

**EUROPE**  
**IN**  
**SYNCH**



Synch Market Profile  
**Slovenia**



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# 1. General Introduction to Synch in Slovenia

In Slovenia, synchronisation, which involves the licensing of music for use in visual media such as films, TV shows, commercials, video games, and more, is a niche but growing part of the country's broader music sector. Although Slovenia's music market is small and structurally underdeveloped compared to Western European countries, the synch sector plays a certain role in the local music ecosystem. We observe awareness among Slovenian artists, filmmakers, advertisers and music professionals about the potential of synch licensing as a revenue stream. The sector is gradually expanding as local artists and professionals seek new ways to monetise their work beyond traditional music sales and streaming. The main challenges seem to be a lack of local investments and entrepreneurial mindset among professionals, as well as a lack of knowledge and information.

## **Market size**

Music Publishing in Slovenia, which is crucial also for synch licensing, is dominated by a few key players (major companies, Society of Slovene Composers), including national music publishers (ZKP RTV Slovenija) and international companies with local representation. These publishers manage the rights to a significant portion of Slovenian music and are responsible for negotiating synchronisation deals.

The recorded music sector in Slovenia is similarly modest in scale. Despite this, it has shown resilience and adaptability in the face of global trends like digitalisation and streaming. Synch deals offer an additional revenue stream for Slovenian artists and labels, particularly as they look to reach wider audiences both domestically and internationally.

## **Key Players and Opportunities**

Many Slovenian artists have begun to recognise the importance of synch opportunities as a way to expand their reach and generate income. Indie bands and solo artists are increasingly open to licensing their music for various media uses.

Slovenian media and advertising agencies are key consumers of synch licences, using local music to add a cultural touch to their productions. This demand has driven growth in the synch sector.

While the domestic market is limited, Slovenian music has occasionally found synch opportunities abroad, particularly within European markets. This potential for international synch deals adds another layer of opportunity for Slovenian artists and rights holders.

## Challenges and Potential

The synch sector in Slovenia faces several challenges, including the small size of the local market, limited resources for marketing and distribution, and the need for more extensive industry infrastructure. However, the potential for growth is significant, especially with the increasing global demand for diverse and authentic music in visual media. There is also a growing focus on building stronger networks between artists, publishers, and media producers to facilitate more synch deals. Educational efforts to inform musicians and rights holders about the benefits of synch licensing are also critical to further developing this sector.

In summary, while the synchronisation sector in Slovenia is still emerging, it represents a promising area of growth within the broader music industry. As local and international demand for Slovenian music in visual media increases, the sector is likely to expand, offering new opportunities for artists, publishers, and media companies alike.

## 2. Copyright & Licensing

### 2.1. Copyright Law

In Slovenia, copyright law is governed by the **Copyright and Related Rights Act (ZASP)**, which implements EU directives and aligns with European standards, as Slovenia is a member of the European Union. This harmonisation means that many copyright principles in Slovenia follow the general framework established by the EU Copyright Directive (Directive 2001/29/EC) and other relevant EU regulations. That being said, experts note that the literal “copy-paste” transposition of directives has created a patchwork effect, resulting in overlapping or conflicting provisions that can be confusing for practitioners.

### Specificities of Slovenian Copyright Law

#### **Moral and Economic Rights**

- **NetfMoral Rights:** *As in most EU countries, Slovenian law provides strong protection for authors' moral rights. These include the right to be recognised as the author of the work (right of attribution) and the right to protect the integrity of the work (right to object to derogatory treatment). These rights are inalienable and are similar to moral rights across the EU.*
- **Economic Rights:** *Authors in Slovenia hold exclusive economic rights to authorise or prohibit various uses of their work, including reproduction, distribution, public performance, broadcasting, and making the work available to the public, all of which mirror the broader EU copyright norms.*

## Synchronisation (Synch) Rights

- Under Slovenian law, there is no specific mention of “synch” rights as a separate right. Instead, synchronisation is legally governed by Article 104 of the Copyright and Related Rights Act (ZASP) as the **right of audio-visual adaptation**. This is defined as the right to transform or include a pre-existing work in an audio-visual work.

In practice, a synchronisation license covers several key permissions:

1. *The right of audio-visual adaptation: The legal basis for fixing the music to the visual content.*
2. *The right of reproduction: As the work is being copied onto a medium such as film or a digital drive.*
3. *The right of communication to the public (or making available): Since the work will subsequently be broadcast, screened in cinemas, or made available on digital platforms.*

## Collective Management of Rights

In practice, synchronisation rights (especially for music) are often managed by **collective management organisations (CMOs)** in Slovenia<sup>1</sup>, as they are in many EU countries<sup>2</sup>. These organisations ensure proper licensing and compensation for the use of copyrighted works, including synchronisation.<sup>3</sup>

### 2.2. The Role of Collective Management

In Slovenia, collective management organisations play a limited role in the direct licensing of synchronisation rights. For example, **IPF, k.o.**, which represents phonogram producers, is not mandated to license or collect remuneration for synch rights themselves; these rights are typically negotiated and managed individually by phonogram producers or other rightsholders. As a result, a significant portion of synchronisation agreements is concluded directly between users and rights owners rather than through collective management structures.

However, CMOs remain active and influential in the area of secondary rights and remuneration related to the communication of works to the public. They collect fees for uses such as radio and television broadcasting, retransmission, rebroadcasting, and public performance, although this does not extend to on-demand “making avai-

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<sup>1</sup> CMOs in Slovenia - at least IPF, k.o. is not mandated for and does not collect for synch rights. This is done individually by phonogram producers themselves

<sup>2</sup> Not that many. We'll know by the end of the project.

<sup>3</sup> Section informed by Copyright Law expert Urša Chitrakar.

lable” rights. In this secondary sphere, CMOs report high market penetration and a long-standing, well-established presence in the Slovenian market. According to available statements, no major legal inconsistencies or grey areas between regulation and practice have been identified in relation to collective licensing in this field.<sup>4</sup>

### 2.3. Collective Management Organisations

The legal basis for copyright, related rights and the collective management system can be found in the *Copyright and Related Rights Act (ZASP)*, Act on Collective Management of Copyright and Related Rights (ZKUASP). Licences are issued by the *Slovenian Intellectual Property Office* according to tariff agreements with users. A useful resource in English about copyright in Slovenia is *Copyright and related rights | GOV.SI*.

There are four collective management organisations (CMOs) for music in Slovenia - SAZAS, IPF, AIPA and KOPRIVA.

- *SAZAS* collectively manages the music copyrights of all authors and publishers in this field on the territory of the Republic of Slovenia.
- *IPF* collectively manages the rights of performers and the rights of the producers of phonograms.
- *AIPA* collectively manages and protects the rights of authors, performers and producers of audiovisual works.
- *KOPRIVA* collectively manages the right to fair compensation for sound or visual recording made under the conditions of private or other own use, and which belongs to authors, performers, producers of phonograms and film producers (private copying levy).

All CMOs collect and distribute remuneration to domestic and foreign rights holders, except for Kopriva, which collects private copying levy and distributes it to other CMOs responsible for further distribution to domestic and foreign rights holders.

A specific practical challenge in Slovenia is the “split” management of music in film. SAZAS typically collects for pre-existing music, while AIPA manages music specifically commissioned for a particular audio-visual work. This distinction can be confusing for users who must navigate multiple licenses for a single production.

According to their revenues (per capita), all CMOs rank above average in the region. The total annual collections according to CMOs are shown in Table 1.

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<sup>4</sup>| Section informed by Collective Management expert Miha Šinkovec (IPF)

<b>CMO</b>	<b>TYPE</b>	<b>EUR (in millions)</b>
<b>SAZAS</b>	authors	14.3 mln
<b>IPF</b>	neighbouring	6.6 mln
<b>AIPA</b>	AV	6.3 mln
<b>KOPRIVA</b>	Private copying	3.1 mln

*Table 1*

*Total annual collections of CMOs in 2022. Source: SAZAS, IPF, AIPA and KOPRIVA websites.*

Below you will find a table showing the uses for music that are licensed collectively through the Slovenian collective management organisations, and which licences must be obtained directly from the rightsholders.

<b>USAGE</b>	<b>AUTHOR'S RIGHTS</b>	<b>NEIGHBOURING RIGHTS (Recordings)</b>
<b>Public performance</b>	SAZAS	IPF
<b>Broadcasting in Radio &amp; TV</b>	SAZAS	IPF
<b>Reproduction and distribution (physical)</b>	SAZAS	Individual
<b>Background music</b>	SAZAS	IPF
<b>Making available online</b>	SAZAS	Individual
<b>Licensing to film production</b>	Licensing is individual, the usage is collectively managed by AIPA, SAZAS	Licensing is individual, the usage is collectively managed by IPF
<b>Licensing to TV production</b>	Licensing is individual, the usage is collectively managed by AIPA, SAZAS	Licensing is individual, the usage is collectively managed by IPF
<b>Licensing to advertisements</b>	Licensing is individual, the usage is collectively managed by AIPA, SAZAS	Licensing is individual, the usage is collectively managed by IPF
<b>Licensing to video games production</b>	Individual	Individual
<b>Private Copying</b>	KOPRIVA	KOPRIVA

*Table 2*

*Licensing music in Slovenia.*

## 3. Rightsholder & Music Providers

The Slovenian music licensing landscape is small and concentrated, and synchronisation is most often cleared through record labels, with publishers and composer institutions also playing a role depending on the repertoire and rightsholder structure. Dedicated synch professionals exist but remain few: beyond label staff who handle synch as part of their work, only a small number of independent music supervisors and synch agents are described as having the know-how to execute full-scale synch projects for Slovenia and the wider region, with intermediaries such as Žiga Drofenik (Džuboks s.p.) frequently bridging between music users and rights holders. Key rightsholders include major labels and institutional catalogues (e.g., ZKP RTV Slovenija and the Society of Slovene Composers), alongside a large share of artists who manage rights directly.

### 3.1. Synch Agents and Music Supervisors

Although Slovenia is a relatively small market, the roles of music supervisors and synch agents do exist, particularly within the advertising, film, and television sectors. These roles are not always formally titled “music supervisor” or “synch agent” though. In many cases, individuals perform similar functions under different job descriptions such as producer, music editor, or music licensing specialist. The sector remains niche, and many professionals work independently or as part of broader media, advertising, or production companies rather than through dedicated music-supervision agencies.

There are also small companies and sole proprietors who act as intermediaries between rights holders and music users, assisting with music selection, negotiations, and licensing. One example is **Žiga Drofenik (Džuboks s.p.)**, who represents a catalogue of Slovenian artists and operates as a bridge between film or advertising clients and songwriters or publishers.

Due to the limited size of the domestic industry, a large proportion of Slovenian songwriters effectively act as their own publishers and manage their own copyrights. Some engage legal professionals when needed, but many rely primarily on their own knowledge and direct negotiation with users. Synch licences are therefore often arranged directly with music publishers, record labels, or the artists themselves, especially in the independent sector.

Within national and commercial broadcasters, music supervision is usually embedded in broader production roles rather than being a standalone profession. At the national public broadcaster RTV Slovenia, designated music supervisors include **Blaž Šivic**, **Manca Udovič**, and **Miha Vardjan**. At major commercial television stati-

ons such as Planet TV and POP TV, music selection is typically handled by producers as part of their overall production responsibilities. Large commercial and national radio stations also tend to appoint specific staff members responsible for music supervision in relation to production music and broadcast content.

### **Local vs. Imported Synchronisation Usage**

The balance between locally sourced and imported music for synchronisation has shifted in recent years. Historically, local repertoire accounted for roughly 30% of synch usage, but this figure has reportedly increased to nearly 50% for larger synchronisation projects (excluding production-music libraries). Industry professionals also note a gradual emergence of AI-generated music in advertising, which is beginning to affect the synch market by reducing the number of traditional licensing deals.

### **Trade Organisations and Professional Networking**

Slovenia does not currently have a dedicated national trade association exclusively for music supervisors or synch agents. However, three main publishers with interests in the Slovenian market - IMC, AKIN, and MARS (with IDM participating informally) - are members of a joint trade body called **SIPA GIZ**. This organisation is primarily used as a collective platform for negotiating music pricing and licensing terms with large domestic media companies such as television and radio broadcasters.

In addition to formal structures, copyright and licensing professionals regularly interact through the business and social activities of collective management organisations such as **SAZAS** and **IPF**, as well as through industry events including the **MENT Ljubljana** showcase and conference. These gatherings function as important informal networking and knowledge-exchange environments for professionals involved in music licensing and synchronisation.

## **3.2. Music Publishers**

- **AKIN** (NIKA) is an affiliated company of the major record label NIKA. AKIN is the representative for Warner Chappell Music, Schubert, Weiss in Slovenia, and its own catalogues.
- **IMC MP** is the representative for Universal Music Publishing in Slovenia.
- **MARS MUSIC (DALLAS)** is an affiliated company of the major record label Dallas. Mars Music is the representative for Sony Music Publishing + EMI Music Publishing.
- **MENART** is a major record label and publishing company. In publishing, it only represents the catalogue of Slovenian artists.

There are no known examples of international artists working exclusively with the Slovenian publishers. There are also smaller publishers in Slovenia, mostly covering niche or genre artists from Slovenia. Some of these include:

- **DSS Slovenian Composers Association (Editions DSS)** systematically takes care of the editions of Slovenian works and their accessibility, also in the form of audio recordings in the *Ars Slovenica* record collection. It represents the catalogue of the members of the Society only.
- **Založba Avsenik** releases the compositions of the Avsenik brothers in various bands, as well as the music of the younger generation of the Avseniks; Slavko Jr., Gregor and Sašo.
- **IDM Music** represents BMG publishing and other indie and major publishers for the whole EX YU\* territory, including Slovenia.
- **Založba Obzorja** (the complete *Helidon* catalogue, which also includes ex-YU artists and songwriters).

### 3.3. Record Labels and producers

The Association of the Phonographic Industry of Slovenia lists about 40 labels; however, in reality, there are many more labels that are present and active. The list of active labels can be found [here](#).

**Dallas Records** is one of the first independent record labels in Slovenia and, with its sister company Mars Music, is present throughout the former Yugoslavia. For seventeen years, Dallas has been a partner and agent of EMI Records. Today, Dallas Records is mainly involved in discography and in raising the profile of artists in the region, such as Laibach, Severina, Helena Blagne, Alenka Godec, Gibonni, and more.

**Menart Records** is a full-service record label that has the exclusive Sony Music licence for the territories of Slovenia, Croatia, Serbia, Bosnia and Herzegovina, Macedonia, Montenegro, and Albania. As a domestic label, Menart has grown in Slovenia to the leading company in popular music – dominating sales and airplay charts with acts such as Dan D, Siddharta, Jan Plestenjak, Magnifico, Niet, and Kingston.

**Nika Records** is the exclusive representative of the Warner Music catalogue in Slovenia. The rich foreign catalogue is complemented by domestic releases such as Laibach, Siddharta, Big Foot Mama, Koala Voice, Dubioza Kolektiv, Buč Kesidi, etc. Another important activity of the company is the distribution of the catalogue to stores. They supply distribution partners such as OMV, Pošta Slovenije, Mercator and Big Bang to over five hundred points of sale throughout Slovenia.

*Society of Slovene Composers (Društvo slovenskih skladateljev, DSS)* systematically publishes sound recordings of works by Slovenian composers (Ars Slovenica), members of DSS, and compositions (printed, digital) by Slovene composers (Muzicije DSS).

*Universal Slovenia* is the exclusive representative of Universal Music's catalogue for Slovenia. They started with the local label in 2016, releasing Zalagasper and Klemen Slakonja.

*ZKP RTV (ZKP RTV Slovenija)* takes care of all musical genres, including rock, pop, chanson, folk, ethnic and folk music, jazz, classical, and contemporary music, whether it is chamber, symphonic, choral or opera music. It is closely related to radio and television programs in terms of promotional added value, restoration and release of valuable audio and video archives, and support for new projects.

Much of indie and alternative music is released by smaller independent labels, such as *Monlee Records* (Repetitor, KOIKOI), *Glitterbeat Records* (Tamikrest, Altin Gun), a German label located in Slovenia. *Celinka Records* (Janez Dovč, Katja Šulc, Patetico) is mostly active in releasing and promoting Slovenian music.

For the past decade and a half, *Tresk* festival has played an important role in connecting music and local distribution. Tresk provides a more concrete overview of what is happening in the field of publishing in Slovenia. In a way, Tresk makes up for the lack of record shops in the country today, and also for the fact that there are no one-stop shops for local music distribution, as of yet.

There are several private labels in the field of Slovenian Oberkrein music. *Založba Avsenik* releases the compositions of the Avsenik brothers in various bands, as well as the music of the younger generation of the Avseniks; Slavko Jr., Gregor and Sašo. Another label *Zlati zvoki* releases music from various Slovene Oberkrein or folk entertainment bands.

On the regional level (the EX-YU territory), some Slovenian labels are active in *RUNDA - Regional association of independent discographers Balkan*, which is also a member of *IMPALA* - a European organisation for independent music companies and national associations.

### 3.4. Composers

The story of Slovenian film music began in 1948, when France Štiglic directed the first Slovenian sound film *Na svoji zemlji* (*On Our Own Land*). The score was composed by **Marjan Kozina**, who is considered the founding father of Slovenian film music. His orchestral compositions, particularly the motifs from *On Our Own Land* and *Mojčina Pesem* (*Mojca's Song* from the film *Kekec*), framed the relationship between music and narrative that will continue to influence Slovenian film for decades to come.

A few years later, Kozina's score for *Kekec* (1951, directed by Jože Gale) shaped the foundations of Slovenian musical identity. The song *Kekčeva pesem* (*Kekec's Song*) became a cultural touchstone while the film won the Venice Film Festival's Golden Lion for best children's film. The 1950s brought new genres: in the comedy *Ne čakaj na maj* (*Don't Whisper*, 1957), Borut Lesjak introduced *pop evka* (Slovenian pop genre) as a carrier of the film's narrative, foreshadowing the later intersection of popular and film music.

The 1960s saw a modernist shift. In the film *Ples v dežju* (*Dance in the Rain*, 1961), **Bojan Adamič** employed jazz and harmonic dissonance, while in the films *Zgodba, ki je ni* (*On the Run*, 1967) and *Ko zorijo jagode* (*Strawberry Time*, 1978) Jože Privšek blended popular music with orchestral elements. During this period, Slovenian films began including pop-rock bands, for example **Kameleoni** for *Sončni krik* (*Cry of the Sun*, 1968). This signalled an expansion of Slovenian cinematic stylistic range. Important musical contributions of this era also include Bojan Adamič's score for *Valter brani Sarajevo* (*Walter Defends Sarajevo*, 1972) and Boštjan Hladnik's music for *Masquerada* (*Masquerade*, 1971).

The 1970s and 1980s were the golden age of Slovenian cinema sound. **Urban Koder**'s music for *Cvetje v jeseni* (*Blossoms in Autumn*, 1973), which set the zither as the symbol of the Slovenian rural soul, is among the best-known film scores in Slovenian film history. **Dečo Žgur** composed one of the most beloved children's film melodies for *Sreča na vrhovi* (*Hang on Doggy*, 1977), while **Jani Golob** bridged the boundary between film and popular music in *Poletje v školjki* (*A Summer in a Seashell*, 1984). The film *Rdeči boogie ali Kaj ti je deklica* (*Red Boogie*, 1982) is a Slovenian drama directed by Karpo Godina and scored by **Janez Gregorc**. It tells the story of a group of musicians entertaining Yugoslav work brigades after the war, though they really just want to play jazz and boogie, genres which the government deemed imperialist and undesirable. In the same period, **Bojan Adamič**'s *Butnskala* (1985) unveiled its own original grotesque musical dramaturgy.

The 1990s brought about a new generation of composers educated both at home and abroad. **Slavko Avsenik Jr.** (*Socializacija bika*, *The Socialisation of a Bull*, 1998) and

**Mitja Vrhovnik Smrekar** (*Ekspres, ekspres / Express, Express*, 1997) professionalised film scoring by fusing orchestral, electronic, and jazz elements. The music for the first feature film of independent Slovenia, *Babica gre na jug* (*Grandma Goes South*, 1991), was composed by **Vinci Vogue Anžlovar** and **Milko Lazar**.

The third millennium has brought even more plurality to Slovenian film music: **Uroš Rakovec**, **Chris Eckman**, and **Boštjan Gombač** create more intimate and minimalist soundscapes (*Šelestenje, Instalacija ljubezni, Hit poletja* | *Rustling Landscapes, Installation of Love, Summer Hit*), while the duo **Silence** score the film *Slovenka* (*Slovenian Girl*, 2009) by introducing electronic ambient aesthetics. Their later work on *Odrešitev za začetnike* (*Family Therapy*, 2024) directed by Sonja Prosenc, earned them the Vesna Award for best original score.

In recent years, Slovenian films demonstrate a clear shift in their approach to the sonic landscape. While popular music was seldom used in the past, it is becoming an ever more important part of the cinematic experience. The inclusion of contemporary domestic performers is increasingly planned for already in the early stages of production. This is how directors lend their films an additional layer of authenticity. Better-known examples of this include the use of music by bands like **Koala Voice** in the film *Prasica, slabšalni izraz za žensko* (*Bitch, a Derogatory Term for a Woman*, 2021), **MRFY** in *Gepack* (2024), *Pa tako lep dan je bil* (*It Was Such a Beautiful Day*, 2024), and **Vazz** in *Igrišča ne damo* (*We Won't Give Up the Playground*, 2024). Another important individual in this process, **Žiga Drogenik**, is one of the few Slovenian synch agents who helps creators select music and clear licensing for the use of music in films. This trend of blending film and music reflects a broader rebirth of the Slovenian music scene in recent years.<sup>5</sup>

#### LIST OF ACTIVE SLOVENIAN COMPOSERS

**Aldo Kumar** (*Pod njenim oknom; Lahko noč, gospodična* | *Beneath Her Window; Good Night, Missy*),

**Anže Kacafura – Cazzafura** (*Čefurji raus!* | *Southern Scum Go Home!*),

**Borut Kržišnik** (*A Life in Suitcases*),

**Bratko Bibič** (*Sanremo*),

**Davor Herceg** (*Kruha in iger; Idila* | *Bread and Circuses; Idyll*),

**Drago Ivanuša** (*V leru; Kruh in mleko* | *Idle Running; Bread and Milk*),

5| Section adapted from the article by Mitja Reichenberg, 'Filmska glasba in zlata leta slovenskega filma 1' ('Film Music and the Golden Years of Slovenian Film, 1'), *Slovenika* 4 (2018), available at: <https://slovinci.rs/wp-content/uploads/2018/12/slovenika.2018.4.1.6.pdf>

*Drejc Pogačnik (Posledice | Consequences),*  
*Janez Dovč (Legenda o Zlatorogu | The Legend of Goldhorn),*  
*Laren Polič Zdravič (Moški; Vaje v objemu | A Real Man, Tango Abrazos),*  
*Leon Firšt (Šepet metulja | Whisper of a Butterfly),*  
*Milko Lazar (Dedek gre na jug | Grandpa Goes South),*  
*Mitja Reichenberg (Svet edincev | The World of Only Children),*  
*Sašo Lošič (Kajmak in marmelada; Outsider | Cheese and Jam),*  
*Dečo Žgur (Nino de Gleria (Odrešitev za začetnike | Family Therapy),*  
*Sebastjan Duh (Gajin svet | Gaja's World),*  
*Tomaz Grom (Ne misli, da bo kdaj mimo Don't Think It Will Ever Pass),*  
*Tomaz Okroglič Rous (V imenu ljudstva | In the Name of the People),* and many others.

**Kino-uho** is a regular film series organised by the Slovenian Cinematheque. It is dedicated to exploring how film and music blend. It presents works where sound – particularly music – plays a key role: either as a narrative-driving device, a form of authorial expression, or a standalone artistic element. The programme often includes concerts and live sound interventions accompanying silent films, resulting in a unique visual and aural experience.

**Society of Slovene Composers** (Društvo slovenskih skladateljev, DSS) systematically publishes sound recordings of works by Slovenian composers (Ars Slovenica), members of DSS, and compositions (printed, digital) by Slovene composers (Muzicije DSS). Events for film composers and music producers: **Festival of Slovenian Film** (Portorož).

### 3.5. Music Libraries and Other Actors

#### A LIST OF MAIN MUSIC LIBRARIES USED IN SLOVENIA

**APM Music:** Known for its large and diverse collection, APM Music is frequently used by Slovenian broadcasters and production companies, particularly for TV shows and advertising.

**Audio Network:** Another player in the market, Audio Network offers a comprehensive catalogue of high-quality music tracks. It is widely used in Slovenian media production due to its extensive library and ease of licensing.

***Epidemic Sound:** Popular for online content creators, including YouTubers and social media influencers in Slovenia, Epidemic Sound offers royalty-free music with straightforward licensing options.*

***Getty Images Music:** This library is part of the Getty Images service and is often used for commercial purposes in Slovenia, offering a wide range of tracks suitable for various media projects.*

***Glasbena banka** is a relatively new music library operating on the Slovenian market, headquartered in the Czech Republic, with a dedicated Slovenian department. The company offers a music catalogue supported by an AI-powered search engine and actively commissions Slovenian composers to create original music for its library.*

***Universal Production Music:** A leading global music library, Universal Production Music provides a vast selection of tracks across genres, often used in Slovenian TV shows, commercials, and films.*

Other used music libraries: ***Artlist**, **Envato Elements**, **audiojungle** (royalty-free music), **Musicbed**.*

## 4. Music Users & Market Opportunities

The main users of synchronised music in Slovenia are the **film and audiovisual production sector, advertising sector, television and video-on-demand platforms**, and the **video-game industry**. Advertising agencies and brand clients represent a consistent source of demand, primarily for commercials and branded content, while film directors and producers commission or license music for feature films, documentaries, and short formats. Television broadcasters and Video-On-Demand (VOD) producers use music across entertainment, cultural, and promotional programming, and the game-development sector increasingly incorporates original compositions and licensed tracks as part of interactive projects. For artists and composers, opportunities therefore arise mainly through collaboration with film directors, creative agencies, production companies, broadcasters, and game studios, with both commissioned works and catalogue licensing representing viable entry points into the synch market.

#### 4.1. The Film Industry

Slovenian professional film production began in 1946 with the film *On My Land* directed by France Štiglic. By 1995, when the Film Fund of the Republic of Slovenia, the predecessor of the Slovenian Film Centre, was founded, 130 feature films had been shot.

The Slovenian film industry produces a modest number of films annually, including feature films, documentaries, and short films. The majority of these productions are supported by the Slovenian Film Centre (SFC), which provides funding and resources for filmmakers. Co-productions are common, particularly with neighbouring countries such as Croatia, Serbia, and Italy, as well as other European Union nations. These collaborations help Slovenian films reach broader audiences and tap into larger markets.

*SFC – Slovenian Film Centre* is a public institution supporting Slovenian film production, post-production, and distribution. SFC also organises film festivals and grants awards for outstanding achievements of Slovenian cinematography. Funds for film industry support are distributed on the basis of various public competitions covering film production, project development, script development, and educational activities. An automatic incentive scheme was introduced in 2017. Furthermore, SFC annually co-finances international co-productions when a Slovenian producer is acting as a minor producer. It is also responsible for the cultural presentation and promotion of Slovenian films abroad (in 2023 ca 27 Slovenian feature and short films were shown at more than 400 festivals).

##### STATISTICS FOR THE YEAR 2023

***Feature films with national support, including co-productions: 31***

*(14 fiction, 17 documentaries)*

***Number of screens: 106***

***Number of digital screens: 101***

***Number of distribution companies: 8***

*Blitz, Continental Film, Cinemania Group, Karantanija Cinemas, Demiurg, Fivia, Constantin Film, Slovenian Cinematheque*

***Number of bigger private TV Networks: 3***

*POP TV and Kanal A (Members of CME), Planet TV (Member of Antenna group).<sup>6</sup>*

<sup>6</sup> Slovenian Film Centre (2023). *Strateški načrt za razvoj avdiovizualne industrije v Sloveniji do leta 2030 - ZDSFU*.

*Academy of Theatre, Radio, Film, and Television (AGRFT)*: The AGRFT, part of the University of Ljubljana, is the only film school in Slovenia. It offers comprehensive programs in film directing, screenwriting, cinematography, and editing, among other disciplines. Many of Slovenia's leading filmmakers and industry professionals are alumni of this institution.

### **Film Festivals**

- *Ljubljana International Film Festival (LIFFe)*: LIFFe is the most prestigious film festival in Slovenia. It showcases a wide range of international films and serves as a platform for Slovenian filmmakers to present their work to a broader audience. LIFFe also features retrospectives, tributes, and various side events that foster film culture in Slovenia.
- *Festival of Slovenian Film (FSF)*: FSF is the primary national festival dedicated to Slovenian cinema. It highlights the latest Slovenian film productions and awards the Vesna Awards, which are the highest honours in the Slovenian film industry.
- **Other Festivals**: Slovenia hosts several other smaller festivals, including *Dokudoc*, focusing on documentaries, and *Animateka*, which specialises in animated films. These festivals contribute to the diversity of Slovenia's film culture and provide platforms for niche genres.

### **Technical, Post-Production and Studios**

*Viba Film Studio Ljubljana* is the national technical base, primarily intended for projects of the national film program. With a varied choice of studios, production facilities, cameras, lighting, grip, mobile sound equipment and expert technical staff, it is also suitable for all other audio-visual projects of producers from Slovenia and abroad. Viba Film is based not far from Ljubljana city centre, where there are approximately 10 000 m<sup>2</sup> of combined space for film production, audio and video post-production, producers' offices and premises for the hire of film equipment, wardrobe and props. The sound studio I (665.23 m<sup>2</sup>) and sound studio II (475.88 m<sup>2</sup>) are available for production, together with a number of accompanying production facilities: wardrobe, make-up, offices, workshops and storage premises. Post-production of images and sound are made possible by video and audio studios, sound mixing under the Dolby licence and a projection hall with 45 seats. Viba Film enables year-round 24-hour continuous work in production and post-production.

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1| Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.

## International Cooperation and Reach

Slovenia is a member of: Eurimages (the European Fund for the Support of Co-production and Distribution of Creative Cinematographic and Audio-visual Works), Creative Europe MEDIA, which provides the financial support to the EU film and audio-visual industries for the development, distribution and promotion of their work, Filming Europe EUFCN – European Film Commissions network, EFP – European Film Promotion, EFAD - European Film Agency Directors Association and EFA - European Film Academy.

Slovenian films have been increasingly recognised at international film festivals such as Cannes, Berlin, and Venice. Filmmakers like Jan Cvitkovič, Damjan Kozole, and Olmo Omerzu have garnered critical acclaim for their work, often dealing with complex social and cultural themes. Co-Productions and Awards: Slovenia's participation in international co-productions has also led to greater visibility. Films co-produced by Slovenian companies have won awards at major festivals, further establishing Slovenia as a noteworthy contributor to the global film industry.

Important publications on the Slovenian film industry can be found [here](#).

### 4.1.1 Main Actors in the Film Industry for Synch

#### LIST OF MAIN FILM PRODUCTION STUDIOS/FIRMS

##### *A Atalanta*

**Overview:** A Atalanta is a production company that has been active in the Slovenian film industry for many years, producing feature films, documentaries, and short films. They are known for their contributions to Slovenian cinema.

**Notable Films:** *Cheese and Jam* (2003), *Rooster's Breakfast* (2007).

##### *Blade Production*

**Overview:** Blade Production is a production company known for producing feature films, documentaries, and TV content. They often collaborate with other production companies for larger projects.

**Notable Films:** *Weasel* (2016), *Breakthrough* (2020).

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1/ Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.

### *Film Studio Viba Film*

**Overview:** Filmstudio Viba Film is the central film studio in Slovenia, providing infrastructure, technical support, and production services for a wide range of Slovenian films. They have a long history in the Slovenian film industry.

**Role:** Serves as a hub for film production, offering studio space, equipment, and post-production facilities.

### *Gustav Film*

**Overview:** Gustav Film is a production company that focuses on creating feature films, documentaries, and television series. They are known for their involvement in both Slovenian and international film projects.

**Notable Films:** *The Tree* (2014), *The Miner* (2017).

### *Perfo Production*

**Overview:** Perfo Production is a versatile production company known for producing feature films, documentaries, and television content. They have a reputation for high-quality productions in both the film and television sectors.

**Notable Films:** *Piran-Pirano* (2010), *Nightlife* (2016).

### *Sever & Sever*

**Overview:** Sever & Sever is a film production company that produces feature films, documentaries, and short films. They are known for their focus on innovative and creative projects.

**Notable Films:** *Family Film* (2015), *Half-Sister* (2019).

### *Staragara*

**Overview:** Staragara is a well-known Slovenian film production company that focuses on producing feature films and documentaries. They often collaborate on international co-productions and are known for supporting auteur cinema.

**Notable Films:** *Idila* (2015), *Zvenenje v glavi* (2002).

### *Vertigo*

**Overview:** One of the most prominent film production companies in Slovenia, Vertigo is known for producing feature films, documentaries, and short films. They have been involved in both Slovenian and international co-productions.

**Notable Films:** *Circles* (2013), *Class Enemy* (2013), *Grain* (2017).

Other: *Bela film*, *Astral Film*, *Ena Banda*

List of main music post-production studios: [Studio Ritem](#), [Zvokarna](#), [Audio FM](#), [Studio S](#), [Zibrat Studio](#).

A list of main Slovenian composers can be found under point 3.4.

#### **4.1.2 Getting Music Into Films – practical insights**

As part of the Europe in Synch (EinS) project, we spoke and collaborated with several film directors, music composers, and supervisors. The directors mostly select the music for the film, as they follow the music scene and are familiar with relevant Slovenian performers and composers. Often, they arrange with musicians to adapt or change a popular song's lyrics or arrangement for the film's needs. The MENT Festival is a popular place for directors to discover young bands. Or in the classical and social media, at concerts, and word of mouth. We found that directors who prioritise music in their work are familiar with the Slovenian music scene and actively engage with it. Some directors work closely with composers who are involved in the creative process from the beginning.

In recent years, Slovenia has experienced few major problems with music licensing or obtaining rights for collaborations between directors and the domestic music scene. However, it is more complicated, or even problematic, to regulate rights in the territory of the former common state because many rights to popular songs were never acquired. Therefore, using such works (e.g., arrangements or adaptations of world-famous hits) is not possible or encouraged. Younger directors now have a certain level of understanding of the licensing and rights acquisition process, but due to a lack of knowledge about synch in general, which is not part of the education system, they sometimes have to learn from their mistakes. The latest revision of legislation now allows for „secondary collection,“ but it also largely depends on the relationship and agreement between the director and the musician. Typically, it is still a one-to-one agreement and purchase of works.

While these one-to-one agreements are standard, they often exist in tension with the theoretical protections of Slovenian law. Although the moral rights to integrity and recognition are technically inalienable, authors frequently de facto waive these rights when negotiating with international streaming platforms or major foreign producers to secure significantly higher upfront economic returns. Even in instances where subsequent use is perceived as a breach of the initial agreement, litigation is rarely a viable or pragmatic strategy, as legal proceedings can take years to resolve a single copyright dispute. Furthermore, in such a compact market, many creators fear

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*1/ Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.*

that strictly asserting their rights could lead to being “blacklisted” by the country’s few major broadcasters or producers. Also, large international producers as a rule state in contracts that disputes would be solved under their copyright regimes (i.e. the US or UK). Consequently, most Slovenian authors prioritise the immediate certainty of a professional partnership over the pursuit of theoretical legal safeguards. Existing disputes are usually settled out of court.

## 4.2. The Advertising Industry

The advertising industry in Slovenia is relatively small but well-developed, reflecting the country’s size and market dynamics. The industry is characterised by a mix of local and international advertising agencies, with a focus on digital, traditional, and integrated marketing solutions. Slovenia’s advertising landscape is modern and influenced by global trends, with a strong emphasis on creativity and innovation.

### Agencies vs. In-House Production:

- **In-House Production:** *A limited number of large brands and companies in Slovenia produce their ads in-house. These are typically big corporations with the resources to maintain internal marketing and creative teams. However, most brands, especially small and medium-sized enterprises (SMEs), prefer to outsource their advertising needs.*
- **Advertising Agencies:** *The majority of Slovenian brands work with advertising agencies, which range from small boutique firms to larger, full-service agencies. These agencies handle everything from creative concept development and media buying to digital marketing and brand strategy.*

There are roughly **50-100 advertising agencies** operating in Slovenia, covering a broad spectrum of services, including digital marketing, traditional advertising, media buying, and public relations.

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*1/ Based on interviews and conversations conducted by Virgo Sillamaa in 2018-2019 with the Estonian game developers community; and interviews with Jari-Pekka Kaleva and Konsta Klemetti in 2023.*

## INDUSTRY TRADE ASSOCIATIONS AND ORGANISATIONS

### *Slovenian Advertising Chamber (Slovenska oglaševalska zbornica - SOZ)*

**Overview:** The Slovenian Advertising Chamber is the main industry trade association in Slovenia. It represents the interests of advertisers, advertising agencies, media, and related stakeholders. The SOZ is a member of international organisations like the European Advertising Standards Alliance (EASA) and actively promotes ethical advertising standards.

**Activities and Data:** SOZ organises events, awards (such as the Golden Drum Festival, SOF, Effie), and provides industry data, including advertising expenditure reports, market analysis, and trend forecasts. This data is invaluable for understanding the advertising landscape in Slovenia. The Advertising Tribunal is a self-regulatory body operating under the umbrella of SOZ. It reviews complaints related to advertising content to ensure compliance with the Slovenian Code of Advertising Practice and other ethical guidelines.

### *The Slovenian Marketing Association - SMA (Društvo za marketing Slovenije - DMS)*

**Overview:** The Slovenian Marketing Association (SMA) was established in 1975 and represents communication and advertising agencies in Slovenia, focusing on improving industry standards, education, and networking. The association provides a platform for agencies to collaborate and share best practices.

**Activities and Data:** The SMA highlight of the year is the annual Slovenian Marketing Conference, co-organised with the Slovenian financial daily Finance. The conference includes speakers from Slovenia and abroad. Since 2015, the SMA has awarded the best companies with the title Marketing Excellence.

## 4.2.1 Main Actors in the Advertising Industry for Synch

*ArnoldVuga+* is a well-regarded Slovenian advertising agency that specialises in creative campaigns, branding, and digital marketing. They are known for their innovative approach and strong focus on creative excellence.

*DROM* agency is an advertising and media agency in Slovenia, offering a mix of services including media buying, strategic planning, and creative advertising. They are known for their integrated approach to campaigns.

**Futura DDB**: is part of the DDB Worldwide network and is a top agency in Slovenia, recognised for its strong creative work and effective advertising strategies. They focus on integrated marketing communications, including digital, social media, and traditional advertising.

**Luna \TBWA**: is a part of the global TBWA network and is one of the leading advertising agencies in Slovenia. They are known for their innovative and disruptive advertising strategies, as well as their strong creative output.

**Pristop** is one of the largest and most influential advertising agencies in Slovenia. They offer a full range of services, including advertising, public relations, digital marketing, and brand management. Pristop is known for its creative campaigns and strategic approach to marketing.

**Publicis Groupe Slovenia** - Publicis Groupe is a global leader in marketing, communication, and digital transformation. In Slovenia, they operate through agencies like Publicis, Saatchi & Saatchi, and Leo Burnett, offering a wide range of advertising and marketing services.

**SHIFT agency** is known for its creative and effective advertising campaigns. The agency provides a comprehensive range of services, including branding, digital marketing, and integrated communications.

**Zadruga** is a smaller, independent agency with a reputation for creative and strategic advertising solutions. They offer services in branding, advertising, and digital marketing, focusing on delivering unique and impactful campaigns.

Other: **Trampolin studio**, **Agencija 101**.

Production companies, which produce adverts and get hired by the advertising companies, are: **Square me**, **ORBIS Production**, **Pakt Media**, **PRIMATE** or **FIXMEDIA**. The most well-known music supervisor in this area is **Žiga Drogenik**, **Džuboks**.

#### **4.2.2 Ad Production and Market Opportunity**

Available information indicates that the number of major advertising campaigns in Slovenia that use specifically licensed or commissioned Slovenian music is relatively limited, generally estimated at fewer than ten per year nationwide. Individual agencies report even smaller figures. For example, SHIFT Agency notes that in their recent experience, the upper limit is around three campaigns per year using Slovenian music, with many years averaging only one or two, depending on the type of clients and projects received. The relatively small number of large domestic companies further constrains demand for higher-profile music licensing.

Budgets allocated to music in advertising vary considerably and are often treated as an additional or external cost rather than an integral part of campaign budgets, which can reduce clients' willingness to invest in licensed repertoire. For standard licensing of existing tracks, typical fees are reported in the range of approximately €300 to €1000, excluding the cost of original composition or production. In cases where music is acquired for promotional endorsement purposes - for example, when a well-known Slovenian artist's catalogue or public profile is associated with a brand, annual buy-out fees may range between roughly €10 000 and €20 000, with lower amounts applying to less established artists. By contrast, digital and social-media advertising most commonly relies on inexpensive production music libraries and therefore represents a separate, lower-budget segment that is not directly comparable to larger national advertising campaigns.

#### **4.2.3 Getting Music Into Advertisements**

In Slovenian advertising practice, the search for music for commercials is usually carried out internally within the agency, most often by copywriters or creative directors as part of the creative development process. When agencies lack a clear musical concept or need support, they commonly turn to trusted external intermediaries or music consultants who can propose suitable tracks and assist with rights management. These intermediaries frequently serve as a bridge between agencies and rights holders.

The clearance and licensing process is typically handled directly between the intermediary and the publisher or rights owner, with agencies themselves less involved in the legal and contractual details. In recent practice, licence agreements are often signed on the client's side, while price negotiations may involve the agency, the music supervisor or intermediary, the client, and sometimes the production company. Artists and composers generally come to the attention of agencies either through direct discovery by creative staff or through intermediaries who actively present music catalogues, with additional potential in more structured channels, such as newsletters or curated platforms, through which artists could more easily showcase music for advertising use.

In advertising, music is an important conveyor of emotions and brand recognition. In Slovenia, adverts often use well-known songs or new compositions adapted to the visual language of the ads. One of the most famous examples is the song *Lep je dan* performed by **Anja Rupel**, which has been associated with *Ljubljanske mlekarne* (Ljubljana Dairies) for decades. A similar function is served by Perpetuum Jazzile's arrangement of the same song, which revived nostalgia in a contemporary way. More recent notable examples include **Muff**'s composition *Naj sije*, which became the signature tune of Pop TV.

**Jani Golob**'s music is also ubiquitous, from the national advertising anthem *Slovenija, moja dežela to Prisluhni školjki*, which was used in Planica ski-jumping promotions. In this context, we also simply must mention **Miha Kralj**'s *Andromeda*. **Siddhartha**'s *Ledena* used in the promotion of Union Brewery, forged another widely-known association between music and brand, while **Vlado Kreslin**'s *Pustite nam ta svet* and *Cesta* helped shape campaigns for Lidl and Škoda. **Koala Voice** also bridged domestic music and commercial advertising through their Škoda campaign.

Over the years, Telekom Slovenije adverts have leaned on original Slovenian pop hits, such as **Tabu**'s *Angel* and *Poljubljena*, ensuring a youthful tone for the brand. The same can be said of *Poglej* by **Neomi** for T2 and *Ne bodi kot drugi* by **Ditka**, which accompanies the Spar chain store campaign. **Slon in Sadež** take the next step in humorous advertising with their *Sponzorska plata (Sponsorship Album)* for *Ljubljanske mlekarne* (Ljubljana Dairies), whose humorous take on the very concept of sponsorship embodies the duo's critical yet relaxed sonic identity.

These examples perfectly illustrate how Slovenian musical creativity blends organically with the advertising industry, often even more than in some other European countries. This attests to the high quality of our domestic production and strong emotional ties between the audience and the local sonic expression.

### 4.3. The Game Development Industry

The Slovenian game development industry, while smaller than global markets, is steadily growing and has produced titles with international recognition, such as *Talking Tom* (Outfit7), *Mordhau* (Triternion), and *Elroy and the Aliens* (Motiviti). The industry includes a mix of small, medium, and a few larger studios, most of which are independent, with only some maintaining a dedicated in-house composer or audio director. Slovenia is represented by the *Slovenian Game Developers Association*, providing networking, knowledge sharing, and industry support.

Production budgets typically allocate 5–10% to music, covering composition, recording, arrangement, implementation, mixing, and mastering. Music is overseen by

the audio director or composer, with hiring often based on prior collaboration, recommendations, or networking. Original game music is usually created under work-for-hire or exclusive licence agreements, while featured songs require synchronisation and master use licences. Composers with a strong artistic identity and proven track record are increasingly preferred, reflecting the growing importance of music in the player experience.

#### **4.3.1 Main Actors in the Game Development Industry**

Video games have become a global industry that, in some areas, surpasses the size and revenue of the Hollywood film industry. Major titles in this industry involve hundreds of developers, animators, writers, and other professionals for several years, turning video games into a form of art and cultural landmarks in the information society. This trend is also seen, though to a lesser extent, in Slovenia. The habits of gamers are also changing. „In recent years, the smartphone scene with free-to-play games has significantly developed among young people, where users spend money on in-game purchases. Content-wise, a large portion of the market is taken up by repeatedly recycled major franchises,“ explains Martin Klemenc, the conceptual leader of the Jazbina magazine project, which is one of the few magazines in Slovenia focusing on video game culture.<sup>7</sup>

The history of Slovenian video game development dates back to the 1980s, with the first Slovenian game being mentioned as “Kontrabant”, a simulation of smuggling computer components into Yugoslavia, developed by Žiga Turk and Matevž Kmet for the then-popular ZX Spectrum.<sup>8</sup>

A new milestone in development came almost ten years later with Arxel Tribe, which, after starting as a design studio in 1996, began developing video games. With titles such as “Pilgrim” and “Ring: The Legend of the Nibelungen”, which sold thousands of copies worldwide, they set new standards for the Slovenian gaming industry. Arxel Tribe was sold in 2001 to the Italian company CTO S.p.A., one of the largest video game distributors in Italy at the time, but it went bankrupt in 2004.<sup>9</sup>

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7| Savič, Domen (2022). Slovenski razvijalci računalniških iger - V svetu domače digitalne domišljije. Monitor.  
<https://www.monitor.si/clanek/slovenski-razvijalci-racunalniskih-iger-v-svetu-domace-digitalne-domisljije/215158/>

8| *ibid*

9| *ibid*

## LIST OF SOME OF THE GAME DEVELOPMENT COMPANIES IN SLOVENIA<sup>10</sup>

### *Acta Logic*

**Notable Games:** *Call of Osiris*

**Overview:** For more than 15 years, the independent studio ActaLogic has been developing video games and providing software solutions for the video game, military and civil industries. Based in Ljubljana, the capital of Slovenia, they produce original and immersive experiences of various genres for various platforms – PC (Steam, Epic Store), Nintendo Switch, PlayStation 4, PlayStation 5, Xbox, Mac, Linux, iOS, Android.

### *Fraoula*

**Founded:** 2013

**Notable Games:** *Neon Drive* (2016)

**Overview:** Fraoula is known for its retro-futuristic racing game Neon Drive. The company focuses on creating visually appealing and challenging games, primarily for PC and consoles.

### *Motiviti*

**Notable Games:** *Elroy and the Aliens* (2025)

**Overview:** Elroy and the Aliens was in development for 11 years, with a team of over 100 people contributing to its creation. The game was developed at **Motiviti**, an independent game and software studio founded in 2009 by Tadej Gregorcic and Jernej Kocjancic. Martin Bezjak served as the composer and audio director, shaping the game's immersive soundscape.

### *Outfit7*

**Founded:** 2009

**Notable Games:** *Talking Tom series*

**Overview:** Outfit7 is probably the most famous Slovenian game development company globally, known for its *Talking Tom* franchise, which became a massive hit on mobile platforms. The company was acquired by a Chinese conglomerate in 2017, but continues to have a strong presence in the mobile gaming market.

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<sup>10</sup> Section informed by:

- Savič, Domen (2022). *Slovenski razvijalci računalniških iger - V svetu domače digitalne domišljije*. Monitor.

- Slovenia Games (2026). *Društvo razvijalcev iger Slovenije*.

- Slovenia Games (2026). *About Slovenia Games*.

### *Triternion*

**Notable Games:** *Mordhau* (2019)

**Overview:** Triternion is a small team of highly skilled international developers based in Ljubljana, Slovenia, who are all big fans of making and playing multiplayer slasher games for PC and Consoles. *Mordhau* has been hugely successful and has gained a strong and passionate community of players from all around the globe.

### *Tricky Tribe*

**Founded:** 2016

**Notable Games:** *Angry Birds Explore* (2019), *Nonstop Chuck Norris* (2017)

**Overview:** Tricky Tribe is a mobile game development studio that has worked on a variety of popular titles, including collaborations with larger companies like Rovio Entertainment. Their focus is on casual and mid-core games for mobile platforms.

### *ZootFly* (ex Arxel Tribe)

**Founded:** 2002 - 2013

**Notable Games:** *Prison Break: The Conspiracy* (2009), *Panzer Elite Action* (2007)

**Overview:** ZootFly was one of the most well-known game development studios in Slovenia, primarily focusing on console and PC games. In 2013, it was sold to the company Elektronček, which develops software and hardware for casinos.

Other companies associated with game development: [Amo2](#), [Artrebel9](#), [CtrlArt](#), [Edenap](#), [Emberheart Games](#), [Gugila](#), [Hyper Fox Studios](#), [Interblock Gaming](#), [LightMass](#), [MediaAtlas](#), [BRAGG Gamin Group](#), [Pilcom/Bubadu](#), [Proxima](#), [Razum](#), [Random Salad Games](#), [TopApp](#).

[Slovenia games conference](#) happened for the first time in 2019 and is the biggest games industry event in Slovenia. Bringing together the local community and the communities abroad, the conference offers the opportunity for networking, learning, exchanging ideas, and having fun in a very casual, relaxed environment. Attendees include programmers, artists, game designers, producers, business leaders, and future industry professionals.

## LIST OF MAIN COMPOSERS WORKING WITH VIDEO GAMES

*Anže Rozman*

*Danilo Kapel*

*David Beovič*

*Jure Jerebic*

*Martin Bezjak*

Slovenian music has found its way into video games – for instance, **Happy Ol’ McWeasel’s** song was used in the world-renowned Call of Duty franchise. The said game also featured award-winning music by **Jure Jerebic**. Compositions by **Rok Nardin**, the most renowned Slovenian trailer music composer, has been featured in promos for numerous international projects. The studio **Epix Productions**, another standout in the field of interactive media, creates music for games and multimedia projects, while studios like **Studio Ritem** and **Julij Zornik** are key production partners in several Slovenian films, ads, and games.

### 4.3.2 Game Production and Market Opportunity

#### **By Martin Bezjak (Epix Soundworks)**

Slovenia produces approximately 3–5 new game titles per year, mostly mobile games and apps, with occasional PC or console projects.

The music budget in games typically represents around 5–10% of the total development budget, depending on the scope and importance of audio for the project. This budget usually covers composition, arrangement, recording (including musicians and studios where applicable), spotting and planning, music implementation in middleware, as well as mixing and mastering.

In smaller indie or mobile projects, the percentage may be lower in absolute terms, while narrative-driven or premium (AAA) titles often invest more heavily in music as a core part of the player experience.<sup>11</sup>

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<sup>11</sup> | Section by Martin Bezjak (Epix Soundworks).

### 4.3.3 Getting Music Into Video Games

#### By Martin Bezjak (Epix Soundworks)

The musical component of a video game is typically overseen by the audio director or the game's composer. In smaller projects, the composer often manages the full music process, while in larger productions, an audio director defines the musical vision and coordinates the audio team in collaboration with the game's creative leadership.

Game developers most commonly hire composers through previous collaborations or via trusted recommendations within the game development community. Existing professional relationships play a major role, as teams often prefer composers with a proven track record and established working dynamics.

Networking, particularly at game development conferences and industry events, is an important way to discover new composers. Online platforms, portfolios, and direct outreach are also used, especially in indie and mobile development, where hiring processes tend to be more informal.

Additionally, as featured songs are more frequently used in games, composers and artists with distinctive personas, a strong social media presence, and an established artistic identity have become more relevant within the gaming industry.

Original game music is often created under work-for-hire or exclusive licence arrangements, commonly referred to as a "buyout", while featured songs require synchronisation and master use licences. Contracts may also address royalties, soundtrack releases, and performance rights, depending on the project and distribution model.<sup>12</sup>

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<sup>12</sup> Section by Martin Bezjak (Epix Soundworks)

## 4.4. TV and Video-on-Demand

### 4.4.1 Main Actors in the TV and VOD Sector

In Slovenia, there are TV channels that feature programs with a focus on music, ranging from dedicated music channels to general entertainment channels that include music shows. Here are some of the main ones:

1. **Slovenska televizija (RTV Slovenija) - TV Slovenija 1 (SLO 1):** The national public broadcaster, which occasionally airs music-related content, including live broadcasts of concerts, music documentaries, and festivals.
2. **Slovenska televizija (RTV Slovenija) - TV Slovenija 2 (SLO 2):** Another channel under the national public broadcaster, known for cultural and educational programming, including classical music concerts, music-related talk shows, and special music events.
3. **POP TV:** One of Slovenia's most popular commercial channels, which includes music events, talent shows, and entertainment programs with music segments.
4. **Planet TV:** A commercial channel that occasionally features music-related shows, concerts, and music competitions, alongside its general entertainment programming.
5. **OTO:** A children's channel that occasionally features music programs aimed at younger audiences, including music videos and sing-along shows.
6. **TV Veseljak:** A channel focused on traditional Slovenian music, particularly folk and polka. It features music videos, live performances, and shows dedicated to promoting Slovenian musical heritage.
7. **Golica TV:** A dedicated Slovenian music channel focusing on folk, pop, and ethnic music, particularly popular for airing music videos, live performances, and music-related content.

These channels provide a variety of music programming catering to different tastes and demographics, from mainstream pop and rock to traditional Slovenian folk music.

We used to have a channel **MTV Adria**, which was the regional version of MTV, featuring a mix of international and local music videos, music shows, and pop culture content. It served audiences across the Balkans, including Slovenia. Sadly, it stopped broadcasting in 2017.

## LIST OF SOME OF THE MAIN PRODUCTION COMPANIES IN SLOVENIA

**RTV Slovenija:** The national public broadcaster, RTV Slovenija, is the main producer of television content in Slovenia. They produce news, documentaries, drama series, entertainment programs, and cultural content across their channels (TV Slovenija 1, TV Slovenija 2, and TV Slovenija 3).

**Pro Plus:** One of the largest media companies in Slovenia, Pro Plus operates the popular channels POP TV and Kanal A. They produce a wide range of TV content, including news, entertainment shows, and TV series.

**Planet TV:** Planet TV is both a TV channel and a production entity. They produce various shows, including reality TV, entertainment, and sports programming.

**Perfo Production:** A well-known production company in Slovenia that produces TV commercials, music videos, and TV shows, often collaborating with major broadcasters.

**Mangart:** A production company that focuses on creating documentaries, TV series, and films, often with a strong cultural or social narrative.

**360 VPK:** VPK is a production and post-production company in Slovenia, involved in producing TV shows, commercials, and video content. They are known for their high-quality production services and have collaborated with various TV channels.

**Videoprodukcija Kregar:** This company specialises in the production of documentaries, TV series, and video content, with a focus on quality storytelling and high production values.

**Senca Studio:** A production house known for its work in film, television, and commercial production. They produce drama series, documentaries, and feature films, often working with both local and international partners.

**Seventh Frame:** Specialises in producing TV commercials, corporate videos, and television content. Seventh Frame has collaborated with various Slovenian and international clients.

These companies are integral to the Slovenian television landscape, contributing to a diverse range of content that includes everything from entertainment and drama to documentaries and news.

In Slovenia, Video on Demand (VOD) services have become increasingly popular, offering a variety of content ranging from movies and TV series to documentaries and children's programming. Here's a list of some of the main VOD platforms available in Slovenia:

#### *A1 Xplore TV*

**Operator:** A1 Slovenia

**Content:** A1 Xplore TV is the VOD service provided by A1 Slovenia, offering access to a variety of movies, TV series, and other on-demand content. The service is available to A1 subscribers and includes local and international content.

#### *Amazon Prime Video*

**Operator:** Amazon

**Content:** Available in Slovenia, Amazon Prime Video offers a diverse library of movies, TV shows, and original series. The content includes both international and some localised content.

#### *Apple TV+*

**Operator:** Apple

**Content:** Apple TV+ is a subscription-based VOD service that offers original TV series, movies, and documentaries produced by Apple. It's available in Slovenia with a growing library of content.

#### *Disney+*

**Operator:** The Walt Disney Company

**Content:** Disney+ offers a wide range of content from Disney, Pixar, Marvel, Star Wars, National Geographic, and more. It includes movies, series, and exclusive originals.

#### *HBO Max*

**Operator:** Warner Bros. Discovery

**Content:** HBO Max is available in Slovenia and offers a vast library of HBO content, including original series, movies, and documentaries, as well as a variety of international content.

### *Netflix*

**Operator:** Netflix, Inc.

**Content:** Netflix is accessible in Slovenia, providing a wide array of international TV series, movies, documentaries, and original productions. Although its library varies by region, it remains one of the most popular VOD services.

### *RTV 365*

**Operator:** RTV Slovenija

**Content:** RTV 365 is the on-demand service provided by the national broadcaster RTV Slovenija. It offers a wide range of programs, including news, documentaries, entertainment, and cultural shows from its channels (SLO 1, SLO 2, SLO 3). Viewers can watch previously aired content as well as live streams.

### *T-2 TV2Go*

**Operator:** T-2

**Content:** T-2 offers a VOD service through their TV2Go platform, which includes a selection of movies, series, and other content. Subscribers can access this content on multiple devices, including smart TVs, smartphones, and tablets.

### *Telemach EON*

**Operator:** Telemach

**Content:** Telemach's EON platform offers VOD services to its subscribers, featuring a variety of movies, TV shows, and other video content. The service is accessible via the Telemach set-top box or through their mobile app.

### *Voyo*

**Operator:** Pro Plus

**Content:** Voyo is one of the most popular VOD platforms in Slovenia, offering a wide range of content, including Slovenian and international TV series, movies, reality shows, and sports events. It also provides early access to some of the content aired on POP TV and Kanal A.

**4.4.2 TV and VOD Production and Market Opportunity** Music is usually incorporated at the very end of the production process, which is why budgets allocated for music are often quite limited.

## 5. Main Challenges

The main challenges of the synchronisation sector in Slovenia stem primarily from the small size of the domestic market, which limits both the number of projects and the available budgets for music licensing. Music is often treated as a secondary or external expense in audiovisual and advertising production, resulting in low financial allocations and reduced willingness by clients to invest in original or licensed repertoire.

Enforcement remains a primary hurdle. A court case for copyright infringement can take up to five years for a first-instance ruling, which is effectively 'too late' for the fast-moving film and advertising industries. Furthermore, in a small market of 2 million people, authors often avoid litigation against major entities like the national broadcaster for fear of future exclusion from the industry.

A further structural challenge is the limited number of specialised professionals in music supervision and sync licensing, with many responsibilities dispersed across broader production or label roles rather than dedicated positions. The sector also faces a lack of knowledge, education, and entrepreneurial awareness among artists, producers, and other stakeholders regarding the potential and mechanics of synchronisation as a revenue stream.

Additional difficulties arise from fragmented rights ownership and complex licensing procedures, particularly in cross-border or legacy catalogue situations, as well as from the growing reliance on low-cost music libraries and AI-generated music, especially in digital advertising, which reduces opportunities for locally licensed works. While collective management organisations maintain strong activity in secondary rights collection, direct synch licensing is frequently handled individually, which can create inconsistency in practice and negotiation capacity. Overall, the Slovenian synch market shows gradual growth and awareness, but continues to be constrained by scale, limited investment, and insufficient professional infrastructure.

## 6. Case Studies

**Bojan Adamič** stands as a foundational figure in Slovenian and former Yugoslav film music, whose work demonstrates how composers from the region have long participated in internationally resonant screen cultures. A highly versatile composer, Adamič created numerous film scores, but he is especially remembered for the powerful and dramatic music for **Valter brani Sarajevo** (Walter Defends Sarajevo, 1972), whose heroic themes became inseparable from the film's narrative and emo-

tional impact. The film achieved extraordinary popularity beyond Europe, most notably in China, where it has been cited as one of the most-watched foreign films of all time, and Adamič's music played a key role in shaping its iconic status. This case illustrates an earlier form of transnational circulation, in which Slovenian film music reached massive global audiences through the international success of Yugoslav cinema, anticipating later contemporary examples of global integration.

The music **Magnifico (Robert Pešut)** composed for the Serbian film *Montevideo, Bog te video* (*Montevideo, God Bless You*; 2010) directed by Dragan Bjelogrić, became extremely popular – to the point of being adopted as “folk” even though the author is clearly known. Magnifico's music for *Montevideo, Bog te video* (2010) quickly exceeded its role as a film soundtrack and entered everyday musical life in Serbia and the wider region. Written in a deliberately archaic Balkan folk and brass idiom, the songs sounded stylistically older than their actual date of composition and were strongly associated with the film's nostalgic portrayal of early Yugoslav football and collective pride. As the melodies began circulating beyond the cinema - performed by brass bands, played at football matches, weddings, and informal gatherings - they were increasingly transmitted without reference to their author. Through this process of folklorisation, Magnifico's clearly authored compositions came to function as “traditional” music in practice, demonstrating how contemporary works can be absorbed into collective memory and treated as folk when they convincingly adopt the sonic language and social role of tradition.

**Anže Rozman** represents another striking international success story, having established himself within the global film and television scoring industry through his work with **Bleeding Fingers Music** under the mentorship of **Hans Zimmer**. As part of this renowned collective, Rozman has contributed music to high-profile productions for National Geographic, BBC, and Netflix, operating in an environment where large-scale collaborative composition and fast-paced production are standard. His trajectory illustrates how Slovenian composers can successfully integrate into elite international networks, gaining access to major platforms while developing a distinctive voice within contemporary screen music. At the same time, Rozman's career highlights the importance of mentorship, institutional affiliation, and transnational collaboration in enabling emerging composers from smaller music markets to reach global audiences.

The networking project Europe in Synch, whose partners include SIGIC, further strengthens the position of Slovenian musicians in the European synchronisation industry (music for film, television, advertising, games) as well as offers education and international networking opportunities.

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