech Network media economy by 2022 .....	62
Figure 27: Select international comparison of CR4 and HHI figures, 2022-2023 .....	64

# Analyzing the Communications, Internet, and Media Industries

## Insights from the Global Media & Internet Concentration Project— **Czech Republic**

### Executive summary

As a part of the Global Media and Internet Concentration Project (GMICP), this country report examines trends in revenue and market concentration within the Czech media, internet, and telecommunications industries between 2019 and 2022. It organizes the analysis into three groups: Telecommunications and internet access (including wireline, wireless, ISP, and multichannel video distribution), Online and traditional media (covering broadcast TV and radio, online video services, film distribution and exhibition, music services, digital games, books, magazines, and news media), and Core internet applications (such as search engines, app distribution, social media, and internet advertising). Each of these sectors is examined individually in terms of the scale, scope and structure, then grouped into the three categories just introduced, and finally taken altogether. These groups are then drawn together to form a comprehensive overview of the Czech “network media economy.”

The report includes detailed data on market concentration, primarily focusing on revenue, though in some cases, access data was used as a substitute when revenue figures were unavailable. Revenue is used as much as possible as a common denominator to make comparisons across time, media and countries possible. The analysis highlights the shifts in concentration and revenue across various sectors, with a focus on ownership and competition in the Czech market.

## Key Findings:

- In the period 2019-2022, the Czech network media economy experienced a significant revenue growth from 156.65 to 201.15 CZK billion (+28.4%).<sup>1</sup> When adjusted for the fluctuating CZK-to-USD exchange rate, this represents an increase from USD\$6.83 billion in 2019 to USD\$8.61 billion in 2022.
- Internet has driven the growth: while telecommunications and internet access grew by 7% between 2019 and 2022 (from 75.5 to 80.76 CZK bill.), online and traditional media grew by 12.4% (55.2 to 62.07 CZK bill.), and core internet applications by 123.9% (26.04 to 58.32 CZK bill.).<sup>2</sup>
- Among online and traditional media, digital media services grew fastest: digital games by 65.5% and online video services by 184.6%. However, digital music streaming would have been the fastest growing sector if separated from other music services (live music, music performance rights, etc.), achieving 227.6% growth between 2019 and 2022. This is largely due to the low starting penetration and the process of catching up with more mature markets.
- On the opposite end, physical network and media sectors were most affected by the Covid-19 pandemics, with film and TV distribution declining by 19.2%, newspapers by 11.9%, film exhibition by 11.6%, magazines by 11.5%, and wireline by 9.1%.
- In terms of revenue, internet advertising is the largest market (53.09 CZK bill.), followed by wireless (47.05 CZK bill.), and broadcast TV (20.32 CZK bill.) as of 2022.
- On one hand, the Czech network media economy seems conservative: broadcast TV and books have not significantly declined, and multichannel video distribution (which includes IPTV, cable, and satellite) has grown. While advertising TV in the EU27 declined by 3.1% between 2021 and 2022, it rose by 13.6% in the Czech Republic. Unlike some other markets (US, EU), OTT services have not yet caused decline in viewership and ad revenue for broadcast TV as well as multichannel video distribution.
- On the other hand, the growth of digital media was steep, partly due to the comparatively low starting position (e.g., very low penetration of online video

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<sup>1</sup> This is not a definitive figure: it does not include audiovisual production and includes only internet advertising and app distribution out of the category of Core internet applications.

<sup>2</sup> For core internet applications, only internet advertising and app distribution was counted.



services). The Czech Republic is the regional (CEE) leader in internet advertising, which by 2022 became the largest and the second fastest growing of all sectors covered (53.09 CZK bill., growth by 126% between 2019 and 2022).

- In terms of overall concentration, the Czech network media economy in 2019-2022 had a weighted HHI 2614.9, which means even at the highest level of aggregation, this is a highly concentrated market. The core internet applications was the most concentrated group of markets (3647.7), followed by telecommunications and internet access sectors (2411.7) and online and traditional media (2160,85).
- The network media economy concentration slightly declined. In 2019, the weighted HHI was 2618.0, it then grew to 2626.3 in 2020 and to 2678.1 in 2021 but dropped again in 2022 to 2550.2. The decline was caused by core internet applications, whose HHI dropped from 4341.7 in 2021 to 3031.6 in 2022, a development resulting from rising competition in internet advertising. However, internet advertising's HHI is only hypothetical due to the experimental method of approximation described below. If its concentration did not decline but stayed the same, the overall concentration of the network media economy would have slightly grown.
- While core internet applications showed the strongest tendency of declining concentration (again, only hypothetically), online and traditional media's HHI slightly grew, from 2118.2 in 2019 to 2294.6 in 2022, and telecommunications and internet access stayed almost the same (growing marginally from 2388.1 to 2399.0).
- The most concentrated sectors were those core internet applications dominated just by two or three of the global platforms (Google, Facebook, Apple, Microsoft). The least concentrated were some physical media like books and magazines, film distribution and exhibition, but also several digital services: ISP and multichannel video distributors.
- The single largest actor in the Czech network media economy is the PPF financial group, founded by the late Czech billionaire Petr Kellner (29.6 CZK billion revenue or 14.7% of the total Network media economy in 2022). PPF's leading position was cemented by the 2020 acquisition of CME (the owner of TV Nova and Voyo VOD service) from AT&T. PPF is followed by international telecom giants T-Mobile and Vodafone, as well as global platforms Google and Meta. The four largest players together controlled 47.6%, the five largest players 53.3% of the whole network media market as of 2022.

- Public service media (Česká televize and Český rozhlas) remain relatively strong players in the market. Seznam.cz, the leading local online platform, also holds a prominent position. Media groups controlled by Czech oligarchs, such as Mafra, GES MEDIA, and Czech Media Invest, which have often been criticized for undermining media pluralism, rank next.
- Netflix rounds out the list of players exceeding 1.5 billion CZK in annual revenue, with its marginal position among giants highlighting the relatively conservative, nationally oriented, telecom- and broadcast-driven nature of the Czech media market.
- In terms of international comparison, the Czech network media economy exhibits slightly below-average concentration when assessed through two key metrics: CR4, which stands at 47.6% compared to the GMICP sample average of 52%, and a weighted HHI of 2550.2, compared to an average of 2997.3 (2023 or the nearest year available). However, these averages are influenced by the inclusion of highly concentrated markets such as Brazil, Mexico, India, and Australia, which skew the data upward. When benchmarked against more comparable European Union markets, Czech media concentration appears relatively high. Its CR4 exceeds that of Austria, Italy, Denmark, and Spain, ranking just below France. This positioning highlights the Czech Republic's media market as notably consolidated within the EU context, raising potential concerns about competitive dynamics and media pluralism.

# Introduction

The evolution of Czech media and communications reflects the nation's complex political and social changes. Since the 1990s, the Czech media landscape has undergone significant transformations, particularly in ownership structures. The Velvet Revolution in 1989 led to the collapse of the communist regime, the state-owned media organizations were dissolved, privatized, or transformed into public service media, and censorship was abolished. The media sector opened to private businesses and foreign investments, leading to a diverse array of newspapers, radio stations, and television channels, reflecting diverse political and cultural perspectives.

The state telecom monopoly's split in 1993 and privatization the following year has gradually led to the current oligopoly of the three giants: O2, T-Mobile, and Vodafone (see further below). Broadcasting shifted from state control to a competitive landscape with two strong private channels challenging public TV. Film production transitioned from state studios to service-oriented foreign production on one hand and fragmented domestic independents on the other, while film distribution became dominated by companies associated with US majors. In music, major labels like UMG and Sony opened local offices but focused on importing Anglo-American content.

The 2008 financial crisis prompted some international investors to withdraw from the country, paving the way for domestic entrepreneurs to acquire substantial media holdings. Post-2015, this trend intensified, resulting in notable consolidation within the Czech media industry, which has been since described as dominated by several media groups, four of which own assets across multiple industries covered by this report. Critical debate about the concentration of media power in the Czech Republic has focused on a few key figures that have emerged as dominant media proprietors:

- PPF Group: Founded by the late Petr Kellner and now controlled by his widow, RePF acquired Central European Media Enterprises (CME) in 2020, gaining control over TV Nova, the Czech Republic's most-watched commercial television network, and Voyo, the most-watched domestic VOD service. CME operates its TV and VOD services across 6 national markets in Central Eastern European (CEE) countries, comprising 43 TV channels and reaching 49 million viewers in total (the Czech Republic, Romania, Bulgaria, Slovakia, Slovenia and Croatia). This makes it the strongest CEE-based transnational media group. PPF also owns one of the largest Czech and Slovak telecommunication and IPTV networks O2, which represents the starkest example of vertical integration among analyzed companies. It has recently invested in international media assets, such as

Germany's ProSiebenSat.1 and the Nordic streamer Viaplay, indicating a strategy to diversify and penetrate European media markets, leveraging synergies between its media and telecommunications assets.

- Andrej Babiš/Karel Pražák: Andrej Babiš, founder of the Agrofert conglomerate, ANO2011 party leader, and Prime Minister of the Czech Republic from 2017 to 2021, significantly expanded his influence in the Czech media landscape through his 2013 acquisition of Mafra, one of the country's leading media groups. Mafra's portfolio includes major newspapers such as Mladá fronta DNES and Lidové noviny, which have historically been among the most influential print publications in the Czech Republic. The group also owns the widely visited news portal iDnes.cz and operates other digital properties and radio stations, such as Rádio Impuls, further diversifying its reach across media formats. Mafra's advertising operations, a significant part of its business, benefited from Agrofert's substantial resources and market presence. Moreover, the conglomerate's access to its own media channels provided Babiš with unparalleled opportunities to shape public discourse during his political tenure. A 2023 amendment to the Act on Conflict of Interests forced Babiš to sell the media assets held in his trust fund since 2017. His media company Mafra and radio broadcaster Londa were acquired by Kaprain Group, a Czech investment firm owned by entrepreneur Karel Pražák.
- Ivo Lukačovič, the founder of Seznam.cz, maintains a controlling interest in the company, which has strategically expanded its media assets to become a dominant force in the Czech media landscape. In the Czech digital market, Seznam.cz stands as a significant competitor to global giants like Google, offering a comprehensive suite of services that includes a search engine, email, news, and mapping services, thereby securing a substantial user base and a significant share of the online advertising market. In 2021, Seznam.cz restructured its media operations by establishing Seznam.cz média, a subsidiary consolidating its publishing and broadcasting activities. This entity oversees platforms such as Seznam Zprávy, a leading news website, Stream.cz, a web TV portal, and Televize Seznam, a television channel. Additionally, Seznam.cz holds a stake in the publishing house Borgis, the publisher of the daily newspaper Právo.
- Daniel Křetínský: a prominent Czech entrepreneur, has strategically diversified his investments through Czech Media Invest (CMI), establishing a significant media presence in the Czech Republic and internationally. CMI owns Czech News Center (CNC), which publishes widely read newspapers and tabloids such as Blesk, Aha!, Sport, and the popular weekly Reflex. Beyond print, CNC has aggressively expanded its digital footprint, operating popular websites like

Blesk.cz and Reflex.cz. CNC has also ventured into online video content, leveraging its established brands to create multimedia offerings tailored to evolving consumer habits. Křetínský's (and his partner Patrik Tkáč's) media portfolio extends to broadcasting, where CMI owns several radio stations under the Czech Radio Center network, including Frekvence 1, Evropa 2, and other regional stations, giving it a dominant position in Czech radio markets. CMI has recently entered the television sector, broadening its influence across multiple media platforms. Internationally, CMI acquired iconic publications such as Elle, Marianne, and Télé 7 Jours in France. This integration of print, online, radio, and video media aligns with Křetínský's broader investment strategy, which spans energy, retail, and logistics.

- Ivan Zach, a Czech businessman and media investor, exerts significant influence in the Czech media landscape through his ownership of the Prima Group, one of the country's leading commercial television networks. The Prima Group operates a broad portfolio of TV channels, catering to diverse audience segments. Additionally, the group has successfully integrated digital offerings with its Prima+ platform, which combines video-on-demand services and exclusive content to meet shifting viewer habits. Beyond television, the Prima Group has diversified into radio broadcasting, owning stations such as Kiss. Zach's influence extends into online advertising and digital media sales, with Media Club serving as a prominent player in the Czech advertising ecosystem. Ivan Zach owns the Prima Group through GES Media Europe, part of the larger GES investment portfolio, which spans various industries. His media ventures are characterized by their strategic focus on local content production, regional news, and partnerships with international brands like CNN.<sup>3</sup>

This consolidation has led to a media environment where a few conglomerates hold significant sway over public discourse. The intertwining of media ownership with other business interests and political affiliations has raised concerns about editorial independence and the potential for conflicts of interest. Analysts and journalists have expressed apprehension regarding the "oligarchization" of Czech media, where ownership by powerful business figures with political connections could undermine media pluralism and democratic processes.<sup>4</sup>

High concentration of news media has been identified as the highest risk to media plurality by annual country reports of Media Pluralism Monitor. According to Václav

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<sup>3</sup> Martina Vojtěchovská, Aktualizovaná mapa vlastníků českých médií 2024. [Mediaguru, 24 June 2024](#).

<sup>4</sup> See Václav Štětka, Czech Republic. [Digital News Report 2024](#). Josef Šlerka, Čtyřlístek mediálních magnátů. [NFNZ, 23 November 2020](#).

Štětka and his co-authors, “the high level of concentration is enabled by the lack of formal restrictions on both horizontal and cross-media ownership, and by the traditionally lenient approach of the Office for the Protection of Competition towards assessing market dominance.” In online news media, the concentration was linked to “the overall dominance of the legacy publishers over digital native ones, largely reproducing the concentration patterns from the offline market”.<sup>5</sup> The weak regulatory oversight of the Office for the Protection of Competition was mentioned as a factor of media concentration also by a country report of Euromedia Ownership Monitor.<sup>6</sup> In their 2024 global analysis of press freedom, Reporters Without Borders ranked the Czech Republic 17<sup>th</sup> (three positions down from the previous year) and stated that “press freedom in Czechia is threatened by the high concentration of private media and the online hatred directed against journalists”.<sup>7</sup> The present report on “network media economy” proposes an alternative perspective on media concentration, because, unlike debates about news media pluralism and “oligarchization”, it does not prioritize news media but rather places it in an expanded context of network media industries, where global platforms play a much larger role.

The Czech media industries have been also described as “peripheral” in the sense of uneven media flows, high export barriers, and the lack of strong domestic players with international operations.<sup>8</sup> The platformization of cultural distribution in the 2010s and early 2020s potentially could have opened new opportunities for export and transnational collaboration. However, this process seems to be reproducing or even further exacerbating the periphery status of the Czech Republic as an importer rather than exporter of culture. HBO/Max and Netflix on one hand and Spotify on the other have contributed to the popularity of Czech content domestically, for example, but have not significantly increased its cross-border circulation. While domestic audiovisual content as well as music have proven relatively popular in the domestic market, movie theaters, radios, and commercial TV programs have been flooded with previously

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<sup>5</sup> Václav Štětka, Jitka Adamčíková, Albín Sybera, Monitoring Media Pluralism in the Digital Era. Country report: The Czech Republic. [European University Institute 2023](#).

<sup>6</sup> Josef Šlerka, Katerina Hrubesova, Stepan Sanda, Czechia: **Country report 2022**. [Euromedia Ownership Monitor 2023](#).

<sup>7</sup> Reporters Without Borders, [2024 Press Freedom Index – Czechia](#).

<sup>8</sup> Petr Szczepanik, *Screen Industries in East-Central Europe*. [London: Bloomsbury BFI 2021](#).

inaccessible US popular culture, and American content has generated the highest share of revenues.<sup>9</sup>

## Media Policy and Regulation

New national communication, media and cultural policy and regulatory frameworks started to take shape only slowly after the change of the regime in 1989. At that time, the Czech Republic implemented a series of media sector reforms to create a democratic, pluralistic broadcasting environment. To this end, in 1991, for instance, the government passed two key pieces of legislation: the Broadcasting Act (Act No. 468/1991 Coll.), which allowed for the creation of a dual broadcasting system, enabling both public and private broadcasters to operate. That same year, the Czech Television Act (Act No. 483/1991 Coll.) established Česká televize (Czech Television) as the public service broadcaster. These laws formed the basis for a diverse media landscape that promoted both competition and freedom of expression. In 2001, the Czech government also established the Council for Radio and Television Broadcasting (Rada pro rozhlasové a televizní vysílání), which is responsible for overseeing the media sector, ensuring content plurality, and protecting media independence.

The **Telecommunications Act** (Act No. 151/2000 Coll.) harmonized the Czech telecommunications sector with EU standards, outlining the principles of competition, universal service, and consumer protection, and established the regulator Czech telecommunication office, later transformed into the **Czech Telecommunication Office (ČTÚ)**. After joining the European Union in 2004, the Czech Republic further aligned its audiovisual and telecommunications policies with the EU framework, including directives like the Telecoms Package and the Audiovisual Media Services Directive (AVMSD). With the advent of digital broadcasting and the internet, media policy increasingly overlapped with telecommunications. In 2012, the Czech Republic completed its transition from analog to digital terrestrial television, overseen by both telecom and broadcasting regulators.

The Czech Television Act has recently been amended to address financial challenges faced by ČT, particularly its heavy reliance on stagnating license fees. The amendment aims to adapt the fee system to modern viewing habits, including the growth of digital platforms. However, the process of negotiating and approving the amendment has

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<sup>9</sup> Based on preliminary results of the ongoing research project “Support for Export of Audiovisual Content: Means for Measuring, Predicting, and Increasing Cross-border Circulation of Czech Film and Television Works” (The *Technology Agency* of the Czech Republic, TQ01000479, PI: P. Szczepanik).

been difficult. The proposal faced significant resistance in the Czech Parliament, with political parties divided on how to modernize the funding model without burdening taxpayers or undermining ČT's independence. Commercial broadcasters argued that increasing the public funding for ČT could distort competition, especially in an increasingly digital media environment where commercial broadcasters are already dealing with shifting consumer behavior and declining advertising revenues.<sup>10</sup>

In the film sector, the Audiovisual Act (Law No. 496/2012 Coll.) was passed after nearly two decades of political negotiation and reform attempts. This law marked a critical milestone, addressing key issues such as the regulation of state support for Czech cinema and production incentives, and establishing the Czech Film Fund. Key to the reform's success was the involvement of a wide coalition of interest groups and policymakers who worked to align the legislation with both the needs of the small domestic economy, and the EU regulatory framework, particularly the Audiovisual Media Services Directive (AVMSD) and the state aid rules. As of 2024, the Audiovisual Act has been amended to expand the scope of public support to TV series and digital games and to implement financial obligations of transnational VOD services based on the 2018 version of the AVMSD.

Unlike some other European countries, the Czech Republic lacks specific legislation directly limiting media concentration. The current approach primarily relies on general competition law, overseen by the Office for the Protection of Competition (ÚOHS). This body assesses mergers and acquisitions based on market dominance and potential harm to competition, but it does not address broader concerns with media pluralism.

The Czech legislation does not impose ownership limits for media entities or cross-ownership restrictions between different media types (e.g., print, radio, and television). The high media concentration in the country prompted some experts to call for a more robust legal framework that would go beyond general competition law, emphasizing the importance of safeguarding media pluralism and independence to maintain a healthy democratic environment.<sup>11</sup>

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<sup>10</sup> Martina Vojtěchovská, Návrh na zvýšení peněz pro ČT je šokující, bez diskuse nepřijatelný. [Mediaguru, 26 September 2023](#).

<sup>11</sup> Aleš Rozehnal, Možnosti omezení koncentrace vlastnictví médií. [Pravniprostor.cz, 24 June 2018](#).



## Methodology

The Global Media and Internet Concentration Project (GMICP) employs a methodology designed to analyze the scale, scope and structure of a wide variety of telecommunications, digital, broadcasting and publishing sectors both individually and collectively. It also aims to do so across time (history) and in a way that makes international comparisons possible. To facilitate cross-media, historical, and international comparisons, revenue is used as much as possible as a common denominator.

The approach begins with defining the media landscape and assembling data from multiple sectors, including telecommunications, audiovisual and publishing media, and core internet applications. This data collection focuses on firm-specific revenues and market shares within each sector. Subsequently, the data is aggregated to identify trends within each media type, followed by a comprehensive analysis to provide an overarching view of the entire media system. The primary unit of analysis is annual revenue, as it offers consistent comparability across different media and time periods.

Revenue data for specific sectors can often be sourced from national regulators, such as the Czech Telecommunication Office, industry associations like the Union of Film Distributors or the Association of Czech Booksellers and Publishers, and from the European Audiovisual Observatory. Additionally, revenue data for individual firms is typically obtained from annual financial statements.

However, there are notable limitations to the availability and usability of such revenue data. For certain sectors, no official data exists, necessitating reliance on third-party analytics services, such as Ampere Analysis or PricewaterhouseCoopers (PwC). For individual firms, even those legally obligated to disclose revenue data often present it in formats that do not align with the definitions or categories required for media sector analysis. Transnational platforms operating without a Czech office further complicate data collection, as they do not publish national financial statements. In instances where reliable company-level revenue data was unavailable for constructing market shares, alternative metrics such as traffic, readership, or viewership data were utilized. These metrics were derived from sources like Statcounter, the Czech Statistical Office, and commercial market research studies, including Media Projekt and Radioprojekt (commissioned by industry associations and conducted by research agencies).

These limitations have raised significant challenges regarding transparency, reliability, and comparability of data. To mitigate these issues, we employed cross-verification and triangulation wherever possible. For example, we compared figures from international analytics providers, such as PwC, with those from industry associations, including the

International Federation of the Phonographic Industry (IFPI) and the Interactive Advertising Bureau Europe (IAB). We also validated total revenue figures by aggregating financial data from individual companies. In some cases, we sought insights from industry insiders and employed estimations based on context-specific assumptions, correlations, and extrapolations. Details of these approaches are outlined in the notes accompanying the data workbooks provided with this report. It is important to note that some estimates, particularly those related to global platforms (mainly in the sectors of online advertising and app distribution), should be interpreted with caution. These estimates represent provisional findings that will be refined and expanded in subsequent stages of this research.

Additionally, the project utilizes economic tools such as Concentration Ratios (CR) and the Herfindahl-Hirschman Index (HHI) to measure concentration levels and trends, facilitating historical and international comparisons. The HHI method is perceived as a more sensitive metric for identifying changes and differences in markets, with thresholds defined as followed:  $HHI < 1500$  = unconcentrated market,  $HHI > 1500$  but  $< 2,500$  = moderately concentrated,  $HHI > 2,500$  highly concentrated.

The “weighted HHI” measure of concentration within the whole network media economy refines the analysis by assigning each sector and the firms within them a weight proportional to the sector’s size relative to the entire media economy. This method ensures that the significance and influence of larger sectors, such as telecommunications and online media are accurately reflected in the overall calculation of market concentration across the network media economy. In short, the weighted HHI provides a useful lens to assess the distribution of market power within a multi-sector media economy.

# Telecoms and internet access

After the political and economic changes initiated in 1989, the telecommunications segment of the Czech Republic became the subject of major transformations. The state monopoly enterprise Správa pošt a telekomunikací – SPT Praha managing the then-outdated infrastructure of postal services and telecommunications was divided into two state monopolies in 1993: Česká pošta (postal services) and SPT Telecom (managing telecommunications).<sup>12</sup>

In 1991 the first mobile operator—Eurotel owned by SPT Telecom together with Atlantic West (a joint venture of US WEST International, Inc. and Bell Atlantic International Inc.—entered the market. Simultaneously, this also marked the first major foreign investment in the segment. SPT Telecom changed its name to Český telecom<sup>13</sup> and was later acquired by the Spanish company Telefónica in 2005.<sup>14</sup> It was subsequently sold again in 2013 to the above-mentioned Czech investment group PPF and renamed to O2.<sup>15</sup> In 2015, O2 was divided into O2 (focusing on providing telecommunication services to clients) and CETIN (operating telecommunications infrastructure). CETIN currently boasts of covering 99.6 percent of the population of Czechia in terms of wireline and mobile internet.<sup>16</sup> Both O2 and CETIN are by majority of shares owned by PPF.<sup>17</sup>

In 1996, the second mobile operator Radiomobil (nowadays T-Mobile), acquired subsequently by Deutsche Telekom, entered the market, ending the monopoly in telephone services.<sup>18</sup> In 2000, the third mobile operator, Český mobil, ventured into the market and was later acquired by the British-owned Vodafone Group in 2005.<sup>19</sup>

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<sup>12</sup> Jiří Peterka, Už ne Telefónica, ale jen O2. [Aktuálně.cz, 23 June 2014](https://aktuálně.cz/23-june-2014).

<sup>13</sup> jyx, SPT Telecom se přejmenuje na Český Telecom. [iDNES.cz, 22 April 1999](https://idnes.cz/22-april-1999).

<sup>14</sup> Právo, novinky, Vláda prodala Telecom španělské Telefónice, [Novinky.cz, 6. 4. 2005](https://novinky.cz/6-4-2005).

<sup>15</sup> Jiří Peterka, Už ne Telefónica, ale jen O2. [Aktuálně.cz, 23 June 2014](https://aktuálně.cz/23-june-2014).

<sup>16</sup> CETIN. Propojujeme Česko spolehlivou sítí. [CETIN.cz, 2024](https://cetin.cz/2024).

<sup>17</sup> ČT24, PPF prosadila rozdělení O2 na dvě firmy. Drobní akcionáři protestovali marně. [Česká televize, 8 April 2015](https://ceska-televizie.cz/8-april-2015).

<sup>18</sup> Jan Lásk, Před 28 lety vstoupil do Česka druhý operátor. Ohlásil se jako T Mobil a nabízel tarif se 400 minutami za 1795 Kč. [MobilMania.cz, 28 March 2024](https://mobilmania.cz/28-march-2024).

<sup>19</sup> Vodafone, Z Oskara se stává Vodafone. [Vodafone, 31 January 2006](https://vodafone.cz/31-january-2006).

Vodafone further diversified its services by the acquisition of a major provider of internet services and cable television, UPC, in 2019.<sup>20</sup>

Thus, the telecommunications market in Czechia is now concentrated in the oligopoly of three major players, two of them foreign (Vodafone, T-Mobile), and one domestically owned (O2). The oligopolistic structure of the telecommunications market has been criticized for restricted competition and for driving the prices for mobile broadband internet up, resulting in prices in Czechia that are significantly higher than the EU27 average.<sup>21</sup> The Czech market has also demonstrated a strong shift from wireline to wireless services over time. Consequently, for example, the usage of wireline call services remained significantly below the EU27 average, while the usage of wireless mobile services exceeded the EU27 average by 14.5% as of 2022.<sup>22</sup>

Total revenues in the telecommunication's sector according to the Czech Telecommunication Office (ČTÚ) remained consistently around 120 billion CZK between 2019 and 2022. A noticeable decline occurred in 2021, however, when revenues dropped from 121.7 billion to 119.8 billion. ČTÚ's underlying data reveal that the decrease can be attributed to long-term trends in wholesale services, which consistently declined across all telecommunications sectors over the four observed years (except for ISP), while retail services exhibited more varied development.<sup>23</sup> Our analysis, however, focuses exclusively on the retail services, which grew from 75 to 81 billion CZK in the covered period.

When collecting data for the telecommunications sectors, it was necessary to reconcile two sets of relevant but only partially compatible data. On one side, there were annual reports from the three dominant players in the Czech telecommunications market. On the other side, there was information provided by the key regulatory body, the ČTÚ, and other external actors. The reports from the dominant players were inconsistent: while one (O2) carefully published revenue broken down by sector, another (T-Mobile) only

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<sup>20</sup> Vodafone, Vodafone se spojuje s UPC a dělá další krok k budování gigabitové společnosti. [Vodafone, 1 August 2019](#).

<sup>21</sup> empirica Gesellschaft für Kommunikations- und Technologieforschung mbH and TÜV Rheinland,

Mobile and fixed broadband prices in Europe 2021. [Publications Office of the European Union, 2022](#). Barbora Novotná, ČTÚ: Tichá dohoda tří operátorů Čechům výrazně prodražuje mobilní tarify. [Seznam Zprávy, 2 September 2022](#).

<sup>22</sup> ČSÚ, Informační společnost v číslech – 2024. [ČSÚ 2024](#).

<sup>23</sup> SPIR, an annual report for 2022. [SPIR 2023](#).

<sup>23</sup> ČTÚ, Zpráva o vývoji trhu 2019–2023 – podkladová data, fig. 1. [Prague: ČTÚ 2024](#).

provided a general division between wireline and mobile services, and the third (Vodafone) did not break down revenues at all. The regulator's data were also incomplete on the grounds it could not provide commercially sensitive business information beyond what it already publishes. Nevertheless, correspondence with the ČTÚ's economic regulation department helped refine the analysis, leading to a qualified estimate of the market situation.

In the first phase, regulatory data on overall sector revenues and market share of the three major companies were compared with the figures from the individual players. Since discrepancies were found—where the combined revenues of the three players exceeded the total sector revenue reported by the ČTÚ—it was necessary to establish more reliable criteria. In the second phase, additional public data on market shares, specific to each sector, were used for further comparisons.

For wireless services, data on the total number of active mobile SIM cards in the retail market helped, as these figures roughly matched the annual market share values for the three key players. Minor discrepancies were attributed to M2M SIM cards and mobile virtual network operators (MVNOs) linked to the three major mobile network operators (MNOs).

For wireline services, published market shares based on the total number of fixed-line voice service subscriptions were partially useful but did not match the ČTÚ's figures and did not distinguish specific subtypes of services. The ČTÚ requires companies to report revenue from subscriber lines, call minutes, voice service setup, and voice transmission in private networks, but does not classify additional revenues from equipment sales and other fixed revenues as wireline services. To refine the data, more transparent information from O2 (ratios between services types) was applied to the other major players, while taking into account each player's share of subscriptions.

For ISP, ČTÚ's market analysis was crucial. It thoroughly addressed retail internet access and included a chart of the market shares of the three dominant players for 2021, which was used as a benchmark for estimating the market shares of the three players, with overall sector data from the ČTÚ enabling the tracking of changes in the other years. To fill out our analysis of the wireline sector, we relied on a custom dataset acquired from Ampere Analysis in 2024 for the multichannel video distribution sector. That data was then triangulated with data from European Audiovisual Observatory (see below).

The Czech Republic demonstrates relatively high broadband coverage compared to the EU27 average, including in Next-Generation Access (NGA) technologies, but its performance is mixed in specific areas, such as networks capable of 1Gbps speeds (FTTP and DOCSIS 3.1), as of 2022. NGA penetration in rural areas remains slightly below the EU average, indicating room for improvement in connectivity outside urban

centers. While LTE networks provided full population coverage and 5G networks reached 82.6% of the population—exceeding EU27 averages in 2022—the high mobile data prices (as mentioned above), potentially hindered broader adoption of mobile internet services.<sup>24</sup>

The penetration of mobile internet services in the Czech Republic exceeded the EU27 average by two percentage points as of 2022, reaching 98.9% per 100 active SIM cards. However, the monthly volume of mobile data usage lagged at only 54.2% of the EU27 average (7.0 GB per SIM card). Internet usage among the Czech population (16–74 age group) slightly surpassed the EU27 average in 2023 (92% compared to 91%). Mobile internet usage in the same age group aligned with the EU27 average at 86% in 2023 but demonstrated a steeper growth trajectory than Western Europe, increasing from 65% in 2019 to 77% in 2022 among individuals aged 16 and older. The age group 16–24 reached full mobile internet penetration (100%) by 2023. Social media platform usage among the 16+ group grew modestly from 54% to 58% between 2019 and 2022 but exceeded the EU27 average in 2023 for the 16–74 demographic (68% vs. 59%). Czech users aged 16–74 also exhibit slightly below-average usage of paid internet services, such as music and gaming, but demonstrate above-average engagement with free services, including music, e-commerce, and messaging apps, compared to the EU27 average.<sup>25</sup>

The wireless sector dominated the telecommunications industry, accounting for 59.9% of total revenues between 2019 and 2022. It was followed by internet service providers (ISP) at 21.5%, multichannel video distribution at 12.9%, and wireline services at 5.7%. Telecom revenues generally grew during this period, with marginal growth in wireless (+0.9%), modest growth in ISP (+10.8%), and significant growth in multichannel video distribution (+41.4%). The only segment experiencing a decline was wireline services, which saw a revenue drop of 9.1%.

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<sup>24</sup> European Commission, Broadband Coverage in Europe 2022. [Luxembourg: Publications Office of the European Union 2023](#).

<sup>25</sup> ČSÚ, Informační společnost v číslech – 2024. [ČSÚ 2024](#).

## Wireless

The retail mobile services sector has long been the most significant component of the Czech telecommunications market, holding around a 60% share of the total revenues (46.5% when including wholesale revenues).<sup>26</sup> Mobile services are divided into voice and data services. In the observed years, a long-expected shift occurred. In 2022, mobile internet revenues surpassed voice revenues for the first time, reaching 51.3% compared to 48.7%. For comparison, ten years earlier, the ratio was 86.1% in favor of voice services. Retail revenues from mobile internet access grew significantly, outweighing the decline in mobile voice communication services, which consistently decreased each year, although at a very limited rate (1.8% in 2020, 1.0% in 2021, 0.9% in 2022).<sup>27</sup>

The long-term shift from traditional voice services to mobile internet or mobile data services in wireless telecommunications is reflecting broader changes in technology, consumer behavior, and industry dynamics. Consumers increasingly use smartphones for data-intensive applications such as streaming video, social media, messaging apps, online shopping, and gaming, rather than voice calls. This, in turn, reflects the fact that the deployment of LTE (followed by 4G and 5G) networks has significantly improved data speeds, latency, and reliability. Consequently, mobile data services have become more attractive and practical, while also helping to drive up internet access and usage rates in previously underserved and remote regions. In addition, in 2019, Czech mobile operators introduced unlimited mobile packages. Average mobile data consumption rose by 51% between 2018 and 2019 in response, and the volume of transferred mobile data tripled between 2016 and 2019.<sup>28</sup>

O2's more transparent data revealed that some dominant market players reached this shift as early as 2020, although mobile voice services still had a substantial lead in 2019.<sup>29</sup> The volume of call minutes in mobile networks decreased since, however: in 2022, it fell to 26.3 billion minutes, nearly 660 million fewer than the previous year.<sup>30</sup> However, it's important to note that the data were influenced by the atypical year of 2020, during which call volumes surged (in both wireless and wireline sectors).

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<sup>26</sup> ČTÚ, Zpráva o vývoji trhu 2019–2023 – podkladová data, fig. 4. [ČTÚ 2024](#).

<sup>27</sup> Ibid.

<sup>28</sup> Jaromír Novák, Češi se rozdatovali. Loni v mobilech přenesli v průměru skoro 1,9 GB měsíčně, odhaduje ČTÚ. [Lupa.cz, 17 June 2020](#).

<sup>29</sup> O2, Výroční zpráva 2020, [Prague: O2 Czech Republic a.s. 2021](#), pp. 75, 76.

<sup>30</sup> ČTÚ, Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2022, [Prague: ČTÚ 2023](#), p. 7.

According to the ČTÚ, the average monthly number of minutes per active SIM card fell to 160 minutes in 2022 (from 169 minutes the year before).

The share of active SIM cards was a key indicator for determining the position of dominant market players. The increasing influence of mobile data can be seen when comparing the growth in the number of SIM cards with mobile internet access (10.7 million in 2021, 11 million in 2022, 11.5 million in 2023) to the total number of SIM cards used for voice communication (13.3 million in 2021, 13.7 million in 2022, 13.6 million in 2023). Despite the partial decline in mobile voice services, the stability of total revenues in the wireless sector in the observed years has been much higher than in the mid-2010s, when revenues dropped by almost 15% between 2012 and 2014.<sup>31</sup>

The mobile services sector showed a long-term stable market position for the three dominant players. The distribution of market shares between the three mobile network operators (MNOs) and dozens of mobile virtual network operators (MVNOs) remained nearly unchanged, with approximately 94% of the market held by the MNOs: T-Mobile (38.8%), O2 (30.3%) and Vodafone (25.3%) as of 2022. The concentration of revenues around the three MNOs is reflected in the fact that half of the remaining market share (3.7% in 2019, 3.9% in 2020, 3.5% in 2021, 3.5% in 2022) was divided among the three MVNOs, which are financially linked to the mobile network operators. The other half of the market share was held by MVNOs that remained independent from the network operators. While the number of MNOs and financially linked MVNOs remained unchanged over the years, the number of active providers from the independent MVNO sector decreased (134 in 2019, 102 in 2022). The market share of SAZKA, the largest independent MVNO, for example, also showed a decline (from 1.4% in 2019 to 1.3% in 2022).<sup>32</sup> In sum, the independent MVNO sector is shrinking and the tight three-way oligopoly in the mobile wireless market is solidifying.

Figure 1 below illustrates the stable division of the telecom market among the three major players between 2019 and 2022.

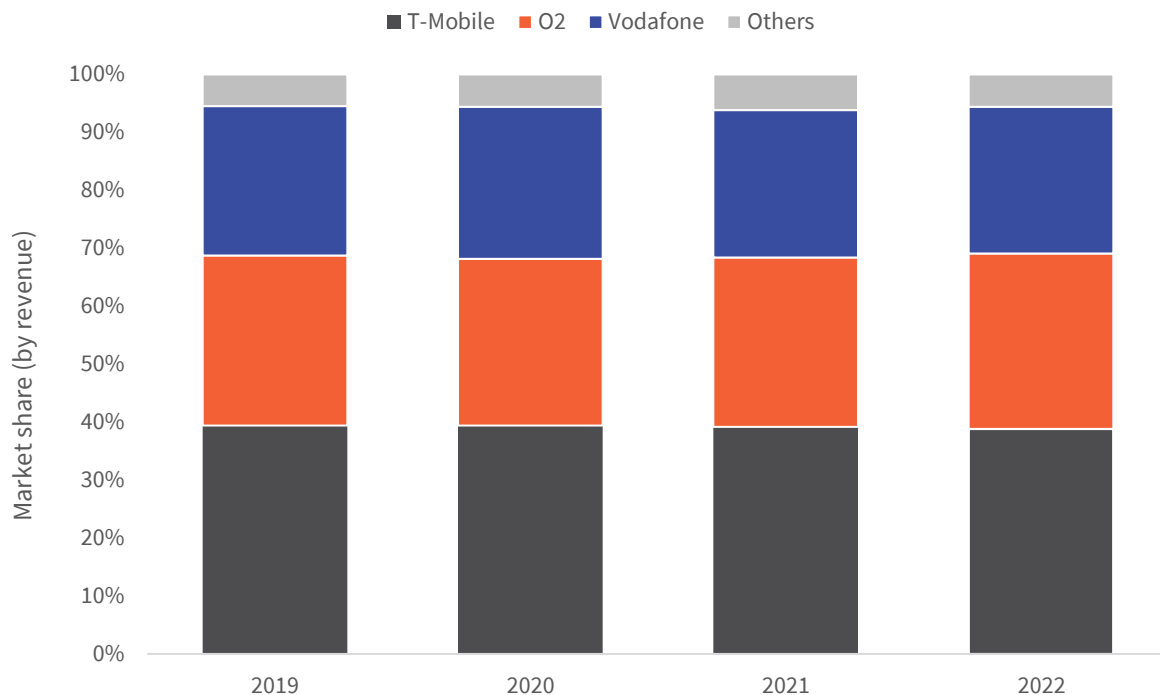
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<sup>31</sup> ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2021*. [Prague: ČTÚ 2022](#), p. 7; ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2022*, [Prague: ČTÚ 2023](#), pp. 6, 7; ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2023*. [Prague: ČTÚ 2024](#), pp. 6, 7.

<sup>32</sup> ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2020*. [Prague: ČTÚ 2021](#), p. 27; ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2021*. [Prague: ČTÚ 2022](#), p. 26; ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2022*, [Prague: ČTÚ 2023](#), p. 24, 26.



Figure 1: Wireless: Market share by revenue, 2019-2022



	2019	2020	2021	2022
CR3	94.2%	94.5%	93.9%	94.4%
HHI	3055.62	3076.13	3039.53	3063.62

These developments contributed to maintaining high concentration in the Czech mobile services market (HHI 3055.62 in 2019, 3076.13 in 2020, 3039.53 in 2021, 3063.62 in 2022). While these values are still lower than those estimated by the GSM Association in the European market (3250 in 2021), the Czech three-player market does not exhibit the same trend of decreasing concentration observed in some European four-player markets.<sup>33</sup> Unlike the EU, where four-to-three MNO mergers have been restricted and concentration reduced as a result, Czech data shows a more stable level of concentration, particularly with the dominant role of T-Mobile. Moreover, the steady

<sup>33</sup> GSM, *Competition Dynamics in Mobile Markets: An Assessment of the Effects on Network Investment and Quality in Europe*. [London: GSMA Head Office 2022](#), p. 10.

level of concentration and above-average profitability in the Czech market contrast with the ongoing downward trend seen in many European markets, particularly those with four MNOs.

## Internet Service Providers

ISP has been the most competitive sector within the telecom and internet access market measured both by CR4 and HHI and includes the highest share of small players below 1% market share.

The retail internet access market showed clear year-on-year growth in the observed years, though not substantial (3.8% in 2020, 3.3% in 2021, 4.5% in 2022). Similar to the wireless sector, the market position of fixed internet services strengthened at the expense of voice services, with wholesale service revenues remaining stable. The sector reversed the negative trends from the mid-2010s, during which total revenues had been declining for several consecutive years.

Key to the steady rise of retail internet access was the incorporation of technological solutions enabling faster data transfer—such as the rise of the fixed LTE and the migration from ADSL to VDSL—and the consolidation of key internet access providers.<sup>34</sup> This consolidation occurred with the change of ownership of UPC Czech Republic, which became part of the Vodafone group in July 2019. This strengthened its position in the retail market, and by the following year, it became the second-largest broadband provider.

According to the ČTÚ, the Czech retail internet access market is highly fragmented, a situation not diminished by the consolidation of major mobile operators: “This is a very specific situation in the EU, indicating that local providers, thanks to long-term establishment and knowledge of the market, are able to retain customers and compete with larger companies.” The number of these local providers—each with less than one percent market share—decreased gradually (1,657 in 2019, 1,629 in 2020, 1,541 in 2021), but together they keep holding a significant portion of the market.<sup>35</sup>

The ČTÚ’s analysis also includes comparisons based on European Commission data:

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<sup>34</sup> ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2022*, [Prague: ČTÚ 2023](#), p. 22.

<sup>35</sup> ČTÚ, *Analýza trhu č. A/1/07.2023-2*, p. 64. [ČTÚ, July 18 2023](#).

the market share of the incumbents in the Czech retail broadband market is decreasing, reaching relatively low levels (...), while alternative operators continue to gain a larger market share (...). The Czech Republic thus ranks second in the EU in terms of the lowest incumbent market share (...). These comparative figures highlight the increasing level of competition in the retail market, as the average market share of incumbents in the EU decreased by only 2.7 percentage points between mid-2016 and 2021, whereas in the Czech Republic, it decreased by 4.2 percentage points.<sup>36</sup>

Apart from the local embeddedness of the small independent ISP players, the position of the above-mentioned CETIN plays a pivotal role in shaping the fragmented structure of the retail ISP market in the Czech Republic. It operates as a wholesale provider of telecommunications infrastructure, but does not directly compete in the retail market, allowing a wide range of retail ISPs to use its infrastructure, without the need for large-scale infrastructure investments.<sup>37</sup>

Figure 2 highlights the low market share of the three incumbents and the significant share of the diverse set of smaller local and regional providers.



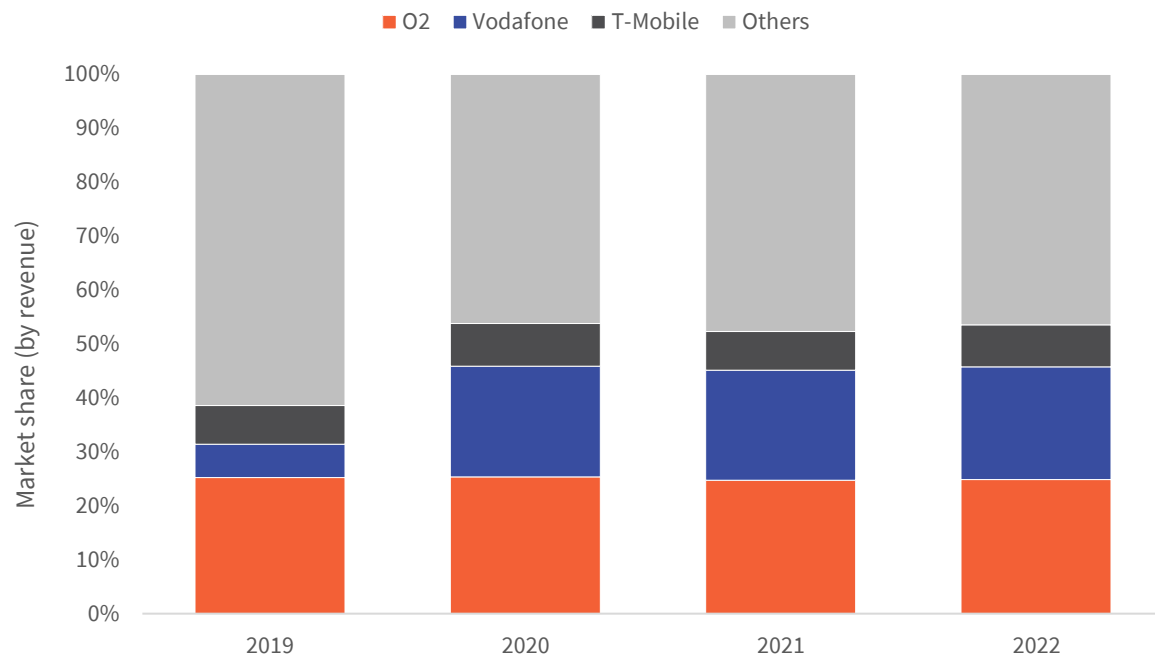
**“ISP has been the most competitive sector within the telecom and internet access market”**

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<sup>36</sup> Ibid., p. 66.

<sup>37</sup> PPF, Cetin. [PPF 2024](#).

Figure 2: ISP: Market share by revenue, 2019-2022



	2019	2020	2021	2022
CR3	38.6%	53.8%	52.3%	53.6%
HHI	729.14	1127.82	1081.61	1117.66

## Wireline

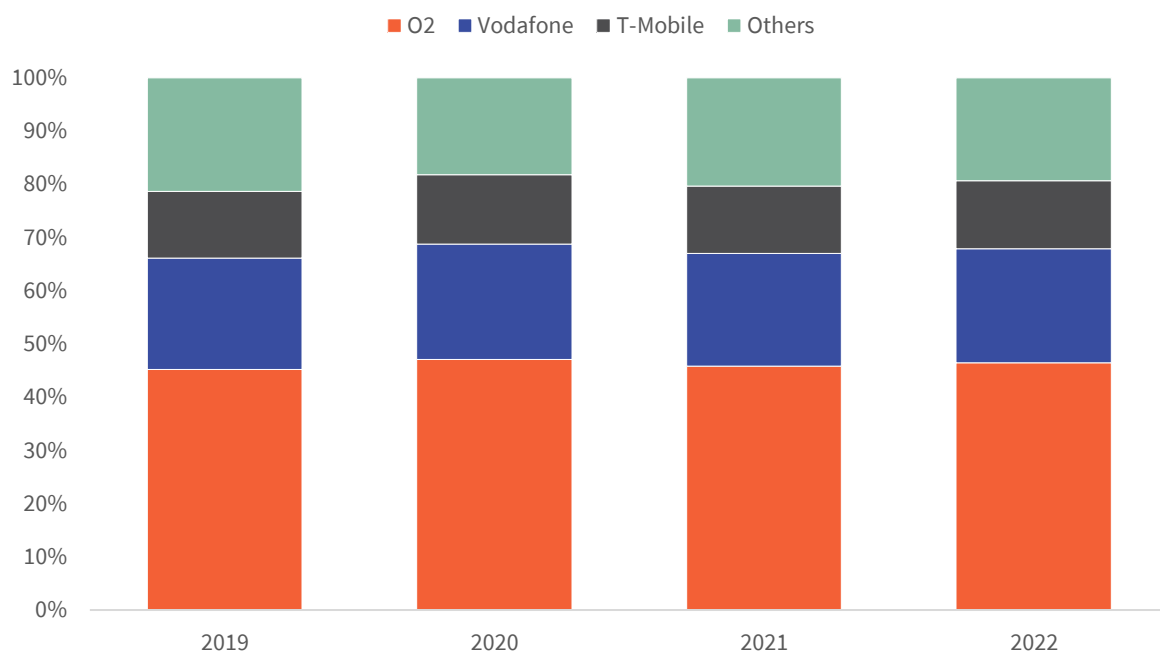
The fixed voice services sector, whose revenues were estimated by the share of voice service subscriber lines, exhibited signs of strong concentration around the three dominant market players. Over the observed four years, the number of active businesses providing wireline services with non-zero revenues consistently decreased (by 8.5%).<sup>38</sup> Fluctuations in annual revenues in the wireline sector seem to be caused by unpredictable changes in call volumes, especially during the COVID-19 pandemic.

<sup>38</sup> ČTÚ, *Výroční zpráva Českého telekomunikačního úřadu za rok 2022*. Prague: ČTÚ 2023, p. 25; ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2022*, Prague: ČTÚ 2023, pp. 45–46.

Additional revenues such as equipment sales could have moderated the overall decline in wireline services.

Although the strongest player, O2, consistently achieved more than a 45% market share, which is higher than the similarly dominant T-Mobile in the wireless sector. While the concentration remained high in general terms, the HHI indicated a lower level of concentration compared to wireless, which was related to several factors. First, O2's market share showed a slight decline after 2020. Second, the second and third players had market shares more than half smaller, leaving a significant share to small service providers. The future outlook for sector concentration is influenced by the ownership connection between O2 and CETIN, formerly the Czech Telecommunication Infrastructure, which operates the nationwide electronic communications network and was a wholesale provider of fixed telecommunications services with significant market power.<sup>39</sup> Both O2 and CETIN belong to the PPF investment group portfolio. Figure 3 illustrates the short-term growth in call volumes during the first covid-19 pandemics year, followed by return to the pre-pandemics figures, as well as the significant market share of small players.

**Figure 3: Wireline: Market share by revenue, 2019-2022**



<sup>39</sup> See ČTÚ, *Opatření obecné povahy č. A/S1/12.2022-22*. [ČTÚ, 5 December 2022](#).

	2019	2020	2021	2022
CR3	78%	81.1%	79.1%	80%
HHI	2598.26	2809.55	2670.01	2735.94

## Multichannel Video Distribution

The sector was the fastest-growing within the telecom category, expanding by 41.4% from 8.53 billion CZK in 2019 to 9.87 billion CZK in 2022. It is also the second most competitive segment within the telecom and internet access market, as indicated by its CR4 and HHI metrics. The market is divided among the three major telecommunications companies (O2, Vodafone, and T-Mobile), the satellite/cable/IPTV provider Skylink TV (owned by the French group Canal+), and various smaller providers. Skylink maintained the largest market share at 26%, while T-Mobile, the fourth-largest player, demonstrated the most significant growth, increasing its revenues by 149.2% between 2019 and 2022.

A 2023 study commissioned by the Association of Mobile Network Operators (APMS) surveyed Czech consumers about their primary source for watching TV at home, providing insights into the approximate distribution of TV consumption methods and their business implications. The results revealed the following proportions: free-to-air (FTA) accounted for 23%, VOD 22%, IPTV 20%, video platforms (e.g., YouTube) 13%, cable 12%, satellite 8%, and HbbTV 2%. The findings suggest that streaming services and IPTV are likely to continue growing at the expense of more traditional technologies, reflecting broader shifts in multichannel video distribution.<sup>40</sup>

Skylink, originally owned by a Czech company TradeTec, was acquired by the M7 Group in 2009, and has been a leading satellite TV provider in the Czech Republic since. It has also entered the IPTV sector. M7 Group, a Luxembourg-based company, owned by the French media conglomerate Canal+, is one of Europe's leading satellite operators. Skylink offers a wide range of channels and services, including the OTT services Skylink

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<sup>40</sup> APMS, Internet dominuje sledování pořadů v domácích TV. [APMS, 4 July 2023](#).

Live TV. In 2019, M7 Group acquired the operator FreeSAT from UPC, owned by Liberty Global, but FreeSAT has remained a separate service.<sup>41</sup>

O2 Czech Republic, owned by the financial group PPF, provides IPTV services through O2 TV. It offers various packages and a broad selection of channels, including the PPF-owned VOD service Voyo. In August 2024, O2 expanded its market presence by integrating services from Nej.cz and Kuki, two smaller IPTV providers, thereby increasing its customer base. O2 TV also aims at positioning itself by providing premium sports content and investing in user interface functionality.

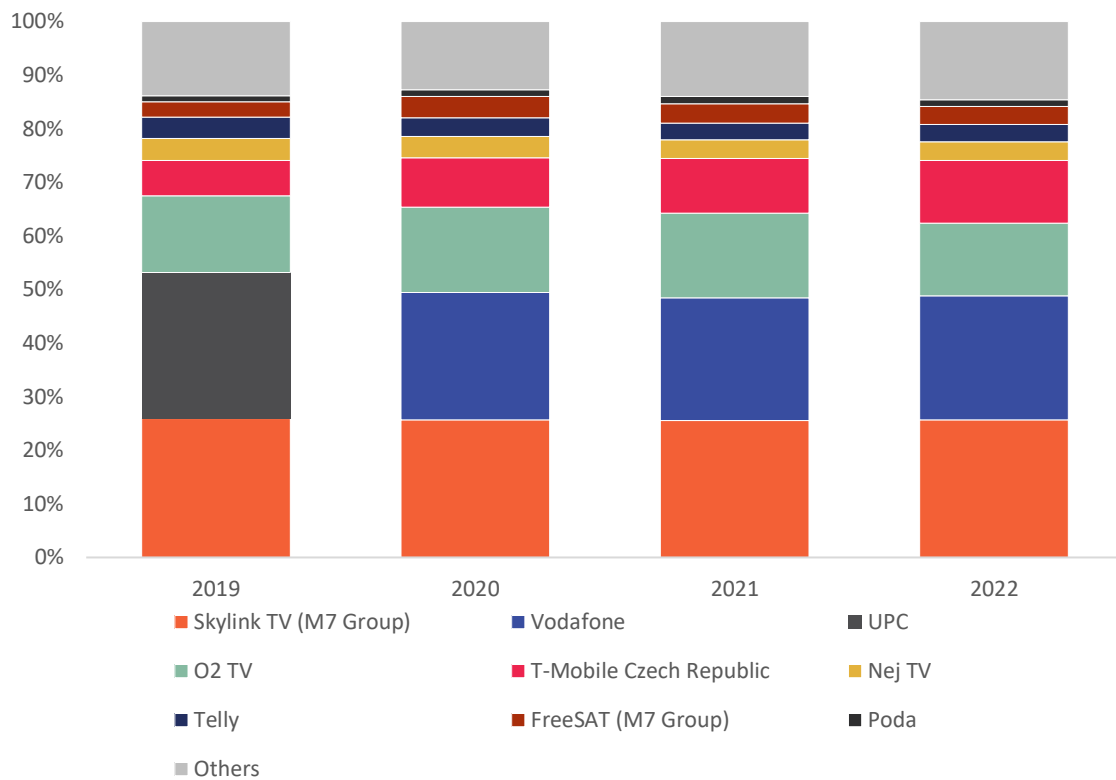
As a subsidiary of the British Vodafone Group since 2005, Vodafone Czech Republic has operated an IPTV service under the brand of Vodafone TV since 2020, featuring multiple packages and a diverse channel lineup, including VOD services Netflix and Prima+. Vodafone acquired the most significant of the smaller players, the Czech cable company UPC, in 2019 (that's why the chart does not show a market share for UPC since 2020 and for Vodafone in 2019).

T-Mobile's IPTV service is the smallest among the dominant players but has been dynamically changing and showed the highest growth between 2019 and 2022. In May 2023, T-Mobile rebranded its television service from T-Mobile TV to Magenta TV, aligning with the branding used in neighboring countries. More recently, Magenta TV has incorporated MAX, Canal+ and Voyo VOD libraries. In October 2024, T-Mobile also announced plans to introduce FAST (Free Ad-Supported Streaming TV) channels to Magenta TV. Magenta TV's strategic initiatives, including rebranding, content diversification, and user-centric features, have strengthened its position in the competitive Czech television market.

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<sup>41</sup> Jan Brychta, Satelitní trh čeká další konsolidace, Skylink přebírá od UPC klienty freeSatu. [Lupa.cz, 21 December 2018](https://lupa.cz/21-December-2018).

Figure 4: Multichannel video distribution: Market share by revenue, 2019-2022



	2019	2020	2021	2022
CR4	74.1%	74.6%	74.4%	74.1%
HHI	1706.81	1609.53	1565.48	1554.45

Source: Ampere Analysis.

## Telecoms and internet access grouped results

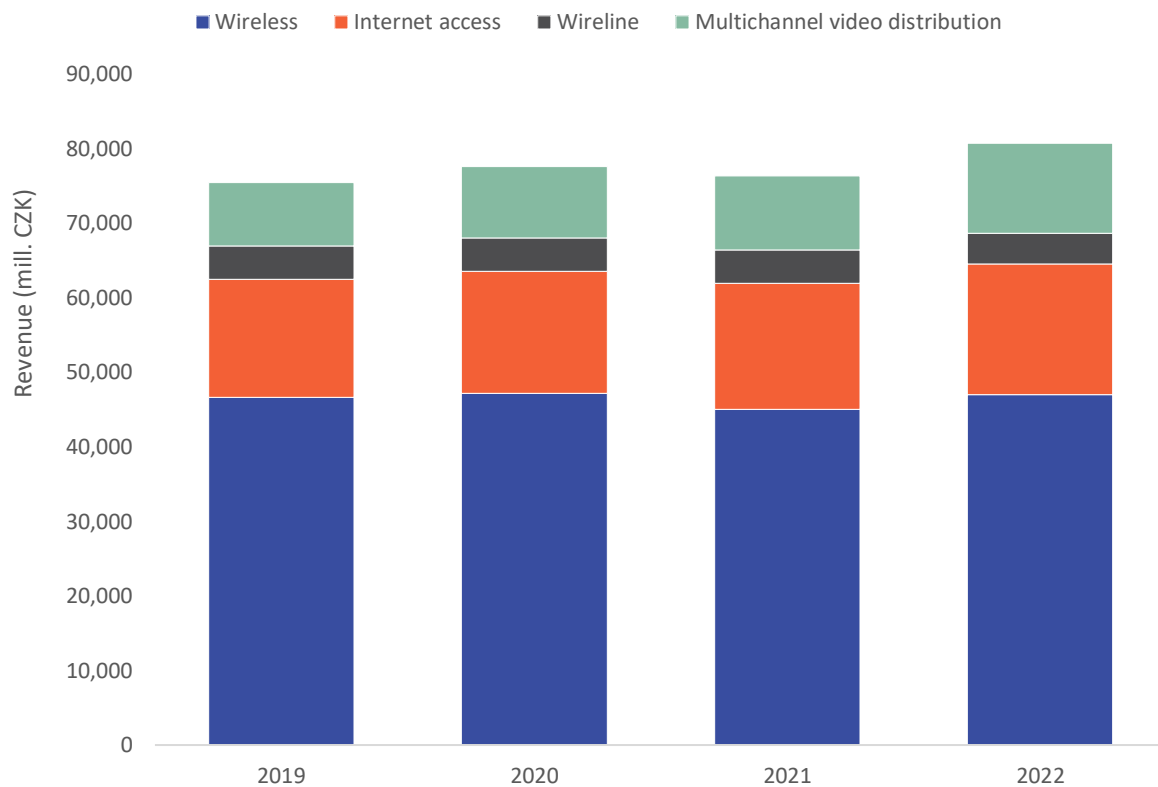
In the field of electronic communications within the Czech Republic, approximately two thousand active business entities with non-zero annual revenues operated between 2019 and 2022. During these four years, the number of active businesses in the



telecommunications sector consistently decreased by a few percentage points annually (2,068 in 2019, 1,895 in 2022).<sup>42</sup>

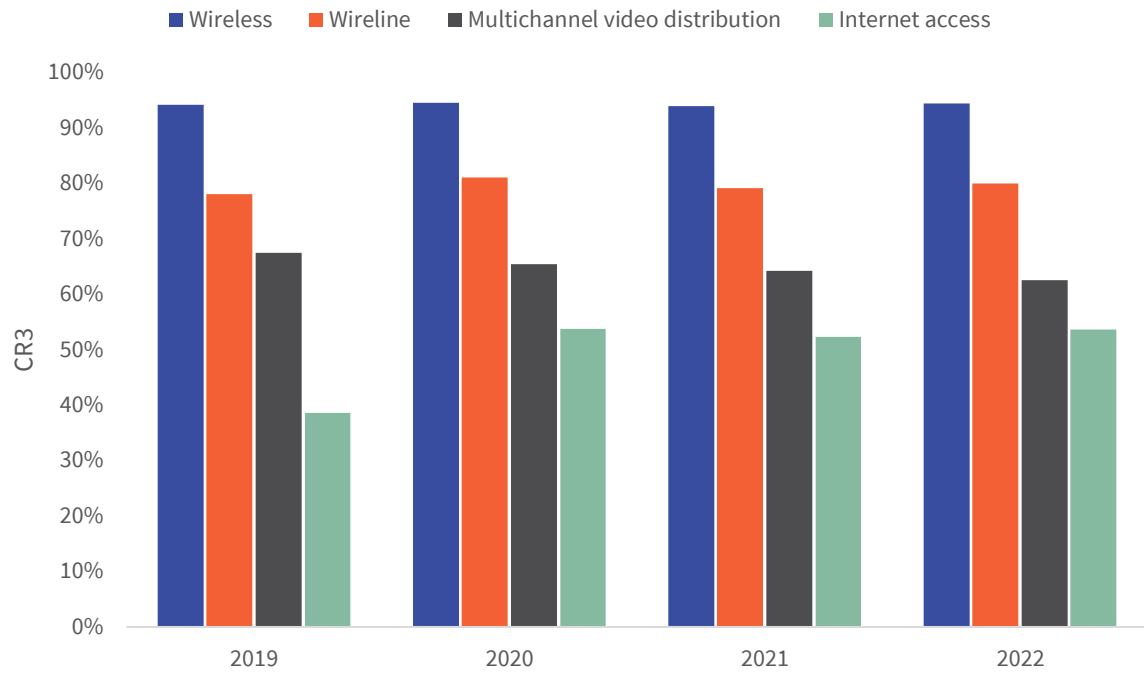
The situation of the three dominant players in the market indicated a consistently high level of concentration (wireless), as well as a specific fragmentation (ISP). Multichannel video distribution differs in terms of the composition of the dominant players: instead of a three-player market as in other sectors in the category, it is a four-player market, where the leader is not a large telecom, but a satellite provider.

**Figure 5: Total revenues: Telecom and Internet Access, 2019-2022 (mill. CZK)**

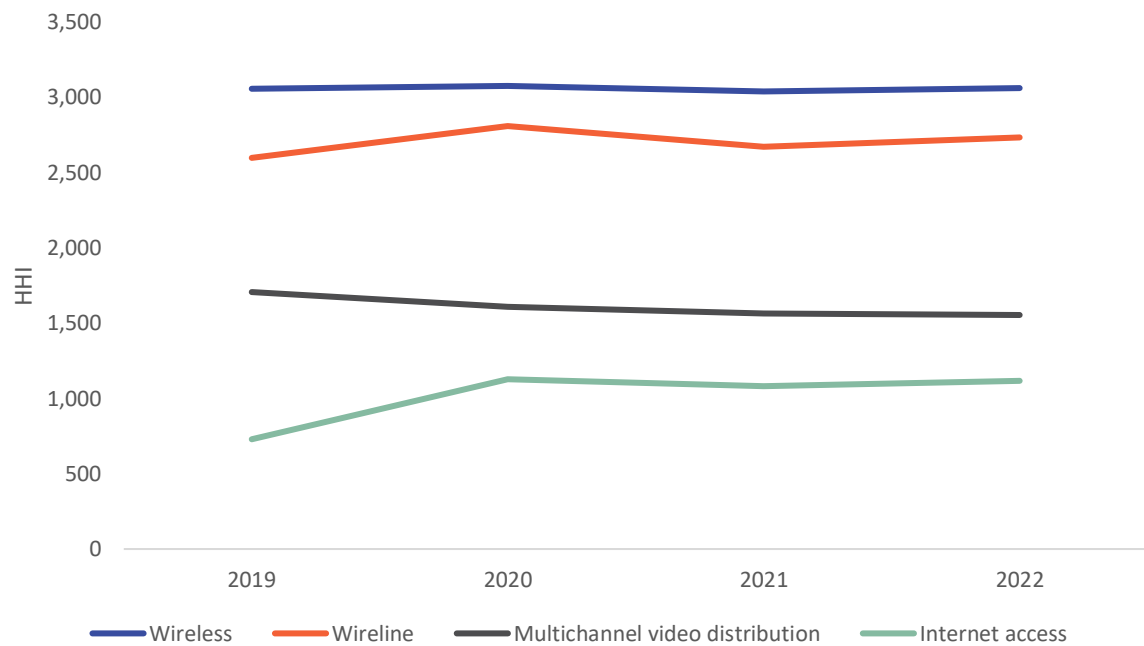


<sup>42</sup> ČTÚ, *Zpráva o vývoji trhu elektronických komunikací se zaměřením na rok 2022*, [Prague: ČTÚ 2023](#), p. 11.

**Figure 6: CR3 scores for Telecom & internet access sectors, 2019-2022 (based on revenue)**



**Figure 7: HHI scores for Telecom and internet access sectors, 2019-2022 (based on revenue)**



# Online media and traditional media services

The European media industry is generally characterized by high market concentration, which limits economic competition and tends to strengthen its oligopolization.

According to the European Audiovisual Observatory, the top 20 economically strongest audiovisual groups in 2022 generated 73% of the total revenues of the top 100 companies on the ranking (if we focus only on the private sector, their share would be 88%).

Among these 20 economically strongest companies, seven are from the USA (according to the ultimate owner), and their revenue accounts for 48% of the total revenue of the top 20 companies on the ranking. American companies thus have a significant share of the European audiovisual market and its growth: their revenue constitutes 36% of the total income of the top 100 most economically successful audiovisual companies operating in the European market, and their total revenues grew by 46% between 2016 and 2022, contributing two-thirds of the overall growth of the top 100.

American firms dominate the SVOD (Subscription Video on Demand) sector, which represents the most dynamic part of the audiovisual industry and is also characterized by the highest degree of concentration (the top 10 companies account for 90% of the subscribers) and the highest level of private ownership within the audiovisual sector (99%). In 2022, American SVOD providers accounted for 84% of the total subscriptions in Europe (Netflix – 30.7%, Amazon Prime – 19.2%, Disney+ – 14%). The dynamic growth of the SVOD sector thus increases the level of market concentration in the European audiovisual industry as a whole.<sup>43</sup> The dynamics of the market in the Czech Republic, however, differ slightly due to the stable position of the local broadcasters and the growing strength of their SVOD services (this trend is noticeable across Europe, but not at this intensity).

The television market, audiovisual production, and cinema exhibition in Europe are more divided along national borders, which results in a lower concentration of economic power and a smaller share of US-based final owners compared to SVOD. The 20 largest European television companies had 56% of total television viewership (again,

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<sup>43</sup> Laura Ene Iancu, *Top players in the European AV industry: Ownership and concentration*. 2023 Edition. [Strasbourg: EAO 2024](#).

from the top 100 companies), and only 3 of them were owned by the USA (11% of the revenue). The top 20 largest producers of fictional television content (including ČT and PPF Group) produced only 34% of the fictional titles released by the top 100 producers in 2022 (with 3% ownership from the USA). Somewhere between the television and production markets, cinemas are positioned in terms of concentration: the top 20 cinema chains owned 39% of all cinema halls in 2021, with 8% of those chains being owned by the USA. Again, the Czech Republic differs by lower concentration due to its small, fragmented, and nationally oriented market where conglomeration and vertical integration is rare.

The television broadcasting sector accounted for the largest share of media services revenue between 2019 and 2022, contributing 33.8%, followed by books (14.8%) and digital games (12.4%). Other sectors accounted for between 3% and 7% of the market. Digital media services exhibited the highest growth during this period, with revenues from digital games increasing by 65.5%, online video services by 184.6%, and music streaming services by an impressive 227.6% (when separated from other music-related services such as live performances and performance rights). In contrast, physical media services either stagnated or declined: film and TV distribution decreased by 19.2%, newspapers by 11.9%, film exhibition by 11.6%, and magazines by 11.5%. Books, however, remained largely stable, with a marginal growth of 1.2%.

## Broadcast television

The current structure of the Czech television market started taking shape in the mid-1990s. TV Nova, launched in 1994, was the first private national commercial TV station in the Czech Republic, significantly altering the media landscape. Its entry into the market disrupted the dominance of Česká televize (Czech TV), the public service broadcaster and successor to the earlier generation of state-run television. Nova's aggressive and commercially oriented strategy, focusing on attracting a broad audience with a mix of foreign films, telenovelas, and action series, quickly gained substantial market share. By 1995, it had surpassed both Česká televize channels in viewership, marking a turning point in the Czech media industry. In response, Česká televize maintained a public service approach, focusing on cultural programming, educational content, and a diverse range of domestic productions. However, the competition forced it to update its programming strategy, refining its offerings to counteract Nova's success. The arrival of the second major commercial channel TV Prima also contributed to the competitive pressure, though it initially struggled to achieve the same level of success as Nova. The competition among these broadcasters led to a dynamic TV

broadcasting environment in the Czech Republic, with each station continually adapting its strategies to attract and retain viewers.

Broadcast television remains the most robust and stable sector among traditional media services in the Czech market. It is the largest provider of audiovisual content, attracts the most audiences, and, in terms of revenues, holds the largest share by far. According to the European Audiovisual Observatory, revenues from TV advertising and license fees for public service broadcasting combined represented 63.0% (public broadcasting 23.2%, advertising TV 39.8%, advertising radio 3.8%, pay TV 27.6%, VOD 5.6%) of the audiovisual market in the Czech Republic in 2022, compared to 50.7% in the EU27 (public broadcasting 24.9%, advertising TV 25.8%, advertising radio 4.6%, pay TV 29.8%, SVOD 14.8%). Additionally, while advertising TV in the EU27 declined by 3.1% between 2021 and 2022 (with -1.2% GACR for 2022/2018), in the Czech Republic, it rose by 13.6% (with 4.76% GACR for 2022/2018).<sup>44</sup> These differences show the relative strength and stability of commercial TV broadcasting and the underdevelopment of the VOD market and in the Czech Republic.

Our data indicate similar results as the above-mentioned EAO: a total growth of 13% in TV broadcasting revenues, increasing from 18.0 billion CZK in 2019 to 20.32 billion CZK in 2022. The three main players have consistently been the Czech public service broadcaster Česká televize, the oldest and most-watched commercial television TV Nova, and Nova's main competitor FTV Prima. Barrandov TV, the smallest player with a market share above 1%, focuses on the oldest audiences and is currently undergoing financial restructuring. Česká televize retained the largest market share during the observed period. However, the commercial broadcaster TV Nova demonstrated the most significant growth, with revenues rising by 29.6%, from 5.45 billion CZK to 7.07 billion CZK.

The biggest companies in the Czech Broadcast TV sector are easy to identify thanks to audience ratings annually published by Czech Television<sup>45</sup> and other entities. Detailed information on the revenues of individual companies can be obtained from annual reports or Statements of profit and loss published in the public register. Information on total revenues is taken from statistics published by Statista.<sup>46</sup> If we add up the revenues

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<sup>44</sup> European Audiovisual Observatory, Yearbook Online Services (2020–2024), MAR-EU The audiovisual market in the European Union (EU27); CZ - Market revenues in Czechia.

<sup>45</sup> ČT, Sledovanost TV stanic. [ČT 2024](#).

<sup>46</sup> Statista, Annual turnover of the programming and broadcasting activities industry in Czechia from 2013 to 2022. [Statista 2023](#).

of all the majority entities and subtract the resulting amount from the total revenues, we obtain the income generated by the other companies on the market in this sector.

Česká televize (Czech Television) is a public service broadcaster established in 1992 by transforming from its predecessor Czechoslovak Television. It operates multiple channels, including ČT1, ČT2, ČT 24, and ČT art, offering a diverse range of content. The primary source of funding is the television license fee, constituting 90% of its revenue, amounting to 5.71 billion CZK in 2021. In 2022, Česká televize announced plans to reduce the number of employees, limit premieres, and discontinue the ČT3 channel as part of a strategy to ensure the sustainability of public service broadcasting.

Founded in 1994, TV Nova is the leading commercial television channel in the Czech Republic. It is part of the Nova Group, which includes multiple channels such as Nova Cinema, Nova Sport, and others. In 2020, the PPF Group acquired Central European Media Enterprises (CME), the parent company of TV Nova, marking a significant shift in the Czech media landscape. In January 2023, Daniel Grunt was appointed CEO of TV Nova, focusing on strengthening its market position and driving digital transformation, particularly through the growth of the Voyo streaming platform. Under his leadership, TV Nova reported revenues exceeding seven billion CZK in 2022, with profits surpassing one billion CZK.

FTV Prima is majority-owned by GES Group, a Czech investment firm led by entrepreneur Ivan Zach. GES Group acquired its initial stake in Prima in 2015 and became the majority shareholder in 2017. In February 2023, Prima launched its streaming service, Prima+, aiming to compete with TV Nova's Voyo. The service operates on a hybrid subscription model, offering both ad-supported and premium SVOD tiers to cater to diverse viewer preferences.

In terms of 15+ audience market share, ČT maintained its dominant position throughout the years 2019–2022, consistently being the most-watched broadcaster. Its market share surpassed 30% in 2020, solidifying its leadership in the overall audience. However, TV Nova led in the younger 15–54 demographic, and FTV Prima showed significant growth, particularly in 2020 and beyond, narrowing the gap with TV Nova and becoming a stronger competitor. Despite the overall increase in Prima's market share, TV Nova continued to lead in key demographics, highlighting the competitive dynamics between the two commercial broadcasters.<sup>47</sup>

Barrandov TV, owned by the Barrandov Group, is the smallest player among the major Czech broadcasters, with a market share above 1%. The channel primarily targets older

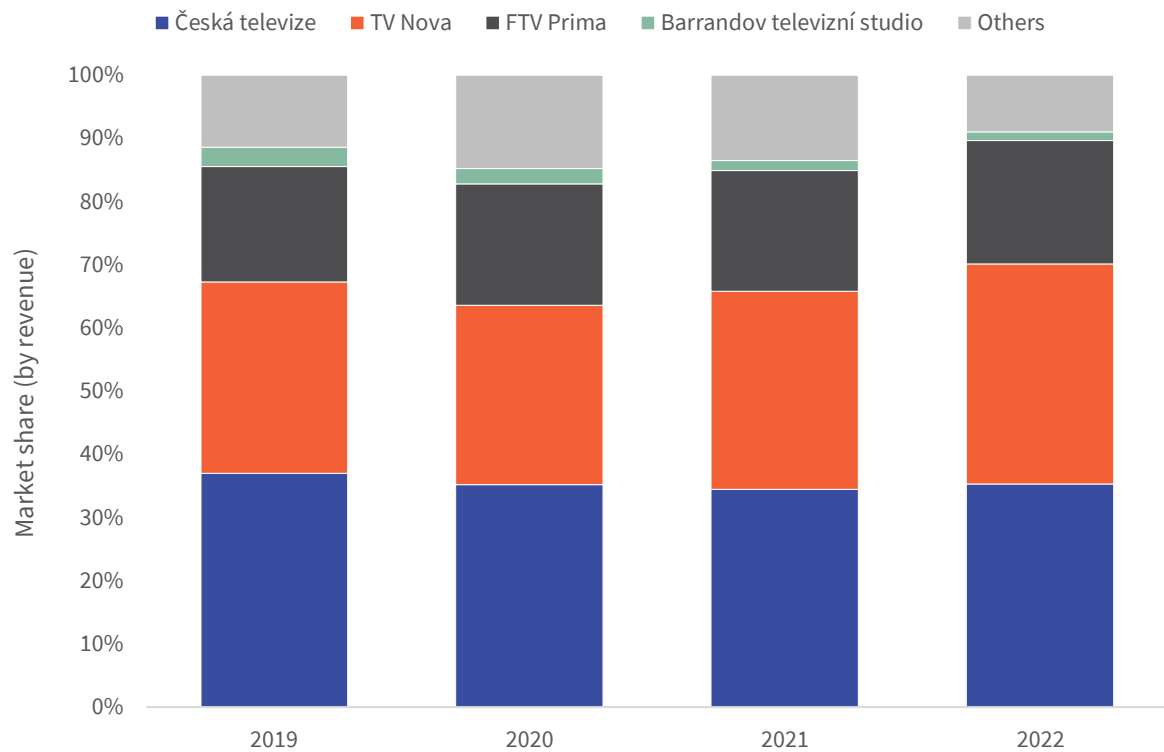
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<sup>47</sup> See regular reports of ATO-Nielsen Admosphere and its annual summaries by Mediaguru.cz.

audiences and is currently undergoing financial restructuring to improve its market position.

The figure 8 shows the stable structure of the Czech broadcasting market, with the only significant change being the deepening crisis of Barrandov TV.

**Figure 8: Broadcast TV: Market shares by revenue, 2019-2022**



	2019	2020	2021	2022
CR4	88.6%	85.3%	86.5%	91%
HHI	2627.94	2425.69	2537.31	2842.98

## Online Video Services

Online video services experienced one of the highest growth rates among all media sectors, increasing from 0.94 billion CZK in 2019 to 2.68 billion CZK in 2022—an impressive growth of 184.6%. Excluding Apple TV+, which was just entering the market in 2019, the fastest-growing SVOD service was the Czech platform Voyo, which expanded its revenues by 961.9%, from 33.62 million CZK to 357.01 million CZK. Netflix also demonstrated significant growth, rising by 125.6%, from 692.54 million CZK to 1,562.5 million CZK during the same period. The only major service that exhibited more moderate growth below 100% was HBO, which, following a corporate restructuring, saw its revenues increase by 70.4%, from 116.97 million CZK to 199.3 million CZK.

A reliable data source for Online Video Services is Ampere Analysis, which is also used by the European Audiovisual Observatory. Ampere custom data set provided data on the revenues of the largest companies in the sector from 2019 to 2022, excluding HBO. HBO has not shared specific data on VOD subscribers and revenues prior to the transformation of its HBO Go service into Max in 2022, so we had to construct our own estimates. To determine HBO's VOD revenue, we considered two key factors: first, the total revenue of the company from local subscriptions, as reported in annual reports (combining cable and VOD);<sup>48</sup> second, a consumer study indicating that approximately one third of that revenue comes from VOD services.<sup>49</sup> We verified the final amount by comparing it with qualified independent estimates of HBO's VOD subscribers.<sup>50</sup> Ampere Analysis also reports on the total sector revenues, but it does not include HBO. To calculate the total revenue for the entire Online Video Services sector, we need to add HBO's estimated revenue to the total revenue reported by Ampere. By subtracting the revenue of all major players from the total, we can determine the revenue of VOD providers with a market share of less than 1%, such as niche arthouse or documentary services like KVIFF.TV, Edisonline, DaFilms, and others.

The Czech VOD market is characterized by growing competition between international players like Netflix and locally focused services attached to the two commercial broadcasters TV Nova and FTV Prima: Voyo and Prima+ respectively. While Netflix remains the strongest service, the local competitors have capitalized on regional

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<sup>48</sup> HBO Europe s.r.o., Účetní uzávěrka (31. prosince 2022), p. 11. [Veřejný rejstřík a Sbírka listin 2024](#). HBO Europe s.r.o., Účetní uzávěrka k 31. prosinci 2020, p. 12. [Veřejný rejstřík a Sbírka listin 2024](#).

<sup>49</sup> APMS, Internet dominuje sledování pořadů v domácích TV. [APMS, 4 July 2023](#).

<sup>50</sup> Filmtoro, Streaming novinky. [Filmtoro, 8 January 2021](#). Filmtoro, Streaming novinky. [Filmtoro, 15 December 2021](#).



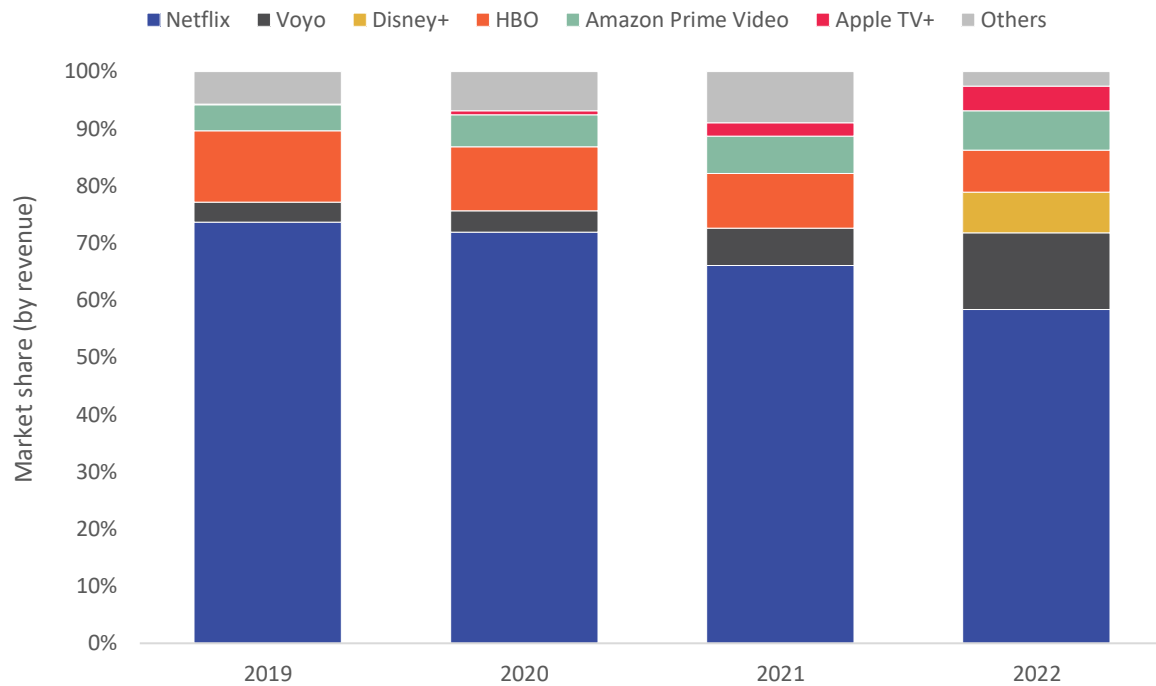
content and local partnerships to strengthen their positions in a market traditionally dominated by linear TV.

While the VOD market remains more concentrated than broadcast TV, due to the high market share of Netflix, the local broadcaster-affiliated services are gaining ground, making the market more competitive. Voyo's local content strategy, particularly its symbiosis with TV Nova's linear programming and the original Czech productions, has proven to be an effective way to attract subscribers, as it caters to the specific tastes and preferences of local audiences, particularly younger groups. From 2020 to 2023, Netflix's market share in Czechia's SVOD revenues dropped from 72% to 51%, while Voyo's share grew significantly from 4% to 14%.

This sets the Czech market apart from the EU27, where both market concentration and the dominance of Netflix—and to a lesser extent Amazon Prime Video—remain higher, despite a similar trend of decline in favor of VOD services operated by local or multi-territorial broadcasters. GMICP country reports identify parallel developments also in non-European markets such as the US, Canada, Australia, and Mexico. The figure below illustrates the current high concentration of the Czech VOD market, where Netflix continues to dominate. However, the market structure is gradually shifting toward greater balance, with the new entrants and the local leader Voyo progressively gaining a larger share.

**“The Czech VOD market is characterized by growing competition between international players like Netflix and locally focused services”**

Figure 9: Online video services (SVOD): Market share by revenue, 2019-2022



	2019	2020	2021	2022
CR4	94.1%	92.3%	88.7%	85.9%
HHI	5604.14	5324.89	4551.63	3747.05

## Radio Broadcasting

The Czech radio broadcasting market underwent a similar historical transformation to TV broadcasting after 1989. While television experienced rapid commercialization and the emergence of powerful private broadcasters such as TV Nova, the radio sector evolved more gradually. This transformation was characterized by the proliferation of numerous smaller private stations and a stronger emphasis on regional diversity. Unlike Česká televize in the television market, the dominant role of public service radio remained relatively intact and less affected by competition from private broadcasters.

Data for the Czech radio market are derived from two types of sources. The first are financial statements and annual economic reports (in the case of the public broadcaster Český rozhlas), which disclose revenue at the level of individual market players. The second type includes reports from the audience research project *Radioprojekt*, which focuses on measuring radio listenership in the Czech Republic. Commissioned by the Association of Communication and Media Organizations in the Czech Republic (SKMO) and the Association of Communication Agencies (ASMEA), this project is conducted by research agencies STEM/MARK, Median, and Nielsen, most often through telephone surveys (CATI method).<sup>51</sup> Both types of sources are valuable for their specificity and detailed data at the company level. While the first provides figures reported directly by the companies themselves, the second offers estimates based on extensive, long-term research.

As a result of the growing importance of internet radio and online music streaming platforms, there has been only a slight decline in the audience for traditional radio broadcasting. Research on listening habits by the companies Median and STEM/MARK from April 2020 shows that the impact of the coronavirus crisis and the associated state of emergency declared in the Czech Republic (which included restrictions on citizens' movements) had little effect on the popularity of radio among listeners.<sup>52</sup> The public service radio group Český rozhlas has not been allowed to increase the license fee rates since 2005, which has led to a gradual, modest decrease in revenues, by about 6 million CZK annually. However, this decline has been offset by higher advertising revenues for Český rozhlas.

The radio broadcasting's total revenue decreased by 6.3% from 4.2 to 3.94 billion CZK between 2019 and 2022. While small players in the "Others" category lost most, the strongest group, the public broadcaster Český rozhlas, grew marginally by 2.1% across the whole period.

The market share of the largest private companies in this sector remains low but stable, which also applies to specific station brands. Ownership structures are similarly unchanged, except in the case of Media Bohemia (operator of Radio Blaník and others), where, in 2022, ownership was transferred from Media Bohemia Holdings Limited to Brabeum, with the same owners (Czech radio entrepreneurs) behind both the former

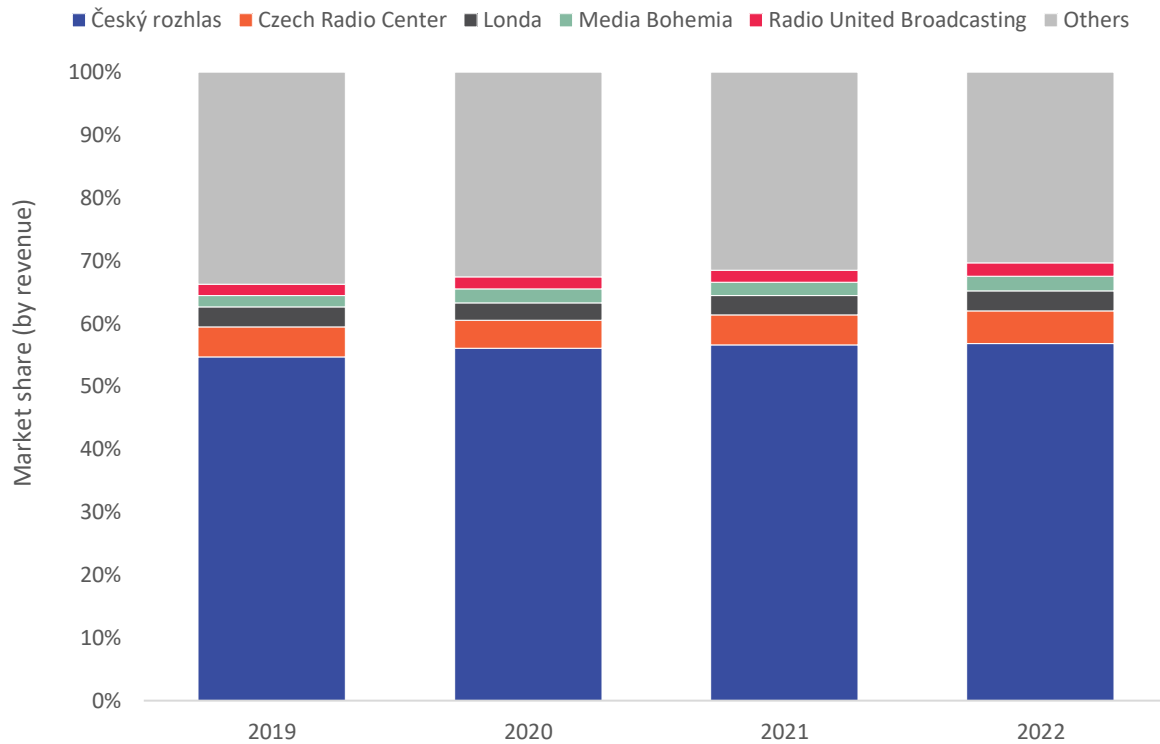
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<sup>51</sup> Median, STEM/MARK, and Nielsen, [Radioprojekt](#).

<sup>52</sup> ČRo, Rádio v době nouzového stavu lidé intenzivně poslouchají, relaxují u něj a považují jej za důležité při informování. [ČRo, 27 May 2020](#).

and the new parent company.<sup>53</sup> The figure below depicts the radio market highly concentrated around the public broadcasting group.

**Figure 10: Radio broadcasting: Market share by revenue, 2019-2022**



	2019	2020	2021	2022
CR4	64.5%	65.5%	66.6%	67.6%
HHI	3,026.32	3,172.43	3,244.29	3,273.58

<sup>53</sup> ČSÚ, Audiovizuální a mediální sektor v ČR 2021, s. 44. [ČSÚ 2022](#).

## Film/TV/Online video distribution

As in many other sectors of the economy, the Czech film distribution market experienced liberalization and privatization after 1989. The state monopoly of Ústřední půjčovna filmů (the state-owned Central Film Distribution Corporation) was dismantled, paving the way for private companies to take over film distribution activities. This transformation resulted in a more diverse selection of films available to audiences, particularly Western productions that had previously been heavily restricted. By the early 2000s, the market was dominated by major distributors representing U.S. studios while a parallel ecosystem of independent distributors served niche audiences. Legislative changes and new funding models, such as the creation of the Czech Film Fund, facilitated these shifts. Today, the theatrical market is dominated by three companies representing US studios associated with the Motion Picture Association (MPA): CinemArt (representing Universal and Paramount Pictures), Falcon (Sony and Disney), and Vertical Entertainment (Warner Bros). Alongside these major players, numerous independent distributors, including Bontonfilm, Bioscop/AQS, Aerofilms, Film Europe, and Artcam, contribute to the diversity of the Czech film market.<sup>54</sup>

The film distribution sector demonstrated the highest drop in revenues in the whole network media economy, largely due to the covid-19 pandemics. Its total revenues decreased by 19.2% from 2.62 to 2.12 billion CZK between 2019 and 2022. Vertical Entertainment, representing Warner Bros., lost the most (drop by 52.7%), while smaller independent producers experienced lower losses, or even growth.

The Union of Film Distributors (UFD) regularly publishes statistics on the annual market share of distribution companies operating in the Czech Republic.<sup>55</sup> Unfortunately, they only take into account revenues of these companies from cinemas, not from other distribution channels. Financial statements are not published by all Czech distributors, and the data presented in them conflict with those reported by the UFD. We therefore decided to use data collected by a uniform method by a single representative institution, UFD.

The dominant position of distributors representing the MPA members on the Czech market mirrors current distribution tendencies in other European countries, although domestic films maintain an unusually prominent market presence in the context of

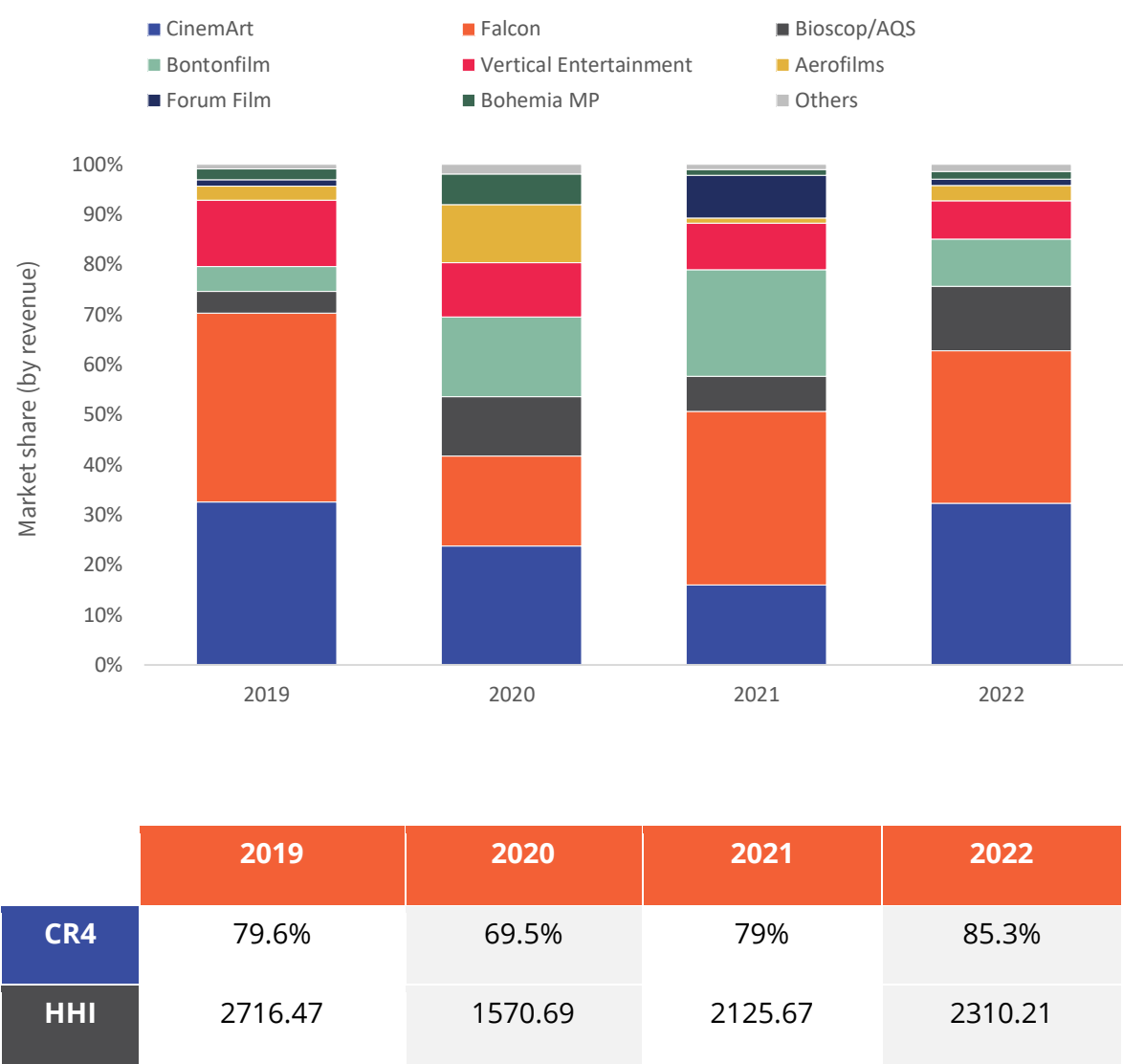
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<sup>54</sup> Aleš Danielis, Česká filmová distribuce po roce 1989. *Iluminace* 19(1), 2007, 53–104; Petr Szczepanik, Pavel Zahradka (eds.), Mapa audiovizuálního pole v České republice z hlediska digitalizace a strategie pro jednotný digitální trh. [Olomouc/Brno: FF UP/FSS MU 2018](#); UFD, [Distributors' market share overviews \(2019–2022\)](#).

<sup>55</sup> UFD, [Distributors' market share overviews \(2019–2022\)](#).

other peripheral and small film industries.<sup>56</sup> Figure 11 below shows the dominant position of US majors-associated distributors and the drastic impact of the anti-pandemics measures in 2020, from which the sector has not fully recovered yet.

Figure 11: Film TV OVS Distribution: Market share by revenue, 2019-2022



<sup>56</sup> European Audiovisual Observatory, *Focus 2023. World Film Market Trends*. [Marché du film: EAO 2023](#).

## Film Exhibition

After a gradual decline of film admissions after 1989 (caused by uncomfortable venues, newly emerging leisure activities and other socioeconomic factors related to the post-socialist transformation), the trend was reversed in 1996 when the first, domestically owned, multiplex cinema opened to viewers in Prague. Based on this pioneering success, foreign investors entered the market and began operating multiplexes in larger cities of Czechia. After numerous shifts in ownership of multiplexes, two major chains currently dominate the market: Cinema City (owned by the Dutch company Cinema City Holding B.V. connected to the UK-based cinema chain Cineworld Group) and CineStar (co-owned by the chain CineStar International B.V. based in the Netherlands and Czech entrepreneur Pavel Vodička). The rest of the exhibition sector is composed of the domestically-owned smaller chain Premiere Cinemas, independent multiplex cinema Golden Apple Cinema and numerous other film exhibitors, many of which are owned by municipalities. As for art-house cinema, the segment is dominated by several cooperating cinemas based in larger university cities (Aero, Světozor, Bio Oko, Přítomnost, Bio Central and Scala).<sup>57</sup>

The Czech Film Exhibition sector is fragmented, consisting of numerous small entrepreneurs and a few multiplex chains, which have accounted for roughly 70% of the market share over the past twenty years.<sup>58</sup> We determined their market share using statistics published by the UFD (Union of Film Distributors) and obtained more precise revenue data through the annual reports filed in the public register. The actual profits of multiplexes exceed the figures published by the UFD, which only reflect box office receipts and exclude revenue from advertising, concession sales, and other sources. Therefore, to estimate total revenues, we summed all multiplex revenues and adjusted the final amount based on the percentage of multiplexes in the market, according to UFD data.<sup>59</sup>

Vertical integration exists to some degree in both the commercial and arthouse sectors of the film exhibition business. The distribution company Falcon is connected through

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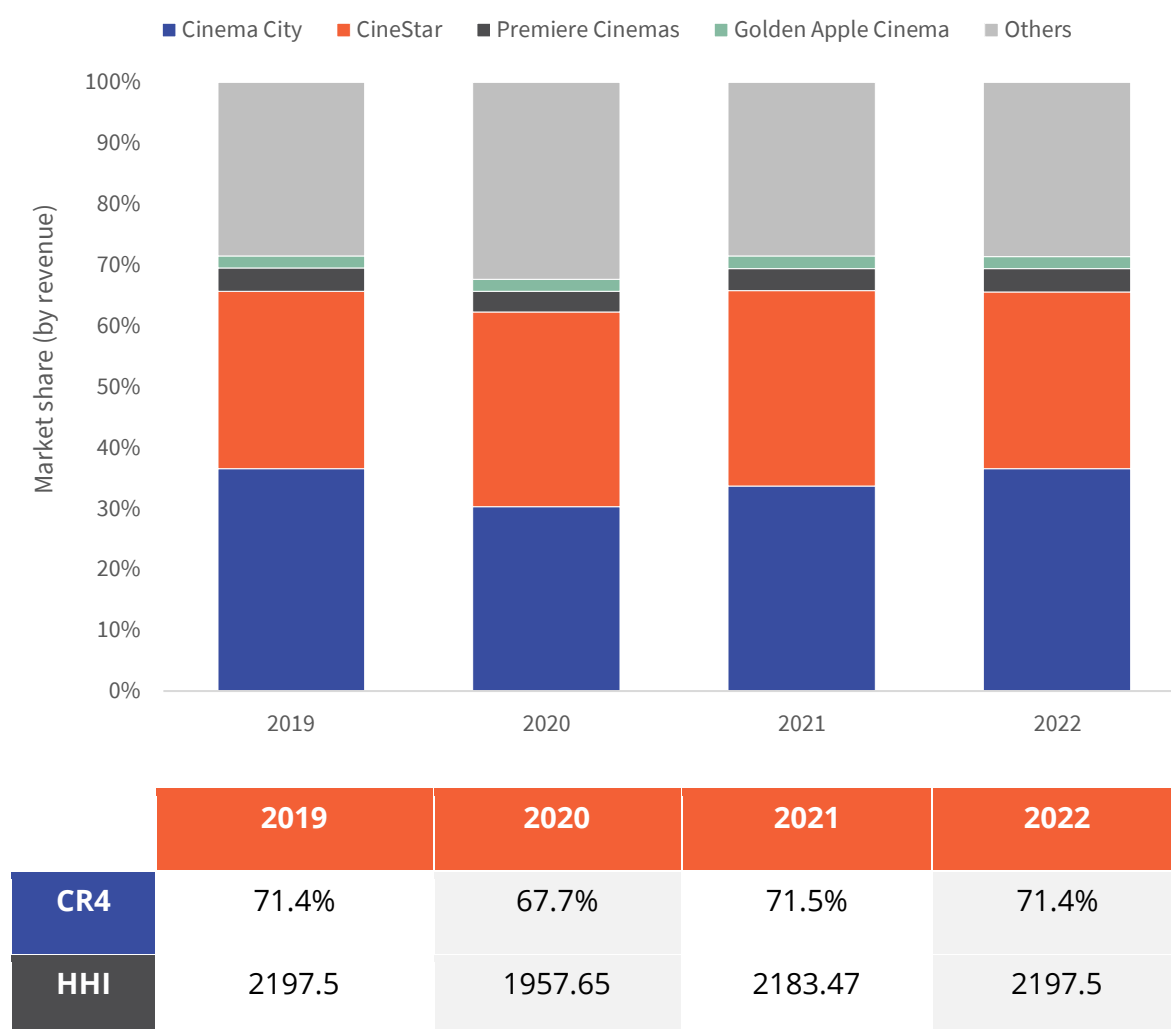
<sup>57</sup> Aleš Danielis, Česká filmová distribuce po roce 1989. [Illuminace 19\(1\), 2007](#), 53–104; Aleš Danielis, Česká filmová distribuce 2007–2016. [Illuminace 29\(2\), 2017](#), 25–63; Petr Szczepanik, Pavel Zahrádka (eds.), Mapa audiovizuálního pole v České republice z hlediska digitalizace a strategie pro jednotný digitální trh. [Olomouc/Brno: FF UP/FSS MU 2018](#).

<sup>58</sup> See UFD, [Multiplexes' market shares](#).

<sup>59</sup> We excluded CNMX Cinema Company CZ from the final statistics, as it does not publish profit and loss statements. Since CNMX owns only 6 screening rooms out of a total of 247 and 602 seats out of 42,276, we assume its revenue is similar to that of single-screen cinemas. Additionally, CNMX is exempt from the legal obligation to publish profit and loss statements annually due to its small profits.

ownership to the CineStar chain and the chain Cinema City has its own distribution branch Forum Film. Similarly, the independent distribution company Film Europe is connected to the Edison Film Hub cinema, Edisonline VOD service, and several minor cable TV channels. The already mentioned cinemas Aero, Světozor, Bio Oko, Přítomnost, Bio Central and Scala are connected to the distribution company Aerofilms and its KVIFF.TV VOD service.<sup>60</sup> As depicted in the figure below, the COVID-19 pandemic hit Czech cinemas hard, as was the case in numerous other countries of the world, yet they appear to have recovered faster than in some other countries such as Italy and Spain.<sup>61</sup>

**Figure 12: Film exhibition: Market shares by revenue, 2019-2022**



<sup>60</sup> Aleš Danielis, Česká filmová distribuce 2007–2016. *Iluminace* 29(2), 2017, 25–63.

<sup>61</sup> Cinema-going in Europe in 2022, [Filmnewseurope.com](https://www.filmnewseurope.com), 16 February 2023.



## Digital Games

Digital games are the third strongest and the second fastest growing sector among media industries. The Czech video game industry has experienced significant growth, aligning with the global surge in video game demand. In 2020, global spending on video games increased by 9.3% compared to the previous year.<sup>62</sup> This global trend has positively influenced the Czech market, leading to a revenue growth of 65.5% (from 5.13 to 8.5 billion CZK) and a growing number of game developers. As of 2022, the strongest sub-sectors in terms of revenue were in-game advertising (28,4%), mobile games (28,1%), and games live streaming (15.7%).<sup>63</sup>

In the Czech Republic, the video game industry is regarded as a relatively new media sector. Consequently, no state institution exists to oversee the development of this sector or to publish data concerning it. This role has been partially assumed by the industry organization GDA CZ – the Association of Czech Game Developers, a member of the European Games Developer Federation and a collaborator with the Czech Chamber of Commerce. However, their revenue estimates for the sector are rudimentary and limited to game developers.<sup>64</sup> As a result, the primary source of revenue data for the Czech video game industry has become the *PWC Global Entertainment & Media Outlook 2019–2028*. The lack of transparency in policies of multinational corporations that are the primary distributors of digital games today prevents us from estimating market shares by revenue.

A notable contributor to the growth is the success of titles like *Kingdom Come: Deliverance* by Warhorse Studios, released in 2018. The game achieved massive success both domestically and internationally, with over six million copies sold to date. This success has not only elevated the profile of Czech game development but also attracted international attention to the country's gaming capabilities. In 2019, shortly after the success of *Kingdom Come: Deliverance*, Warhorse Studios was acquired by Koch Media, which operates under the Plaion (formerly Koch Media) group, itself a subsidiary of Embracer Group, a large Swedish gaming conglomerate.

The Czech gaming industry is characterized by a diverse structure. As of 2022, there were approximately 180 studios, over 90% of which are Czech-owned, reflecting a

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<sup>62</sup> Tom Wijman, The World's 2.7 Billion Gamers Will Spend \$159.3 Billion on Games in 2020. [Newzoo.com, 8 May 2020](https://www.newzoo.com/news/2020/05/2020-gaming-revenue-forecast/).

<sup>63</sup> Statista, [Market Insights: Digital Media](https://www.statista.com/topics/1094/digital-media/).

<sup>64</sup> Pavel Barák et al., České počítačové hry. Vývojáři počítačových, konzolových a mobilních her v České republice v roce 2020. [GDA CZ 2021](https://gda.cz/2021/).

strong domestic presence. The industry comprises primarily smaller studios, most with fewer than 10 employees, contributing to a dynamic and innovative environment.<sup>65</sup> This, however, does not include the main distributors of games: global platforms such as Nintendo, Sony Interactive Entertainment, or Microsoft Games, for which we were unable to obtain any data.

The success of *Kingdom Come: Deliverance* has had a ripple effect on the Czech gaming industry. It has demonstrated the potential for Czech studios to produce globally competitive titles, thereby enhancing the industry's reputation and encouraging investment and talent acquisition. The game's success has also led to increased interest in Czech game development, both from international publishers and consumers.

## Music Services

The music market displays similar characteristics as film and TV distribution. The major music labels (UMG, Warner, Sony) opened their local offices in Prague in the 1990s and inspired hopes of Czech musicians to break through in the West. However, the Western interest in the world behind the Iron Curtain waned quickly and the majors have since operated mainly as importers of Anglo-American repertoire.<sup>66</sup>

The Czech music market has demonstrated robust growth in recent years. According to the International Federation of the Phonographic Industry (IFPI), the total revenue of the Czech recorded music market increased by 13.7% in 2022.<sup>67</sup> According to data from *PWC Global Entertainment & Media Outlook 2019–2028*, which proved to better reflect our findings from the annual reports of major labels, the growth was even higher: 27.8% between 2021 and 2022. This growth was driven primarily by live music, which was recovering from the pandemic but still had not reached the 2019 levels (82.5% growth 2021/2022), and by streaming (19.3%). Across the whole period of 2019–2022, music streaming was the most dynamic segment with 227.6% growth. As of 2022, the total annual music services revenues of 3.1 CZK billion are composed of 30.1% live music and the rest recorded music (including 39.9% streaming).

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<sup>65</sup> GDA, [Czech Games Industry Study](#); Czech Invest, [Game Development in the Czech Republic](#).

<sup>66</sup> C. Michael Elavsky, Musically Mapped: Czech Popular Music as a Second “World Sound”. *European Journal of Cultural Studies* 14, 2011, no. 1, pp. 3–24.

<sup>67</sup> EMEE, Czech Republic: Market Profile, [An EMEE Music Market Study 2023](#).

The market is characterized by a diverse structure, with a mix of domestic and international players. Major global record labels, such as Universal Music Group, have expanded their presence in the Czech Republic. In 2022, Universal Music Group (UMG) relaunched six label brands, including Capitol Records, Island, and Def Jam, as part of a newly established Universal Music Central Eastern Europe structure. This expansion aims to strengthen cooperation between national companies and streamline management processes.<sup>68</sup> Despite this corporate expansion, UMG still predominantly focuses on importing Anglo-American music, rather than exporting local music.

While the local IFPI office has stopped publishing company market shares from 2018, probably under the pressure of streamers as the new industry players.<sup>69</sup> Data from annual company reports we were able to collect indicate that the record label segment has been dominated by the two global majors, who also grew faster than their local competitors. However, the traditional local label Supraphon (a successor of the monopoly state-owned corporation of the same name) preceded Sony Music, which had partially withdrawn from the local market in 2015. The UMG took 36.8% of the recording segment revenues as of 2019 and grew by 53.7% between 2019 and 2022, Warner took 25.5% and grew by 78.9%, Supraphon took 19.3% and grew by only 2.7%, Sony took 15.9% (we do not have Sony's data for 2022, and so are not able to estimate its growth).

The Czech music industry also boasts a vibrant live music scene, with approximately 400-500 venues regularly hosting concerts. Genres such as metal, rock, pop, folk, jazz, drum and bass, techno, and electronic music are particularly popular among local audiences. Additionally, the country hosts around 400 summer festivals, including free events coordinated by cities and villages, offering artistically diverse programming.<sup>70</sup> Live Nation has emerged as the undisputed leader among ticketing companies and its annual revenues exceeded UMG, reaching 1113,16 CZK mill. in 2022 (compared to 472,6 CZK mill. for UMG).

As in other European countries, streamers, led by Spotify,<sup>71</sup> have recently contributed to the increased domestic popularity of the local music and a relative increase in authors' revenues.<sup>72</sup> But they have not significantly increased Czech music export, because

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<sup>68</sup> Jack Needham, Universal expands business in Czech Republic by relaunching six label brands. [Music Business Worldwide, 22 May 2022](#).

<sup>69</sup> IFPI, Celkový přehled hudebního trhu 2005–2023. [IFPI 2024](#).

<sup>70</sup> EMEE, Czech Republic: Market Profile, [An EMEE Music Market Study 2023](#).

<sup>71</sup> For Spotify's worldwide growth, see Spotify Statistics, User Growth, Top Artists & More. [Spotify 2024](#).

<sup>72</sup> Will Page and Chris Dalla Riva, 'Glocalisation' of music streaming within and across Europe. EIQ Paper No. 182 / 2023. [London: LSE 2023](#).

streamers' editorial playlists (as key vehicles of music visibility) reproduce the peripheral status of Czech – and more generally CEE music – in the global listening habits.<sup>73</sup>

## Newspapers

The transformation of the Czech newspaper business after 1989 saw the privatization of state-owned titles and a subsequent influx of foreign investors, which later shifted toward local ownership. This period also marked the decline of traditional print circulation, as digital platforms grew in prominence, forcing publishers to diversify revenue streams through paywalls and native advertising. Czech newspapers began introducing paywalls in the early 2010s as a response to declining revenues from print circulation and advertising. The first notable move came in **2011**, when the **Economia publishing house** implemented a paywall for its flagship business daily, *Hospodářské noviny*. This was followed by similar initiatives from other publishers in subsequent years, as digital subscriptions became an increasingly important revenue stream.

The Czech daily newspaper market exhibits characteristics of an oligopoly. Companies such as Mafra, Czech News Center, Economia, Borgis, and Vltava Labe Media – all owned by large local media groups (see introduction to this report) – together publish all ten national daily newspapers. Between 2019 and 2022, the parent companies of these firms remained unchanged. These companies are also leading publishers of magazines. However, unlike in the newspaper sector, the magazine market is also home to many smaller players.

Calculations of revenues for magazines and newspapers were based on the same sources. The first source was the *PWC Global Entertainment & Media Outlook 2019–2028*. However, specific figures from this dataset were not directly adopted, as they significantly deviated (by several billion CZK) from data regularly published by the Czech Statistical Office in its report *Audiovisual and Media Sector in the Czech Republic*. Even these data proved inadequate as they combined revenues for newspapers and magazines, while also being much higher than likely real figures. According to the report, this sector was estimated to generate revenues four times greater than the radio sector and, around 2020, double that of the video game industry.

The PWC dataset was instead used to determine the proportional revenue shares of magazines, newspapers, and online news media, which were then applied to the total

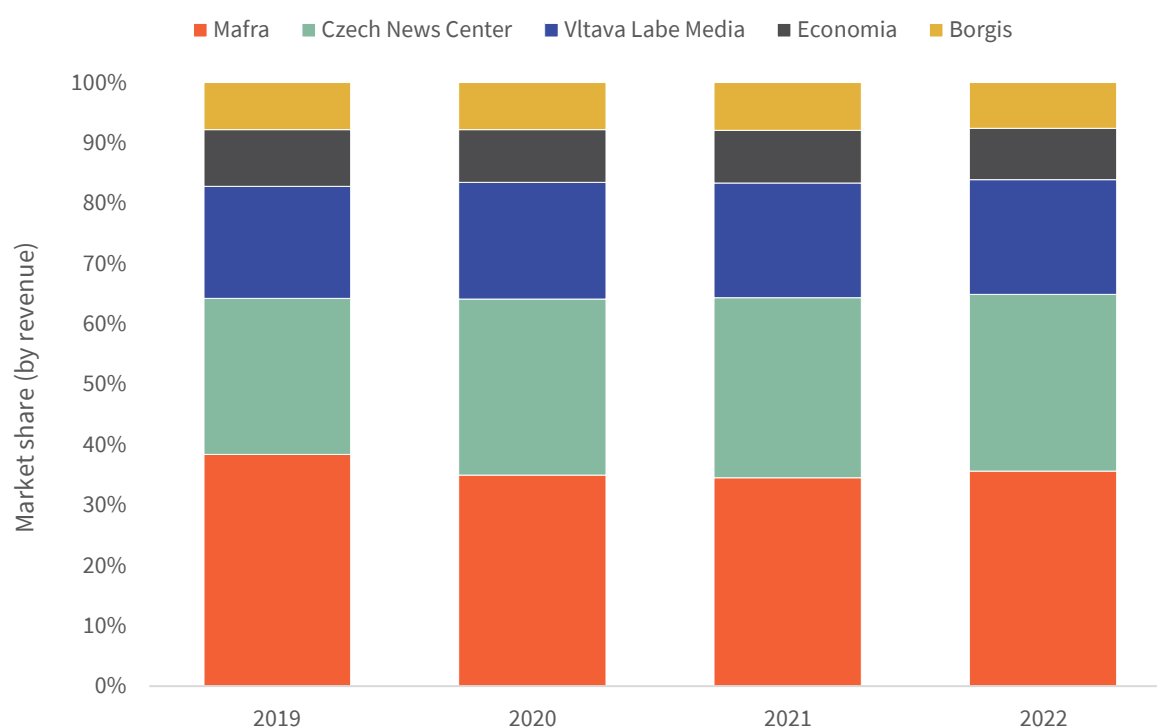
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<sup>73</sup> This has been verified by analyzing Czech music's standing in both listening and playlist-reach statistics by Chartmetric and Soundcharts, two prominent analytics companies in the field.

revenues of individual companies. If a company did not operate across all these areas, the proportions were recalculated accordingly. This approach allowed for a reconstruction of the newspaper market. However, a limitation of this methodology lies in assuming a uniform revenue ratio across all companies. Total revenues were calculated by summing the revenues of identified companies, as there is no newspaper publisher in the Czech Republic whose revenue accounts for less than one percent of the market. This analysis covers five companies.

An example of the impact of the COVID-19 pandemic on the physical media industry can be seen in retail revenue, which experienced a sharp decline from 4.46 billion CZK to 3.96 billion CZK in 2020. While revenues from printed media sales dropped significantly, advertising revenue in the print sector rose by nearly 10% (1.8 billion CZK) in 2021, reaching 19 billion CZK, indicating that COVID-19 had no negative impact in this area.<sup>74</sup>

**Figure 13: Newspapers: Market share by revenue, 2019-2022**



<sup>74</sup> ČSÚ, Audiovizuální a mediální sektor v ČR 2021, p. 24. <https://csu.gov.cz/produkty/kulturni-a-kreativni-prumysly-v-cr-2021>.

	2019	2020	2021	2022
CR4	92.2%	92.2%	92.1%	92.4%
HHI	2636.59	2583.87	2581.13	2616.25

## Magazines

The magazine market is dominated by the same large publishers linked to the largest national media groups as the newspaper sector, in the same order: Mafra, Czech News Center, and Vltava Labe Media. Their combined share has increased over time, and while it remains significantly lower than in the newspapers market, the concentration of the sector intensified significantly. These big three are followed by media groups Economia (a Czech media group owned by Zdeněk Bakala), Burda (a Czech subsidiary of Hubert Burda Media Holding), and Borgis (owned by the Czech group Seznam.cz since 2023), whose combined market share declined slightly. The remaining smaller magazine publishers marginally increased their shares, but the combined share of the “other” smallest publishers with market share below 1% declined most significantly, contributing to the increase in overall concentration of the sector.

For some entities operating in magazine publishing, a similar method was applied as in the case of newspaper publishers. However, not all companies submit their financial statements to the public registry. In such cases, revenues were estimated by recalculating the revenues of identified companies based on their readership numbers. Readership data, unlike revenue figures, are available for all companies thanks to the Media Project, commissioned by the Czech Publishers Association and the Association of Media Agencies and conducted by research firms STEM/MARK and Median.<sup>75</sup> This method assumes that readership shares correlate with revenue shares, which is generally supported by evidence but does not account for potential differences in revenue composition across companies. Advertising revenue, for instance, depends on reach statistics and print penetration rather than solely on readership. Using the same methodology, a collective percentage was assigned to smaller entities with less than one percent market share. This allowed for the calculation of total market revenues by

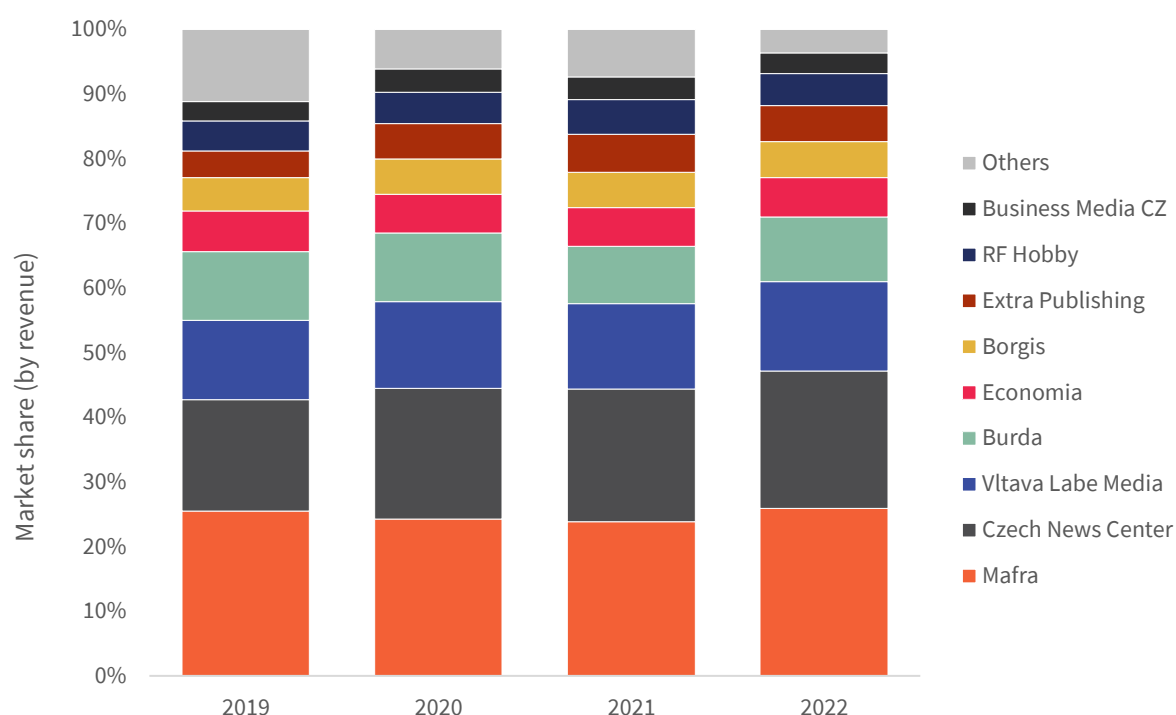
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<sup>75</sup> Median and STEM/MARK, [Media Projekt](#).

summing all identified revenues, enabling sectoral revenue estimates for individual years.

The covid-19 pandemics reduced magazine revenues from 3.83 billion CZK in 2019 to 3.28 billion CZK in 2020. With a one-year delay, the pandemic's impact was also reflected in the number of magazine titles published. From approximately 3.9 thousand titles, the number dropped to 3.4 thousand in 2021, although newspapers saw an increase of 0.2 thousand.<sup>76</sup> The figure below shows that while magazine market demonstrates a higher diversity compared to newspapers, its concentration is slowly growing (from HHI 1324.0 in 2019 to 1547.6 in 2022).

Figure 14: Magazines: Market share by revenue, 2019-2022



	2019	2020	2021	2022
CR4	65.7%	68.5%	66.4%	71%
HHI	1323.99	1421.59	1384.59	1547.57

<sup>76</sup> ČSÚ, Audiovizuální a mediální sektor v ČR 2021, p. 24. [ČSÚ 2022](#).

## Online News Media

The Online News Media market in the Czech Republic is relatively under-researched. The top positions in terms of traffic for news websites are held by the largest media groups outlined in the introduction to this report, namely Seznam.cz, Mafra, Czech News Center, Vltava Labe Media, and TV Nova (owned by PPF).<sup>77</sup>

Due to the unavailability of revenue data for the largest companies operating in the online news sector, it was not possible to determine this industry using a similar method as in the case of magazines. Instead, total revenue figures were taken from the *PWC Global Entertainment & Media Outlook 2019–2028*, with the understanding that their accuracy is more approximate than precise.

Between 2019 and 22, the sector demonstrated a significant growth of 34.6% (from 1.86 to 2.5 billion CZK), with the covid-19 pandemics not causing any negative impact.

## Books

It might be surprising that book publishing is the second strongest sector among traditional media after broadcast TV. At the same time, it is stagnating in terms of total annual revenues: its growth between 2019 and 2022 was 1.2% from 8.3 to 8.4 billion CZK. The COVID-19 period was not favorable for the book industry: its revenues decreased by 3.6% between 2019 and 2020, and the number of published titles even dropped by 10%. The growth pattern has then shifted, with medium-sized publishers having experienced a modest rise in the number of titles published since 2020, while the output of the three largest publishing groups has seen a small decrease. These major Czech-owned players include Albatros Media, which expanded its portfolio by acquiring Mladá fronta, Euromedia Group with its collection of eleven brands, and Grada Publishing, which manages five distinct publishing brands.<sup>78</sup>

Book publishing represents a well-documented sector in the Czech Republic. Publishers regularly submit their annual financial statements, including overviews of revenues, profits, and losses, to a public registry administered by the Ministry of Justice. Comprehensive revenue data is also published in the *Report on the Czech Book Market*,

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<sup>77</sup> MediaGuru, Zpravodajské weby: V první desítce i Echo, v blízkosti také Forum 24. [MediaGuru.cz, 23 September 2018](https://mediaguru.cz/23-September-2018).

<sup>78</sup> SČKN, Zpráva o českém knižním trhu 2021/2022, p. 15. [SČKN 2023](#).

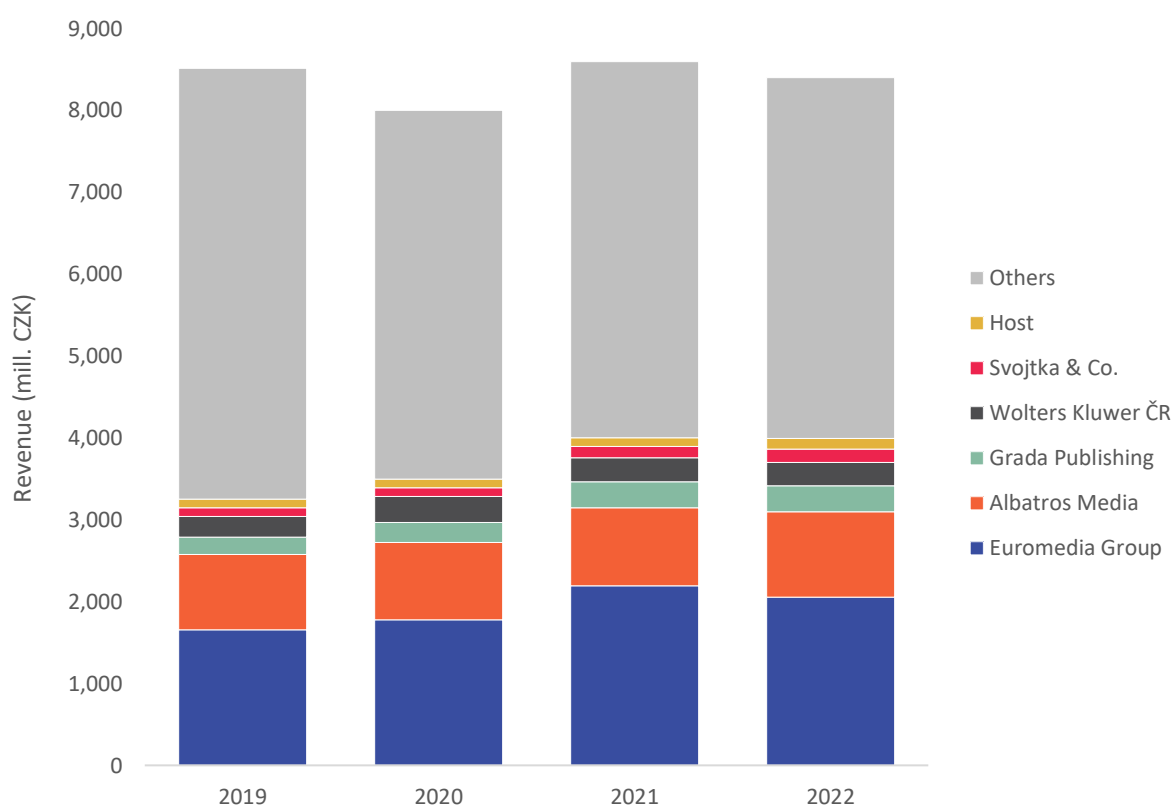


issued by the Association of Czech Booksellers and Publishers, which has access to confidential internal data. However, the limitation of these revenue figures lies in their rounding to the nearest hundreds of millions.

The state has played a significant role in the book market by setting the VAT rate on book products. The previous 10% VAT rate for books in the Czech Republic was implemented on January 1, 2015. This reduction applied to both printed and electronic books, aligning with broader European Union trends aimed at promoting access to literature and knowledge. As of January 1, 2024, the Czech Republic implemented significant changes to its VAT system, and exempted books—whether in print or electronic formats—from VAT entirely.

The figure below points to the low concentration, which was however increasing during the observed period (from HHI 538.1 in 2019 to 782.6 in 2022), largely due to the decreasing share of very small publishers.

**Figure 15: Books: Market share by revenue, 2019-2022**



## Online media and traditional media services grouped results

The overall revenue results for media services show the dominant position of broadcast TV, books, and digital games, with games and music streaming growing faster than other sectors. However, if film and TV production were part of the overview, its volume would have ranked second after broadcast TV, with revenues reaching approx. 15.44 CZK bill. as of 2022, largely due the boom of incoming US-based SVOD production.<sup>79</sup>

As elsewhere in the world, the Covid-19 pandemics harmed physical media and live entertainment sectors (see declines in music services, film exhibition and distribution, and books), but boosted broadcasting OTT services (growth of broadcast TV, online video services, and digital games). Among the winners, online video services demonstrated the steepest growth, reaching CAGR of 42.6% between 2019 and 2022, followed by digital games with 18.29% CAGR.

Vertical and horizontal integration or cross-ownership has emerged as a defining factor from 2020 on, especially between telecommunications, online video services, and broadcast TV, with the leading media/communication group PPF capitalizing on synergies between the strongest commercial broadcaster TV Nova, the strongest domestic VOD service Voyo, and the third strongest multichannel distributor O2 TV.

The concentration was by far highest in online video services, with HHI 5604,14 in 2019, although gradually decreasing thereafter to 3747,05 in 2022. As explained above, this development was caused mainly by the success of the local broadcast-affiliated VOD Voyo, and also by the introduction of Disney+ in 2022, which together reduced the market share of Netflix. Broadcast radio, broadcast TV, and newspapers also are highly concentrated markets by HHI, but their concentration was either stagnating (newspapers), or slowly growing (radio and TV). Broadcast radio showed very low values of CR4, but that is caused by the dominant position of the public service group Český rozhlas and the low market shares of all private competitors (below 5% each).

In some physical media sectors, the Covid-19 pandemic and other socioeconomic challenges contributed to the increase in concentration and the reduction of the smallest players, namely in book and magazine publishing and in film distribution.

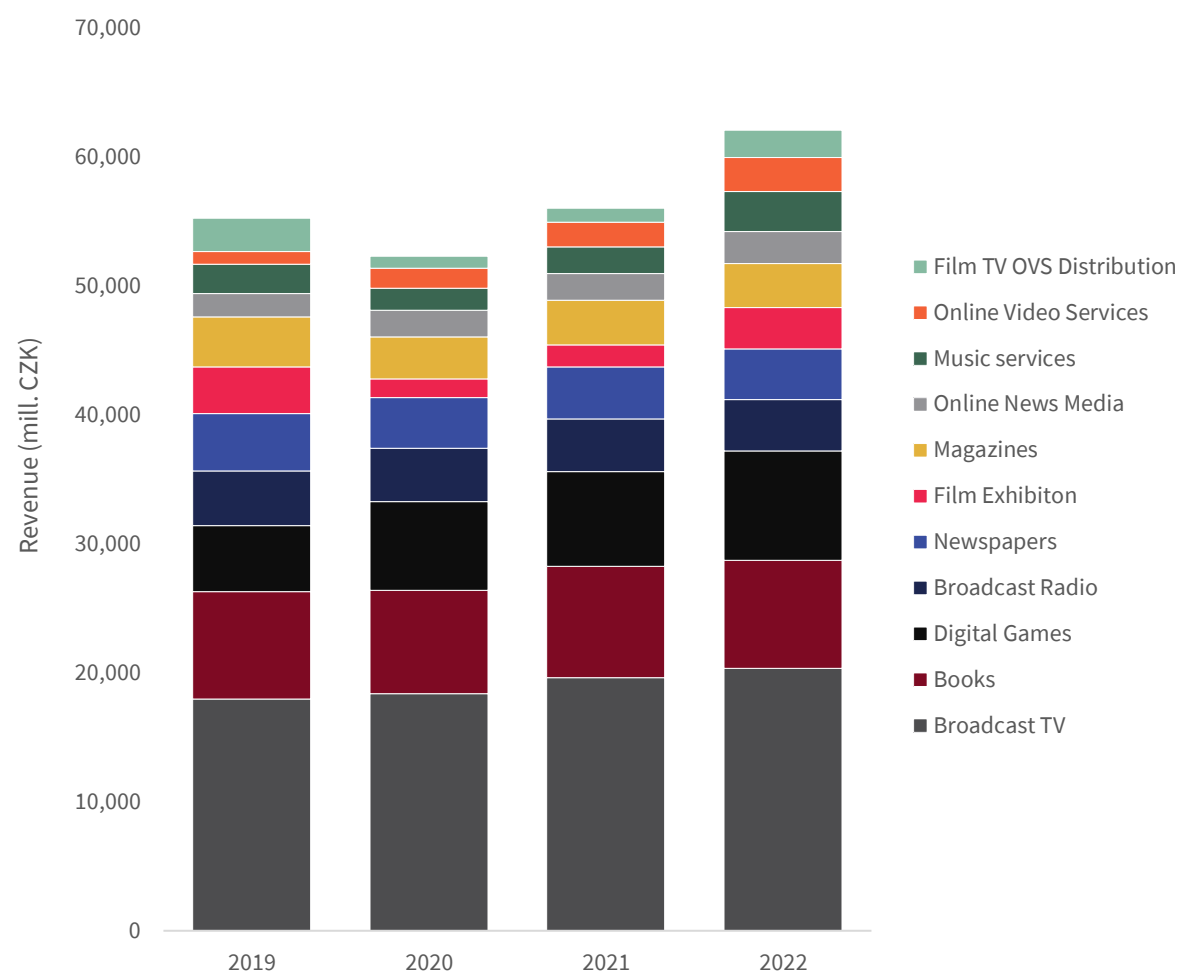
Figures 16–18 below show the impact of the pandemic, the growing total revenues, and the growing concentration in most of the sectors. HHI grew in books by 45.4%, in magazines by 16.9%, in broadcast TV as well as radio by 8.2%, while it decreased in

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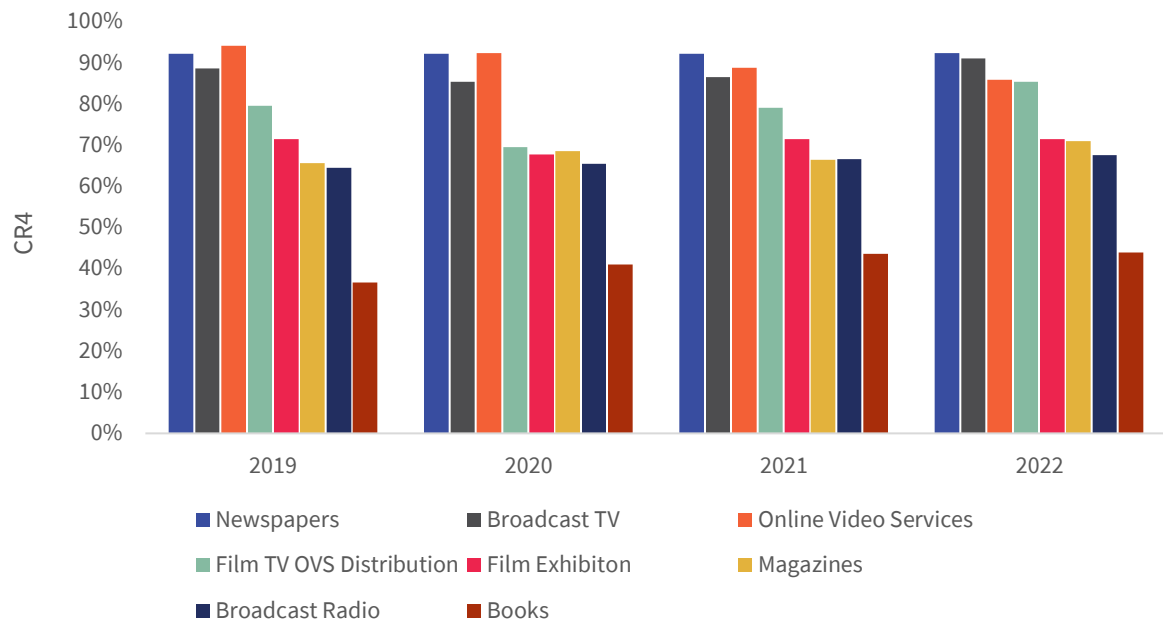
<sup>79</sup> APA (Czech Producers Association), Audiovisual sector reports 2023 turnover of 13.5 billion. [APA 2024](#).

online video services by 33.1%, film and TV distribution by 15.0%, and in newspapers by 0.8%. Film exhibition's HHI did not changed.

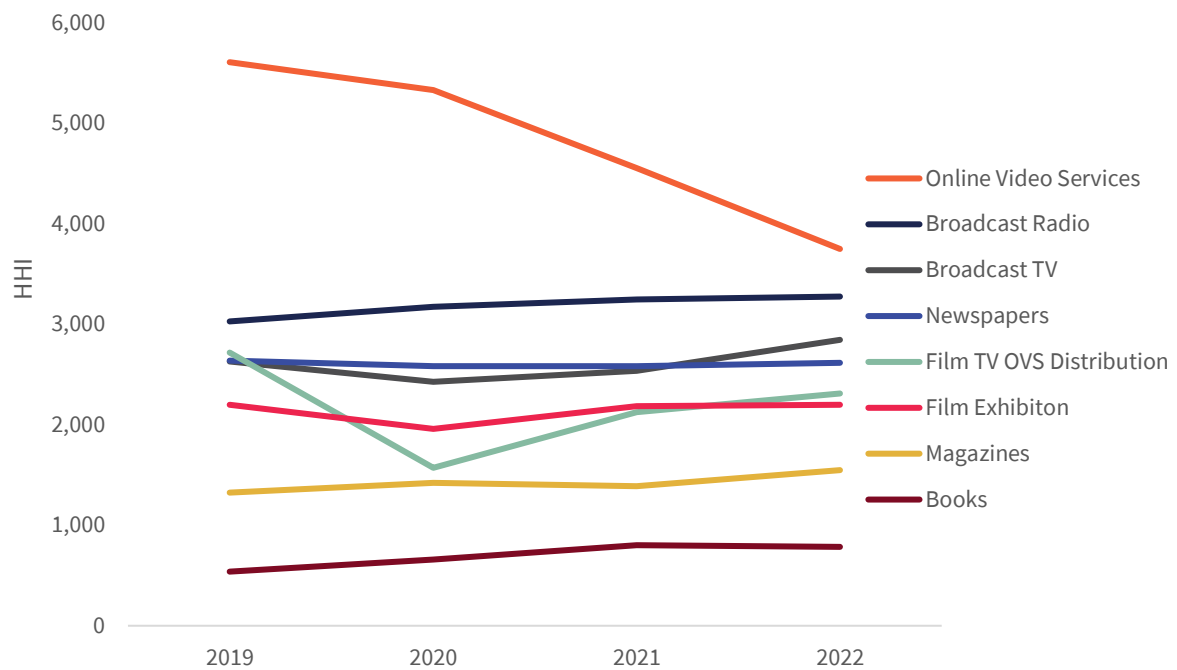
Figure 16: Total revenues for online media and traditional media services, 2019-2022 (CZK mill.)



**Figure 17: CR4 scores for online media and traditional media services, 2019-2022 (based on revenue)**



**Figure 18: HHI scores for online media and traditional media services, 2019-2022 (based on revenue)**



# Core internet applications

As in other markets, internet advertising became the financial backbone of commercial internet, driven by the development of ad tech, optimizing consumer targeting through algorithms, data analytics, and programmatic advertising. The internet economy has been dominated by the global platforms Google and Meta, whose strength lies in their unparalleled ability to collect and monetize user data at scale, which has deeply influenced the commercialization of digital spaces and the architecture of the internet.<sup>80</sup> Internet advertising became the largest sector in the Czech network media economy, growing from 23.49 to 53.09 billion CZK.

## Internet Advertising

Since the mid-2010s, internet advertising has been consistently the second fastest-growing (after online video services) and most dynamically developing sector, achieving a CAGR of 31.23% and an aggregate growth of 126% between 2019 and 2022. It has been the strongest media type in the Czech advertising market, too, surpassing TV advertising in 2016 for the first time, and all other advertising types (print, radio, out-of-home) combined in 2021.<sup>81</sup>

The total ad spend data were derived from the IAB AdEx Benchmark reports for the Czech Republic<sup>82</sup> and triangulated with total online advertising revenues figures from *PWC Global Entertainment & Media Outlook 2024-2028* as well as with the annual reports of The Association for Internet Development in the Czech Republic (SPIR), representing publishers, media agencies and technology companies involved in the Czech internet economy.<sup>83</sup>

However, none of these sources stipulate company market shares. To estimate them, we had to employ several approximation steps. First, we applied the Statcounter market share in search, to get the share of Google and Seznam in search ads. Second, we applied the share of search ad spend in the total online ad spend in CZ according to IAB

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<sup>80</sup> Lee McGuigan, *Selling the American People: Advertising, Optimization, and the Origins of Adtech*. Cambridge, MA: MIT Press 2023.

<sup>81</sup> SPIR, an annual report for 2022. [SPIR 2023](#).

<sup>82</sup> IAB Europe, ADEX Benchmark 2023 Study. [IAB 2024](#).

<sup>83</sup> SPIR, an annual report for 2022. [SPIR 2023](#).

reports for individual years, exclusive social display, to get the total online ad revenues for Google and Seznam. Third, by using Statcounter shares in social media platforms, we estimated Facebook and Instagram shares from the total social display ad spend in the Czech Republic, according to IAB. For Seznam, we took the publicly announced annual revenues and calculated 80% as the estimated share of online ad revenues.<sup>84</sup> For MAFRA, we estimated the share of 60% (since it is the biggest media house in the country publishing both print and online media) from total annual revenues based on the company's financial reports. This method needs to be perceived as only provisional and is probably giving relatively reliable results only for Seznam and MAFRA, based on the hard data from the financial reports.

When compared to other EU countries, the above-average dynamic growth of the Czech internet advertising market dropped to below-average levels in 2021 (and stayed so in 2022), affected by the Covid-19 pandemic. Moreover, the national market shows specific characteristics in terms of the composition of online ad types: an above-average share of digital display, and below-average share of social (probably due to the lower-than-average penetration of certain social media). Between 2021 and 2022, the growth of video (excluding social video) ad spend was the third highest in Europe (after Turkey and Austria). In the total digital ad spend, and even more visibly in the paid-for search and online video ad spend, the Czech market outperforms all other countries from Central and Eastern Europe including Poland, which is a 4-times larger market.<sup>85</sup>

The rise of online advertising can be attributed to several factors, including the increasing consumption of digital content and the ability for advertisers to target specific audiences more effectively. The COVID-19 pandemic accelerated this transition, as more consumers turned to online platforms for information and entertainment. Consequently, advertisers have adjusted their strategies to align with changing consumer behaviors, leading to a significant increase in online advertising expenditures in the Czech market.

Similar to other European countries, the Czech online advertising sector is dominated by global platforms, particularly Meta, which leads in social media, and Google, the leader in search. However, the Czech market distinguishes itself from other EU nations through the notable presence of the domestic platform and media group Seznam.cz. As an older competitor of Google, Seznam.cz maintains a significant, albeit gradually declining, share of the search engine market. The stable performance of Seznam.cz, combined with the role of the Czech media group Mafra, contributes to a lower

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<sup>84</sup> Based on the company's own blog report on 2016. [Seznam.cz, 2016](#).

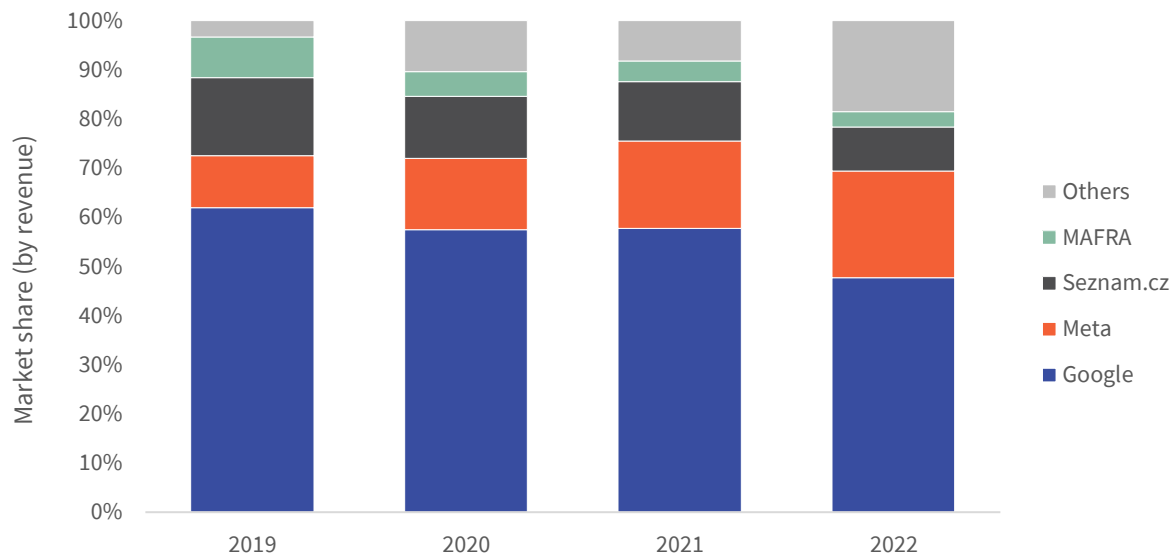
<sup>85</sup> IAB Europe, ADEX Benchmark 2022 Study. [IAB 2023](#); IAB Europe, ADEX Benchmark 2021 Study. [IAB 2022](#).

combined market share for Google and Meta compared to other European countries (e.g., as reported in the GMICP analysis for Italy).

Despite this unique feature, the revenues of global platforms have grown at a much faster pace than those of their domestic counterparts between 2019 and 2022. Google's estimated revenues increased from 14.55 billion CZK to 25.35 billion CZK, while Meta's grew from 2.48 billion CZK to 11.5 billion CZK. In contrast, Seznam.cz saw modest growth, from 3.75 billion CZK to 4.74 billion CZK, while Mafra experienced a decline from 1.91 billion CZK to 1.65 billion CZK.

The figure below illustrates the dominance of global platforms alongside the decreasing market concentration (with HHI declining from 4269.1 in 2019 to 2837.7 in 2022, and CR4 falling from 96.6 to 81.4). However, the precise drivers of this declining concentration remain unclear, potentially reflecting methodological challenges in revenue estimations.

**Figure 19: Internet Advertising: Market shares by revenue, 2019-2022**



	2019	2020	2021	2022
CR4	96.6%	89.6%	91.8%	81.4%
HHI	4269.1	3693.3	3818.3	2837.7

## Social Media Platforms

The social media landscape in the Czech Republic reflects global trends, with Meta platforms (Facebook and Instagram) maintaining their leading positions in user base and advertising reach. Facebook remains the dominant platform; combined with IG, Meta's market share rose from 49.7 to 57.6%. As a result, the sector's concentration appears to be high, with HHI growing from 3543.6 in 2019 to 4001.7 in 2022.

However, the Statcounter data, which were the basis for our calculations, seems to underestimate certain platforms.<sup>86</sup> More specifically, it apparently does not reflect sufficiently the growing user base of TikTok in the Czech Republic. According to data from ByteDance's advertising resources, TikTok had 1.95 million users aged 18 and older in Czechia at the start of 2023. Based on Datareportal, the platform's advertising reach in the country represented 20.3% of the total internet user base, compared to 34.9% for Instagram and 49.9% for Facebook.<sup>87</sup> This is why we need a better methodology to account for this sector and the specific firms active in it, especially multinational big tech giants such as Alphabet, Meta and Bytedance. This is a task that we will pursue in subsequent iterations of this report.

## App Distribution

The mobile app distribution market demonstrated a steep growth of 104.4% between 2019 and 2022 (from 2.56 to 5.23 billion CZK). Like in other European countries, the market for app distribution has been divided between Apple and Google. Out of the two incumbents, Apple grew faster (from 1.23 to 2.57 billion CZK) during this period and gradually closed the gap between itself and Google (whose revenue grew from 2.56 to 5.23 billion CZK between 2019 and 2022).

The total revenues for app distribution were extrapolated retrospectively from data.ai free trial account (figures available for 2024 and 2023): 299 USD mill. (2024), 275 USD mill. (2023). The estimated revenue progression aligns with the overall app market growth trends in Europe according to SensorTower.<sup>88</sup> Market shares and revenues of individual players were approximated from Statcounter statistics of IOS and Android

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<sup>86</sup> Statcounter calculates social media platforms' market shares by taking the proportion of total web traffic that comes from each social media platform.

<sup>87</sup> Datareportal, Digital 2023: Czechia. [Datareportal 2024](#).

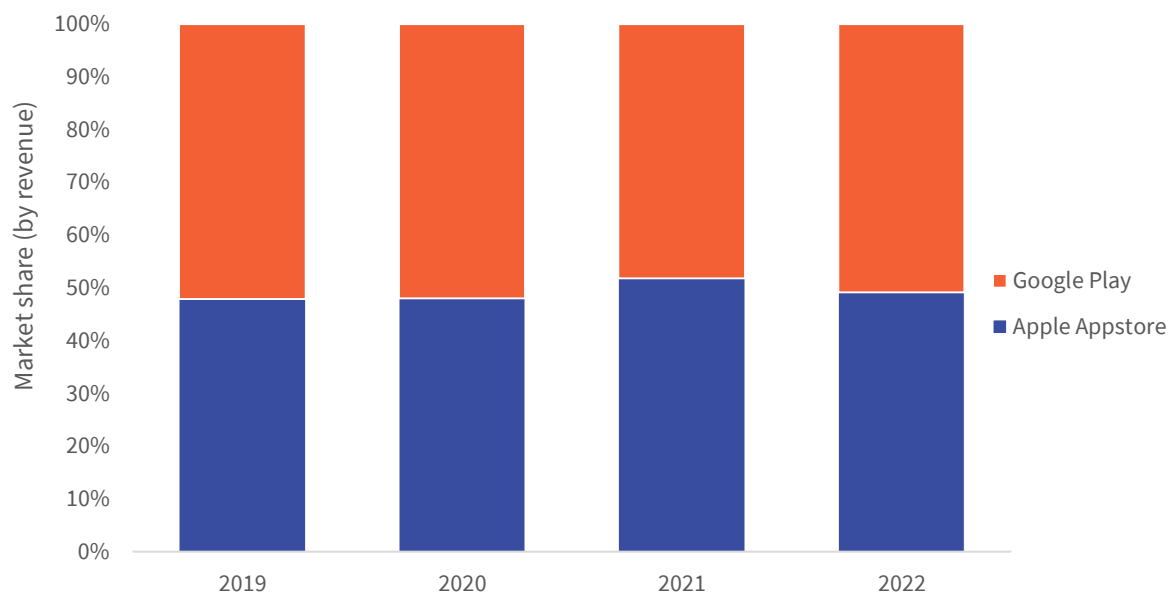
<sup>88</sup> SensorTower blog, [January 2022](#); [January 2020](#).



mobile OS in the Czech Republic, but adjusted to reflect the difference in ARPU based on SensorTower/data.ai (revenues/downloads).

The mobile app distribution shares derive from shares of mobile operating systems. Android's market share in Czechia has grown steadily since 2010, reaching a peak of over 79% in 2019. By 2021, Android held more than 75% of the market, while Apple's share was around 27% in 2023, showing a slight increase from the previous year but still lower than its 30.4% share in 2010.<sup>89</sup> However, when calculating app distribution market shares from mobile OS shares, differences in average revenue per user (ARPU) need to be taken into account because Apple generates significantly higher revenue per download than Google. Consequently, this translates into Apple App Store's stronger performance in many markets, as illustrated in the figure below.

**Figure 20: App distribution: Market shares by revenue, 2019-2022**



	2019	2020	2021	2022
CR2	100%	100%	100%	100%
HHI	5008.6	5008.2	5006.8	5000.5

<sup>89</sup> Statista, Market share of mobile operating systems in Czechia from 2010 to 2023. [Statista 2024](#).

## Core internet applications grouped results

The core internet applications sector was the fastest-growing part of the Czech network media economy between 2019 and 2022. It also exhibited notably higher concentration levels compared to the telecommunications and internet access sector, as well as online and traditional media services. Despite a slight decrease in its HHI over time, the sector remains highly concentrated, with global platforms such as Google, Apple, and Meta dominating the markets that constitute this grouping of sectors.

The Czech internet economy seems to be driven by high penetration of wireline as well as mobile data services. The relatively strong domestic players Seznam.cz and Mafra contributed to the dynamic online advertising sector (growing fast especially in the segment of online video advertising). However, Czech internet economy has been also limited by the existing oligopoly of O2, Vodafone and T-Mobile and related high consumer prices in the wireless sector as well as the low adoption of paid online services among Czech population.

A significant challenge in evaluating this sector was the lack of comprehensive revenue data and reliable market share information for many areas, leaving us to rely mainly on web traffic estimates from Statcounter. This data gap is particularly problematic in the context of internet advertising, which is the principal revenue source for the internet economy and serves as the connective tissue between most other sectors.

Consequently, and unfortunately, we could only construct rough approximations for this key area. As a result, while the overall decline in concentration within core internet applications—and consequently the broader network media economy—suggests a trend toward more competition, this finding must be treated with caution due to the limitations in available data and by the seemingly immovable fact that concentration levels within and across these sectors has remained stubbornly high (see figures 21 and 22 below).

**“The core internet applications sector was the fastest-growing part of the Czech network media economy between 2019 and 2022”**

Figure 21: C4 scores for Core internet applications, 2019-2022

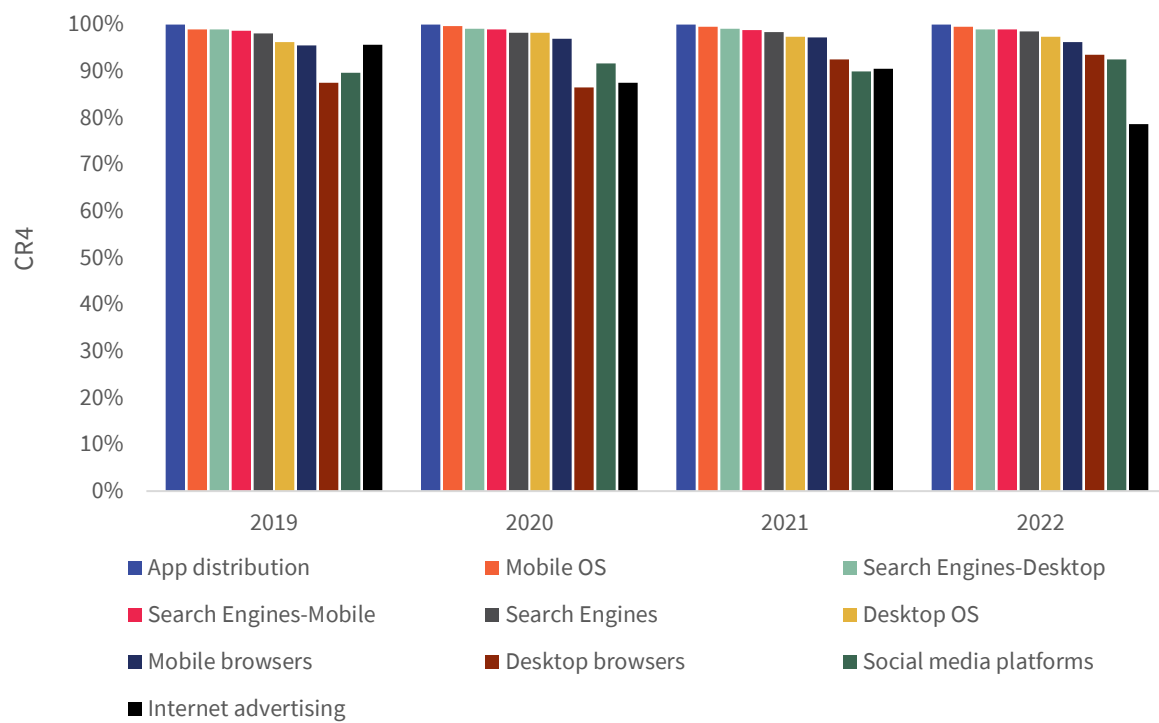
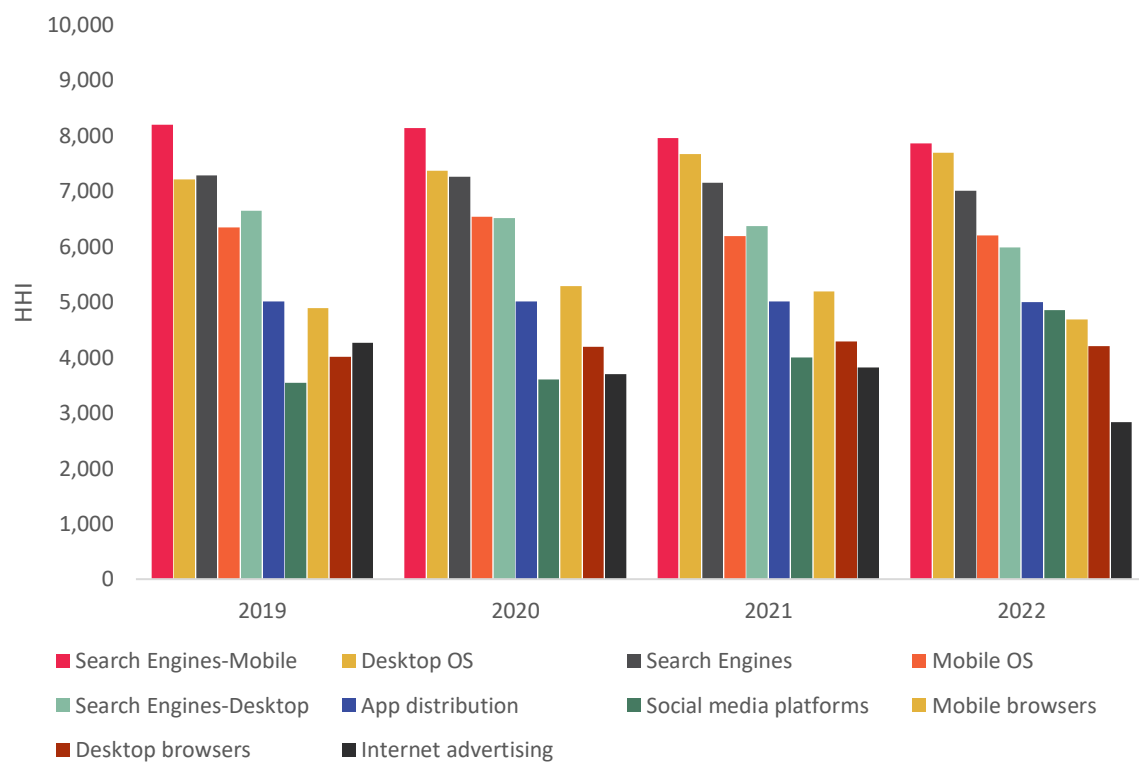


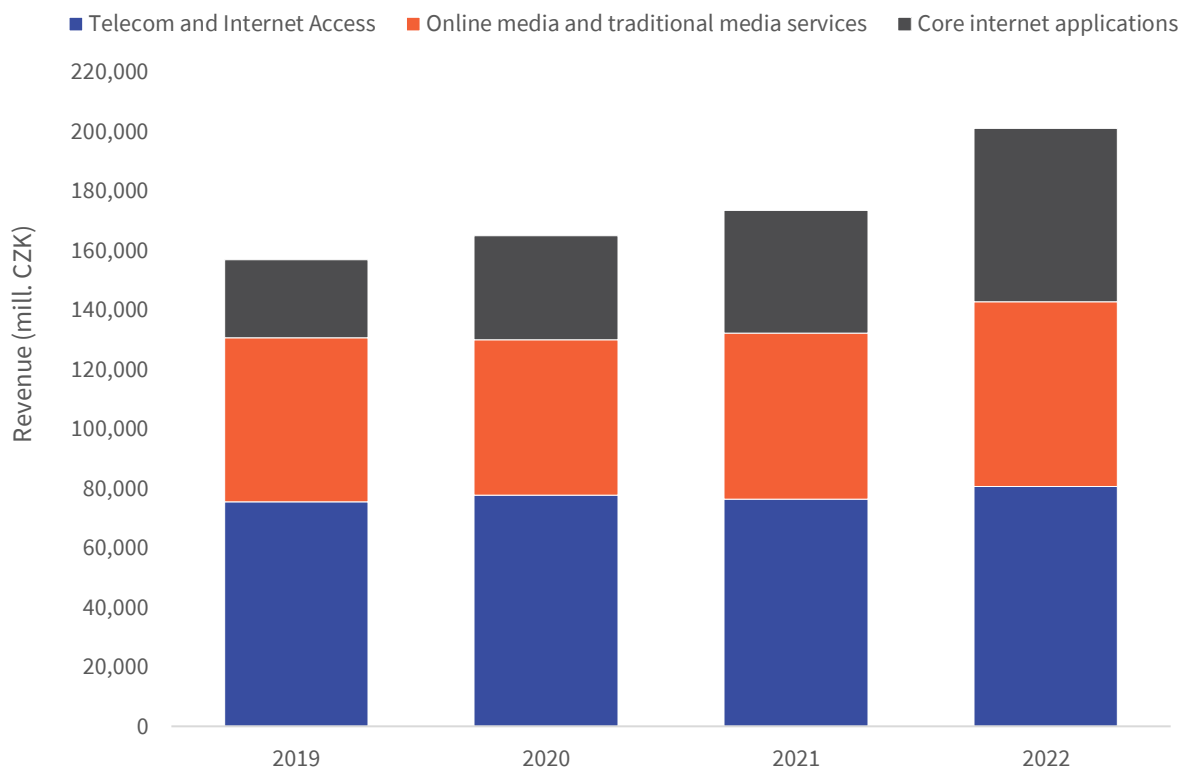
Figure 22: HHI scores for Core internet applications, 2019-2022



# Conclusion: The Czech Network Media Economy

The Czech network media economy saw a notable revenue increase from 156.65 billion CZK in 2019 to 201.15 billion CZK in 2022, driven largely by the growth of online services. The online media sector, especially online video, IPTV, digital games, music streaming, and mobile apps saw the most significant expansion, fueled by a combination of increasing penetration and global demand for these services. Particularly, the surge in internet advertising, which became the largest sector by revenue by 2022, demonstrates a clear shift towards digital platforms and big tech. However, traditional sectors such as film, magazines, and newspapers showed declining trends, largely impacted by the COVID-19 pandemic, which accelerated the ongoing struggles in physical media and live entertainment markets.

**Figure 23: Total revenues for the Czech Network media economy, 2019-2022**



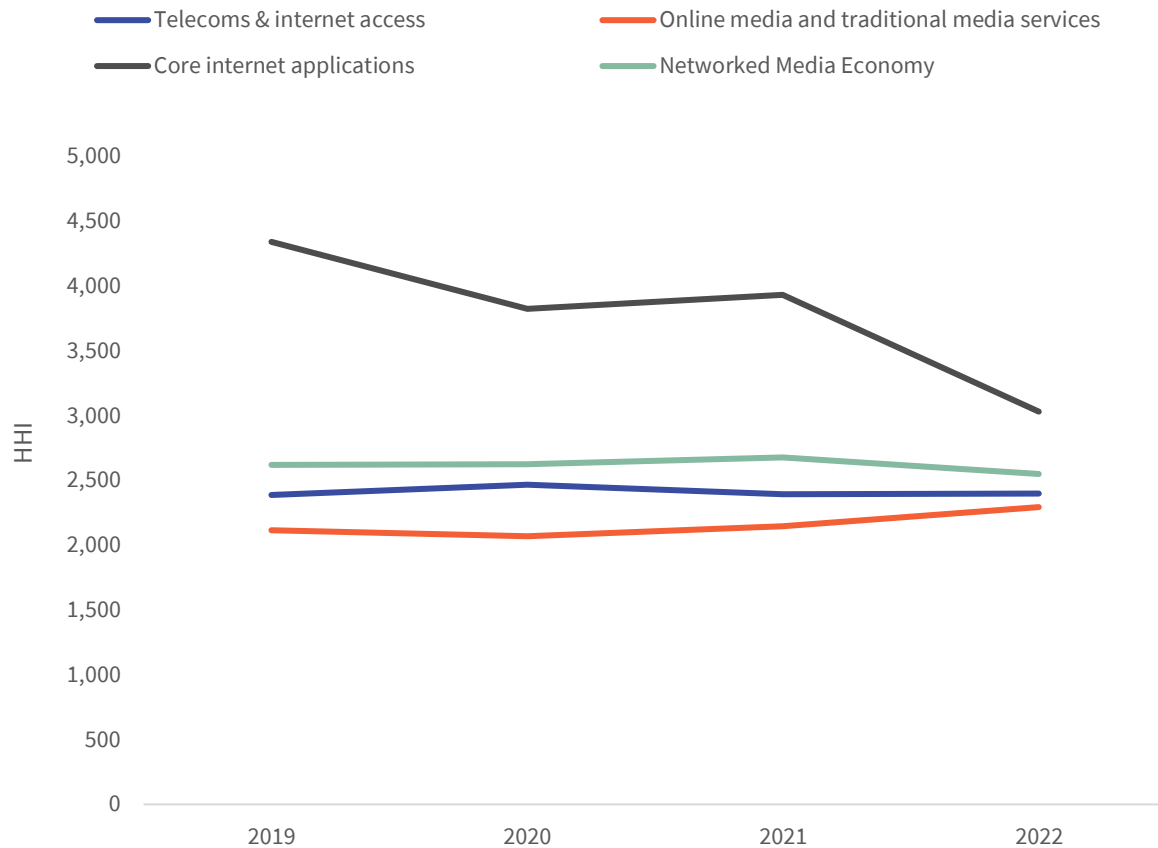
Despite overall growth in digital media, the Czech Republic remains unique in certain aspects. Unlike other European or global markets where OTT services like Netflix have undermined the dominance of traditional TV broadcasters, Czech TV and broadcast services, as well as multichannel video distributors (IPTV, cable, and satellite), have maintained a stable presence. The significant dominance of internet advertising, however, positions the Czech Republic as a leader in Central and Eastern Europe (CEE), reflecting the country's specific adaptation to digital market dynamics.

Additionally, the high concentration within the Czech network media economy, especially in sectors of core internet applications, indicates a market controlled by a few global and transnational players together with the local leader PPF. The data also show that while competition has increased in some sectors (e.g. in online video services, multichannel video distribution), the overall trend points to continued high concentration, underscoring the need for regulatory frameworks that can balance growth with media diversity and independence. The HHI values for core internet applications suggest very high concentration, particularly in social media platforms and app distribution, dominated by the global companies Google, Meta, and Apple.

Nevertheless, figure 24 shows the network media economy concentration slightly declining. In 2019, the weighted HHI was 2618.0, it then grew to 2626.3 in 2020 and to 2678.1 in 2021 but dropped again in 2022 to 2550.2. The decline was caused by core internet applications, whose HHI dropped from 4341.7 in 2021 to 3031.6 in 2022, a development resulting from rising competition in internet advertising. However, internet advertising's HHI must also be highly qualified due to the experimental method of approximation described below. Regardless of these qualifications and provisional outline of key trends, however, the fundamental fact is that overall concentration in the network media economy remains at the very high end of the spectrum and, therefore, cause for concern.

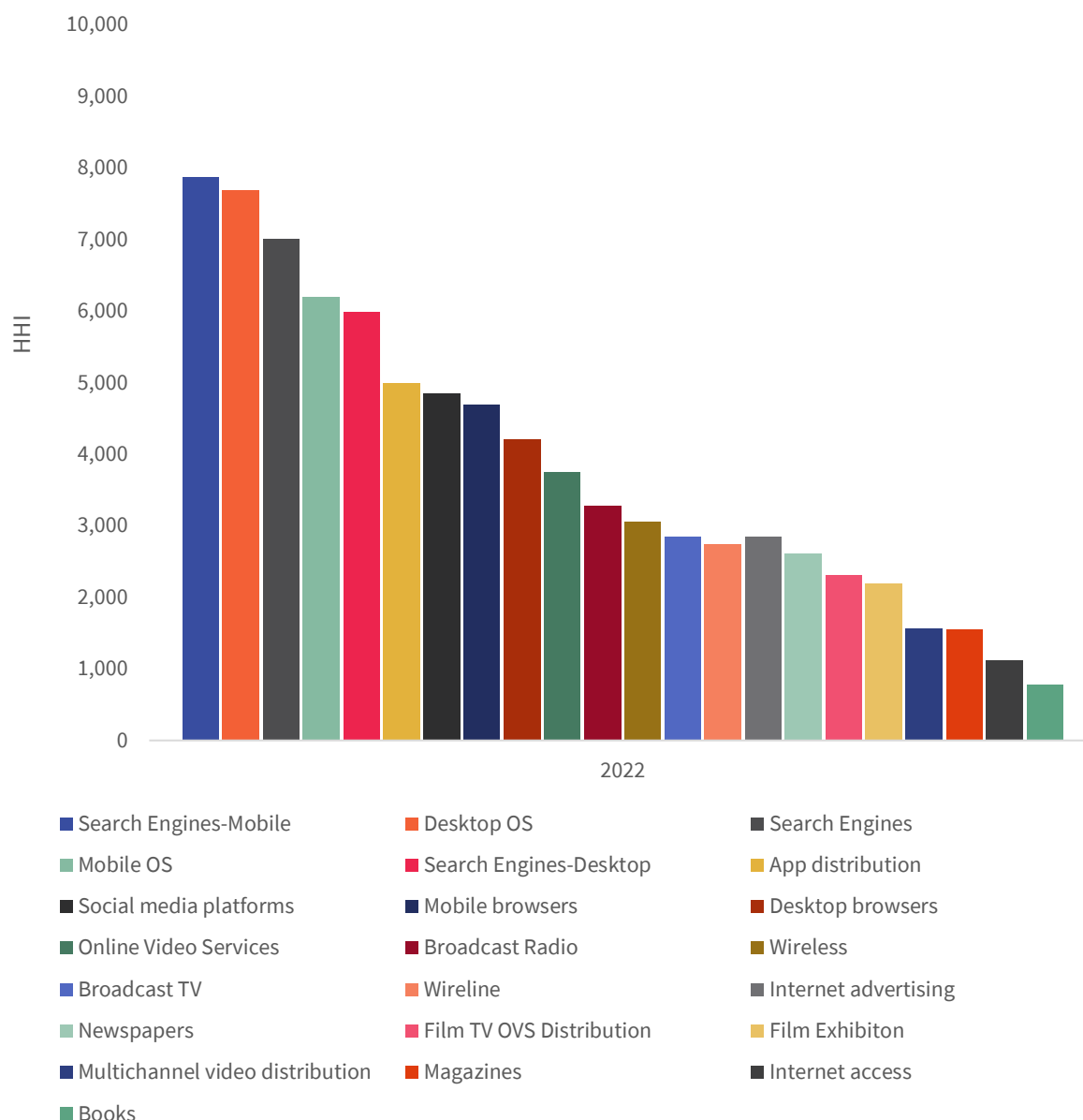
**“Overall  
concentration in  
the network media  
economy remains  
at the very high end  
of the spectrum”**

Figure 24: HHI scores for network media economy, 2019-2022



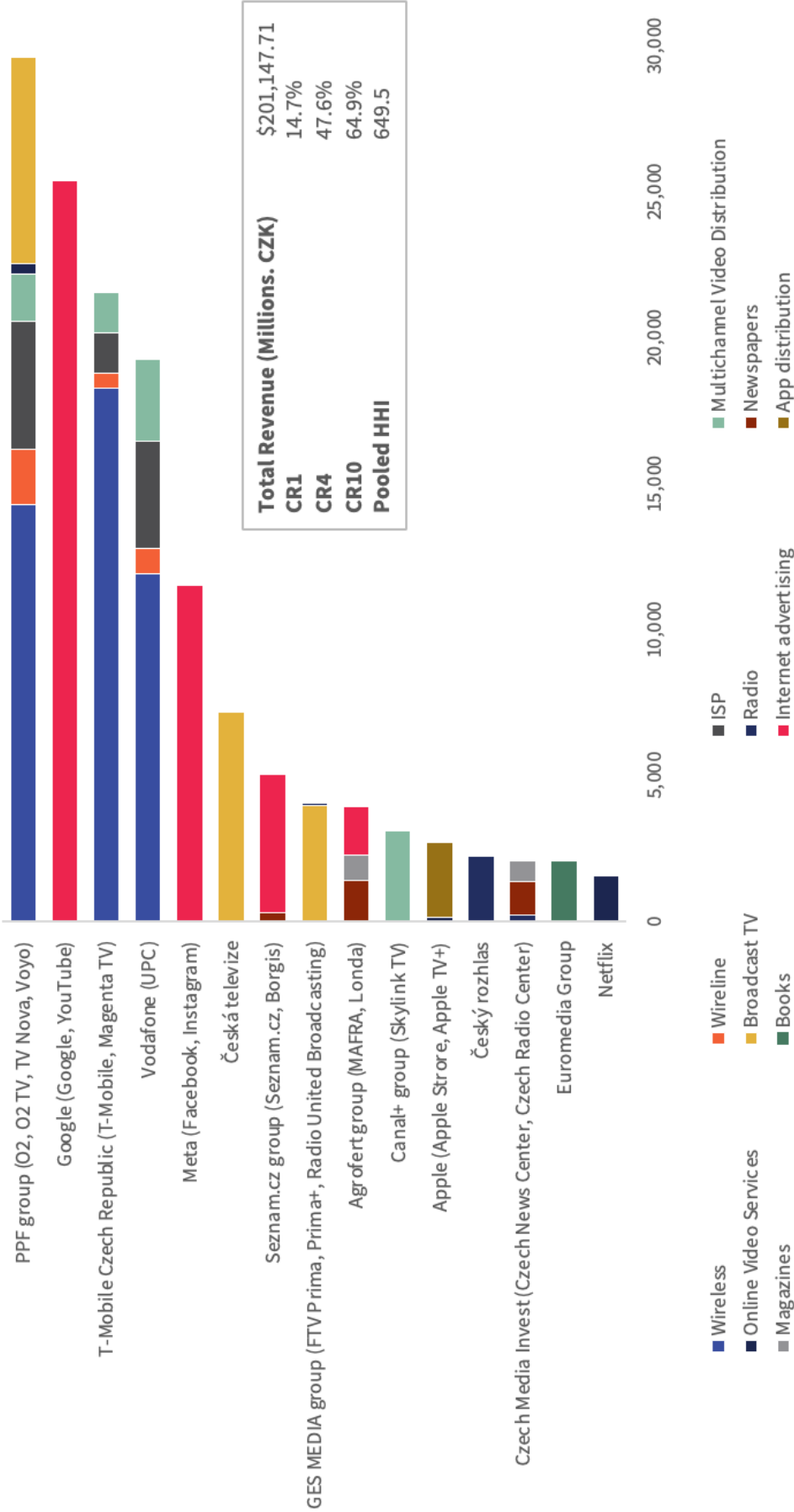
The changing landscape in the Czech media and telecommunications sectors presents challenges to market diversity and competition. The trends of oligopolization are most evident in internet services and core internet applications, where the market is increasingly controlled by the global platforms. Yet, the Czech media industry is in some respects insulated from the global forces that shape many other European countries. For instance, the HHI of the local market for online video services declined due to the rise of the local platform Voyo (owned by PPF), outperforming Amazon Prime Video or Disney+, although the sector still remains highly concentrated, with Netflix holding the major shares (see fig. 25).

Figure 25: HHI scores for individual sectors of the Network media economy, 2022



When comparing total revenues of the biggest players across all sectors (see fig. 26), the PPF financial group, founded by the late richest Czech Petr Kellner, appears to be an undisputed leader, followed by transnational telecom groups T-Mobile and Vodafone and by the global platforms Google and Meta. The four largest players (PPF, Google, T-Mobile, Vodafone) collectively controlled 47.6%, the five largest players (including also Meta) 53.3% of the whole network media market as of 2022. Public service media (Česká televize and Český rozhlas) remained relatively strong players, despite their financial difficulties caused by stagnating license fee rates.

Figure 26: The biggest players in the Czech Network media economy by 2022





Looking at the online and traditional media services alone, PPF would still rank as the strongest player, followed by the public service TV and the strongest local online platform Seznam.cz. Other groups controlled by Czech oligarchs often criticized for hampering media pluralism, namely Agrofert, GES MEDIA, and Czech Media Invest, do not appear as strong as their public image might suggest (see introduction to this report). Netflix is the last player exceeding the limit value of 1.5 CZK billion annual revenue and its marginal position illustrates the conservative, broadcast-driven characteristics of the Czech media market we have written about in the above sections of this report.

The overall high concentration of the Czech network media economy raises concerns about media pluralism, especially as local media groups like PPF (operating across telecommunications, broadcast TV, online video), Seznam (search, internet advertising, online news media), and MAFRA (newspapers, magazines, online news media, broadcast radio, internet advertising) have grown in influence, raising questions about the impact on democratic media functions in Czech society. However, the above list of strongest players suggests that the established critical discourse about oligarchization should be balanced by a focus on concentration caused by the transnational and global players.

The figure 27 shows that the Czech network media economy exhibits slightly below-average concentration when assessed through two key metrics: the CR4 that stands at 47.6% compared to the GMICP sample average of 52%, and a weighted HHI of 2550.2, compared to an average of 2997.3 (2023 or the nearest year available).

**“The overall high concentration of the Czech network media economy raises concerns about media pluralism”**

Figure 27: Select international comparison of CR4 and HHI figures, 2022-2023

	United States	South Korea	China	Italy	France	Switzerland	Austria	Canada	Czech Republic	Australia	Spain	Brazil	Denmark	India	Mexico
<b>CR1</b>	11.2%	15.4%	17.9%	19.6%	21.1%	26.1%	14.6%	23.0%	14.7%	25.0%	18.2%	32.0%	17.0%	31.7%	47.2%
<b>CR4</b>	32.9%	40.9%	42.0%	42.7%	54.2%	56.2%	39.2%	60.7%	47.6%	58.0%	46.8%	82.6%	33.3%	70.1%	72.7%
<b>CR10</b>	54.5%	56.0%	65.4%	67.3%	77.6%	74.7%	57.6%	79.6%	64.9%	84.0%	65.9%	99.4%	50.7%	82.1%	92.9%
<b>Big Tech</b>	18.3%	NA	29.6%	10.2%	12.0%	21.2%	6.9%	18.9%	20.4%	19.0%	14.4%	13.1%	12.4%	10.6%	17.5%
<b>Pooled HHI</b>	384.5	542.2	648.0	689.0	935.3	1076.7	492.6	1263.3	649.5	1167.0	691.3	2165.9	453.0	1662.6	2552.6
<b>Weighted HHI</b>	2027	NA	2097.87	NA	NA	NA	2153.8	2502.1	2550.2	3677.2	3936.40	NA	NA	NA	5033.90

However, these averages are influenced by the inclusion of highly concentrated markets such as Brazil, Mexico, India, and Australia, which skew the data upward. When benchmarked against more comparable European Union markets, Czech media concentration appears relatively high. Its CR4 exceeds that of Austria, Italy, Denmark, and Spain, ranking just below France.

The Czech Republic's media economy thus stands out as notably consolidated within the EU context, raising potential concerns regarding competitive dynamics and media pluralism. This observation is further reinforced by the significant market presence of global big tech firms such as Google, Meta, Apple, and Netflix. These companies collectively hold a 20.4% share of the Czech media market as of 2022, surpassing the 16% average recorded in the GMICP reports and exceeding the levels observed in all EU countries included in the sample (see fig. 27).<sup>90</sup> This dominance underscores the growing influence of global platforms in the Czech media landscape, which could have profound implications for local media ecosystems and regulatory frameworks.

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<sup>90</sup> The big tech share could potentially be higher if additional services, such as YouTube Premium, Google Play Store, and Google Cloud, were included in the analysis, along with more comprehensive data for platforms like TikTok, Spotify, and others.

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