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EUMEPLAT

European Media Platforms: assessing positive and negative externalities for European culture

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Patterns in media production: regional models

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Part One

EUMEPLAT

European Media Platforms: assessing positive and negative externalities for European culture

On media systems in Europe

An introduction to the reports of WP1

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Introduction

The media in Europe have dramatically changed since 1990. The number of TV channels has increased and at the same time privatization and commercialization have become dominant. Incidentally, the newspapers have presented a considerable decline. The advent of the internet and the digital media has caused further changes with the analogue media world giving its place to the digital one.

By and large, the European media sector has entered in an almost permanent period of changes driven by the forms of technological advances, increasing competition and new consolidation in the ownership status and the developments associated with the process of Europeanization of Europe. These new developments are, on the one hand, creating a new market, and on the other, are altering the dynamics of the existing structure. Nevertheless, these developments are not new. In effect, they have been refocused by several contemporary trends.

As it is known, since mid-1980s European media, in general, and television, in particular, have entered a period of tremendous and continuous transformation, following the developments in television technology and implementing public policies favoring the liberalization, privatization and commercialization of television systems. Prior to that was the age of the "shortage" of the radio spectrum and the subsequent monopoly of the public broadcasters as well as the affluence of the newspaper industry. At that period broadcasting was regarded as a powerful political tool to be given to private interests, and this concern gave governments' sufficient reason to create regulatory mechanisms to ensure that broadcasting was organized to guarantee the *public interest* (Papathanassopoulos & Negrine, 2011, pp. 17-25).

On the other hand, we used to define the European media in comparison to the US media, and to contrast them among themselves (Papathanassopoulos & Negrine, 2011, pp. 17-20). By and large we used to differentiate the European model from the US one, in terms of ownership (public or private), competition among the broadcasters as well as the role of the state, especially before and after the World War II. Broadly speaking, the state in Europe used to be responsible for the development of new technologies, the parallel operation of private mainly production companies along the system, the way of financing, even of the press in the form of state loans and subsidies.

But even within Europe the processes or mechanisms of “oversight” varied according to individual political and cultural traditions. In the past we used to distinguish between the West and East European media systems, the nowadays called ‘old’ and ‘new’ Europe. In those days, one used to differentiate the Western European or ‘Social responsibility” media model from the East European or Soviet (McQuail & Windhal, 1981, pp. 88-92). The former was a mixed system which used to predominate in Western Europe, while the later was in Eastern Europe and the Soviet Union. In the latter, broadcasting used to be controlled by the party through a state committee, while all the newspapers and periodicals were published by elements of the party government or by government approved organization. By and large, all the media in the Eastern European and Soviet countries, either print or electronic, were owned, supervised, controlled by the Communist Party, and fully subsidized from the state budget (Vartanova, 2002; Stevenson, 1994, pp. 194- 195). In fact, as Sparks notes: “The media before the fall of communism were large- scale, hierarchically organized, bureaucratic establishments in which there were elaborate procedures for ensuring acquiescence to the will of the directorate” (Sparks, 2000, p. 45)

The second and in effect a major element of the European media has been that they have been characterized by great diversity. In fact, there are not only different media systems between the "old" and the "new" European countries but also among the southern, central and the northern European countries. A multitude of examples illustrate this. For example, the broadcasting organizations in some countries were ‘state-owned’ and/or state-controlled (Greece, Italy, Spain), in other countries some were publicly funded or wholly or partially funded through means of a license fee paid by all owners of sets (Britain, Ireland, Finland), and in some others they were funded by a combination of public and private (i.e. commercial advertising) funds (Germany, France). The case of newspaper market is another example: the national daily newspapers in Britain have been very strong, but in France, Germany and other European countries regional titles are very popular.

1 The heritage of Hallin and Mancini today

Hallin and Mancini, in their seminal work "Comparing Media Systems: Three Models of Media and Politics" in 2004, have suggested three models which describe the media systems in mainly 'old' Western Europe, but it, to a certain extent, apply to 'new' ex-Eastern Europe too. At the same time, their model has served as a theoretical landmark for most of comparative media systems studies and can still provide a useful framework for current comparative research on the media field. As Flew and Waisbord (2015, p.13) suggest, "media systems are points of convergence of political, economic social, and cultural forces grounded in the local, the national, and the global" and we should think of them "as analytical units to understand how and where multiple dynamics intersect as well as the comparative weight of actors and institutions in shaping the media".

Hallin and Mancini identified four basic dimensions for the analysis and comparison of media systems: "media markets," "political parallelism," "journalistic professionalism," and the "role of the state". This four-dimension analytical approach revealed the existence of three distinct models of media systems in the countries under examination:

The “Polarized Pluralist Model”, characterized by highly politicized media, heavy TV use and low levels of newspaper circulation and journalistic professionalization, includes all the European Mediterranean countries,

The “Democratic Corporatist Model” which gathers all the Northern European countries with welfare state traditions, and it is described by high newspaper circulation, strong professionalization of journalism, relatively high degree of political parallelism and strong state intervention, in the form of prominent public service broadcasters and press subsidies and finally,

The “Liberal Model,” which is characterized by high reach of the press market, a weak role of the state, low degree of political parallelism, strong professionalization and a journalistic culture of neutrality and objectivity journalism, mainly reflecting the media landscape of Anglo-Saxon countries.

As no model can account for every detail of complex systems, a few spurious cases will fall outside the established patterns: French media market, for instance, shows features of different categories, whereas the inclusion of Turkey in the Mediterranean cluster is still to be discussed (Papathanassopoulos, Giannouli, & Archontaki, 2021). In the meantime, other factors have been added to the original framework, ranging from the focus on clientelism (Hallin & Papathanassopoulos, 2002), to the application to non-Western countries (Sparks, 2000; Thomass & Kleinsteuber, 2011; Hallin & Mancini, 2012; Castro Herrero & others, 2017), to the diffusion of the web and digital media (Wessler, Held, & Kleinen-von Königslöw, 2008), which – quite surprisingly, one may say - are not considered at all by Hallin and Mancini. To which extent digital disruption has affected the nature of media systems is an open question (Mancini 2020), that we will address throughout our report.

Table 1: Dimensions and indicators for empirical analysis

Original dimension	New dimension	Empirical indicators
Media market	Inclusiveness of the press market	- Overall diffusion of newspapers;

		- Working class reaching of newspapers; - Women reaching of newspapers.
Political parallelism	Political parallelism	- Separation [or lacking of separation] between news and commentary; - Partisan advocacy; - Political orientation of journalism; - Political bias.
Journalistic professionalism	Journalistic professionalism, ethics, and autonomy	- Internal autonomy; - External autonomy; - Professional guidelines; - Media credibility; - Orientation towards public service.
Role of the State	Role of the State, broadcasting and funding	- Market share of public TV; - Regulation of broadcasting; - Regulation of press; - Regulation of cross-media; - Direct subsides; - Tax reductions.

Source: adapted from Brüggerman, Humprecht, & Engesser, 2014.

On the other hand, it is still under question, whether media systems clusters have to overlap geographical distinctions, or be built on broader, transnational, and, so to speak, more abstract indicators – as a matter fact, in Hallin and Mancini it all began with this very oscillation [2004, 6-7]. Somehow, we can take advantage of this theoretical impasse, for reflecting on the relation between the *ideal-typical* model, and the geo-cultural variety it has to encompass and to account for. In this sense, Brüggerman, Humprecht and Engesser have tried to the test it. As Mancini and Hallin explicitly have called for more data, the authors break down the four original dimensions into more than twenty measurable indicators, as shown in the table below.

In short, the authors split Mancini and Hallin's dimensions – or, we should say more properly, their *fields* – into detailed variables, and they add some interesting research questions too. The role of self-regulation (and self-censorship) as an instrument for journalistic autonomy, for instance, is an often-overlooked problem, which would deserve specific investigations, as the comparative assessment realized by Fengler and others (2015) on fourteen countries, including Estonia, Poland, and Romania. As a result of quantitative analysis, more broadly speaking, four clusters emerge, that Brüggerman, Humprecht and Engesser simply label by referring to the geographical coordinates. As one can see, there are some slight differences between their pattern and that of comparative media systems.

Table 2: Empirical clusters and original dimensions

	Original model		
Empirical Cluster	Democratic-Corporatist	Liberal	Polarized Pluralist
Northern	Denmark, Finland, Norway, Sweden	--	--
Central	Austria, Germany, Switzerland	GB	--
Western	Belgium, The Netherlands	Ireland [and USA]	Portugal
Southern	--	--	France, Greece, Italy, Spain

Source: adapted from Brüggerman, Humprecht, & Engesser, 2014.

In place of the three original spaces, we find therefore a four-class model; and, by adopting alternative variables we could have – actually, we *do have* – endless possible 'clusterizations'. The reason behind that is very simple: history is *continuous*, and geography too, while theoretical categories are *discrete*, as in Weber's separation between the level of empirical reality and that of knowledge objects (1904), which is the epistemological foundation of the media systems model, among many other things. Exactly for this very reason, the relevance of the above-cited research is not due to the proposal of a new classification – on the very contrary, it is due to the light shed on the unstable relation among the different indicators. As Mancini and Hallin themselves would eventually state (2017, p. 158), the four dimensions and their related sub-dimensions do not necessarily *vary at the same pace*, or by following the same rule – and this is perhaps the main methodological assumption to be met, as we will discuss again in the final section.

In the last fifteen years, there were some prominent attempts tried to put into test the standardized measures of this framework, resulting in the refinement of the proposed indicators (Brüggemann, Engesser, Büchel, Humprecht, & Castro, 2014; Mattoni & Ceccobelli, 2018; Mellado & Lagos, 2013) as well as studies, that seek to elaborate on ways by which qualitative comparative approaches could complement quantitative research designs (Downey & Stanyer, 2010). The advent of digital technologies, the political developments in Europe and the processes of globalization have given a new dimension to their approach. Nonetheless, we still believe that typologies and classifications as such provided by Hallin and Mancini's model are still of value as a theoretical starting point, since even if the market forces and the triumph of digitalization have managed to erode the national differences in different European media systems this "convergence was not a one-way-street" (Hallin & Mancini, 2010, p.64).

Such a possible evolution of the model had been already foreseen by Hallin and Mancini, as we know, with the idea of a *convergence* towards the Liberal model. By and large, this would be due to market forces becoming dominant and organized politics being in decline (Voltmer, 2012, p. 231), thus reflecting the alleged triumph of neoliberalism at the global scale. As Mancini and Hallin note, though, the idea of such a convergence or homogenization of media orders has been repeatedly rejected by the scholars, and the more so in non-Western regions (2012, p. 62). Wide research realized on thirteen national broadcasting industries in the period 1977-2007 (Austria, Belgium, Germany, Greece, Israel, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and UK), for instance, reveals a mild tendency towards convergence, while also indicating how the original frame does not match the country grouping based on the forms of political communication (Esser & others, 2012, pp. 265 and 257). As the homogenization thesis appears not to be confirmed, either by in-depth investigation (Flew & Waisbord, 2015) or by wide comparative research (Nielsen, 2013), a more nuanced approach will be necessary, which deals with both *convergence* and *divergence* as main forces shaping the European media landscape.

On the totally theoretical side of the discourse, a complication is implied by media convergence usually being analyzed in parallel with globalization tendencies (Mancini 2020, pp. 5765-5766). To what degree these tendencies are bringing about a homogenization process, though, is still to be understood. As a matter of fact, globalization itself is a double-edged weapon, as it relies on a wide range of forces variously fostering convergence and divergence. In a passage that bizarrely echoes David Harvey's analysis of capitalism (2015), Thomas Piketty notes how in the last decades we have been observing both an increasing in domestic imbalance *within* each country, and a decreasing of the economic inequality *among* different countries (2013, p. 80). Manuel Castells' (1996) idea of global connection coming at the price of local disconnection can also frame this new world order, from the standpoint of the Internet Studies. One may wonder if this twofold tendency is what is making so complicated the identification of convergence as a dominant contributor to the evolution of media systems.

2 Structure of the media market: What about digital media?

In what follows, we present a discussion of the changes introduced by new communication technologies, considering the consequences of the "technology critical juncture", as Mancini put it (2020, p. 5764), in order to provide a revised understanding of each dimension, originally proposed by Hallin and Mancini, under the scope of the media digitization era.

The media market dimension refers to the media market development in a country, taking into consideration the news media industry and the dominant patterns of media consumption. Hallin and Mancini place the development of the print press at the center of their media market analysis, examining its circulation, the separation between "sensationalist" and "quality" press, readership, and its specific characteristics, such as the press reach among women and men, or among different segments of society (for a thorough discussion of press reach indicator see Brüggemann et al, 2014). In addition, they examined the relative weight of national, regional, and local press for each country under examination. Finally, they tried to identify alternative patterns of news consumption diet, comparing newspaper and TV news.

As Nossek, Adoni and Nimrod (2015) suggest the discussion over the future of print media is an open debate among stakeholders and academic experts. Even though the press and broadcasters still are an integral part of the media market, current studies suggest that there is a shift in citizens' news consumption repertoire:

Firstly, citizens are turning more to the internet for their daily news information, a situation accompanied by a parallel decline in printed press readership (Nielsen, Cornia, & Kalogeropoulos, 2016). According to Pew Research Centre (2018), the majority of young Europeans choose to get their news from the social media platforms at far higher rates than older people, a trend that might pave the way for a future displacement of the print news media in favor of their digital counterparts:

New players, but also old ones have expanded their activities in the digital media sector, underlying the need for a different approach on the market dimension, with an emphasis on the audiences, market fragmentation, as well as on the nature and the size of the local advertising market (El Richani, 2012).

Furthermore, citizens now access news content through a variety of different media services, platforms, and devices, rather than just merely relying on one channel or platform.

However, the existing patterns of media use and penetration of technology are the result of a varying response, that each European country has produced under the particularities of its specific contextual societal issues and economic abilities (McCain, 1986, p. 233). In other words, Esser and Vliegenthart made a crucial point by arguing that "the casual significance of contextual conditions" makes comparative research so "exceptionally valuable" (2017, p.5).

Under the scope of these pressures and in accordance with Mellado and Lagos' suggestion (2013, p.17) that the study of media market development should not exclude media types, we aim to use supplementary indicators (referring to the digital media market) to better capture the current media landscape in Europe and thus, to offer the opportunity "to go beyond the narrow realm of traditional news production" (Brüggemann et al, 2014, p. 1038). Subsequently, we aim at scrutinizing the changes brought by the new technologies in the entire media spectrum (press, radio, TV-both traditional broadcasting and IPTV-, as well as the advent of social media use as news information sources), going beyond the simple contrasting between newspapers and TV, originally made by Hallin and Mancini. That been said, we aim at investigating if there is a concrete "response" to the "digital challenge" between the countries under examination.

3 Political Parallelism a useful concept, but under which social-political context?

The concept of political parallelism, originally used to describe the "convergence of organization, goals, perspectives and supporters/audience between given newspapers and political parties" (de Albuquerque, 2013, p.746) was further refined by Hallin and Mancini (beyond the concept of party-press parallelism) to encompass general political values and the media closeness to specific political camps, rather than parties (Brüggemann et al, 2014, p. 1040). It can be traced in media contents; in the ownership of the news media; in the affiliations of journalists, owners, and managers; and in readership patterns (van Kempen, 2007, p. 307).

The concept has been criticized for holding validity as an analytical tool only in western societies or in countries where specific conditions are met. In other words, this concept "makes little sense if applied to countries where political parties are neither strong nor stable, leaving space for individual figures and a mixture of interests to influence the news media" (Mancini & Zielonka, 2012, p.385).

Besides its relevance in specific political conditions, regarding its validity on the on-line media environment, there is evidence that the lack of separating news and commentary, as well as the political affiliations of journalists, are dimensions that characterize both the on-line and the traditional media (Mattoni & Ceccobelli, 2018, p.6). It would be interesting to further explore whether ICTs have not attenuated the level of political parallelism within Mediterranean countries, but also to what extent they tend to mirror the high level of political parallelism in the on-line community of these countries.

One crucial remark here is provided by Mancini (2020), according to whom in the digital era we are becoming more the spectators of increased political polarization, than of political parallelism. Mancini, by holding that we are witnessing a profound de-institutionalization both in politics and in media, claims that the new forms of political alignments, manifested in the spurge of polarization derive from "modes of news production and circulation that are based on the direct relation between single persons and net consumers missing any form of mediation by institutions" (2020, p.5770).

All in all, we believe that the dimension of political parallelism does not require the inclusion of new indicators to be tested today (Mattoni & Ceccobelli, 2018). As Hallin and Mancini (2004) originally proposed and Brüggemann et al. (2014) statistically reaffirmed, the concept of political parallelism can be operationalized through six indicators:

(1) a lack of separation of news and commentary,

(2) partisan influence and policy advocacy,
(3) political orientation of journalists,
(4) media-party parallelism,

(5) political bias and

(6) public service broadcasting dependence.

4 The role of the state: Fading glory, but still powerful as regulator

According to Hallin and Mancini (2004, p.41) the state plays a significant role in shaping the media system in any society, although the extent and the forms of this intervention might significantly vary. Brüggemann et al. (2014) hold that the dimension of "state intervention" is in fact a multidimensional category and proposed its further distinguishment in three indicators to better standardize and measure the state's role in the media market. More precisely, in their revised model for comparing media systems, they distinguished and measured three different forms of state intervention (all of them included as sub - dimensions in Hallin and Mancini's dimension role of the state), which were labeled "public broadcasting", "press subsidies" (that support commercial media, either in the form of direct or indirect press subsidies), and "ownership regulation".

According to the aforementioned model, the operationalization of the three dimensions, that must be seen as integral parts of the state interventionism, can be established based to the following indicators; the "public broadcasting" dimension can be measured by using as indicators the market share of public TV, the public revenue (licensed fees) of public broadcasting), the "press subsidies" dimension, respectively, by looking at direct subsidies and/or tax reduction and the "ownership regulation" dimension by looking into TV ownership regulation, newspaper/publisher ownership regulation, cross media (print/broadcast)ownership regulation. Since, our study aims at shedding some light to the developments in the media market during the digital era, we propose that cross media regulation must also include the digital segment of the media market.

As Mancini suggests (2020, pp. 5770-5771) the role of the state as owner has almost disappeared in the digital era and it could be evaluated only in the funding and regulatory level; In other words, there cannot be a digital market, without digital infrastructures, which are state made, and digital media can be regulated or unregulated, following different rationales and patterns (Mattoni & Ceccobelli, 2018, p.5).

5 Journalistic professionalism: A prerequisite of media trust?

Hallin and Mancini (2004, pp. 34-36) provide three indicators that can be used to better operationalize the journalistic professionalism index in different countries. The first indicator is the degree of *professional autonomy* that journalists enjoy as a group. Journalistic autonomy can be limited either by external forces, such as political or economic pressures, or can be compromised by managerial pressures in the newsroom (by publishers or media owners). The second indicator for journalistic professionalism is the development of *distinct professional norms and code of ethics*. The last indicator is the degree of journalists' orientation towards an *ethic of public service*.

The absence of journalistic professionalism paves the way for the instrumentalization of journalists by economic or political interests, which in turn harms their *credibility* (Hallin & Mancini, 2004, p. 37).

The term "occupational professionalism", described by Evetts (2003, 2006) as a discourse constructed by the members belonging to a professional group, reflecting the cognitive and normative dimensions of what journalism is and what is its mission in a democratic society, emerges as a useful concept that journalists use in order to legitimize their role in society, by trying to set boundaries (Gieryn, 1983) among professionals and amateurs, insiders and outsiders.

As a result, the "occupational professionalism" discourse has a twofold meaning (Aldridge &Evetts, 2003, p.555). On the one hand, the journalistic corps use this discourse as way to forge its professional identity, as the consolidation of a shared professional ideology that consists of ideals of public interest, ethical codes and journalistic norms, like objectivity (Deuze, 2005). At the same time, this discourse legitimizes the journalistic profession not only to the eyes of the professional members but to those of the public, as well. It is worth mentioning, that according to Russmann and Hess (2020, p.3186) a thorough conceptualization of media trust should include all three layers: trust in the channel or the medium used to transfer the message, trust in the content's origin or journalist, and finally, trust in the message or media content itself.

Even though the issue of media trust and credibility is not new, the increase of the information available on-line and the ever-growing importance of social media as a gateway to news has propelled the problem to new proportions. In their study, Fletcher and Park (2017) found that those with low levels of trust in legacy media, tend to prefer alternative news sources like social media platforms, blogs and digital native news media, while are more likely to embrace different forms of online news participation.

Table3: Indicators per dimension

Indicators	Dimensions
Market structure	Daily newspaper reach, radio listenership, Tv ratings, Pay TV penetration, internet penetration, social media use
Political Parallelism	Separation of news and commentary, partisan influence and policy advocacy, political orientation of journalists, political bias, public service broadcasting dependence
Role of the state	TV ownership, public revenue of public broadcasting, market share of public TV, cross media ownership, tax reduction, press subsidies
Journalistic professionalism	External autonomy, internal autonomy, professional guidelines, media credibility, public orientation

After this sort of presentation of the four-dimension theoretical approach of Hallin and Mancini, we believe that there is still a place for the concept of media systems among comparative studies in the digital era, considering newer indicators. The latter These are not simply a consequence of processes of globalization but also outcomes of technological change, policy making and economics which help give shape to the new world and to the media order. We strongly believe that in Europe there is a dialectic relationship between the national and the international, the global and the regional, and the old media and new media.Besides, a contextual, comparative research is better equipped to address common pitfalls regarding the rise of digital media, since “a context aware analysis avoids variants of technology centrism or media centrism that may lead into technological determinism” (Liu et al., 2020, p.5758).

6 Concluding remarks: Media systems and comparative studies

As relevant methodological questions have been evoked, let us finally move the argument to the front. As many have already observed, a risk embedded in the media system model is that of taking on a normative value: looking for the way the world should be, rather than for the world as it is, and the more so when it comes to such topics as institutional communication, role of the State, or deliberative public sphere (Downey & Mihelj, 2012, p. 189). Rather than with the ideological aspect, though, we are concerned with the methodological facet of the discourse: and namely, with the ability of an abstract model to predict its own results – that is to say, with its self-fulfilling effects. Here the empirical issue coincides with the epistemological one, as any ideal-typical model risks to favor a normative interpretation of the real. In Max Weber – whose seminal work lies at the heart of Hallin and Mancini’s typology – this was notoriously due to the role of values in shaping scientific knowledge). Suffice is to say that some characteristics proper to media systems – professionalization of journalism, or political pluralism – run the risk, in their turn, of implying a specific set of values, certainly grounded in the Western way to mass communication.

For the purposes of wide-scale research, this poses the problem of how well-established categories – in the case, three paradigms of media and politics – can reliably pick out different empirical materials in variable contexts. With this respect, one might even question whether *system* is the right category for comparative analysis (Rantanen, 2013, pp. 257-60) – something which, to be totally honest, should not be taken for given, as we have done so far. As Hans Kleinsteuber noted, the comparative method based on *concordance*, when opposed to that inspired by *difference*, usually looks for the same “common characteristics” in different regional media, and therefore implies assuming that all "societies pass through similar stages of development", as in the case of the transition from the industrial to the information era (2004, pp. 70-71).

If we go back to Moretti's seminal work on the dawn of cultural industries, here lies the problem: system is a necessary category for general theory – but system, as a notion, mostly reckons with the repetition, the uniformity, and "the sameness" (2013, pp. 127-128). Structural models are the welcome result of any generalization, but on the empirical side they can make the analysis stick to its very premises, without making space for what lies outside their conventional meaning.

An interesting methodological contribution can be derived from a contiguous field, and namely from Gehring and Oberthür's comparative analysis of institutional interactions in EU countries, related to environmental issues. By means of a sort of "iterative approach", they sort out 163 empirical cases of institutional practices into three main groups. According to them, ideal-typical models show two main flaws. On the one hand, data analysis can easily group real cases in disparate ways and give shape to endless possible clusters: as a matter of fact, though, not all these clusters reveal a "consistent, underlying logics" (the disjuncture between Hallin and Mancini's pattern and Brüggerman, Humprecht and Engesser's empirical clusters can easily come to mind, here). On the other hand, ideal types are by definition mutually exclusive, while field research will always detect many spurious or "mixed cases". According to Gehring and Oberthür, the solution seems to be in an extended *preliminary* data examination, able to reveal which patterns are properly vested with some scientific meaning – or which data reveal a significant level of effectiveness of public policies, in their case (2006, pp. 325-334).

If we generalize these insights to the broader field of comparative studies, it seems that a grounded methodology is the only way to break the vicious circle of systems' self-referentiality – collecting enough data to put the hypothesis to the test and update the hypothesis itself on the basis of such data (and so on). But still, *how much* data is *enough* data, it is obviously an open question; and after which point data assume scientific meaning and start showing something, is even a more complicated one. In effect, there is no universal answer to that, to the point that after the turn of digital archives we still happen to grope in the dark – trying to accumulate as much data as possible and waiting for some patterns to appear. Systems and ideal-types are hardly compatible with historical change; but once you gave up these paradigms, you will face the opposite problem, with "large quantities" of data showing "average [and] loss of distinction" - to quote again Franco Moretti – and even "boredom", as if we were in front of "the Scylla and Charybdis" of scientific research (2013, pp. 180-181).

Breaking down an ideal-typical category into its dimensions, indicators, or indexes, as in some of the considered research - can this pave the way to a different methodology? Even though Moretti never uses these words, we suspect this is what he had in mind, while proposing to replace "comparative *literature*" with "comparative *morphology*" (2013, p. 57; emphasis ours).

Some media systems, it follows, would appear to be marked by the complex equilibrium between "conflicting practices", or by what can be called an "asymmetric parallelism" between social instances and media coverage (Peruško, 2021; for the concept of "asymmetric parallelism", see also Faris & others, 2017). Or, to put it in Harvey's words, the state and advancement of media technologies can proceed at a different speed, and even be based on *a different temporal scale*, when compared to cultural representations of the world. The mediated construction of reality, Couldry and Hepp write, is "characterized by a pluralization of temporalities" (2017, p. 107) - and perhaps, we may add, the methodological gaze has to shift to the very same direction.

This report seeks to present an account of the contemporary media field focusing on the trends as well as on the problems the media in the European Union face. It covers a broad spread of media markets, highlighting the new sectors that are emerging and outlining the factors driving the media business into the digital era. It examines the current structure of the various sectors that make up the European media market (broadcasting, the press, the internet), identifies and assesses the major issues as well as providing an overview of each sector of the industry.

This report is divided in two parts. The first part deals with the theoretical evolution of the media models envisaged by the seminal work of Hallin and Mancini and *then it* attempts to describe the state of the media in Europe between 1990-2020. The second part is consisted of more detailed reports regarding the development of media for each region within Europe.

Last but not least, we have to notice that the task of collecting data for such a long period of time and with so many countries was proven extremely difficult. We were astonished by the lack of available data, their compatibility, even data that were coming from the same research institutions. In some cases, there were no data at all, especially in the case of the Eastern European countries, while in others the continuity of data, and thus their validity, ceased in 2014, as in the cases of newspapers or in others the providing institutions did not allow us to publish them or in some other cases, they changed the methodology their followed for a decade. Even so, we have tried with our colleagues to integrate most available data and to offer to the European media research community at least some continuity regarding the contemporary history of the European media.

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EUMEPLAT
European Media Platforms: assessing positive and negative externalities for European culture

Report on Western and Eastern Media Systems: An Assessment of the Literature Review

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Contents

Introduction

The aim of this text is to provide an assessment of the literature review related to the comparative media systems model, with a focus on the Eastern European case. By means of a second-hand analysis of the most relevant research in the field, we will try to sketch the main features of the Eastern, so- called post-Socialist media markets. Considering the indications and the insights provided by the relevant research, some methodological remarks will eventually be proposed for comparative media studies. Based on scientific literature, Mancini and Hallin's model stands as the most significant framework for wide-scale comparative analysis. While being ultimately inspired by Wilbur Schramm's recognition on press systems (Siebert, Peterson, & Schramm 1956), it makes use of four main elements: dimensions of the media market, with an emphasis on the relative importance of newspapers and TV; political parallelism; level of journalistic professionalism; role of the State. As this text is focused on the European media, we will put out of the picture from the North American case, as shown in the introductory text. When we narrow down the observation to the European context, the missing spot of the picture is, with no doubt, the case of Eastern media. Here the methodological issues raised in the previous section – how media systems change across time and vary across space – take a very specific character. As we will see, adding a "post-communist" cluster to the four-space model would be largely insufficient to the understanding of Eastern transition and its complexity (Mihelj & Downey 2012, 5) – a purpose for which it is rather necessary to work on the specific features of each country in that region. In any case, here we will assume the usual position that the post-Socialist transition has deeply changed the social and economic tissue of all countries, even though some different interpretations can be detected in literature. In particular, the assumption has been questioned that the Eastern systems were totally insulated, whereas some of them might have been open and "pragmatically interested" in Western contents (Sparks 2000, 32).

1 Conjectures on Eastern European media

To start with, Hallin and Mancini reflect on their own on the consistency of such a common post-Socialist pattern. By and large, for them the typical feature of Eastern Europe is the fast transition between two different regimes – "all media systems change, of course", they state, but not all at the same rhythm (2013, 22). *Consequently, Eastern media systems would be in tension between the limited professionalization of the sector – resulting from a sudden commercialization of its assets and from the weakness of civil society – and the high level of politicization and State control, which is the most obvious legacy of Communist era.* Here we will discuss a few empirical and analytical deepening, all originally inspired by this frame.

Table 1- Dimensions and indicators for Eastern media systems (Castro Herrero & others 2017)

Dimension	Indicators
Inclusiveness of Press Market	Daily newspapers reach; Working-class reach; Women reach.
Political Parallelism	Separation of news and commentary;
	Partisan influence and policy advocacy; Political orientation of journalists; Political bias; Public service broadcasting dependence.
Journalistic Professionalism	External autonomy; Internal autonomy; Professional guidelines; Media credibility; Public orientation.
Public Broadcasting	Market share of public TV; License fee revenue.
Ownership Regulation	TV regulation; Newspapers' regulation; Cross-media regulation.

Direct or indirect subsides	Subsides; Tax reductions.
Use of Online News	Information source online.
Press Freedom	Position in the Press Freedom Indexes.
Ownership Concentration	Concentration Ratio- C3 Coefficient.
Foreign ownership	Foreign TV owners among top-3 commercial operators.

A first relevant analysis has been realized by Castro Herrero, Humprecht, Engesser, Brüiggerman and Büchel. They use the original Mancini and Hallin's dimensions in combination with four additional aspects: namely, foreign TV share; concentration in media ownership; level of press freedom; use of online news outlets. With the exception of the latter, those elements seem to directly fit the historical case of post-Socialist countries. By also drawing on their previous research (Brüggerman, Humprecht & Engesser 2014), the authors list out a series of empirical indicators, synthetized in the matrix below.

When we refer to Eastern European media, the convention has it that we refer to them as post-socialist systems: while empirical findings, the authors state, reveal the unsuitability of framing the eleven considered countries in terms of such general categories. Peruško, Vozab and Čuvalo have made a similar attempt, in their comparative analysis of twenty- three European countries. By merging Hallin and Mancini's model with their interest in the "institutional character" of any society, they operationalize four main dimensions: economic, political and social inclusiveness; state of media market, with a focus on ICT and social platforms penetration, and newspapers circulation; advancement of creative production; index of globalization (2015, 347-349). Based on these dimensions, they sort out the countries into four clusters, as in table 3.

Table 2- Eastern media systems: a first model (Castro Herrero & others 2017)

Cluster	Countries	Political parallelism	Public broadcasting	Press Freedom	Foreign Ownership
Eastern	Bulgaria, Hungary Romania	+	-	-	+
Central	Croatia, Czech Republic, Poland, Slovenia	-	+	+	-
Northern	Estonia, Latvia, Lithuania, Slovakia	-	-	+	+

Table 3- Eastern media systems: a second model (Peruško, Vozab, and Čuvalo 2015)

Cluster	Countries	Main characteristics
1	Bulgaria, Croatia, Czech Republic, Greece, Hungary, Poland, Portugal, Romania, Slovenia, Slovakia	Lower inclusiveness and globalization; less developed ICT sector and creative economy; higher TV concentration
2	Austria, Belgium, France, Germany, Ireland, Italy, Netherlands, Spain, UK	High inclusiveness and globalization; highly to moderately developed digital market; low TV concentration; open creative economy
3	Denmark, Finland, Sweden	High inclusiveness and globalization; developed digital market; low TV concentration; moderately open creative economy
4	Israel	Lower inclusiveness, lower globalization; developed digital media sector; highest TV concentration

One may notice how this scheme hardly respects Hallin and Mancini's prototype – with countries belonging to Democratic-Corporatist and Polarized-Pluralist areas collapsing in the same cluster. On the other hand, Nordic countries are grouped together, in such a way to remind us of the Scandinavian exception, based on extreme levels of speech freedom and digitalization, and by an advanced social function of the press (i.e., Allern & Pollack 2017). The intuitive, and empirically evident specificity of Scandinavian media is rarely accounted for, in comparative media studies.

With respect to the main object of this paper, one may become aware of the fact that Baltic media systems have been deeply affected by the Scandinavian influence too, despite their formal belonging to Socialist and post-Socialist order – or even, they "identified more with Scandinavia than with Soviet Union" (Jakubowicz & Sükösd 2008, 28). Not accidentally, Estonia, Latvia and Lithuania easily cluster together with Western or Central European media markets, depending on the scope and metrics of the analysis (i.e., Jakubowicz & Sükösd 2008; Peruško 2015; Castro Herrero & others 2017; Dobek-Ostrowska 2015 and 2019). This discrepancy between geopolitical and information patterns, while striking a blow to the notion of post- Communist system itself, poses a big question as to whether comparative media theory has to rely on existing categorizations – which is what Hallin and Mancini have partially done, with respect to Giovanni Sartori's work (1976, 13) on political and societal pluralism. Upon the "relative independence" of any social field, to recall Pierre Bourdieu's legendary lesson (1993, 40), finding the right place for the media is not an easy task – how largely they depend on institutional power; how intertwined they are with general economic affairs; how autonomously they carry own their own strategies; and how strongly they impose a sectorial hegemony of their own. And how autonomous media have to be from the geo-cultural context surrounding them, in the end, will be the conceptual knot to be undone, also for the purposes of EU regulation of digital platforms (more in Miconi 2021). As an evolution of the previous research, in any case, Peruško eventually came out with the proposal of three geo-cultural patterns, as shown below.

Table 4- Three empirical patterns (Peruško 2015)

	South/East European model	European mainstream model	Nordic model
Countries	Bulgaria, Croatia, Greece, Hungary, Italy, Lithuania, Macedonia, Romania, Russia, Serbia, Spain	Austria, Belgium, Czech Republic, Estonia, France, Germany, Ireland, Poland, Portugal, Slovakia, Slovenia, UK	Denmark, Finland, Netherlands, Sweden
Role of the state	Lower/medium quality of public TV	Not relevant	High quality of public TV
Media market	Low circulation of newspapers	Not relevant	High circulation of newspapers
Political Parallelism	High party influence	Middle influence of parties	Low influence of parties
Economic parallelism	High owner influence	Middle influence of owners	Low influence of owners
Professionalization of journalism	High independence and professionalism	High independence and professionalism	High independence and professionalism

Two significant indications have to be noticed here. The first is the inclusion of the economic version of "parallelism" alongside to its classical one, stating the intrinsically political role of private powers and media owners. The second is the taking together of alleged Eastern and Western countries in the second cluster, which reminds us of Central Europe *as it used to be*, and of the redrawing of its map during the Cold War, resulting in the exclusion of "key cities" and countries of the Mitteleuropa (Carpentier 2021, 5). One may put into question, on the other hand, the choice of a typical categorization in terms of open versus closed systems, where - as Thomass and Kleinsteuber would put it (2011, 27) – "the western liberal model is the measure of classification and uses the binary code of "free" and "unfree" media".

What is interesting, among the other things, is how the above clusters neither respect the three spaces defined by Hallin and Mancini, nor they totally overlap with

East/West territorial distinctions. Somehow, a similarity between the Mediterranean and the Eastern system could be suggested by the presence of Greece and Portugal - and then Greece and Italy - in the first cluster. Late transition to democracy appears to be a main factor here, as also confirmed by comparative analysis of public communication and public relations in the two areas (Rodríguez-Salcedo & Watson 2017). In the end, Peruško, Vozab and Čuvalo propose a sophisticated analysis, while also reflecting on the consequences of systemic arrangements on audiences' practices (2015, 355-357).

With a similar ambition but in a different vein, Boguslawa Dobek-Ostrowska tried to sketch an Eastern-European trajectory, in a certain manner independent from Mancini and Hallin's model. According to her, some habitual categories would not apply to Eastern Europe as they are modeled after the Western example. The latter is the case of "political parallelism": a property that can hardly be observed and measured in situations of structural transition, as already noted by Mancini himself (Mancini & Zielonka 2012, 382). Hence Dobek-Ostrowska's insistence on the Eastern European late transition to liberal democracy, which also makes it necessary to consider some parameters we are used to take for given in Western debate, and namely Gross Domestic Product and press freedom.

More precisely, Dobek-Ostrowska imagines four consecutive stages of institutional and societal reformation: pre-transition; primary transition; secondary transition; late or mature transition. The specific position of each of the twenty-one analyzed countries would therefore result from the intersection between this and other variables, related to the overall state of the system: freedom and freedom of speech (based on the position in World Press Index, Freedom of the Press Freedom House, and Democracy Index); GDP; penetration rate of the Internet. Four different Eastern media systems emerge, which can be eventually identified as Hybrid Liberal, Politicized, Transition, and Authoritarian.

Table 5- Eastern media systems: a third model (Dobek-Ostrowska 2015)

Model	Countries
Hybrid Liberal	Czech Republic, Estonia, Latvia, Lithuania, Poland, Slovakia, Slovenia
Politicized Media	Bulgaria, Croatia, Hungary, Romania, Serbia
Media in Transition	Albania, Bosnia & Herzegovina, Kosovo, Macedonia, Moldova, Montenegro, Ukraine
Authoritarian	Belarus, Russia

When we compare Dobek-Ostrowska's results with those presented by Peruško, Vozab and Čuvalo, it appears how four of the countries included in the first cluster are grouped as in the previous case (Estonia, Latvia, Lithuania, and Slovakia), while other three are sorted out in a different way (Czech Republic, Poland, Slovenia). The second cluster also largely overlaps with Peruško, Vozab and Čuvalo's first pattern, which included Bulgaria, Hungary, Serbia, and Romania -while Belarus, Russia, Albania, Bosnia & Herzegovina, Kosovo, Moldova and Ukraine are not considered in Peruško's two taxonomies.

Almost certainly, the most controversial category is the last one to appear in Dobek-Ostrowska' scheme – that of *authoritarian* systems, sometimes including Hungary (Bajomi-Lázár 2015, 60-62), along with the usual case of Russia (i.e., Becker 2004). The problem is not too different from that of Schramm, Peterson and Siebert's concept of "authoritarian" press (1956), which was even imbued, on its part, with some judgmental and normative value. A further distinction has been advanced in this sense by Jakubowicz and Sükösd, by means of an aggregated analysis of institutional reports on freedom of speech (i.e., those of Freedom House and Reporters Without Borders). In the end, they distinguish amongst three clusters (2008, 31):

- “democratic” systems, as in Baltic States and East-Central Europe;
- “dictatorial” systems, such as Belarus;
- three different kinds of “authoritarian” media systems: “etatist” in Russia; “paternalistic” in Kazakhstan”; “depressed” in Moldova and Southern Caucasus.

As to all instances related to democracy and freedom of speech, one may object that a Western bias is embedded in the free press indexes commonly cited – and it may well be, when it comes to their utility for framing non-Western realities (Farfar & Miconi 2021). As insoluble as such a dilemma risks to be, the analysis of *perception* has been proposed as a mitigation answer – with the focus shifted on people’s satisfaction with media and political institutions, rather than on official global *rankings*, which blink an eye to supposedly universal values. In Auksė Balčytienė and Kristina Juraitė’s work, based on the aggregation of data from the European Social Survey, three alternative clusters would emerge in this sense, with Bulgaria standing as a particular case.

Given the wide variance in data related with information consumption, the authors mainly use these indicators for assessing the polarization tendencies in Eastern Europe. As to the credibility awarded to media outlets, though, it remains unclear whether local perception is shaped by how the national media work, or it refers to the information system *per se*. More abstractly speaking, the doubt is to which extent a particular media pattern can affect a country, without its effects spilling over into other areas. However, before tackling a related and decisive issue – the normative facet of the media systems model - a few words about a concept specific to the Eastern case, that of transition.

Table 6- Clustering of eight Eastern European countries by public perception of media and democracy (adapted from Balčytienė & Juraitė 2015)

Dimension	Indicators	Cluster 1: Bulgaria	Cluster 2: Czech Republic, Slovakia, Lithuania, Hungary	Cluster 3: Poland, Estonia, Slovenia

Consumption of politics in TV	Exposure to TV news; interest in politics; heavy TV watching	High	Medium	Low
Trust in representative institutions	Trust in: political parties; legal system; Parliament	Low	Medium	Medium
Participations in national elections	Participations in national elections	High	Medium/High	Medium
Social activism	Participation in: political parties; NGOs; trade unions; associations	Low	Low	Low
Perception of democracy and society	Satisfaction with: level of democracy; functioning of democracy; economy	Low	Medium	Medium

2 Transitional systems?

The concept of *transition* is even too heavily used in literature, to the point that some have started to speak about "transitology", for mocking the tendency to frame Eastern European history in such a way (Sparks 2008, 44). In the original Mancini and Hallin's theory, one may recall, late and problematic transition to democracy was a feature of the Polarized Pluralist system, including countries which came out of dictatorship during the 1970s, or underwent a turbulent post-War experience. To some extent, this could suggest similarities between the post-Socialist and the Mediterranean case, as already noticed by a few scholars and even referred to as "Italianization" of "Mediterraneanization" of Eastern media systems (Jakubowicz 2008; Wyka 2008; Dobek-Ostrowska 2012). Analogous conclusions are reached by Peruško and Čuvalo (2014, 149) in their analysis of post-Socialist Croatian TV, and by Örnebring in his fieldwork on media clientelism in ten Central-Eastern European countries (2012); and what is more, Hallin and Mancini themselves seem tempted to endorse this hypothesis (2013, 18-20).

Even though explicit reference is rarely made to his work, such association between Eastern and Southern European countries can probably be explained upon Samuel Huntington's idea of democratization cycles. Here history is made of a continuous alternance between waves of democratization and anti-democratic "reverses"- according to an alleged Schumpeterian regularity -which shape the contemporary landscape. Mediterranean and Eastern European countries, as schematized in table 10, tend to cluster around a specific pole – that of post-1974 "third wave" of democratization, starting with the Portuguese revolution, and then affecting all the continents and peaking in 1989 and post-1989 events in South Africa and in the former Soviet Union (Huntington 1991, 13-26).

Table 7- Democratization waves in Southern and Eastern European countries (adapted from Huntington 1991)

Waves:	Second wave (1943-1962)	Third wave (1974-), after a previous reverse	Late democratization, reached at the third wave stage (1974-)
Countries:	France, Italy	Czechoslovakia, East Germany, Estonia, Greece, Hungary, Latvia, Lithuania, Poland, Portugal, Spain	Bulgaria, Romania

A direct application of Huntington's work is claimed by Kleinsteuber, while replacing the notion of transition with that of *transformation*, allegedly able to explain all cases of non-linear change or "blocked transformation" - when historical evolution is not paralleled by a democratization process or by a proper delinking between State control and media ownership (2010, 24-25). In his view, Eastern European transformation would belong to a third historical wave, following the first one in Spain, Greece and Portugal, between 1967 and 1974; and the second one in Latin America, during the 1980s (2010, 29-30). As influential as Huntington may be, nevertheless, the focus on the broader characteristics of post-Communist institutional change can hardly give justice to the variety of Eastern systems. As it has been observed, the insistence on "common aspects of post-Socialist transition and transformations" is typical of the early stages of comparative studies, which more recently have rather specialized in the *differences* among regions and countries (Peruško, Vozab, & Čuvalo 2012, 2). What is interesting, is that closer analyses have shown the emergence of alternative media patterns yet back in the Socialist era, as it appears on Mihelj and Huxtable's comparative study, based on four main variables: infrastructural development; level of State control; transnational orientation and "openness to the West"; position in the core-periphery scheme (2018, 81-87).

Table 8- Three models of Socialist TV systems (Mihejlj & Huxtable 2018)

	Market State Socialist System	Reformist State Socialist System	Hard-Line State Socialist System
Countries:	Yugoslavia	Czechoslovakia, Hungary, Poland	Albania, Bulgaria, East Germany, Romania, the USSR
Infrastructural Development	Late	Early and mid-range	Early and late
Party-State Control	Moderate control	Strong control	"Almost complete" control
Transnational Orientation and Openness to the West	High	Medium	Low to medium
Core-Periphery Position	Aspiring alternative core	Periphery moderately influenced by the core	Soviet core and peripheries heavily influenced by the core

Though limited to the TV industry – or perhaps, *the more so* - Mihelj and Huxtable's work reveals a more nuanced picture, while also giving substance to the *long durée* analysis repeatedly called for by Zrinjka Peruško. To some extent, the historical legacy of the above Socialist patterns is also visible in Dobek-Ostrowska's taxonomy (2014), with the former "hard-line" countries being, not accidentally, the farther from the Hybrid Liberal pole.

The overall definition of Eastern systems as transitional, what is more, can be quite problematic, as it often reflects the idea of a broader change-over towards more advanced institutional arrangements. As a matter of fact, the development of media sector has been paralleling the growth of democratic and representative institutions, while at the same time following opposite trends, such as biased coverage of the events, ownership concentration, and dependence on political powers, which can hardly be considered typical of democratization processes (Georgieva & others 2015, 108). This problem probably derives from a more general one: the implicit definition of Eastern progress as being oriented towards the Western model. In this perspective, Peter Gross, distinguishes between three different stages: the *transition*, or the restructuring after the fall of Communist regimes; the *consolidation*, or the empowerment of media professionals, actors, and outlets; and finally, the *integration*, or the adhesion to Western European standards (2004, 127-128). The same distinction between transition towards Western rules and consolidation of democratic media has been proposed by Bajomi-Lázár (2008, 78), with attention appropriately paid to the *non-irreversible* nature of the process, by which press, and information freedom can decline even upon stable structural conditions. This is the same trajectory as that described by Eva Polońska, while analyzing the "reversal of democratic transition" and the failure of the public service project in the specific case of Poland (2019, 230, 248-249), and in such a way to remind us that history does not follows a linear path – like a *transition* – and is rather characterized by endless accidents and unpredictable twists. To which degree systemic analysis can apply to such irregular historical trends, needless to say, is a main issue for both theoretical and methodological investigation.

What systemic analyses of *transition* risk to overlook in all cases - them being based on the symmetric breakdown of Hallin and Mancini's structural indicators - is the imbalance between Eastern and Western media sectors, which might be heightened by the integration process itself. An example of that is provided by a comparative analysis of daily coverage in Eastern and Western European newspapers, with the former cluster showing a lot of "references to Western European countries", and the latter no less than a "neglect of Eastern Europe" (Wessler, Held, & Kleinen-von Königslöw 2008, 183). In other words, the global system is set in motion so that bringing national markets closer to each other always implies a *hierarchization* of geographical spaces (Wallerstein 1983, 30). Technological innovation would spillover from the core and spread into the semi- peripheries, and influential media industries would produce contents for the less advanced – something that the conventional comparative method, as it relies on the search for common trends, can hardly account for. As we know, Hallin and Mancini's model is all about the organization of media markets, with a little attention paid to media contents. How to combine the two dimensions is therefore a priority task for historical research, in the years to come, as it is expected to account for the unequal relation among media systems, and the way geographical and economic convergence can actually foster it.

According to Gross, so, Eastern media systems "should not pursue" their consolidation "in the name of integration", but rather follow a trajectory of their own (2004, 131). To some extent, his work is an attempt of considering both divergence and convergence as potential factors driving innovation, resulting in a synoptic confrontation between Western and Eastern European media systems, as shown in the table below.

Table 9- Eastern and Western European media systems (Gross 2004)

General Dimension	Specific Differences of Eastern media systems
Media laws	Variability in their application
Media economics	Absence of a strong market dimension
Codification of public service	Variability in their interpretation
Varied ownership and consolidation of media conglomerates	"Consolidation is less evident in the East"
Pluralism and diversity	"Extreme pluralism and diversity"
Politicization and partisanship	"Extreme politicization and partisanship"
Inclination towards analytical journalism versus "Zola-like" style	Limited analytical journalism, and presence of personal "Zola-like" positions"
Journalism education	Quality is variable among the countries
Journalistic trade unions	Weaker in the East
Growth in foreign language media outlets	No significant differences
Growth in ethnic language media outlets	No significant differences
Participations of journalists to international organizations	No significant differences

As ambitious as it may be, though, Gross' model is far from perfect. Firstly, as to variability in media laws application, it is not always clear whether we are talking about the implementation of the EU framework – which, by definition, would show a delay in countries not being part of the Union, or recently admitted – or rather about the existence of an advanced regulation as such. In the latter case, we know that a transnational regulation has been in place in Socialist Europe since the 1980s, partially due to the consultation of Western agencies and governmental organizations (Harcourt 2012), but also based on the traditional "transnational entanglement" of Eastern media systems (Mihelj & Huxtable 2018, 59-61). Secondly, other points of his seem to be oversimplified – namely, the absence of a strong market dimension, and the weak level of "consolidation" in the various fields of public service, media ownership, and pluralism. The rough attribution of an *extreme* level of partisanship to all Eastern media systems, in particular, does not pass the test of empirical verification, which rather shows a continuum between high and low levels of politicization, even based on such common indicators as the Free Press Index (Dobek-Ostrowska 2019, 264-265).

Table 10- Level of politicization in Eastern media systems (adapted from Dobek-Ostrowska 2019)

Light	Medium	Medium/ Strong	Strong	Very Strong
Estonia, Slovakia, Czech Republic, Latvia	Lithuania, Slovenia, Romania	Poland, Bosnia & Herzegovina, Serbia, Hungary, Croatia, Albania	Moldova, Kosovo, Ukraine, Montenegro, Bulgaria, Macedonia	Russia, Belarus

According to some scholars, again, there would be significant exceptions to the growth of foreign language outlets foreseen by Gross, with Poland being the most cited case of country not colonized by global media (i.e., Kostadinova 2015). Some other conclusions, which are related to media partisanship, parallelism and polarization, would rather confirm the already considered similarity between Eastern and Mediterranean systems, and the same can be told about the lack of analytical journalism, or what Brüggerman, Humprecht and Engesser (2014) have already codified in terms of confusion between "news" and "commentary".

For what concerns the overall utility of Gross' scheme, just a few considerations. For sure, it is deeply inspired by the original media systems model, as it mostly deals with the state of journalism and public service. What is more interesting, it reveals two main difficulties we would need to keep in mind. Firstly, any binary comparison runs the risk of reproducing the dichotomic opposition that after Said (1978, 184) we know as *orientalism* – with Eastern Europe sometimes being framed in a negative, generalized idea of "otherness" (low/high level of journalism education; advanced/backward state of the media market; and so forth). Secondly, once again the dialogue lacks between two analytical levels: the institutional and structural dimensions of media markets, and the media contents. As Franco Moretti once pointed out, no bridge exists between economics of culture and the humanities: so that book history and the history of forms not only "seem very distant; they *are* very distant" – and well, "that's why the bridge is useful" (1997, 143).

From the methodological standpoint, the most advanced attempt of dealing with the transitional nature of Eastern media system is probably that of Peruško, Vozab and Čuvalo (2021). Even though their research is limited to six former countries of the Yugoslav Republic, they break down the generic definition of *transition* into a complex set of indicators, by taking into account both recent events and *long dureé* process, among which the establishment of the press. A synthesis of the indicators is provided below.

Table 11- Indicators for former Yugoslavian countries transitions (adapted from Peruško, Vozab, & Čuvalo 2021)

Dimension	Indicators
Long durée processes	Patrimonial regime Absolutist or constitutional monarchy Literacy Industrialization Early development of the press
Recent history	Level of EU integration Intensity of war Cooperative transition Stateness issues Presence of majoritarian governments
State of the journalism	Early development of the profession High development of the profession
Media market (partially based on Hallin & Mancini 2004)	Globalization of communication Development of advertising Development of socialist media market Globalization of culture Development of digital infrastructure Development of contemporary media market
Media systems	Accomodative pluralism Level of clientelism Level of political parallelism and asymmetric parallelism Level of clientelism Strong public broadcasting State support for pluralism Level of media capture Media freedom
Freedom of press	Dominance of right-wing parties Freedom of press
Social field	Post-materialist values Socio-economic development

Against this backdrop, the authors perform a multi-factorial analysis, so as to the detect the emerging patterns. As it is always the case, the nature and weight of some indicators could be discussed: for instance, the idea of "dominance of right-wing parties" threatening press freedom seems based on precise historical accidents, rather than on well-rounded theoretical hypotheses. In any case, results of their analysis – which is only partially inspired by the original Hallin and Mancini's model – are synthetized in table 15, as they identify the "sufficient conditions" necessary to the development of media markets of various types.

Table 12- State of media systems in former Yugoslavian countries (adapted from Peruško, Vozab, & Čuvalo2021)

Dimension/Country	Bosnia and Herzegovina	Croatia	Macedonia	Montenegro	Serbia	Slovenia
Highly developed press in modern history	-	+	-	-	+	+
Highly developed journalism in modern history	NA	+	NA		+	+
Highly developed socialist media market	-	+	-	-	+	+
Journalism profession in socialism	-	+	-	-	+	+
High political parallelism in socialism	+	-	+	+	+	-
Developed media market in digital era	-	+	-	-	-	+
Media freedom in digital era	-	+	-	-	-	+

Peruško, Vozab and Čuvalo also look for a further break-down of the analytical dimensions, by trying to weight the relative influence of *long durée* and more recent historical processes, and to telling apart the role of agency and structure in the shaping of media systems (2021, 194-200) - an intriguing task, the latter, that would probably require a more specific investigation (see Fu 2003, 275-277). The main result of their work, in any case, is in the identification of very *irregular* patterns in historical evolution, which comes as an antidote to all normative implications of the media systems model. Not only does political parallelism not correlate with institutional democratization, for instance, but broader questions may arise regarding the connection between media freedom and journalistic professionalism; between overall liberalization and the level of “media capture” on the part of political power; between the degree of literacy and the expansion of cultural markets (2021, 243). The presence of three advanced media and journalism markets back in the Socialist era – in Serbia, Croatia, and Slovenia – actually contradicts many beliefs about the consubstantiality between open societies and information development, while also reminding us what systemic analysis, counter-intuitively enough, should be about – *variants*.

3 Concluding remarks

As relevant methodological questions have been evoked, let us finally move the argument to the front. As many have already observed, a risk embedded in the media system model is that of taking on a normative value: looking for the way the world should be, rather than for the world as it is, and the more so when it comes to such topics as institutional communication, role of the State, or deliberative public sphere (Downey & Mihelj 2012). Rather than with the ideological aspect, though, I am concerned with the methodological facet of the discourse: and namely, with the ability of an abstract model to predict its own results – that is to say, with its self-fulfilling effects. Here the empirical issue is one with the epistemological one, as any ideal-typical model risks to favor a normative interpretation of the real. In Max Weber – whose seminal work lies at the heart of Hallin and Mancini's typology – this was notoriously due to the role of values in shaping scientific knowledge. To what extent the ideal-type *as such* would imply a normative evaluation is not easy to tell: in one way, Weber's separation between the choice of the research topic and the moment of the analysis can prove otherwise; in the other way, the abstraction of an *ideal* model can easily reflect personal preferences, as in Weber's "glorification" of German Nation-State, and his attentions for social configurations "able to live up" to that model (Portis 1983, 33). The most energic use of Weber's lesson – that of Perry Anderson – would stick to the same problem, not surprisingly, with the ideal-type of socialist hegemony becoming a political horizon for British left, and not only a theoretical path to its understanding (1965, 241-243). Suffice is to say that some characteristics proper to media systems – professionalization of journalism, or political pluralism – run the risk, in their turn, of implying a specific set of values, certainly grounded in the Western way to mass communication.

For the purposes of grounded research, this poses the problem of how well-established categories – in the case, three paradigms of media and politics – can reliably pick out different empirical materials in variable contexts. With this respect, one might even question whether *system* is the right category for comparative analysis (Rantanen 2013, 257-60) – something which, to be totally honest, should not be taken for given, as we have done so far. As Hans Kleinsteuber noted, the comparative method based on *concordance*, when opposed to that inspired by *difference*, usually looks for the same "common characteristics" in different regional media, and therefore implies assuming that all "societies pass through similar stages of development", as in the case of the transition from the industrial to the information era (2004, 70-71). Not accidentally, even in Weber's work a certain discontinuity can be detected, with this respect, between his epistemological lesson and his comparative-historical research, with the latter being framed by the concept of "type", rather than by that of ideal-type (see Kuckartz 1991, among others).

An interesting methodological alternative can be derived from a contiguous field, and namely from Gehring and Oberthür's comparative analysis of institutional interactions in EU countries, related to environmental issues. By means of a sort of "iterative approach", they sort out 163 empirical cases of institutional practices into three main groups. According to them, ideal- typical models show two main flaws. On the one hand, data analysis can easily group real cases in disparate ways and give shape to endless possible clusters: as a matter of fact, though, not all these clusters reveal a "consistent, underlying logics" (the disjuncture between Hallin and Mancini's pattern and Brüggerman, Humprecht and Engesser's empirical clusters can easily come to mind, here). On the other hand, ideal-types are by definition mutually exclusive, while field research will always detect many spurious or "mixed cases". According to Gehring and Oberthür, the solution seems to be in an extended *preliminary* data examination, able to reveal which patterns are properly vested with some scientific meaning – or which data reveal a significant level of effectiveness of public policies, in their case (2006, 325-334). If we generalize these insights to the broader field of comparative studies, it seems that a grounded methodology is the only way to break the vicious circle of systems' self-referentiality – collecting enough data to put the hypothesis to the test, and update the hypothesis itself on the basis of such data (and so on). But still, *how much* data is *enough* data is obviously an open question; and after which point data assume scientific meaning, and start to tell something, is even a more complicated one. In all likelihood, there is no universal answer to that, to the point that after the turn of digital archives we still happen to grope in the dark – trying to accumulate as much data as possible, and waiting for some patterns to appear. Systems and ideal-types are hardly compatible with historical change; but once you gave up these paradigms, you will face the opposite problem, with "large quantities" of data showing "average (and) loss of distinction" - to quote again Franco Moretti – and even "boredom", as if we were in front of "the Scylla and Charybdis" of scientific research (2013, 180-181).

While it is difficult to come out with a conclusive answer, here, some clues can be found, which all lead to the importance of asymmetries and imperfections – in spite of the neo-Kantian inspiration of Weber's ideal-types (1904). As already observed, Mancini and Hallin aptly noticed that the different dimensions do not always vary at the same time, and together (2017, 158). To my knowledge, the best theory for framing this irregularity as a constitutive requisite is that of David Harvey, according to which global capitalism is made of seven "activity spheres" – technologies and organizational forms; social relations; institutional/administrative arrangements; production and labor; relations to nature; daily life; mental conceptions of the world (2011, 123). I could not say if Harvey is totally right, here: why there should be precisely seven spheres - rather than, say, six or nine - and why exactly *those* seven. In his broader methodological stance, though, Harvey's brilliant idea is that any sphere evolves according to *its own* internal rules, whereas the crisis of *any* of them can impact all the others, and even lead to a restructuring of the system as a whole.
Some media systems, it follows, would appear to be marked by the complex equilibrium between "conflicting practices", or by what can be called an "asymmetric parallelism" between social instances and media coverage (Peruško 2021; for the concept of "asymmetric parallelism", see also Faris & others 2017). Or, to put it in Harvey's words, the state and advancement of media technologies can proceed at a

different speed, and even be based on *a different temporal scale*, when compared to cultural representations of the world. The mediated construction of reality, Couldry and Hepp write, is "characterized by a pluralization of temporalities" (2017, 107) - and perhaps, we may add, the methodological gaze has to shift to the very same direction.

If we go back to Moretti's seminal work on the dawn of cultural industries, here lies the problem: system is a necessary category for general theory – but *system*, as a notion, mostly reckons with the repetition, the uniformity, and "the sameness" (2013, 127-128). Structural models are the welcome result of any generalization, but on the empirical side they can make the analysis stick to its very premises, without making space for what lies outside their conventional meaning. Jack Goody, *The Theft of History*:

Thirdly, world history has been dominated by categories like "feudalism" and "capitalism" that have been proposed by historians, professional and amateur, with Europe in mind. That is, a "progressive" periodization has been elaborated for internal use against the backdrop of Europe's particular trajectory. There is therefore no difficulty in showing that feudalism is essentially European, (…) always starting from and returning to their western European base. This is not how comparison should work sociologically. As I have suggested, *one should start with features such as dependent land tenure and construct a grid of the characteristics of various types* (Goody 2012, 6-7; emphasis mine).

According to Goody – who is more ambitiously talking about the East/West comparative studies – we should therefore get rid of systemic categories, and deal with the granular, identifiable factors they are made of. As such, *feudalism* will always stand out as a Western category: but how about the *material configuration we label as feudalism*, and namely the "dependent land tenure" is it typical of the West too, or can we find something similar in ancient Eastern societies? And if so, in which form or variety (the "grid of characteristics of various types")? A system, but made of imperfections, asynchronies and mutations – is that a realistic goal, for a new generation of comparative media theory?

Breaking down an ideal-typical category into its dimensions, indicators, or indexes, as in some of the considered research - can this pave the way to a different methodology? Even though Moretti never uses these words, I suspect this is what he had in mind, while proposing to replace "comparative *literature*" with "comparative *morphology*" (2013, 57; emphasis mine). But again, how can the analysis of material devices-a specific audience trend; the diffusion of a digital service; the cross-border circulation of a TV-series – produce a synthesis at the level of general theory? Would it be possible to achieve an advanced degree of empirical detail, and still having access to the bigger picture of comparative systems?

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EUMEPLAT
European Media Platforms: assessing positive and negative externalities for European culture

WP 1.1: Report on Media Production in European Media 1990-2020

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Introduction

The media sector in Europe has changed considerably in the last 30 years. The privatization and commercialization drives led to an increase of TV channels and at the same time the decline of the press. The advent of the InternetInternet has transformed the analogue media world giving its place to the digital one. In effect, the media in Europe has undergone a prolonged period of change, in the attempt to adapt to rapid technological advances, the side effects of globalization and the developments associated with the process of Europeanization (see D1.6). These new developments are, on the one hand, creating a new market, and on the other, altering the dynamics of the existing structure (Papathanassopoulos & Negrine, 2011, pp. 17-25).

In reality, there is no simple explanation for these complex processes of change. Neither can we say that there is a common universal trend, even a common model, across Europe. The media markets incorporated in this report have developed within countries of different sizes, which are characterized by different economic development and acting out from vastly different political, institutional and historical frameworks . For instance, the Nordic countries (Norway, Sweden, Finland, Denmark, Iceland) are considered welfare societies, whereas the Baltic states represent recently transformed societies experiencing the transition from the USSR to market capitalism (Ibrus & Rohn, 2019, p. 43). On the other hand, distinctive differences reasonably exist between North-Central and Southern (Mediterranean) European countries, which can be traced to their unequal economic development (Papathanassopoulos, 2004, p.36) These are factors that have considerably affected the evolution of all types of media in the selected countries and they are also expected to incur significant implications on the future path of the media organizations within the digitalized communication sector.

The broadcasting liberalization in Europe, as reflected in the several waves of television deregulation taking place in the 1980s and early 1990s, brought about the restructuring of the media systems and signified a new era on the media production side, characterized by growing advertising spend, the proliferation of commercial television channels, the increasing local production and the development of digital television. In terms of advertising expenditure, former communist countries, after the collapse of the USSR, for more than a decade found themselves in a phase of steady growth, permitting new investments in the broadcasting industry. Particularly, the entry of foreign ownership in media field as well as several shifts in media ownership structures, combined, in some cases, with trends of media ownership concentration, are features experienced differently among the countries of Central Eastern Europe, however they reflect a range of diversified dynamics influencing the overall development of the media industry and especially the growth of the broadcasting field (Herrero et al., 2017, pp. 4801-4803; Reljić, 2014, pp.10-11; Carelli, 2013).

One aspect of this transformation process concerns the withering of the press industry, although the liberalization processes varied from country to country. For instance, comparing the downward trends of the press among the regions of the sample, it is noteworthy that in the 1990s the greatest negative rates in annual newspaper sales occur mainly in the Southern (Mediterranean) region. This decline can be explained by the expansion of the market economy on the back of political entrenchment, witnessed in the press by the deregulation of television and the rapid expansion of commercialized TV. It is worth mentioning that newspaper circulation dropped even in the Nordic regions, that have traditionally proved more resilient, compared to other regions, to the inevitable repercussions of television deregulation.

With the advent of digital TV and the rise in Internet use, advertising revenue had to be allocated among an increasing number of media players, compared to the past, a development that intensified their competition for the same source of revenue. This fragmentation of the advertising market has arisen in combination with the fragmentation of the audience, trends that threaten advertising as an efficient model of funding television.

The extent and the ways in which national media systems are affected by these global trends vary across time and countries. According to Hallin (2020, pp. 5781-5782), the 'path dependence' is a useful tool to evaluate the form of this change that could be manifested in a twofold way: either we are going to witness a strong tendency of continuity, where new media will be evolving differently in different media systems -but in accordance with established patterns in the relevant national media systems- or new media will trigger new patterns in the respective national systems, aiming at filling niches that were not covered by the institutions of the existing media systems.

In the following sections of this report, we will try to shed light on the emerging patterns in media production during a 30-year period of examination, across European countries. Initially, based on hard data, we try to describe the changes in the media systems of the EU countries, using Hallin and Mancini's model. Then we try to group the similarities, continuities, and discontinuities of the media systems. Finally, in the last section of this report we try to discuss to what extent the regional media models, as envisaged by Hallin and Mancini, remain applicable in the age of digitalization, globalization and Europeanization.

1 The Press Market: A downward trend in sales and circulation

Within the last three decades (from 1990 to 2019/20) the European regions and their respective EU member-states have faced many challenges in the media market, as the evolution of technology has created upheavals and transformations, paving the way for the transition from the analogue to the digital world.

In the era of the media convergence and platformisation of communication, the viability of the press market is still a matter of an open debate. In all four EU regions under examination there has been a common downward trend in newspaper sales and circulation. However, this decline in the relevant figures, as we will see in more detail below, varies significantly among different regions, as well as in countries within them.

Digitalization has made the print media business much more difficult and till that moment it has not succeeded in finding a working business model for the digital times, as the data from Eastern and Southern Europe manifest. Particularly, the steepest declines in newspaper sales occur mainly in the Eastern and Southern regions during the 1990s. However, as shown in table 1 and chart 1 the downward trend for newspapers across and regardless regions started with the dominance of private television long before the advent of the Internet and the digital media. The rapid decline of newspaper sales could also be regarded as a side effect of how the press was used in the past. It might be no coincidence that in almost all Eastern European countries, one sees major drops in newspaper sales. For instance, in Estonia, the drop in newspaper sales in the first half of the 1990s amounts to -71.9%.In the cases of Slovakia (-57.9), Poland (-52.4), Czechia (-42.8), Latvia (-37.7) and Hungary (-27.4), the downward trends of the press during the second half of the 1990s (1995-2000) are so remarkable that they testify to a structural change in the way citizens are informed about current affairs. As we can see in Slovakia between 1995 and 2000 the newspaper sales dropped by nearly 60%.

Even with already low circulation volumes, newspapers in Southern Europe followed a global downward trend in sales and circulation. For example, the rate of change for newspaper sales in Italy has been negative throughout the last 30 years, but this change was relatively small (up to -13%). This trend also applies to the media market of France; between 2005 and 2010 there was a small decrease in sales (-6%). Sales in Greece were also at a negative rate from 1990 to 2005. On the contrary, from 2005 to 2010 there was a sharp increase in newspaper sales (+32%), making Greece the exception to the rule. However, this temporary improvement was not sufficient to reverse the negative impact of the previous period.

An increase in sales both in Spain and Portugal took place earlier, from 1990 up to 2000. In Spain from 1990 to 1995 the increase is almost 24% and from 1995 to 2000 about 20%. In Portugal during the same period, there is an increase of 13.5%. However, the downward trend that follows mostly in the case of Portugal overturns the increase of the 90s.

Table 1: Number of annual newspaper sales (in millions of copies)

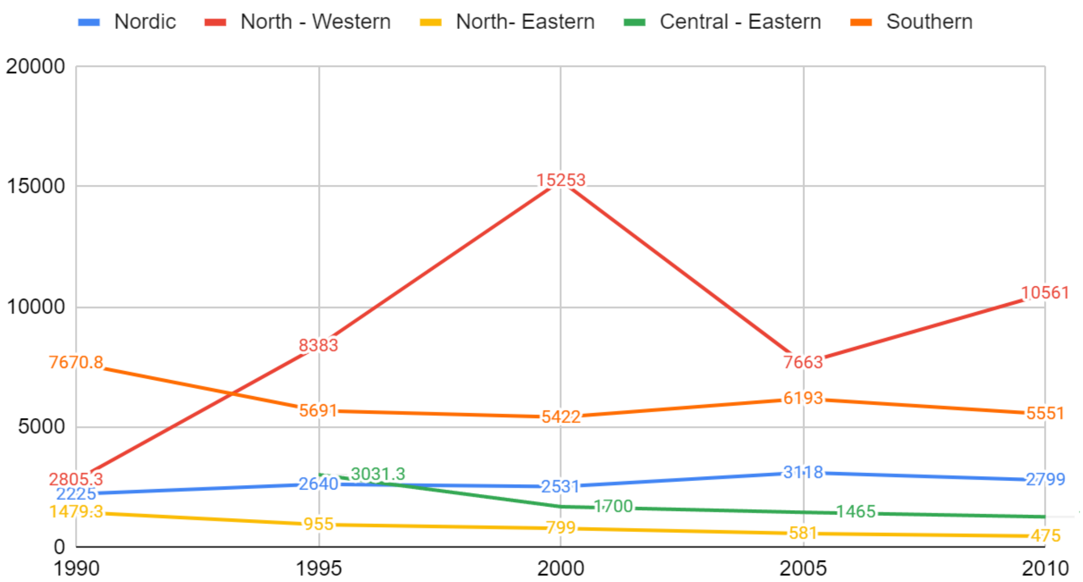
	GEO/ TIME	1990	1995	2000	2005	2009	Change rate 2005 – 2009 (%)
Nordic Region	Denmark	549	500	530	455	384	-15.6
	Finland	917	785	764	753	693	-8
	Sweden	NA	1 355	1 237	1 214	1 077	-11.4
	Norway	759	NA	NA	696	645	-7.3
North – Western Region	Austria	NA	NA	NA	633	690	+ 9
	Belgium	532.3	480	467	438	417	-4.8
	Germany	NA	NA	7 399	NA	8 010	NA
	Ireland	207	162	179	235	232	-1.27
	Luxembourg	36	NA	33	34	35	+3
	The Netherlands	NA	1 464	1 364	1 189	1 177	-6
	UK	2 030	6 277	5 811	5 134	NA	NA
Eastern Region	Czechia	1 248	890	509	506	409	-19.2
	Estonia	231.3	65	75	75	66	-12
	Lithuania	NA	NA	215	NA	NA	NA
	Croatia	232	150	163	NA	195	NA
	Hungary	NA	672	488	445	381	-14.4
	Latvia	NA	104.3	65	73	NA	NA
	Poland	NA	1 777	846	807	702	-13
	Slovakia	434	328	138	140	NA	NA
Southern Region	Cyprus	22.4	19	14	NA	NA	NA
	France	2 665	NA	NA	2 410	2 263	-6.1
	Greece	319.4	261	192	162	213	+31.5
	Italy	2 325	2 089	2 087	1 903	1 658	-12.9
	Portugal	NA	200	227	198	NA	NA
	Spain	1 080	1 337	1 593	1 520	1 417	-6.8
	Turkey	1 259	1 785	1 309	NA	NA	NA

Sources: World Association of newspapers–World Trends Report 1991, 1997, 2002, 2007, 2010, 2011.

During the thirty-year period from 1990 to 2020, the press market in the North-Western European Region has been also in decline, since sales and circulation of dailies kept dropping constantly, rising dramatically to losses, mostly pronounced from 2000 and onwards. An increase in newspaper sales was noted only in Austria (+9%) and Luxembourg (+3%) from 2005 to 2009. During the period 1995-2010, in terms of newspapers sales growth, one exceptional case that stands out is Ireland, where the relevant numbers reveal a repeatedly increase, starting from 10,49% in the period 1995-2000 and amounting to just over 31% both in the period 2000-2005. Newspaper sales started to decline only after 2005.

Traditionally, Nordic countries have had a strong press market. However, the downward trend in sales is evident in these countries, as well. Despite the similarities united the Nordic countries there are some differences that can be easily noticed; for example, Denmark has encountered the biggest loss in sales (15.6 % drop between 2005-2009). A possible explanation for these differences can be provided at a certain degree by the different media consumption patterns in the different countries; newspapers are read to a lower extent in Denmark, compared to the other countries of Nordic region (Nordic Media Trends 14, 2018).

Chart 1: Number of annual newspaper sales (in millions of copies)



Sources: World Association of newspapers – World Trends Report 1991, 1997, 2002, 2007, 2010, 2011.

When examining the dailies average circulation per adult population at the four regions of the sample comparatively, we see countries with the lowest average circulation per adult population both in the 1990s and in the 2000s belong to the Southern region, confirming the findings of previous studies that described the low circulation of the press as a peculiarity of the Southern European media system. Far from Portugal, which consistently displays very low figures in terms of dailies average circulation per adult population, other countries that, even more transiently, show the same trend is Cyprus (with 96 thousand copies in 1996 and 93.6 in 2001), Greece (with 78 thousand copies in 1996 and 81.5 in 2001), and Spain (with 77 thousand copies in 1990, 99.2 in 2009 and 67.1 in 2013).

Italy and France followed an upward trend from 1995 to 2000 and then started dropping too. Malta was the only country in the group that saw its dailies average circulation increasing from 2005 to 2010, while it was by far the country with the biggest average circulation in the group in 2009 (295 copies per thousand), followed by Cyprus with 155.3 copies per thousand.

The downward trend is also prevalent in the case of Eastern European media. In the region, there are big differences in the dailies' average circulation between the countries. Estonia is the country with the biggest average circulation in the group from 2000 and on, followed by Slovenia, Czechia and Lithuania also demonstrates a very high average circulation by 2009.

The press market in the North-Western European region was the first to be substantially affected by commercial TV and digitalization. Circulation of newspapers and magazines dropped during the thirty-year period under examination, while ownership concentration increased. In the majority of the countries of this cluster there was a significant decrease in average circulation from 1990 to 1996 and from 2009 to 2017.

Table 2a: Dailies average circulation / Adult population (copies per thousand)

	GEO/ TIME	1990	1996	2001	2009	2013	2017
Nordic Region	Denmark	355	311	281	235	229.2	NA
	Finland	562	456	543.9	462	362.4	205.4
	Sweden	529	438	543.4	422.2	322.4	139.4
	Norway	615	592	705.5	538.3	391.2	383
North – Western Region	Austria	356	230	363.1	324.9	414.5	340.4
	Belgium	175	163	175.3	157.3	163.6	118
	Germany	343	318	371.1	278.7	245.8	175.1
	Ireland	189	157	233	217.5	167.3	89.9[2]
	Luxembourg	320	348	339	281.8	665.2	NA
	The Netherlands	313	307	363.5	260.3	274.5	164.1
	UK	393	330	383.4	284.7	229.1	154.4
Eastern Region	Czechia	307[1]	254	205.9	152	143.6	98
	Estonia	NA	171	233.7	199	162.7	120.9
	Lithuania	NA	NA	NA	201.8	87.1	49.9
	Bulgaria	NA	158	203	131.1	136.4	NA
	Croatia	NA	110	127.8	141.1	122	46.3
	Hungary	NA	161	199	125	150.6	93.5
	Latvia	NA	NA	184.1	112.8	NA	NA
	Poland	NA	105	91.8	98	76.6	39.4
	Romania	NA	NA	70	66.2	38.7	10.5
	Slovakia	NA	174	117.1	94.4	65.2	NA
	Slovenia	NA	NA	214.4	169.1	143.3	NA
Southern Region	Cyprus	109	96	93.6	155.3	NA	NA
	France	127	182	180.7	146	168.6	86.7
	Greece	118	78	81.5	115.7	NA	NA
	Italy	118	105	127.8	93.8	92.9	40
	Malta	NA	NA	NA	295	NA	NA
	Portugal	39	93	91.2	59.5	NA	11.2[2]
	Spain	77	105	120.1	99.2	67.1	38.6
	Turkey	NA	68	130.8	NA	91.6	NA

Sources: World Association of newspapers–World Trends Report 1991, 1997, 2002, 2010, 2014, 2017.
(1) Data for Czechoslovakia (2) Data for 2016.

In relation to the other European regions, *the Nordic press market seems to be more resilient, since all the Nordic countries traditionally retain a relatively high level of press circulation.* Yet, in absolute numbers the circulation of newspapers per inhabitant has been decreasing consistently since 2000 in all four Nordic countries examined. While the decline has been about equally steep across the board, the level of circulation has been the lowest in Denmark. Norway and Sweden display a level hardly seen anywhere else (see the Nordic market report). Part of the picture is a higher number of newspapers, applying per capita as well as their regional diffusion and embeddedness in regional context. The situation reflects high autonomy for regions and the countries' more active regional policy, especially compared to Denmark or Finland.

Therefore, in the period under examination we can distinguish *two different periods of crisis for the written press.* The first is described by scholars as a *structural crisis* during the 1990s, when print was challenged by TV commercial channels (Casero- Ripollés & Izquierdo-Castillo, 2013). The second major challenge publishers had to confront was the *financial crisis* of 2008 and the decrease both in sales as well as in advertising expenditure. The appearance of the free press as well as the online open access websites of paid newspapers gave readers a gateway for not paying for news content, explaining the drops that are observed in sales volumes in all countries from 2000 to 2005.

In many countries citizens tend to avoid subscribing to newspapers. As manifested in table 2b, there is a group of countries relying on selling single copies, such as Ireland, Portugal, Spain, Italy, Greece, Turkey, Bulgaria, Croatia, Poland, Slovakia and another distinct group relying on hard copy subscriptions (delivered at home or at work) such as Germany, France, The Netherlands, Denmark, Finland, Sweden, Estonia, Hungary, Latvia, Luxembourg and Slovenia. As an exception to the rule Belgium and Romania rely equally on both models. The most important finding, however, is that within the last decade at least, these trends remain astonishingly stable. Only in the case of Portugal and Belgium we saw subscriptions' rate going up; subscriptions in Portugal tripled to 15% within 7 years, whereas in Belgium subscriptions rose by 28.5%. The difficulty in turning occasional readers to subscribers should be taken into consideration when looking for newspapers' viable business models in the digital environment. The examples of Portugal and Belgium should be further analyzed in order to establish best practices in the field.

Table 2b: Type of newspaper sales (single copies / subscriptions) %

	GEO/ TIME	2010		2015		2017	
		SGL. Copies	Subs.	SGL. Copies	Subs.	SGL. Copies	Subs.
Nordic Region	Denmark	15.5	84.5	12.4**	87.6**	-	-
	Finland	13*	87*	-	-	-	-
	Sweden	1.6	94.5	1.2	94.3	-	-
North – Western Region	Austria	9.5	79.3	6.9	80.2	6.3	81.1
	Belgium	43.4	54.9	-	-	22.2	76.3
	Germany	31**	69**	29	71	28	72
	Ireland	94**	6**	94	6	94	6
	Luxembourg	3.8	41.1	-	-	-	-
	The Netherlands	5.5**	87.6**	2.5	87.3	2	88.4
Eastern Region	Czechia	-	-	54.7	33.5	53.8	33.9
	Estonia	21**	70**	18	69	18	69
	Bulgaria	95	0.5	-	-	-	-
	Croatia	93*	0.7*	-	-	-	-
	Hungary	34.3**	63.9**	27.5	70.9	28.9	69.4
	Latvia	41.9*	51.8*	-	-	-	-
	Poland	74.9**	21.1**	76.4	21	76.9	21.6
	Romania	-	-	50.6***	45***	45.7	51.7
	Slovakia	65*	35*	-	-	-	-
	Slovenia	16	80	-	-	-	-
Southern Region	France	35**	54**	33	57	30	60
	Greece	97*	3*	-	-	-	-
	Italy	68.2	6.1	65.8	6.4	57.1	6.3
	Portugal	58.9	4.9	50.3	33.7	72	15
	Spain	65.6**	20.5**	63.9	21.5	62.9	20.5
	Turkey	72.7	27.3	62.4***	37.6***	-	-

Sources: World Association of newspapers–World Trends Report 2010,2011, 2017. * Data for 2005. ** Data for 2013. ***Data for 2014.

Table 2c: Final consumption expenditure of households by consumption purpose (newspapers, books & stationery as percentage of total)

	GEO/ TIME	1995	2000	2005	2010	2015	2020
	EU28 (2013-2020)	1.7	1.6	1.5	1.3	1.1	:
Nordic Region	Denmark	1.6	1.7	1.5	1.3	1.0	0.9
	Finland	2.0	1.9	1.8	1.6	1.3	1.1
	Sweden	1.6	1.4	1.3	1.1	1.0	1.0
	Norway	2.1	1.9	2.0	1.7	1.6	:
North – Western Region	Austria	1.5	1.5	1.4	1.3	1.2	1.1
	Belgium	1.6	1.5	1.5	1.3	1.1	1.1
	Germany	2.0	2.0	1.8	1.8	1.6	1.5
	Ireland	1.7	1.4	1.6	1.6	0.9	0.8
	Luxembourg	1.5	1.3	1.1	1.0	0.9	0.9
	The Netherlands	2.1	1.7	1.4	1.3	1.1	1.1
	UK	1.5	1.5	1.4	1.2	0.9	:
Eastern Region	Czechia	1.5	1.4	1.2	0.8	0.7	0.7
	Estonia	1.1	1.6	1.6	1.3	1.1	1.2
	Lithuania	0.9	0.9	0.9	0.8	0.9	0.8
	Croatia	1.7	1.5	2.7	1.6	1.8	1.7
	Hungary	1.8	1.6	1.5	1.2	0.9	0.7
	Latvia	1.5	1.4	1.3	1.1	1.0	0.9
	Poland	1.7	1.7	1.6	1.3	1.5	1.4
	Slovakia	1.3	1.6	1.9	2.3	2.1	2.0
	Slovenia	1.5	1.5	1.3	1.0	0.9	0.7
Southern Region	Cyprus	1.2	1.1	1.2	1.1	0.6	0.5
	France	2.0	1.8	1.7	1.5	1.3	1.1
	Greece	0.7	0.7	0.9	1.2	0.6	0.5
	Italy	1.7	1.5	1.3	1.2	0.9	0.9
	Portugal	1.5	1.8	1.4	1.4	1.0	0.6
	Spain	1.4	1.3	1.1	0.9	0.7	0.6

Source: Eurostat (2021). Annual detailed enterprise statistics for services (COICOP 3 digit) [nama_10_co3_p3]. Retrieved from: https://appsso.eurostat.ec.europa.eu.

In the Southern Region, we are able to notice a downward trend from 2010 and on, which is a manifestation of the economic crisis effect on the discretionary income of the Southern Europeans (table 2c). In the Northwestern Region there seems to be smaller fluctuations to the total household expenditure on newspapers and books, with the exception of Ireland and the Netherlands. In Nordic Region a downward trend starts taking place after 2010 and is mainly pronounced during 2015. Norway and Sweden seem to be the most stable markets, where the consumption expenditure of households for newspapers and books has marginally been affected. In Eastern Europe we can distinguish two set of countries: On the one hand there are countries like Estonia, Lithuania and Poland where there is great stability on the households' expenditure absorbed by newspapers, etc.; and on the other hand, there are countries like Czechia, Croatia and Slovenia where a considerable drop took place between 1990-2010. The only exception is Slovakia where there was a stable increase during the years under examination.

Table 3a: Number of Daily newspaper titles (paid-for*)

	GEO / TIME	1990	1995	2000	2005	2010	2015	2017
Norh Western Region	Austria	17	17	16	16	15	13	12
	Belgium	35	31	28	28	23	NA	14
	Germany	356	411	382	368	353	343	327
	Ireland	8	8	6	8	9	9	NA
	Luxembourg	NA	5	5	6	6	NA	NA
	The Netherlands	47	39	35	35	28	28	27
	UK	105	100	104	106	99	104	99
Nordic Region	Denmark	45	40	31	31	34	30	30
	Finland	66	62	55	53	50	45	40
	Sweden	109	97	93	88	83	81	78
	Norway	NA	NA	82	77	73	72	71
Eastern Region	Bulgaria	NA	NA	43	60	71	NA	NA
	Croatia	NA	9	12	13	17	NA	13**
	Czechia	26	23	75	84	81	81	80
	Estonia	10	15	13	11	11	37	37
	Hungary	NA	43	40	38	30	31	30
	Latvia	NA	8	21	22	NA	12	11
	Lithuania	NA	NA	NA	21	18	11	11
	Poland	66	84	59	43	38	35	35
	Romania	NA	NA	46	NA	59	42**	21
	Slovakia	NA	20	29	10	9	NA	NA
	Slovenia	NA	NA	5	9	26	NA	NA
Southern Region	Cyprus	10	10	8	21	22	NA	NA
	France	97	60	87*	85	NA	84	82
	Greece	132	24	32	39	40	NA	NA
	Italy	82	78	88	89	90	111	108
	Malta	NA	NA	NA	4	4	NA	NA
	Portugal	24	27	28*	15	19	18	13***
	Spain	110	126	136	139	134	107	107
	Turkey	14	22	45	NA	68	74	NA

Sources: World Association of newspapers–World Trends Report 2010, 2011, 2017. * Data for 2005. ** Data for 2013. ***Data for 2014.

One interesting finding is that in all regions, the decline in sales and circulation is not reflected in the number of the newspaper titles (table 3). In fact, the figures seem quite stable, while in some cases there has been a noticeable increase. The 2008 fiscal crisis seems to have affected the press market in Europe disproportionally, as the data concerning Spain manifest, where a sharp decline took place in the newspaper titles (from 134 in 2005 to 107 in 2017). However, the absence of data for Greece and Cyprus from 2010 and onwards do not allow broader generalizations in the region.

One paradox of the press market, emerged by the data, concerns Czechia, where the number of daily newspaper titles increased considerably in the period 1995-2000, although it is a phase of dramatic drop in the annual newspaper sales. Ireland represents a newspaper market characterised by a consistently low number of daily newspaper titles over the period 1990-2010; however, in these two decades the annual newspaper sales display a steadily increasing trend.

The number of paid-for newspapers published in the Nordic region has remained surprisingly stable since the turn of the millennium. Sweden tops the list with 78 titles in 2017, followed by Norway with 71 and Finland with 40. This means that in the Swedish there is a comparatively high proportion of daily newspapers, whereas the opposite is the case for Finland (Nordic Media Trends 14, 2018). It is worth mentioning that more than half of Finland's paid-for newspapers are local weeklies (Nordic Media Trends 14, 2018).

1.1 The press goes digital …

In all the countries under examination there is a clear shift from the print press to digital press. More precisely in the Southern Europe region, in the early 2000s newspapers started experimenting with their online presence. For instance, *La Repubblica, Il Corriere della Sera,* and *Il FattoQuotidiano* websites in Italy, as well as elmundo.es and elpais.es in Spain and lefigaro.fr and lemonde.fr in France are among the top-ranking websites, while in Greece new native online media have become the most popular sources of news.

The Nordic region is one of the most digitally mature regions in the world, a trait that is reflected in the tendency to use the Internet for news and information to a higher degree, compared to other developed countries. The leading tabloid newspapers, *Aftonbladet* and *Expressen* perform well in online advertising and keep expanding its audience. Similarly, the leading quality-oriented morning newspapers, *DagensNyheter* and *Svenska Dagbladet*, dominate online newspaper subscriptions.

Table 4: Number of daily newspaper websites (online editions)

	GEO / TIME	1997	2002	2005	2010	2015	2017
Nordic Region	Denmark	15	29	35	37	23	30
	Finland	37	49	53	170	176	177
	Sweden	70	77	70	229	227	227
	Norway	50	81	77	NA	70	NA
North - Western Region	Austria	14	15	16	15	14	15
	Belgium	11	18	18	14	NA	18
	Germany	120	259	384	661	691	699
	Ireland	3	3	3	NA	62	NA
	Luxembourg	2	4	6	NA	NA	NA
	The Netherlands	11	35	35	30	31	30
	UK	NA	10	NA	1410	NA	NA
Eastern Region	Czechia	8	8	9	NA	12	12
	Estonia	6	11	12	NA	36	34
	Bulgaria	3	15	31	70	NA	NA
	Croatia	2	5	10	37	NA	NA
	Hungary	NA	19	24	NA	35	34
	Latvia	5	14	16	NA	NA	NA
	Poland	NA	41	42	NA	52	48
	Romania	NA	NA	-	NA	20*	14
	Slovakia	8	18	11	9	NA	NA
	Slovenia	NA	3	7	NA	NA	NA
Southern Region	Cyprus	2	2	NA	NA	NA	NA
	France	17	40	44	57	55	NA
	Greece	8	15	NA	NA	NA	NA
	Italy	17	91	94	108	103	NA
	Portugal	11	12	32	16	742	744*
	Spain	NA	100	59	51	106	107
	Turkey	8*	16	27	NA	NA	NA

Sources: World Association of newspapers – World Trends Report 1997, 2002, 2007, 2010, 2011, 2015, 2017. * Data for 2016.

Regardless of whether the trend with respect to the movement of the press in the online field refers to small or large media markets, the great growth in the newspapers' online editions is observed either in the first or in the second half of the 2000s. Typical examples can be considered the remarkable increase that is taking place in Germany (from 259 newspapers' websites in 2002 to 661 in 2010), in the UK (from 10 in 2000 to 1.410 in 2010), in Finland (from 49 in 2002 to 170 in 2010), in Sweden (from 77 in 2002 to 229 in 2010), in Bulgaria (from 15 in 2002 to 70 in 2010), in Italy (from 91 in 2002 to 108 in 2010). In absolute numbers, it is reasonable that the presence of online newspapers' editions is more expanded in the big markets of the North - Western region, in several markets of the Nordic region, characterised by great tradition in Internet household penetration (Finland, Sweden, Norway) and in a few markets of the Southern region.

1.2 Strong evidence of an ongoing shift towards on-line advertising

In recent years, access to *a wide number of online news sources, the decline of newspaper readership and advertising revenues have considerably affected the newspaper industry in all western countries* (OECD, 2009). However, *the financial crisis of 2008 and the falling of both offline and online advertising spending created additional problems for most newspapers, especially for the countries of Southern Europe.*

It does not come as a surprise that *the advertising industry is more responsive than publishers to sales changes.* During the first newspaper crisis in France from 1990 to 1995 the advertising expenditure for newspapers was cut up to 75%, whereas in Italy there was a - 15% decrease, in Spain - 10% and in Greece almost -43%. On the contrary, from 2005 to 2010, most probably due to French presidential elections, the advertising expenditure for newspapers increased by21%. During the same period in Italy, Spain, and Greece there were slight decreases and in Portugal, a -9% decrease. Newspapers in Italy were resilient most of the time; however, the advertising expenditure was dropped to more than 60% from 2010 to 2019. The drop was huge also in the case of France (-80%), Malta (-72%), Spain (-63%) and Turkey (-73%) for the same period. In Portugal the decrease was -43% while in Greece the drop in advertising share for the same period was -28%. Greece still had the biggest share of advertising expenditure for the press in the region in 2019 reaching 12.4%. *Advertising expenditure for magazines was in most cases higher than for newspapers and did not experience such big fluctuations over the years.* However, during the last ten years there have been huge declines in advertising expenditure too.

Table 5: Advertising expenditure in Press (newspapers / magazines) (%)

	GEO / TIME	1990		1995		2000		2005		2010		2015		2019	
		N	M	N	M	N	M	N	M	N	M	N	M	N	M
Nordic Region	Denmark	66.5	17.6	34	15	49.1	3	46.5	13.8	34	11	22	7.6	13.1	4.7
	Finland	58.3	10	58.7	13.5	57	16.7	54.1	16.3	42.8	12	35.3	7.1	20.8	4.6
	Sweden	78.6	14.7	63.5	11.7	54.1	14.5	45.4	12.4	33.9	8.4	19.6	5.6	8.6	2.6
	Norway	NA	NA	NA	NA	NA	NA	50.1	10	39	7.3	24	4.5	12.2	2.6
North-Western Region	Austria	40.7	19.2	39	16.5	31	28	39	19.8	40.7	14	36.9	10.4	36.1	7.4
	Belgium	19	26.3	18.9	24	22.5	13.5	24.3	11.5	22.6	10	15.8	6.7	9.5	4.4
	Germany	33	13	31	10	44	23.7	39.7	23	34	13.6	25.1	11	17.9	7.9
	Ireland	36	3	31	3	55.3	2.1	61.6	2.7	44.6	1.6	24.3	2.2	15	0,9
	Luxembourg	NA	NA	74	NA	65.6	5.3	NA	NA	62	6.9	55	5.5	46	4.6
	The Netherlands	55	NA	37	19.5	23.2	21.5	40.9	22.3	27.5	13.2	15	8.6	9.4	5.6
	UK	37.7	14.3	35.6	14.3	40.7	16.4	35.5	13.7	22.6	7.5	11	3.6	4.8	1.6
Eastern Region	Czechia	NA	NA	27.3	18.7	19.4	20.3	18.6	20.1	13.9	9.6	8.3	8.5	5.2	5.6
	Estonia	NA	NA	55	6	46.2	14	44	11.7	28.6	6.4	21	6.8	16	4
	Lithuania	NA	NA	NA	NA	38.6	8	14.8	5.9	18.5	10.5	10	10.8	6.8	7
	Bulgaria	NA	NA	NA	NA	NA	NA	14.2	8	10.3	7.9	5.4	3	1.7	1.3
	Croatia	NA	NA	NA	NA	24.6	5.6	14.3	11	15.5	11.2	11.4	7.6	6.3	4.2
	Hungary	NA	NA	45.2	NA	14.1	14	20.9	21.4	15.6	18	13.9	10.3	9	7.3
	Latvia	NA	NA	51.5	8	36	8	29.3	13.2	11.3	8.9	5.7	9.5	3.6	4.9
	Poland	NA	NA	17	14	12	15.1	13.5	15.8	9	10	4	8.3	2.1	4.6
	Romania	NA	NA	NA	NA	12	NA	15.7	13.5	4.5	4.5	2.7	2.6	1.3	1.3
	Slovakia	NA	NA	30	15	11.1	8.1	6.6	7.9	12.5	12	8.5	7.8	2.8	3.6
	Slovenia	NA	NA	NA	NA	12	16.1	20.6	10.2	26.6	21	12	8.5	7.9	5.7
Southern Region	Cyprus	NA	NA	NA	NA	NA	NA	10.9	9.1	7.4	6	5.7	5.2	3.6	3.4
	France	56.2	NA	14.6	15.4	18	32.5	16.5	22.3	37.3	16.9	11	10.2	7.4	5.8
	Greece	18	26.6	10.3	13.2	18.2	26.8	15	36.6	17.2	38	14.6	12.8	12.4	10
	Italy	24.6	17.9	21	13.3	22.9	14.6	19	13.3	16.9	11.4	9.7	6.2	6.4	4
	Malta	NA	NA	NA	NA	NA	NA	34.1	16.7	32.5	15.1	21.7	10.8	8.9	4.7
	Portugal	NA	NA	14	17	10.6	14	7.6	16.2	6.9	14.5	8.3	5.1	3.9	2.4
	Spain	37.6	15.4	33.8	13.5	30.2	13	25.2	10.2	20.1	7.9	13.6	5	7.4	2.8
	Turkey	47.1	8.7	44.9*	NA	34.3	6.3	35.8	3.7	21.7	2.1	15	1.4	5.7	0.8

Sources: World Association of newspapers – World Trends Report 1991, 1997, 2002, 2007, 2010, 2015, 2020. * Data for 1999.

In Cyprus from 2010 to 2019 the expenditure for magazines was reduced to one third, whereas in Italy, France, Spain, and Turkey it was cut by two thirds. In Greece there was a 74% drop and in Portugal almost 84%. Unfortunately, as we will see the rise of the advertising expenditure for the Internet was not as sharp, putting more pressure in publishers who saw revenues evaporating during these ten years.

Between 2007 to 2012 the advertising expenditure decreased by -51% in France, -39% in Spain and approximately -60% in Greece for the same period (Papathanassopoulos, 2013). In Italy between 2009 and 2015, the publishing industry lost about 50% of its total advertising revenues (Mancini & Gerli, 2017). As a result, many historical newspapers were forced to cease operation. In Greece *Eleftherotypia* ceased publication; in France, newspapers continued with only their online editions like *La Tribune* and *France Soir*; many free dailies ceased publication like Metro in Spain, *Meia Hora* and *Global Notícias* in Portugal; mergers and changes of ownership took place; local offices were shut down and continued working with only a few correspondents, as in the case of Spain. As a result, thousands of newsroom staff and journalists became redundant.

The share of advertising expenditure in press has dropped in most of the Eastern European countries. In 1995 for example, 51,5% of the total advertising expenditure in Latvia was directed to newspapers. By 2005 that percentage dropped to 29.3%. Estonia seems to follow its own path, since even after the sharp reduction in the amount of advertising expenditures in newspapers from 2010 and onwards, still, in 2019 the advertising expenditures remain higher (16 %) compared not only to the rest of the countries of the region, but also in comparison with the Southern European market. Regarding the magazine market, the majority of countries experienced an increase in advertising expenditure for almost a decade from 1995 to 2005, when a downward trend started to consolidate in the region.

In Nordic countries, advertising expenditure was subjected to sharp reductions in newspapers and magazines going back to 2005. Given the strong standing of newspapers in Nordic societies however, the amount of advertising expenditures started out correspondingly high in 2005. Even after the decrease of expenditure over the past decade and a half, advertising expenditure was relatively high in these countries, with the highest amount in Finland at almost 60 million euro per year.

For magazines, the situation is quite similar, with the Nordic countries starting out with higher levels of expenses which remained on the higher end in 2019 compared with the other European countries.

The share of advertising expenditure going to press, as compared to other media, shows an increase in some countries of the North-Western Europe in the period of 2000 to 2005, with more than 60% of advertising spending allocated toto newspapers in the small markets of Ireland and Luxembourg, and a strong decline after 2010, most dramatic in the UK. Exceptions, where ad expenditure in press remained constant throughout, are Austria, likely because of indirect subsidies through government ads, as well as in Belgium and Luxembourg. While magazines receive roughly half of the ad money of newspapers, the decline here is more pronounced, even in the subsidised market of Austria, ending in mid to low single digits in 2019.

1.3 Towards a new model for the press industry

As Paolo Mancini (2020) argues, although leading newspapers still are an integral part of the media market, digital news outlets are taking the lead in news consumption. Previous research has confirmed that citizens belonging to the Eastern and Southern European cluster are more likely to consume Internet news content, since their respective media systems are subjected to stronger party and owner influence. Thus, the opening of the digital market gave them the opportunity to search for alternative media sources, that are better placed to address their needs (Perusko, Vozab & Cuvalo, 2015, p.357).

In effect, the digitalization of the media industry has created important challenges for the press market, not only on the production and distribution side of the news, but also on the level of economic viability. Unlike native digital news media, traditional publishers had to worry about the sustainability of newspapers and finding new viable business models.

However, *most publishers and users embraced (or were forced to) the digital environment faster than advertisers*. From 1996 to 2008, as Antheaume (2010) points out for the French press, online open access to newspaper content was the norm. Getting as much traffic and therefore advertising was the goal. The fact that users could and in many cases still can access online the same content that is available in their print edition caused problems in their sustainability, making scholars talk about a cannibalization process (Casero - Ripollés & Izquierdo - Castillo, 2013; Simon & Kadiyali, 2007; Kaiser, 2006; Filistrucchi, 2005; Chyi& Lasorsa, 2002).

Nowadays, there seems to be a paradox, where the consumption of news online steadily grows in all European markets, yet the publishers haven't managed to find a way to "monetize the increased audience" (Casero-Ripollés & Izquierdo-Castillo, 2013, p.64). *New business models combining paywall and subscription models still need time to be established, while publishers in Southern Europe have had more difficulties in comparison to the north of Europe to convert free readers to paid online subscriptions.* The latest data on the share of online news that is paid across countries, revealed that in Nordic countries, within one year (from 2019 to 2020) there was a significant increase in the share of news consumed upon payment (Nordicom, 2021). According to World Press Trends Report (2022) even though advertising revenue is still the primary source of income for news publishers, reader revenue, is expected to bring in around a third of total income in 2021-2022.

To create value in the highly competitive digital environment, publishers try to develop parallel business models based on personalization of content, as well as other opportunities offered by digital marketing practices (advertorials, dedicated websites and landing pages for advertisers and sponsors, niche audience targeting, remarketing tools, ad alliances). On top of these, publishers need to regain their audience trust. That is probably the biggest bet for the years to come for everyone involved in the news industry.

2 Radio: Still resilient across Europe

In Europe radio was born as a “national public institution”, with the concept of public service in its core (Bonet & Fernández-Quijada, 2021, p.2). For many years public radio had the absolute dominance in the airwaves, whereas after the deregulation during the 1970s- and more profoundly in the 1980s and 1990s many commercial stations started to emerge. Nowadays, commercial radio is the number one source for European listeners, with 7.134 commercial FM services in Europe, which represents 61.8 % of all FM services available at the region (EBU, 2019). It should be highlighted though, that for the Nordic countries there is a different picture, with some three quarters of radio audiences listening to national radio, as the news radio market is dominated by the national public service channels.

However, this era of flourishment had reached its peak in most countries around the turn of the century and started to demonstrate a downward trend afterwards. In most European regions under study the number of radio stations, as well as the number of employees in the radio market had started to drop.

More precisely, by 2010, the number of stations had started to drop in North-Western Europe with a possibly delay in Austria which was late in liberalisation, and the UK which was early and peaked in 2010 at the highest level in the region. In Southern as well as in Eastern Europe when it comes to radio production there are big differences among EU member states. For the year 2017, among the EU member countries with highest numbers of radio enterprises from Eastern Europe is Hungary (310), compared to Estonia (10), Slovakia (16) and Lithuania (23). Considering population size, the number of radio broadcasting enterprises per million inhabitants also differs greatly between countries. The highest ratios were recorded in Slovenia (76 radio broadcasting enterprises per million inhabitants), Croatia (38) and Hungary (32), while the lowest ones were observed in Poland

and Slovakia with 3 radio broadcasting enterprises per million inhabitants[1]. Slovakia and Slovenia are the only two countries with positive change rate in the period 2010-2018, while Bulgaria saw the biggest decline in radio stations (-46.32), followed by Czechia (-37.84) and Hungary (-31.35).

Table 6: Number of radio broadcasting enterprises (both public and commercial)

	GEO / TIME	1990	1995	2000	2010	2015	2018	Change Rate 2018/10 (%)
	EU28 (2013-2020)	NA	NA	NA	NA	6243	5629	NA
Nordic Region	Denmark	NA	NA	NA	68	57	45	−33.82%
	Finland	NA	NA	NA	43	49	46	6.98%
	Sweden	NA	NA	NA	68	85	72	5.88%
	Norway	NA	NA	NA	130	101	77	−40.77%
North-Western Region	Austria	13	12	NA	43	47	28	-34,9
	Belgium	252	NA	NA	225	145	154	-31,6
	Germany	171	231	253	246	239	248	0,8
	Ireland	25	38	NA	NA	NA	NA	NA
	Luxembourg	4	20	24	9	8	8	-11,1
	The Netherlands	18	30	363	264	292	274	3,8
	UK	NA	221	346	921	876	813	-11,7
Eastern Region	Czechia	NA	NA	NA	74	53	46	-37.84
	Estonia	NA	NA	NA	13	12	9	-30.77
	Lithuania	NA	NA	NA	29	24	21	-27.59
	Bulgaria	NA	NA	NA	95	67	51	-46.32
	Croatia	NA	NA	NA	187	165	158	-15.50
	Hungary	NA	NA	NA	421	321	289	-31.35
	Latvia	NA	NA	NA	45	47	39	-13.33
	Poland	NA	NA	NA	125	117	101	-19.2
	Romania	NA	NA	NA	202	175	154	-23.76
	Slovakia	NA	NA	NA	12	21	34	+183.33
	Slovenia	NA	NA	NA	131	159	153	+16.79
Southern Region	Cyprus	NA	NA	NA	44	36	34	-22.7
	France	NA	NA	1141	362	462	339	-6.4
	Greece	NA	NA	NA	818	706	614	-24.9
	Italy	NA	2017	1937	940	749	701	-25.5
	Malta	NA	NA	NA	10	NA	NA	NA

[1]Radio broadcasting in the EU on the decline, Eurostat, https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20200213-1, accessed on 13.08.2021.

Portugal	325	337	346	272	271	298	+9.5
Spain	2017	2742	1193*	1,123	953	781	-30.5

Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: https://appsso.eurostat.ec.europa.eu.
*Data for 1999.

According to Eurostat (2018) Spain leads in radio production with 781 stations, followed by Italy with 701 and Greece with 614. Portugal follows in the 5th place with 298 radio stations. Only in the case of France, we found a relatively small number of radio stations, considering the size and the population of the country. On the other hand, France is one of the major employers on radio within the EU. It is worth noting that the effect of the economic crisis is also discernible for this section of the media market, as well, since from 2010 to 2018 Spain saw a 30.5% decline in radio stations, followed by Italy (-25.5%), Greece (-25%) and Cyprus (-22.7%). France had a negative rate of - 6.4%, closer to the European average (-5.1%). Portugal, on the contrary, was the only country in this group where radio stations increased in number (+9.5%).

A more complex development is observable in the number of radio broadcasting enterprises in the Nordic region. In Norway, the total number, which was very high to start with, declined markedly from 2000 to 2018. An equally consistent but less dramatic decline occurred in Denmark, whereas Finland and Sweden experienced a slight rise of radio broadcasting enterprises from 2010 to 2015, followed by a small decline.

As it is expected the drop in the number of radio stations is also manifested in the number of employees working in the radio industry. The years following the 2008 economic crisis had a detrimental effect for the people employed in this media sector in Southern Europe. Namely, in Greece almost half of radio employees lost their job. In Italy almost 40% of the employees were laid off, while in Cyprus the fired employees numbered around 35% and in Spain 28.5%. Regarding radio employment, France is the outlier since employment increased marginally (0.2%) from 2010 to 2018.

The tendency is visible in Eastern Europe too, as Poland is the only country in the region with a positive change rate (+26.34) in the period 2010-2018. For example, in Slovakia just

40 persons were employed in the radio broadcasting sector in 2017[2]. Overall, during the period 2010-2018 the biggest loss in radio industry jobs is found in Hungary (-55.65), followed by Lithuania (-51.61) and Czechia (-43.19).

In North-Western Europe, the number of employees in the radio industry from 2010 to 2018 dropped even more than the number of stations, indicating that many of the commercial stations relied on computer-generated playlists, while saving on personnel. The only exception seems to be Austria where a comparably small number of commercial stations might be counterbalanced by an increase in personnel at ORF. In the Nordic region a slight drop in the number of radio employees is also visible since 2010 and onwards.

The advertising share for radio has remained rather stable throughout the years for the majority of countries under examination, even in countries that have been affected by the economic crisis.

With the exception of Greece, the advertising share for radio was rather stable during the years under examination, ranging from 4 to 9% of the total advertising expenditure. Therefore, we can say that even though the total advertising spending was affected by the crisis, especially from 2009 to 2014, the radio ad spent was not severely affected.

The advertising expenditure going into radio shows only minor fluctuations in North Western Europe, with peaks between 2000 and 2015 in all countries except Austria where ad money in radio peaked in 1990 and dropped continually, until 2019 by more than fifty percent.

[2] Radio broadcasting in the EU on the decline, Eurostat, https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20200213-1, accessed on 13.08.2021.

Table 7: Number of employees working in the radio industry

	GEO / TIME	2010	2015	2018	Change Rate 2018/10 (%)
	EU28 (2013-2020)	NA	58.984	56.509	NA
Nordic Region	Denmark	289	359	327	13.15
	Finland	386	385	348	−9.84
	Sweden	NA	3145	NA	NA
	Norway	515	418	401	−22.14
	Iceland	NA	38	44	NA
North-Western Region	Austria	445	585	515	15,7
	Belgium	575	380	340	-40,87
	Germany	11.795	11.955	8.898	-24,56
	Ireland	NA	NA	NA	NA
	Luxembourg	NA	NA	NA	NA
	The Netherlands	4.830	3.192	2.681	-44,49
	UK	NA	5.807	6.743	NA
Eastern Region	Czechia	NA	257	146	-43.19*
	Estonia	NA	180	113	-37.22*
	Lithuania	217	151	105	-51.61
	Bulgaria	641	519	436	-31.98
	Croatia	NA	930	904	-2.80*
	Hungary	1,93	856	NA	-55.65**
	Latvia	243	186	230	-5.35
	Poland	4,044	3,799	5,109	+26.34
	Romania	3,493	2,995	2,917	-16.49
	Slovakia	68	60	40	-41.18
	Slovenia	426	389	406	-4.69
Southern Region	Cyprus	340	195	221	-35
	France	9,996	8,291	10,018	+0.2
	Greece	5,216	2,012	2,781	-46.2
	Italy	4,162	2,712	2,546	-38.9
	Malta	59	121	NA	NA
	Portugal	1,536	1,219	1,242	-19.2
	Spain	9,608	6,674	6,876	-28.5
	Turkey	NA	NA	NA	NA

Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: https://appsso.eurostat.ec.europa.eu.

*2018/2015; ** 2015/2010

Table 8: Radio advertising expenditure (%)

	GEO / TIME	1990[a]	1995[a]	2000[b]	2005[c]	2010[c]	2015[c]	2019[d]
Nordic Region	Denmark	NA	NA	NA	2.5	2	2.5	2.7
	Finland	NA	NA	NA	4	4.1	5.1	5
	Norway	NA	NA	NA	4.4	3.7	4.6	2.9
	Sweden	NA	NA	NA	2.6	3	3	2.9
North-Western Region	Austria	12.2	11.2	8.7	8	6.1	5.4	5.71
	Belgium	NA	9	9.6	11.4	11	12.5	12.8
	Germany	5.1	3.2	3.2	4.5	4.2	4.2	3.9
	Ireland	NA	NA	7.8	8.3	8.7	6.8	11
	Luxembourg	NA	NA	15	NA	17.6	17	17.9
	The Netherlands	NA	NA	8.2	7.1	6.2	6.5	5.9
	UK	1.8	2.7	3.5	4.4	3.7	3.3	2.8
Eastern Region	Czechia	NA	7	3	7	5.5	4.7	3.4
	Estonia	NA	8	11.03	8.7	9.8	10.5	11.3
	Lithuania	NA	NA	5.05	7	8	8.4	9.4
	Bulgaria	NA	NA	NA	1.8	1.9	1.2	0.9
	Croatia	NA	NA	NA	7.1	8.5	9	7.4
	Hungary	NA	8	5.03	10	6.5	5.4	3.6
	Latvia	NA	4.05	16.03	11.7	11.5	12.5	13
	Poland	NA	8	6.08	7.3	7.5	8.3	7.8
	Romania	NA	NA	5.02	5.6	6.9	6	5.9
	Slovakia	NA	12	5.08	6.4	10.3	6.3	4.9
	Slovenia	NA	NA	NA	7.2	7.3	4.6	4.5
Southern Region	Cyprus	NA	NA	NA	9.7	8.2	7.6	7.8
	France	NA	NA	7.9	8.4	6.8	6.4	5.4
	Greece	7.4	6	4.7	4.3	6.8	3.9	4.64
	Italy	3.4	NA	3.6	5.7	6.9	5	5.2
	Malta	NA	NA	NA	9.9	7.6	7.1	10.1
	Portugal	8	NA	NA	6.1	5.2	9	7.7
	Spain	11.1	10.3	7.4	9.2	9.4	8.92	7.12

Sources: Southern, Nordic & Eastern region: a. European Media Handbook (1997), b. European Media Handbook (2004), c. European Audiovisual Observatory, e. Data for 2019 retrieved from Statista (2021) MAR-AD Advertising expenditures by media (2001-2019) / Source: Warc / © European Audiovisual Observatory / Yearbook 2020. North-Western Region: 1990-2000: European Communities (2003), 2005-2019: World Advertising Research Center (WARC), in: EAO Yearbook 2020.

In Eastern European region although there are not tremendous fluctuations within the countries themselves, there are significant differences in the radio advertising expenditure between the countries. In 2019 the advertising share for radio was 0.9 for Bulgaria, while for Estonia and Latvia was set at 11.3% and 13%, respectively.

Finally, in the Nordic region there is a slight upward trend in radio advertising expenditure in all countries, with the noticeable exception of Norway with almost a €30 million drop from 2015 to 2019.

Overall, the available data regarding the advertising expenditure invested in the radio market suggest that the *radio still consists an integral part of the media industry across Europe*). Even though terrestrial radio broadcasting still remains the primary distribution platform, relevant data confirm that online radio is no longer just a complement to FM, but is replacing it, especially when it comes to younger listeners (Cordeiro, 2012, p.494). With the rise of streaming services and platforms commercial radio enterprises may start to capitalize their experience in the market and opt for a new strategy that compliments expansion beyond their national borders; although, due to its specific traits as a medium and its oral nature, radio, has always been regarded as a difficult medium to internationalize, technological advancements pave the way for a "*more varied and direct interaction with audience and ways to advertise that go beyond the simple radio spot*" (Bonet & Fernández-Quijada, 2021, p.13).

3 TV: Continuities and challenges in the era of "digital disruption"

3.1 The rise of thematic channels

According to Mikos (2016, p.154) "television has always been a medium in transition, subject to constant transformation", triggered by technological advancements, new platforms of content distribution, economics, relevant policy, and audience consumption patterns. The restructuring of the European television systems has brought about an increase in the number of private channels in operation and, consequently, has changed the relationship between the private and the public broadcasting sector. For example, at the end of 2010 the number of channels in Europe was 9,893 compared to 220 in 1996 and less than 90 in 1989. Moreover, only 12% of the TV channels are public (EOA, 2011). Almost a decade later, at the end of 2019, 11,418 TV channels were available in Europe, 4,757 of them local (EOA, 2021).

Table 9: Number of thematic TV channels by country

	GEO / TIME	2010*	2015	2019
Nordic Region	Denmark	523	524	106
	Finland	308	342	73
	Sweden	362	344	93
	Norway	NA	231	83
North-Western Region	Austria	375	544	255
	Belgium	1.295	1.407	328
	Germany	553	804	394
	Ireland	477	463	81
	Luxembourg	406	489	27
	The Netherlands	626	730	154
	UK	629	634	461
Eastern Region	Czech Republic	413	421	141
	Estonia	329	392	88
	Lithuania	353	396	78
	Bulgaria	452	485	175
	Croatia	397	443	187
	Hungary	770	767	137
	Latvia	278	360	104
	Poland	772	770	210
	Romania	604	628	205
	Slovakia	294	335	140
	Slovenia	454	485	146
Southern Region	Cyprus	185	199	52
	France	864	1010	271
	Greece	287	250	173
	Italy	1157	1104	253
	Malta	165	173	26
	Spain	968	882	182
	Portugal	274	664	96
	Turkey	439	328	431

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019.* For Nordic and Eastern Region for 2010 data are from 2013.

Nevertheless, the overwhelming majority of these new channels were thematic channels. In effect, there was no new channel that has started in the last 30 years, that aimed to follow the traditional general entertainment programme diet (Papathanassopoulos, 2002).

Nevertheless, by 2015, the thematic TV market reached its saturation in most countries in all four European regions under examination. It is clear nowadays that thematic channels gave their way to the video platforms. In effect, they have been absorbed by the raising platforms sprung all over Europe.

One interesting finding is that there is no common pattern regarding TV genres, indicating that audiences' preferences may vary significantly from one country to another. For instance, in Cyprus and Malta, 40% of thematic channels are related to sports (in Cyprus 22 channels out of 52 and in Malta 10 out of 26 channels). Nevertheless, with the exception of Greece and Turkey, the number of Sport channels is decreasing, too. Film and Fiction channels are in most cases almost one in ten of the available channels. Again, Greece and Turkey excluded, Film & Fiction channels have universally decreased during the last five years. News and Business though it seemed as a promising niche in the 2000's are now a small part of the industry. In 2019, Malta did not maintain any news channels out of the 11 active back in 2015.

On the flip side, generalist channels have increased significantly in the case of Spain, Greece, and Turkey, while having a considerable presence in all countries, indicating the challenges that thematic TV is facing in 2020. France, Italy, and Portugal still have a wide variety of thematic channels based on different genres.. Children, Music, Culture & Education, Lifestyle / Travel and Entertainment channels still have some presence in these countries.

As far as it concerns the North-Western region, the number of thematic TV channels had peaked in 2015, followed by a dramatic drop until 2019, ranging from 27 percent in the UK to more than 94 percent in Luxembourg.

Looking at the distribution of the genres of these thematic channels in 2019, it seems to be most even in the UK, with the largest share of adult channels among the seven countries. Larger clusters of generalist channels were to be seen in Austria, Germany, and the Netherlands. Their numbers actually rose after the 2015 market consolidation, as in the UK, while it fell in all other countries in the region. Sports channels remained relatively strong in Belgium, Ireland and Luxembourg.

Film and fiction channels had a ten to fifteen percent share in all markets, with only the Netherlands having less. In Germany, their number continued to rise slightly after 2015. News and business channels were quite strong at the hight in 2015, but had almost or even entirely disappeared by 2019, except for the UK with 17 channels remaining, Germany with 11 and Belgium with 9.

In Eastern region there was a stable increase in the number of thematic channels in the majority of countries under examination until 2015, followed by a sharp decline in 2019. Film and fiction channels seem to prevail the thematic Tv industry of Eastern region, being pretty stable during the years. Generalist channels have increased significantly in the case of Romania (from 22 in 2015 to 54 in 2019) and to a lesser extent in Bulgaria (from 36 in 2015 to 39 in 2019), while having a considerable presence in all countries. Sports channels seem to be still resilient in the thematic TV market, although with a clear downward trend. The only exceptions seem to be Poland, where the number of sports channels has increased slightly from 27 in 2015 to 33 in 2019 and Romania (from 15 in 2015 to 20 in 2019). The biggest drop is identified within the news and business channels, where in many countries of the region the amount of the corresponding channels has decreased from double digit numbers to single digit. In Estonia, for example, the number of news and business channels has dropped from 26 in 2015 to 2 in 2019, whereas in Latvia from 23 to 3.

In Nordic countries there has been a decline in the number of thematic TV channels from 2010-2015, which resulted in a dramatic drop in 2019. It is worth noting that sports channels seem to be more resilient compared to other genres. News and business channels are under threat, while in Finland and in Norway are almost extinct (0 and 1, respectively in 2019). *Generalist channels,* with the exception of Denmark, *are in decline*, (from 40 in 2013 to 19 in 2019), while film & fiction channels still constitute a significant part of the thematic TV market. *Broadly speaking, on the production side, segmentation and fragmentation of the market would sooner or later put financial models to the test, especially in small media* *markets.* On the consumption side, IPTV and VOD are becoming established themselves in the field, driving revenues in the TV industry.

Table 9a: Film & Fiction Channels

	GEO / TIME	2010*	2015	2019
Nordic Region	Denmark	28	19	17
	Finland	36	28	11
	Sweden	28	21	14
	Norway	NA	19	12
North-Western Region	Austria	27	35	32
	Belgium	87	91	33
	Germany	27	37	39
	Ireland	44	41	11
	Luxembourg	21	20	4
	The Netherlands	21	25	9
	UK	54	51	50
Eastern Region	Czech Republic	33	38	26
	Estonia	40	33	29
	Lithuania	32	30	29
	Bulgaria	28	31	28
	Croatia	26	42	38
	Hungary	28	28	28
	Latvia	40	34	27
	Poland	49	43	42
	Romania	31	34	32
	Slovakia	20	22	19
	Slovenia	33	35	27
Southern Region	Cyprus	13	14	7
	France	57	63	31
	Greece	7	14	11
	Italy	52	44	26
	Malta	9	7	4
	Spain	35	37	32
	Portugal	31	32	19
	Turkey	21	56	59

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019.* For Nordic and Eastern Region for 2010 data are from 2013.

Table 9b: News & Business Channels

	GEO / TIME	2010*	2015	2019
Nordic Region	Denmark	20	21	6
	Finland	22	24	0
	Sweden	18	17	4
	Norway	NA	5	1
North-Western Region	Austria	18	25	1
	Belgium	94	115	9
	Germany	36	41	11
	Ireland	30	33	0
	Luxembourg	49	51	0
	The Netherlands	36	39	2
	UK	32	34	17
Eastern Region	Czech Republic	23	25	4
	Estonia	25	26	2
	Lithuania	24	36	4
	Bulgaria	36	41	11
	Croatia	25	26	5
	Hungary	23	24	5
	Latvia	23	23	3
	Poland	38	37	7
	Romania	26	25	11
	Slovakia	21	24	15
	Slovenia	22	22	7
Southern Region	Cyprus	25	31	1
	France	60	69	13
	Greece	22	25	5
	Italy	38	43	12
	Malta	10	11	0
	Spain	26	31	5
	Portugal	21	31	8
	Turkey	24	40	22

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019.* For Nordic and Eastern Region for 2010 data are from 2013.

Table 9c: Generalist Channels

	GEO / TIME	2010*	2015	2019
Nordic Region	Denmark	40	38	19
	Finland	21	21	4
	Sweden	30	28	7
	Norway	NA	9	9
North-Western Region	Austria	44	48	81
	Belgium	115	116	62
	Germany	50	46	110
	Ireland	14	12	4
	Luxembourg	51	55	3
	The Netherlands	43	43	44
	UK	17	13	25
Eastern Region	Czech Republic	33	34	12
	Estonia	25	32	14
	Lithuania	25	21	6
	Bulgaria	39	36	39
	Croatia	44	45	27
	Hungary	29	27	13
	Latvia	20	22	20
	Poland	35	34	14
	Romania	20	22	54
	Slovakia	33	34	29
	Slovenia	55	56	20
Southern Region	Cyprus	15	14	12
	France	75	75	17
	Greece	12	11	98
	Italy	27	41	27
	Malta	20	21	5
	Spain	20	15	48
	Portugal	18	25	8
	Turkey	48	64	179

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019.* For Nordic and Eastern Region for 2010 data are from 2013.

Table 9d: Sports Channels

	GEO / TIME	2010*	2015	2019
Nordic Region	Denmark	30	19	13
	Finland	29	36	19
	Sweden	39	28	23
	Norway	NA	27	18
North-Western Region	Austria	28	46	17
	Belgium	125	151	76
	Germany	29	50	60
	Ireland	27	29	20
	Luxembourg	31	49	7
	The Netherlands	29	33	17
	UK	27	51	54
Eastern Region	Czech Republic	26	28	23
	Estonia	35	35	9
	Lithuania	33	27	10
	Bulgaria	24	27	16
	Croatia	34	50	44
	Hungary	22	16	14
	Latvia	29	35	15
	Poland	49	27	33
	Romania	19	15	20
	Slovakia	19	22	21
	Slovenia	31	39	16
Southern Region	Cyprus	51	35	22
	France	56	62	32
	Greece	38	19	23
	Italy	70	57	35
	Malta	36	29	10
	Spain	31	36	24
	Portugal	36	39	18
	Turkey	22	31	40

Sources: EAO 2011, vol.2 / EAO Yearbook 2015 / EAO Yearbook 2019.* For Nordic and Eastern Region for 2010 data are from 2013.

3.2 PSB Television: Defending its position in the new television order

Despite the differences in funding models, as we will see in a greater detail in the next section, most public channels have tried to develop strategies, in order to find their position in the new television order. However, these strategies vary significantly across countries, since they are determined by the specific conditions (size of the market, technological infrastructure, tradition, history, culture, etc.) that characterize each country (Iosifidis,2007). It also comes without question that a group of public broadcasters mainly from larger European countries, but also from the Nordic Region had been better prepared to address the "digital challenge", by investing in on-line services or by building alliances with other public or even commercial channels, so to protect their common interests against the digital threat.

The appreciation of public television remains astonishingly high across the North-Western Europe, given the number of commercial competitors, of audiovisual offerings on the Internet and other forms of audiovisual entertainment, particularly gaming. The number of public TV channels was essentially unchanged between 1990 and 2010 through the region.

The number of public TV channels remains stable through time in most countries of Southern Europe, as well. Few exceptions are that of France, Italy, and Greece where the number of public TV channels more than doubled from 2005 to 2010, due to the operation of digital dedicated TV channels, since the governments used the public broadcasters as platforms for the advent of digital terrestrial television. Subsequently, several new, mostly thematic, channels started transmitting on the digital terrestrial frequencies.

In Eastern Europe, when we look at the number of public TV channels, we can see stability or increase. The biggest increase in numbers is in Poland where the number doubled from 6 to 12 in the period2010-2019. "On the European continent, stronger government control of public broadcasters is becoming a trend, notably in Eastern Europe. In Poland, the conservatives in power have been forcing the public broadcaster TVP to fall in line with the policies of the ruling PiS party since late 2015. The entire TVP executive body was replaced by party loyalists, and some 200 independent journalists left the station"[3], echoing the case of the Hungarian public media In effect, Central-Eastern Europe represents a special case in the field of public service broadcasting, since the transition to a deregulated television field was experienced by former state broadcasters as a rapid process of sudden transformation, lacking the necessary prerequisites at the institutional and technological level, against a background of unplanned dramatic emergence of competition from commercial broadcasters which undermined any prospects for the future route of public service broadcasters (Broughton Micova, 2012). The pace of transformation in Central-Eastern European markets has been regarded as faster than that of the small Western European states.

In Nordic countries there is a strong heritage of PBS TV appreciation. It is worth noting that Norway invests more than the other Nordic countries in public service provision of news, and together with Iceland, has the most dominating individual such provider, NRK1 (see Eumeplat Project- Nordic Regional Report).

From 2010 to 2015 there has been a significant increase in the number of public service national terrestrial TV channels in all Nordic countries, while from 2015 to 2019 there was a noticeable decline except for Denmark. Overall, the Nordic media market incorporates a rigorous and adaptable public service media sector whose operation and remit are highly legitimized coexisting with successful commercial media organisations (Syvertsen et al., 2014). The stable funding and the high level of trust they receive are features that have enabled them to enhance the quality of their fictional programmes, whose success has been internationally recognised through exports of drama series productions. The success of these productions is attributed to the high level of trust in public value related to the

[3] "How the world's countries provide public media," *swissinfo.ch*. Accessed at: https://www.swissinfo.ch/eng/funding-and-debates_how-the-world-s-countries-provide-public-media-/43880294.

public service media sector as well as to the policy strategy of the 1980s aimed at internationalizing the local audiovisual market (Ibrus & Rohn, 2019, p. 44).

Table 10: Number of public terrestrial TV channels

	GEO / TIME	1990	1995	2000	2005	2010	2015	2019
Nordic Region	DK	NA	NA	2	4	3	10	10
	FI	NA	NA	2	2	2	9	3
	NO	NA	NA	2	2		15	6
	SE	NA	NA	3	3	3	7	5
North-Western Region	AT	2	2	2	NA	3	7	3
	BE	2	2	NA	NA	NA	NA	NA
	BE(CFR)	NA	NA	NA	NA	3	6	3
	BE(DSG)	NA	NA	NA	NA	1	1	0
	BE(VLG)	NA	NA	NA	NA	4	4	4
	DE	6	10	14	NA	11	14	11
	IE	2	2	NA	NA	3	9	7
	LU	NA	NA	1	NA	0	0	0
	NL	3	3	18	NA	3	3	3
	UK	2	2	NA	NA	23	29	12
Eastern Region	CZ	NA	NA	NA	2	4	6	6
	EE	NA	NA	NA	NA	2	2	2
	LT	NA	NA	NA	NA	2	2	2
	BG	NA	NA	NA	2	3	4	4
	HR	NA	NA	NA	NA	4	4	4
	HU	NA	NA	NA	3	4	5	6
	LV	NA	NA	NA	NA	2	2	2
	PL	NA	NA	NA	NA	6	10	12
	RO	NA	NA	NA	2	4	2	3
	SK	NA	NA	NA	2	2	2	2
	SI	NA	NA	NA	4	5	5	5
Southern Region	CY	2	3	2	2	3	3	3
	FR	2	7	4	4	10	10	9
	GR	3	3	3	3	8	2	3
	IT	3	3	3	3	14	23	13
	MT	NA	NA	1	1	2	2	3
	PT	2	2	2	2	2	4	5
	ES	2	2	2	2	2	2	2
	TR	5	5	6	4	6	6	5

Sources: European Communities, 2003, EAO - Trends in European Television 2006, vol. 2, EAO - Trends in European Television 2011, vol. 2, EAO – Yearbook, 2010 (vol.2, p.120), 2015, 2019,2020.

While the adoption of digitalization in television around the turn of the millennium expanded the portfolio of niche channels, the development was basically controlled and actively coordinated for the purpose of transforming the Nordic public service broadcasters (see Nordic Regional Report 1). They all introduced new services online and adopted far- reaching changes both to diffusion and content. The concept of "public service broadcasting" has since been applied as an umbrella term that spans television and radio as well as online services (ibid, p.22).

3.2.1 PSB and public funding

As Iosifidis (2012, p.6) argues the justification of regulatory intervention in a free media market on the premise of public interest is a thorny issue. Public funding of pubcasters supports the production and distribution of content that would not be appealing to commercial broadcasters, i.e., educational content, pluralistic, aiming at informing public opinion, etc. Or put it differently, public funding reduces dependence on advertising, thus, eliminating the competition with commercial broadcasters, giving to public broadcasters the opportunity to employ a differentiated programme strategy.

Most of Public Service Broadcasters rely on a mixed model of revenues from licence fees, advertising and in some cases of direct funding from the state's budget.

From 1990 to 2019 in North-Western region the broadcast fee rose roughly in line with the inflation rate. The fee was abolished in the Netherlands in 2000 and in Belgium in 2002, where PSB since then is being funded from the state budget. The rate of the fee which covers both radio and TV ranges from 160 EUR in Ireland to 300 EUR in Austria.

Comparing the amount of money, which public audiovisual media get from government is not practical if we do not pay attention to the specific differences in each country. Although, comparing what percentage of the funding came from government will provide a clearer picture of the situation. Public media in Bulgaria and Slovakia receive the biggest percentage of their incomes from their governments and that percentage is over 90%. In

Poland that percentage is the lowest during the aforementioned period but it has been growing during the years. Due to the economic crisis and the following decrease of the advertising market, states had admitted to limiting PSB revenue coming from advertising, in favour of the commercial channels. That is a controversial decision but is a way of stimulating the free media market. Between the lowest percentage of 18,7% in Poland in 2011 and the highest of 94,9% in Slovakia in 2013 there is a big opportunity for better models, as public broadcasting stations play an integral role in democratic societies and in supporting the production and distribution of content that would not appeal to commercial broadcasters.

In 2019, households in European Broadcasting area (EBU) countries with a license fee paid an average of EUR 121 (and a higher EUR 135 in EU countries). This was €0.33 per day per household in the European Broadcasting area (€0.37 in the EU)[4]. From the data we can see that in the region, fee for public television is under the average for the EU, except for Croatia, where the fee is higher.

With the notable exceptions of Spain and Cyprus, all countries of the Southern European model rely on licence fees. However, the cost of a fee is relatively low. The most expensive licence is found in France (€139) and the lowest in Portugal and Greece (€36). The fee is in some cases collected through the electricity and gas bills, as in the case of Italy, Greece, Portugal and Turkey. In the case of Spain instead of a licence fee, there is a special tax on income.

Perhaps the most interesting correlation is the one between the cost of the TV licence and the public television share. More specifically, as reported by EBU (2020b) and verified in the case of the Southern European model, countries with higher licence fees receive higher shares of public television ratings. Indeed, in France and Italy where the licence fee is higher (still remarkably lower than pay – TV subscriptions), public channels perform better

[4] EBU, EBU-MIS_Licence_Fee_2020_public_.pdf, accessed on 13.08.2021.

receiving more than 30% in ratings. This finding should not strike one as odd, since better funding tends to result in better quality of content.

Table: TV Licence fee (in EUR)

	GEO / TIME	1990	1995	2000	2005	2010	2015	2020
Nordic Region	Denmark	161	222	280	274	304	NA	258.10
	Finland	159	151	NA	194	231	NA	NA
	Sweden	155	154	198	213	202	NA	NA
North-Western Region	Austria	169	212	NA	NA	277	NA	300.03
	Belgium	147	186	190	0	0	0	0
	Germany	76	100	105	201.8	215.8	NA	210
	Ireland	NA	76	89	155	160	NA	160
	Luxembourg	0	0	0	0	0	0	0
	The Netherlands	NA	90	0	0	0	0	0
	UK	NA	104	171	126.5	145.5	NA	171.55
Eastern Region	Czech Republic	NA	NA	28.75	32	NA	NA	84.15
	Estonia	NA	NA	0	NA	NA	NA	0
	Bulgaria	NA	NA	0	NA	NA	NA	0
	Croatia	NA	NA	91.18	NA	125*	NA	129.41
	Hungary	NA	NA	32	40.1	NA	NA	0
	Latvia	NA	NA	0	NA	NA	NA	NA
	Poland	NA	NA	NA	44.5	47.4*	NA	63.39
	Romania	NA	NA	NA	12.1	12.1*	NA	NA
	Slovakia	NA	NA	21.54	NA	144*	NA	55.68
	Slovenia	NA	NA	126.4	NA	NA	NA	153
Southern Region	Cyprus	NA	NA	NA	NA	NA	NA	0
	France	80	103	114	116.5	121	NA	139
	Greece	NA	0	0	NA	50	36	36
	Italy	82	74	91	99.6	110.5	NA	90
	Malta	NA	NA	NA	NA	NA	NA	NA
	Portugal	19	0	0	19.6	21	NA	36.25
	Spain	0	0	0	NA	NA	NA	NA

(+) Proportional amount based on volume of electricity consumed

Sources: North-Western Region-1990-2000: European Communities (2003), 2010: EAO Yearbook 2011 vol. 2, p. 32, 2019: EBU-MIS, Licence Fee 2020. Southern Region:1990-1995: European Commission (2003). Cinema, tv and radio in the EU. Statisticς on audiovisual services. Data 1980 – 2002, 2000-2010: EAO - Trends in European Television 2006, vol. 2, -2019: EAO, 2011 & EBU, Licence Fee Media Intelligence Service, November 2020. Eastern Europe: EAO – Trends in European Television 2006, vol.2, EAO – Trends in European Television 2011, vol.2, EAO – Yearbook 2015, 2019. * Data for 2009.

During the last decade, all Nordic countries have chosen to replace the licence fee with a tax model, in order to develop a long-term and technology-neutral financing policy for public service media (Harrie, 2019). The first country to move away from the traditional licence fee was Iceland, introducing a public service tax in 2009, followed by Finland in 2013. And now, the other countries are following these steps, as well. Despite the similarities, there are also differences between the models, regarding the form of the tax. For example, Iceland and Denmark have adopted a model which is independent of income, while the other countries have opted for an income-related tax (Harrie, 2019).

Public funded services are a valuable contribution to the television ecosystem, since they offer a greater variety of choices to viewers, programme choices that commercial channels may not provide to them. Or this used to be the main argument for the support provided to the PBS. However, in the current TV ecosystem, characterized by a variety of channels and the rise of video on demand culture the justification behind the foundation of PBS funding is under revision (Lotz, Potter & Johnson, 2021, p.16).

Due to the digitization of communications, the traditional argument about the scarcity of broadcasting frequencies on which the public type of funding of public broadcasting was legitimised has now been defeated and therefore it is necessary to formulate an alternative argumentation. Overall, the sustainability of public service broadcasting has proven a perennial issue, shared by all regions, with challenges succeeding one another from time to time. The major ones concern the phenomenon of commercialization of the communication field starting in the 1980s, the digitisation of communications, which has existed since the 1990s, as well as the problem of excessive politicisation.

This review indicates that public broadcasters in Europe are going through probably the most important period in their long and distinguished history as a result of fundamental changes to media environments and to an unprecedented technological development. This is because, on the one hand, the European audiovisual market is expanding tremendously, and on the other, platformization changed the attitudes of the viewers and the TV system at the same time. In this increasingly competitive digital market, public service broadcasters have a go a step further adjusting themselves in the new era.

3.3 Number of commercial TV channels

It is well known that TV still plays a major role in shaping our cultural identity, by determining not only what we see, but also the way we see it. Although,, on the supply side, one notices substantial differences across the European regions under examination.

For example, the media market of the Southern European model varies greatly in size and dynamic. Namely, the model consists of large markets of France, Italy, Spain and Turkey, followed by the medium but poor markets of Portugal and Greece and small but rather rich markets of Cyprus and Malta that mostly import their content. However, following deregulation all these markets experienced a tremendous increase in their number of free commercial TV channels up to 2010. Still, this trend differs greatly from one country to another. The biggest increase is noted in Italy with 79 commercial channels in 2010, even though PTV received more than 40% of audience share at the time (see Southern media report).

In the North-Western region, most commercial TV providers distributed their programmes over satellite or cable and peaked in 2015. Some successfully applied for a terrestrial license, the number of which increased by the switch-over from analogue to digital broadcast (DVB-T) in the early 2000s. These channels also peaked in 2015, with by far the highest number in the UK (91) followed by Germany (27) and the Netherlands (15). Even though the switch-over from DVB-T to DVB-T2 from 2017 again increased the number of available terrestrial channels, commercial interest waned, indicating a consolidation of the market.

In the Nordic countries the number of commercial TV channels increased from 2005 to 2015 and then a significant decrease took place from 2015 and onwards. The most distinctive case is that of Finland where in the period 2005-2015 there has been a considerable increase in the number of channels operating according to commercial standards (from 2 in 2005 to 62 in 2015), followed by a severe decline over the next years (from 62 in 2015 to 27 in 2019). Moreover, another case that stands out is that of Denmark where in 2019 the commercial TV sector consists of only one nationwide commercial TV channel.

Table 12: Number of commercial terrestrial TV channels

	GEO / TIME	1990	1995	2000	2005	2010	2015	2019
Nordic Region	DK	NA	NA	NA	0	NA	2	1
	FI	NA	NA	NA	2	NA	62	27
	SE	NA	NA	NA	1	NA	28	18
	NO	NA	NA	NA	1	NA	13	11
North-Western Region	AT	0	0	0	1	4	12	4
	BE	2	3	0	2	NA	NA	NA
	BE(CFB)	NA	NA	NA	NA	0	0	0
	BE(DSG)	NA	NA	NA	NA	0	0	0
	BE(VLG)	NA	NA	NA	NA	0	1	1
	DE	4	20	60	0	22	27	6
	IE	0	0	1	1	1	4	3
	LU	1	1	1	1	3	6	2
	NL	NA	4	0	0	8	15	9
	UK	NA	NA	3	2	67	91	85
Eastern Region	CZ	NA	NA	NA	2	12	23	28
	EE	NA	NA	NA	NA	13	20	22
	LT	NA	NA	NA	NA	10	12	13
	BG	NA	NA	NA	14	26	32	31
	HR	NA	NA	NA	NA	2	18	13
	HU	NA	NA	NA	17	32	48	48
	LV	NA	NA	NA	NA	8	15	22
	PL	NA	NA	NA	NA	17	88	93
	RO	NA	NA	NA	16	21	66	74
	SK	NA	NA	NA	3	5	8	7
	SI	NA	NA	NA	2	15	83	83
Southern Region	CY	NA	3	5	3	15	7	12
	FR	NA	30	3	3	23	29	24
	GR	2	4	5	8	7	6	7
	IT	NA	9	7	6	79	134	128
	MT	NA	NA	9	NA	12	14	6
	PT	NA	2	2	2	2	2	2
	ES	NA	11	3	4	27	22	22
	TR	NA	23	50	NA	23	20	41

Sources: European Communities (2003), EAO - Trends in European Television 2006, vol. 2, EAO - Trends in European Television 2011, vol. 2, EAO – Yearbook, 2000, 2010 (vol. 2.pdf, p.120), 2015, 2019.

In Eastern Europe, the number of commercial TV channels has remained quite stable, when comparing the relevant trends between 2015 and 2019. Of course, the attention should be drawn to the remarkable growth taking place from 2005 to 2015, which is the period in which most of the countries became part of the EU broadcasting market and new players appeared in the broadcasting field. From 2015 to 2019, in Croatia, Slovakia and Bulgaria there is a slight decline, whereas Slovenia and Hungary appear no change in the commercial broadcasting sector. On the contrary, in all other countries there is a slight increase in the number of commercial television channels with the biggest one taking place in Romania - with 8 new channels in 2019. Although the corresponding numbers in the previous periods are missing, the particularity of Central-Easter European countries lies in that television programming was subject to a process of internationalisation through imports of series and films mainly from the West, including the USA, both in the period before and after the fall of Communism (1989). To this trend was exposed many of these countries' markets, albeit to different extents during the various time periods (Štětka, 2012).

3.4 Digital threats/multi-channel and multiplatform environment

Satellite technology brought about significant changes in the media landscape, since it paved the way for the internalization of the TV market (Lotz, Potter, & Johnson, 2021). It is not a coincidence that 1990s constitutes a period of growth for cable subscription-based television both in North-Western region and in Southern region of Europe. In the former case the media markets that stand out in terms of subscriptions numbers is Germany, the Netherlands and Belgium, while in the latter case distinctive markets of increasing trends are mainly that of France and Spain.

Southern European media systems in fact were deregulated in late 1980s, when satellite technology arrived. In the Nordic countries, by contrast, the public broadcasting monopolies tried to maintain the old order, backed by determined national policymakers (see market report for the Nordic region). Even as the first commercial terrestrial television station could open in 1991, competition was firmly restrained. Satellite and cable TV became increasingly accessible, however, making the public stance unsustainable. All countries under examination, with the exception of Finland, present a slight drop in the number of cable TV subscriptions, while IPTV from 2010 and onwards seems to follow a steady growth (with the exception of Norway).

Table 13: Total Pay TV subscribers (in thousands)

	GEO/ TIME	1990	1995	2000	2010	2015	2019	Change % 2019/15
North – Western Region	Austria	3 000	51 800	NA	1 494	1 983	2 251	+13.51
	Belgium	103 300	371 600	NA	4 409	4 609	4 667	+1.27
	Germany	86 000	1 011 900	NA	21 578	24 702	25 481	+3.15
	Ireland	NA	NA	NA	1 120	1 140	1 137	-0.25
	Luxembourg	NA	NA	NA	147	148	153	+2.9
	The Netherlands	78 000	340 000	NA	7 503	7 528	7 279	-3.31
	UK	930 000	9 095 000	NA	14 129	16 348	16 190	-0.97
Nordic Region	Denmark	25	90	77.88	2 267	2 400.9	2 085.3	-13.1
	Finland	21	65	77.88	1 775	2 163.3	2 422.2	11.97
	Norway	20	135	157.76	2 125	2 231.9	2 190.7	-1.84
	Sweden	NA	496	134.52	4 192	5 218.2	5 216.7	-0.03
Southern Region	Cyprus	NA	NA	NA	81	128.6	153.1	+19
	France	3 024	5 036	NA	19 613	24 815	26 229	+ 5.7
	Greece	2	NA	NA	485	976.6	1 067	+9.3
	Italy	NA	800	NA	10 246	6 661	5 278	-20.8
	Malta	NA	NA	NA	144	149.4	172.7	+15.6
	Portugal	NA	NA	NA	2 670	3 523	4 077	+15.7
	Spain	88	1 287	NA	4 465	5 388	6 641	+23.3
	Turkey	NA	NA	NA	4 460	5 621	6 911	+23

Sources: Ampere Analysis in EAO Yearbook 2020

Following the digitalisation of television around the turn of the millennium, public service providers introduced new services online and adopted far-reaching changes both regarding diffusion and content.

In Southern Europe, from 1995 to 2000 there was an increase in Pay TV operators. However, pay TV penetration can be split into two main groups: a) countries with high household penetration as in the case of France, Italy, Portugal and Malta with above than

40% of penetration by 2010 and, b) countries with lower Pay TV household penetration such as Spain, Turkey and Cyprus of around 20% to 25% by 2010. Greece scores the lowest regarding Pay TV with only 11% of households having a subscription by 2010 (EAO, 2011). However, Pay TV subscriptions showed an upward trend from 2015 to 2019.

In this region, broadcasts relied mostly on satellite transmission, therefore in most cases cable remained underdeveloped. Perhaps, the most prominent challenge was the fragmentation of infrastructure controlled by the public sector in each country. The result was a highly concentrated market in most of the countries. Following an acquisition strategy of seven companies by 2010 the cable sector in France was in the hands of Numéricâble. In Turkey cable remained in the hands of Türksat national operator, while at the same time in Italy and Greece there were no cable networks whatsoever.

Pay TV is mostly connected to linear transmission, while non – linear to VoD services. However, Pay AV services penetration (pay TV and VoD) will continue to grow mostly due to IPTV increasing popularity. According to the EAO (2020), IPTV was the fastest growing distribution network during 2014 – 2018, mainly at the expense of cable network which saw its market share decreasing by four points during the same period. Further growth in IPTV segment will be supported by IPTV service providers offering their services as part of multiplay, for now mostly triple – play, service bundles with flexible subscriptions and packages.

The small and densely populated countries Belgium, the Netherlands and Luxembourg have the most extensive cable infrastructure in the North -Western region. Yet, in the Netherlands cable subscription rate has been decreasing since its peak in 2000.

Germany is the largest European cable television market in the region, although after 2010 there is a drop in the number of cable connections. In the UK, satellite (44.8% plus 39.5% pay DTH) and DTT (42.4%) were the most important platforms for watching TV in 2011, while cable homes (15.5%) were also almost 100% digital.

Table 14a: Cable TV subscriptions (HH in thousand), analogue and digital

	GEO/ TIME	1990	1995	2000	2005	2010[b]	2015[c]	2019[c]	Change % 2019/15
Nordic Region	Denmark	NA	NA	NA	1 508	1 562	1 501	1 229	-7
	Finland	NA	NA	NA	1 220	1 374	1 557	1 786	5.1
	Norway	NA	NA	NA	934	945	891	866	-1.1
	Sweden	NA	NA	NA	2 905	3 387	3 118	2 996	-1.1
North – Western Region	Austria	280	1 080	1 130	1 352	1 349	1 234	1 245	+0.89
	Belgium	3 370	3 630	4 050	4 009	3 500	3 009	2 839	-5.65
	Germany	8 100	15 800	20 620	20 291	20 626	18 360	17 063	-7.06
	Ireland	390	460	660	576	490	366	280	-23.5
	Luxembourg	100	130	120	152	122	95	80	-15.79
	The Netherlands	4 980	5 770	6 390	6 021	5 334	4 450	4 060	-8.76
	UK	160	1 220	3 550	3 310	3 778	3 727	3 687	-1.07
Eastern Region	Czechia	NA	NA	NA	818	800	875	817	-6.63
	Estonia	NA	NA	NA	220	208	213	203	-4.69
	Lithuania	NA	NA	NA	383	437	398	332	-16.58
	Bulgaria	NA	NA	NA	1 280	904	634	564	-11.04
	Croatia	NA	NA	NA	133	147	156	177	+13.46
	Hungary	NA	NA	NA	2165	2004	1893	1951	+3.06
	Latvia	NA	NA	NA	320	315	215	204	-5.12
	Poland	NA	NA	NA	4380	4480	4600	4426	-3.78
	Romania	NA	NA	NA	3550	3570	4560	5430	+19.08
	Slovakia	NA	NA	NA	743	874	320	327	+2.19
	Slovenia	NA	NA	NA	303	260	272	250	-8.09
Southern Region	Cyprus	NA	NA	NA	NA	NA	48	62	+29.2
	France	520	1 890	3 040	3 225	3 421	1 593	2 306	+44.8
	Greece	0	0	10	0	0	0	0	0
	Italy	0	320	90	0	0	0	0	0
	Malta	NA	NA	NA	99	83	79	102	+29
	Portugal	0	60	930	1 395	1 484	1 395	1 515	+8.6
	Spain	110	400	880	1 578	1 508	1 382	1 849	+33.8
	Turkey	NA	NA	NA	1 250	1 230	1 161	1 279	+10.2

Sources: b. IHS, European Audiovisual Observatory, Yearbook 2014, c. Ampere Analysis, IHS, OBS in EAO Yearbook 2020, Highlighted data for 2007 and 2011.

IPTV shows a fast -growing trend in all countries under examination, with a significant increase between 2010-2015.

Table 14b: OTT/IPTV (HH in thousand)

	GEO/ TIME	2006	2010	2015	2019	Change % 2019/15
Nordic Region	Denmark	4	218	433	548	+4.2
	Finland	70	170	380	467	+2.0
	Norway	60	225	502	650	-4.7
	Sweden	52	532	952	1 338	+4.3
North – Western Region	Austria	9*	151	269	324	+20.45
	Belgium	137	839	1 414	1 630	+15.28
	Germany	3	1 233	1 720	2 659	+54.59
	Ireland	NA	NA	45	75	+66.67
	Luxembourg	NA	14	53	73	+37.74
	The Netherlands	NA	302	2 014	2 421	+20.21
	UK	NA	583	2 884	3 003	+4.17
Eastern Region	Czechia	16	129	202	429	+112,4%
	Estonia	35	125	174	212	+21.8
	Lithuania	NA	71	182	289	+58.8
	Croatia	6	319	387	437	+12.9
	Hungary	1	139	569	815	+43.2
	Latvia	2	56	204	239	+17.2
	Poland	5	124	384	864	+125%
	Slovakia	1	104	215	282	+31.2
	Slovenia	29	199	279	360	+29%
Southern Region	Cyprus	21	62	81	91	+12.3
	France	4 627	12 177	17 441	19 060	+ 9.3
	Greece	NA	55	75	208	+177.3
	Italy	201	651	76	208	+173.6
	Malta	NA	NA	19	57	+200
	Portugal	1	648	1 518	2 098	+38.2
	Spain	398	858	2 896	4 237	+46.3
	Turkey	NA	NA	533	1 497	+180.8

Sources: Ampere Analysis, OBS in EAO 2020 Yearbook

The region of Eastern Europe has historically been dominated by local players and traditional linear TV, but *Digital TV* Research predicts that the prevalence of major US players will ultimately drive Eastern Europe to follow the west regarding SVODs. But until that moment comes, cable TV remains the most used form of watching TV. In the same region, the level of digitalization is constantly growing, with more than half countries surpassing 50%, while in Slovenia digitalisation rate is up to 90.3%. These trends are indicative of the considerable change taking place in the media market, framed by new on-demand services, which are part of the culture of the new, digital generation, stepping firmly on the media industry in Eastern Europe (see Media Market Report for Eastern Europe).

3.5 Advertising Market

Considering the popularity of TV in the regions under examination the fact that TV advertising expenditure still constitutes an integral part of the total advertising expenditure shouldn't come as a surprise.

In the Southern European Region, we can distinguish between two different groups; a) one consisting of the large market where TV advertising share actually decreases from 2005 to today, even though change rate has been in most cases small and, b) the other, from small markets where advertisers, regardless of the rise in new technologies and personalized services provided, continue to invest heavily in TV advertising, even more than 15 years ago. Therefore, the TV advertising share in Cyprus was 73% in 2019, in Portugal 72.8% and in Greece 55.5% of the total advertising expenditures.

According to the EAO (2020) TV advertising remains resilient in countries with lower advertising expenditures per capita. In effect, TV advertising expenditure has remained stable over the last thirty years throughout the entire North-Western region, with a slight peak around 2000, in contrast to the dramatic decline that took place in the ad money going to newspapers and magazines after 2010.

In all countries in Eastern Europe, the percentage of ad money going to TV is around 50% of the market, with a downward trend. From this trend, Bulgaria, Romania, Slovakia and Slovenia are excluded, whereas Bulgaria is the only country in the region in which advertising expenditure in TV is above 70%. This can be explained by the dramatic situation in the country's newspaper market, as nearly all advertising money are directed to TV.

Table 15: TV advertising expenditure (%)

	GEO / TIME	1990	1995	2000	2005	2010	2015	2019
Nordic Region	Denmark	NA	NA	NA	20.3	19.3	16.8	14.8
	Finland	NA	NA	NA	19.9	21	22.3	16.5
	Sweden	NA	NA	NA	20.9	22.6	21.7	16.8
	Norway	NA	NA	NA	23.3	20.2	23.4	19.3
North-Western Region	Austria	27	23.3	23.6	23.5	22.7	26.6	27.3
	Belgium	NA	35.1	39.6	35	36.5	31.6	27
	Germany	13.9	26.6	20.2	26.5	23.8	25	21.7
	Ireland	28.5	32.8	34	22	25.9	24.1	18
	Luxembourg	NA	5.3	10	NA	9.3	8.5	7.5
	The Netherlands	16.9	23.9	34.1	22	22.1	24	20.4
	UK	26	28.5	27.4	30.1	30	27.9	18.8
Eastern Region	Czechia	NA	NA	NA	47.9	39	36	32
	Estonia	NA	NA	NA	16.7	32	30	27
	Lithuania	NA	NA	NA	42.6	47	46	44
	Bulgaria	NA	NA	NA	71.6	74.4	81	86
	Croatia	NA	NA	NA	51.5	47	51	44
	Hungary	NA	NA	NA	27	33	30	28
	Latvia	NA	NA	NA	36.3	44.8	43	41
	Poland	NA	NA	NA	51.5	46.7	41.4	37
	Romania	NA	NA	NA	65.2	67.6	67.3	64
	Slovakia	NA	NA	NA	68	42	49.5	68
	Slovenia	NA	NA	NA	31.9	31.8	58.8	57.8
Southern Region	Cyprus	NA	NA	NA	59	69	70	73
	France	NA	NA	30.1	34.2	31.3	28.7	25.7
	Greece	44.5	63	44.1	31.4	32.9	53.1	55.5
	Italy	47.7	NA	58.2	55.9	52.4	48	42.8
	Malta	NA	NA	NA	30	28.4	39.3	44.3
	Portugal	44	NA	51.1	60.2	65.2	63.4	72.8
	Spain	30.1	39.5	41.6	44.7	42.6	39.4	29.2
	Turkey	NA	NA	NA	50.7	51.3	49.2	46.1

Sources: For North Western Region data for 1990-2000: European Communities (2003). For Southern Region data for years 1990 &1995 come from WAN,1991 & WAN,1996, respectively. 2001 – 2019: Warc © European Audiovisual Observatory /

In Nordic countries, in contrast to the newspaper and magazine where market advertising expenditure have been subjected to sharp reductions, the level of expenditures allocated to advertising in TV has remained stable.

A likely reason is that some financially strong companies, in any market, continue to see value in reaching some consumer segments by advertising at commercial TV programme breaks. However, recent data reveal a trend of growing investment in non-linear TV and video, on behalf of advertisers, , spending almost as much to this segment of the market, as they do on traditional linear TV (IAB EUROPE, 2022). TV stations will have to find ways to compete against new audio-visual platforms which attract more and more of the attention of advertisers all over the world. But here, Lotz, Potter and Johnson (2021) make a crucial point by trying to identify the real competitor of TV stations; As they explain (2021, p.13):

In the advertising market, video is used to gather attention, but it is attention that is traded for advertiser spending. In contrast, in the purely subscriber-funded market, video is traded for money from subscribers (…). As a result, ad-supported television has been most affected by changes in the market for selling attention (not by SVODs), in particular the expansion in competition for advertiser dollars introduced by various digital advertising tools that are often conflated as 'digital' 'online'.

The "digital disruption" creates new challenges in the national TV markets and therefore it demands a new strategic response from TV providers, if they aspire to keep their dominance in specific audiences and thus, safeguarding their viability in the future.

4 Towards a new model of ownership concentration…

The liberalization of the rules governing the media systems in general and television sector in particular around the globe in the last three decades has facilitated, if not accelerated, the trend toward the creation of larger and fewer dominant groups in the entire media sector. *As a result, the media industry has become more concentrated and populated by* *multimedia conglomerates*. Nevertheless, the pattern around Europe, as in the past, is not uniform (for a more detailed report on media ownership in Europe please see WP4).

By and large, it is evident that media ownership has taken on many forms across Europe: state ownership, public ownership, party ownership, family/private ownership, corporate ownership, etc. *As digitalisation has disrupted media markets on a very large scale and in almost all aspects of production, content, distribution, and reception, it could be argued that it has offered new access possibilities in an already highly concentrated European media market*. On the other hand, digitalization and media convergence have offered the 'best conditions' for the erosion of the so-called 'legacy' or 'mainstream' media and most importantly their relevant business models resulted – in almost all European countries, north, central, eastern and southern Europe. As the European Union mentioned in its report on the implementation Audiovisual Media Services Directive (CEC, 2021), globalisation and digitalisation have led to further media concentration. In effect, technological developments hand-in hand to global economic processes have affected the status of media ownership in Europe. *The so glorified and celebrated media tycoons of the past (Maxwell, Berlusconi, Kirch, Hersant, even Murdoch) have either disappeared or they don't have the media power of the past.*

Initially in Europe, the break-up of state monopolies and the entry of a plethora of new private-owned channels changed completed the structure and the performance of the industry. The restructuring of the Western European television systems has brought about an increase in the number of private channels in operation and, consequently, has changed the relationship between the private and the public broadcasting sector. For example, at the end of 2010 the number of channels in Europe was 9,893 compared to 220 in 1996 and less than 90 in 1989. Moreover, only 12% of the TV channels are public (EOA, 2011). Almost a decade later, at the end of 2019, 11,418 TV channels were available in Europe,1 4 757 of them local. (EOA, 2021)

In the last two decades one also witnesses various waves of mergers and acquisitions in the media sector and subsequently in the TV landscape (Sanchez-Tabernero, 1993; Albarran, 2002; McChesney, 2004; Bagdikian, 2004). According to the European

Audiovisual Observatory (EAO) 62% of the market was controlled by 15 companies in 2006. The percentage increased further, up to 67% in 2010, indicating growing concentration of ownership at the global level (EAO, 2011). But things have changed dramatically since then. As the European Audiovisual Observatory observes five out of the world's 12 largest audiovisual groups in 2016 no longer appear in the 2019 top 12 ranking… [while the audiovisual market is] triggered on the one hand by the need for telecommunications groups to diversify their activities and on the other by the challenge of responding to competition from Internet players (such Netflix, Amazon Instant Video, and Google's YouTube. The latter have started dominating the media markets as well (EAO, 2021, p. 52).

In Europe, the revenues of the top 100 companies active in the European audiovisual market, like Vivendi (France), the RTL Group (Luxembourg/Germany), ProSiebenSat (Germany), ITV (United Kingdom), Mediaset (Italy) and the public broadcasters of big European countries: ARD (Germany); the BBC (United Kingdom); France Télévisions (France), and RAI (Italy) grew by 4.6% annually between 2014 and 2019 (EAO, 2021, 54). As the European Audiovisual Observatory (2021, p. 54) notes:

> This is faster than the European audiovisual market more broadly (1.6%), but significantly slower than the top 50 companies worldwide (15%). In Europe, after the US, leading US-based InternetInternet players, the so-called platforms, have outperformed their Europe-based competitors with 11.6% growth per year. Netflix, Disney, HBO, Amazon Prime, or Apple TV seem to become the new dominant players on the European media or communications landscape.

The Covid-19 pandemic and the subsequent lockdowns (stay safe-stay home) seem also to have facilitated the increasing important of these TV streaming services all over Europe from North to South and from West to East.

It is yet to be seen whether this OTT/streaming/platforms invasion will not only affect the European media landscape in terms of ownership pluralism but also in terms of content pluralism, business models and entry of new or old local players in the new media field. Perhaps, we are entering a new model of ownership concentration which affects all sectors and all aspects of the media business in Europe.

Content pluralism might be one of them. It is also questionable whether the past strategy of media companies to merge or vertically integrate makes sense any longer since US media players have become on a global scale.

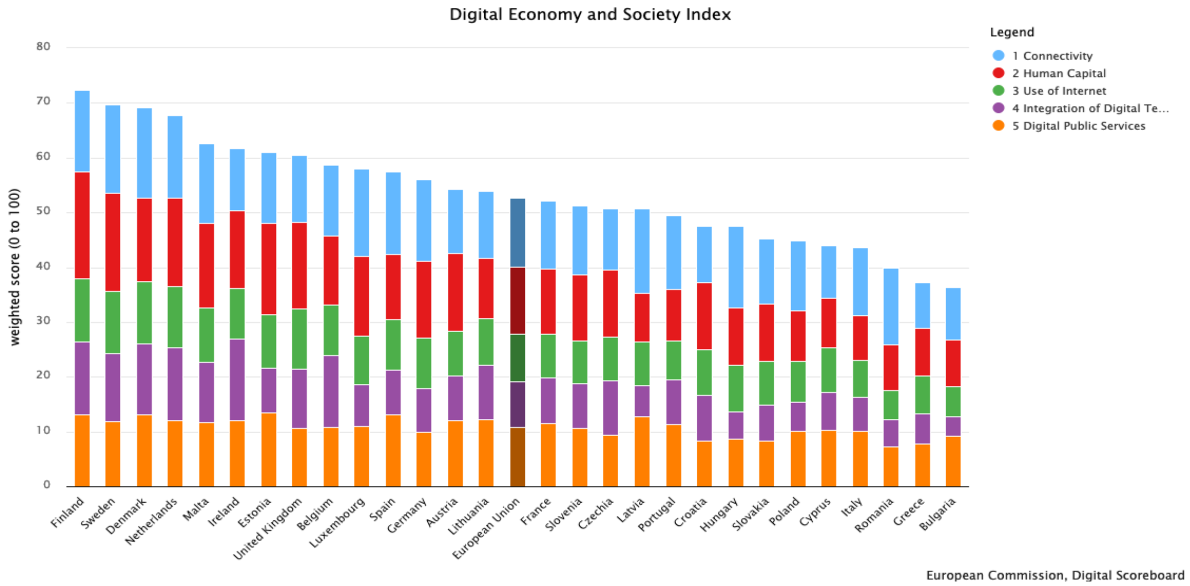
It seems it is the right time for the European Union to intervene by asking the new platforms to adhere not only to the Audiovisual Media Services Directive, but also to reframe according to the new developments. For example, the EU Regulation, 2018/1808 foresees that provider of on-demand audiovisual services should respect at least a quota of 30 per cent for European works on their online catalogues. But it is questionable whether this case be implemented. Perhaps, a quota similar to the one that applies to traditional TV services might be more applicable.

5 Steady increase of digital connectivity

How successful is a society in mastering the different dimensions of digitalization? In their study, Perusko et al. (2015) used indicators such as broadband penetration, which is considered as a precondition for the emergence of a digital economy, and smart phone penetration to evaluate the digital advancement of media systems and subsequently developed a model of categorization.

Similarly, the European Commission, as part of its Digital Decade programme, has devised the Digital Economy and Society Index (DESI). The Digital Economy and Society Index is a composite index that measures the progress made by EU Member States towards a digital economy and society, bringing together a set of relevant indicators. It consists of weighted scores (0-100) of five dimensions: connectivity, human capital, use of Internet, integration of digital technology and digital public services (which, alas, do not include PSM). In the overall composite index for 2020, the Nordics are clearly leading the pack, followed by the North-Western Region (see chart 2).

Chart 2: Digital Economy and Society index



Source: EC, Digital Economy and Society Index (DESI): DESI composite index

The role of the media is crucial for the establishment of a "knowledge society", since the new technologies have made it easier for the public to gain access to information and therefore, cultivating a two-way procedure of processing and interpreting information.

The Nordic countries have an outstanding performance on indicators at the core of the knowledge society, such as R&D expenditures relative to GDP, patents, or training. They similarly excelled in ICT from early on, as reflected in Internet usage, broadband penetration, mobile penetration, mobile networks, e-commerce, hardware installation in homes, and public services on-line (OECD, 2016, 2019 and 2020). In due time, the diffusion of ICT accelerated worldwide and the standing of the Nordic countries in ICT is no longer exceptional, although still generally near the world's best (for a thorough analysis see Nordic Regional Report 1, pp.26-30). As we can see in tables 17 & 19, Nordic countries as a total have the best performance in the relevant indexes, proving that the transition to the digital society has already been achieved. The fact that Scandinavian countries comprise a cluster characterized by higher scores of digital media penetration among their European counterparts is also confirmed by previous research (see Perusko et al., 2015).

Table 16: Percentage of households with broadband Internet (%)

	GEO/TIME	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
	EU27 (from2020)	70	74	79	81	82	85	87	88	90	92
	EU28(2013-2020)	72	76	80	82	83	86	88	89	91	NA
Nordic Region	Sweden	91	92	93	90	91	94	95	92	96	94
	Denmark	90	92	93	93	92	94	97	93	95	95
	Norway	92	93	94	93	97	97	97	96	98	96
	Finland	84	87	89	90	90	92	94	94	94	96
	Iceland	92	93	95	93	NA	NA	96	97	95	97
North – Western Region	Austria	70	74	79	81	82	85	87	88	90	92
	Belgium	72	76	80	82	83	86	88	89	91	NA
	Germany	74	80	82	81	85	88	89	89	91	91
	Ireland	73	73	77	79	76	82	83	83	86	90
	Luxembourg	79	NA	86	87	88	90	93	92	95	95
	The Netherlands	73	NA	76	85	88	89	92	94	92	92
	UK	66	NA	72	92	93	95	95	95	97	93
Eastern Region	Czechia	78	:	:	:	79	:	:	:	83	85
	Estonia	65	:	:	:	87	:	:	:	90	89
	Lithuania	56	:	:	:	67	:	:	:	81	82
	Bulgaria	40	:	:	:	59	:	:	:	75	79
	Croatia	56	:	:	:	76	:	:	:	81	85
	Hungary	59	:	:	:	75	:	:	:	86	87
	Latvia	59	:	:	:	74	:	:	:	83	88
	Poland	61	:	:	:	71	:	:	:	83	90
	Romania	31	:	:	:	65	:	:	:	82	84
	Slovakia	55	:	:	:	78	:	:	:	80	85
	Slovenia	67	:	:	:	78	:	:	:	89	90
Southern Region	Greece	84	85	88	95	95	96	98	97	98	97
	Spain	80	85	87	87	89	91	94	95	95	NA
	France	75	81	81	80	79	82	84	85	88	NA
	Italy	55	57	71	73	77	79	83	85	87	88
	Cyprus	60	NA	69	71	75	76	84	89	92	93
	Malta	76	74	79	76	79	82	84	84	85	89
	Portugal	65	69	69	71	75	80	83	84	84	87
	Turkey	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

Source: Eurostat

In North Western European Region, there is strong evidence of digitization as well, with high scores of broadband Internet penetration among the regions' households (95% of households in Luxembourg in 2020 and 93% in the UK in 2020 according to data from Eurostat). Austria has the best performance on mobile broadband subscriptions index, with 129.92 mobile broadband subscriptions per 100 inhabitants, followed by the

Netherlands with 128.38 mobile broadband subscriptions per 100 inhabitants and Luxembourg (121.76 mobile broadband subscriptions per 100 inhabitants).

In the Southern European region, broadband Internet penetration has followed a considerable growth in the last decade, with Greece presenting the highest development (in 2020, 97% of Greek households have broadband Internet connection -well above the EU average-). Overall, it comes as a surprise that smaller countries and weaker economies like Cyprus & Malta have an exceptional performance in this indicator (93 % & 89% of households, respectively, having broadband Internet in 2020), while countries with advanced economy as Italy and France seem to follow broadband Internet penetration with a slower pace. A more detailed analysis of the broadband Internet penetration, according to fixed broadband and mobile broadband subscriptions per 100 inhabitants, clearly manifests that the mobile broadband Internet has taken the lead in the national markets under examination. Cyprus has the best performance in this indicator with 118.0 mobile broadband subscriptions per 100 inhabitants in 2019, followed by Spain with 102.94 mobile broadband subscriptions per 100 inhabitants.

One interesting finding is, that in countries like Greece, Cyprus, Portugal, which have been affected disproportionally from the economic crisis, the growth of mobile broadband subscriptions had followed a more moderate growth during the years (2010 - 2014), while there is a noticeable upward trend in this indicator during the period 2015 – 2019 (see Media Report for Southern Europe). Additionally, countries in ex Eastern Europe seems to have followed the global trend of digitization, although there are some differences at the pace of adaptation to the digital era, between the countries. More precisely, in Eastern European Region, we can notice two distinct set of countries regarding their connectivity status; On the one hand, there is a cluster of countries like Slovenia (90%), Poland (90%), Estonia (89%), Latvia (88%) and Hungary (87%) which have shown a great performance on the relevant indicator, and another cluster of countries, comprised of Slovakia, Romania, Lithuania, Croatia and Czechia, with an average performance close to 85%

Table 17: Fixed broadband subscriptions per 100 inhabitants

Country	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Austria	2.36	3.96	5.54	7.35	10.59	14.22	17.28	19.51	20.73	22.44	24.38	24.81	25.05	26.09	27.38	28.29	28.85	28.47	28.35	28.13
Belgium	1.40	4.46	7.87	11.93	15.46	19.06	23.09	25.52	27.67	29.04	30.84	32.18	33.31	34.33	35.75	36.51	37.61	38.35	39.22	39.78
Germany	0.33	2.58	3.93	5.48	8.57	13.22	18.38	24.30	28.01	30.86	32.37	33.71	34.53	35.28	36.31	37.55	38.76	40.22	41.11	41.99
Ireland	NA	NA	0.27	1.05	3.75	7.79	13.28	17.54	20.18	21.72	22.40	23.32	24.13	25.77	27.21	28.15	28.97	29.43	29.68	29.95
Luxembourg	NA	0.28	1.31	3.43	8.08	15.31	21.25	27.10	29.50	31.44	33.15	32.69	31.97	32.53	33.69	34.46	35.06	36.26	37.12	37.37
The Netherlands	1.63	2.91	7.27	12.27	19.68	25.05	31.58	33.36	35.04	36.86	37.94	38.82	39.63	40.32	40.56	41.50	42.53	42.83	43.42	43.63
UK	0.09	0.56	2.29	5.23	10.23	16.42	21.40	25.39	27.85	28.45	30.18	32.16	33.61	35.45	36.27	37.45	38.42	39.03	39.60	39.67
Denmark	1.25	4.44	8.4	13.1	18.83	24.79	31.87	34.8	36.48	36.6	30.03	38.39	38.84	40.3	41.34	42.28	43.1	43.82	44.09	43.95
Finland	0.67	2.58	5.25	9.4	15.26	22.33	27.08	30.52	30.42	29.31	29.06	29.8	30.43	31.63	32.2	31.56	31.14	31.03	31.45	32.48
Norway	0.52	1.96	4.52	8.73	14.61	21.4	26.63	30.88	33.06	34.56	35.27	36.09	37.05	37.62	38.45	39.43	40.13	40.88	31.32	42.03
Sweden	2.8	6.6	9.42	12.2	15.68	27.9	27.36	30.34	31.43	31.62	31.94	31.98	32.2	32.73	33.86	35.8	37.41	38.92	39.53	40.24
Bulgaria	NA	:	:	:	:	2.15	:	:	:	:	15.15	:	:	:	:	22.42	:	:	:	28.78
Croatia	NA	:	:	:	:	2.65	:	:	:	:	19.36	:	:	:	:	23.3	:	:	:	27.96
Czech Republic	0.02	:	:	:	:	6.91	:	:	:	:	21.46	:	:	:	:	27.79	:	:	:	34.98
Estonia	NA	:	:	:	:	13.22	:	:	:	:	26.12	:	:	:	:	29.67	:	:	:	32.53
Hungary	0.03	:	:	:	:	6.46	:	:	:	:	21.75	:	:	:	:	27.81	:	:	:	32.94
Latvia	0.01	:	:	:	:	2.70	:	:	:	:	20.52	:	:	:	:	25.2	:	:	:	26.69
Lithuania	NA	:	:	:	:	7	:	:	:	:	21.75	:	:	:	:	28.42	:	:	:	28.69
Poland	NA	:	:	:	:	2.46	:	:	:	:	15.28	:	:	:	:	19.10	:	:	:	20.54
Romania	NA	:	:	:	:	1.76	:	:	:	:	14.66	:	:	:	:	21.39	:	:	:	27.25
Slovakia	NA	:	:	:	:	3.36	:	:	:	:	16.23	:	:	:	:	23.43	:	:	:	29.05
Slovenia	NA	:	:	:	:	9.86	:	:	:	:	23.03	:	:	:	:	27.47	:	:	:	30.21
Cyprus	NA	0.35	0.82	1.39	2.33	4.28	8.32	12.57	18.48	21.49	23.15	24.61	25.47	26.71	28.76	30.72	32.58	34.21	36.27	37.79
France	0.33	1.01	2.77	5.92	10.81	15.50	20.67	25.46	28.66	31.74	33.93	35.98	37.73	39.03	40.45	41.68	42.80	43.92	44.78	45.69
Greece	NA	NA	NA	0.09	0.46	1.43	4.36	9.15	13.65	17.49	20.69	22.76	24.95	27.12	29.49	32.26	34.06	35.75	37.65	39.62
Italy	0.20	0.69	1.49	3.91	8.15	11.71	14.51	17.23	19.14	20.45	22.08	22.69	22.99	23.29	23.81	24.60	25.66	27.34	28.14	28.85
Malta	0.42	2.31	4.43	5.67	9.34	12.70	13.03	20.59	23.98	27.62	30.39	30.81	32.18	33.56	35.23	37.64	39.27	41.40	43.67	45.99
Portugal	0.24	0.96	2.51	4.81	8.01	11.09	13.50	14.44	15.44	18.03	20.07	21.22	22.71	24.48	27.43	30.31	32.69	34.74	36.90	38.80
Spain	0.19	1.13	2.98	4.98	7.85	11.44	15.07	17.73	19.83	21.04	22.70	23.72	24.49	26.11	27.80	29.02	30.26	31.44	32.50	33.41
Turkey	NA	0.02	0.03	0.30	0.86	2.34	4.03	6.83	8.18	9.04	9.81	10.34	10.54	11.71	11.48	12.10	13.15	14.70	16.28	17.06

Source: ITU

This pattern is also discernible, if someone looks at countries' performance in the mobile broadband subscriptions index. For the year 2019, Estonia with 157.7 mobile broadband subscriptions per100inhabitants, Latvia with 132.4 subscriptions per 100 inhabitants and Poland with 117 subscriptions per 100 inhabitants lead the transition to the digital society in their corresponding region.

One interesting finding is that Estonia has not only the best performance in this index compared to the rest countries of the Eastern European Region, but in comparison to all the countries under study, followed by Finland (154.91 mobile broadband subscriptions per 100 inhabitants).

-According to the *New Yorker*, Estonia is called "Digital Republic" (Heller, 2017), indicating the country's progress towards the establishment of a digital society. It is worth mentioning that in their analysis on CEE media systems, Herrero et al. (2017) also conclude that Estonia is a distinct case, "with substantial similarities to the Scandinavian countries" (p. 4811).

As Hubbard argue the unique success of Estonia in transformed to a digital state can be traced to the strong political commitment of the country's leaders to achieve the establishment of a truly digital state, which had resulted in productive collaborations between the public and the private sector. At the same time, Estonia by giving tangible results to civilians on how digitalization could make their lives easier had managed to convince the skeptics and united its people under the vision of a truly digital nation (Hubbard, 2022).

As the applications of ICT keep evolving, we believe that in the foreseeable future the digital transformation of the media market will also be in an open end. However, the technological advancements are only the one pillar of the foundation of a truly digital and participatory society. The other pillar is how the public reacts and adapts its repertoire of daily media consumption. In other words, as Hasebrink et al., suggest "the evolution of patterns of media use is the result not just of what technologies do to people, but also of what individuals, groups and societies (want to) do with technologies (2015, p.439). This is exactly, the focal point of analysis of the second report, regarding the media consumption patterns across Europe.

Table 19: Mobile broadband subscriptions per 100 inhabitants

Source: ITU

Country	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Austria	:	:	:	56.09	80.35	96.29	110.92	114.54	126.44	130.01	134.15	129.60	129.92
Belgium	:	3.42	5.66	9.51	18.90	32.82	51.28	57.39	61.48	65.88	75.21	75.78	86.98
Germany	11.32	16.78	23.49	26.23	35.37	41.62	45.58	64.58	71.49	76.76	79.25	82.56	86.52
Ireland	:	:	50.27	48.25	58.54	63.84	67.33	81.87	96.57	101.47	102.15	103.80	105.30
Luxembourg	:	:	:	49.95	66.24	75.95	78.74	84.76	84.17	83.21	86.84	101.56	121.76
The Netherlands	:	:	:	37.85	52.37	61.03	64.03	68.88	114.02	122.15	122.95	125.03	128.38
UK	:	:	36.29	42.22	61.10	74.94	84.71	86.17	84.83	82.63	87.26	98.54	103.39
Denmark	6.09	19.19	29.6	63.83	83.31	96.99	101.81	109.22	117.07	122.71	129.51	140	138.02
Finland	:	9.02	71.28	84.28	87.02	106.3	123.18	138.02	143.45	143.15	153.14	154.46	154.91
Norway	:	57.89	68.56	74.43	76.15	83.73	86.06	105.45	94.42	95.46	97.97	99.18	101.71
Sweden	:	65.25	69.89	83.7	97.09	104.51	109.59	115.6	121.2	123.43	122.59	126.94	128.78
Bulgaria	:	:	:	34.8	:	:	:	:	80.3	:	:	:	105.6
Croatia	:	:	:	7.6	:	:	:	:	73.6	:	:	:	83.2
Czech Republic	:	:	:	5.2	:	:	:	:	73.6	:	:	:	92.7
Estonia	:	:	:	17.5	:	:	:	:	101.1	:	:	:	157.7
Hungary	:	:	:	7.8	:	:	:	:	40.1	:	:	:	73.4
Latvia	:	:	:	36.4	:	:	:	:	80.1	:	:	:	132.4
Lithuania	:	:	:	8.86*	:	:	:	:	76.6	:	:	:	104.4
Poland	:	:	:	48	:	:	:	:	61.5	:	:	:	117
Romania	:	:	:	10	:	:	:	:	69.1	:	:	:	87.5
Slovakia	:	:	:	20.8	:	:	:	:	68	:	:	:	89.2
Slovenia	:	:	:	24.2	:	:	:	:	47.8	:	:	:	83.7
Cyprus	:	:	:	38.72	39.86	44.03	42.73	57.34	75.25	96.13	104.67	111.20	118.70
France	9.52	18.39	28.30	36.43	43.89	51.60	57.20	66.77	75.27	81.75	86.75	91.37	96.99
Greece	:	:	12.54	25.59	31.34	35.48	37.37	42.61	47.64	56.03	66.94	81.38	87.10
Italy	:	13.73	17.39	38.54	45.27	50.75	62.26	71.35	82.90	83.45	86.05	89.89	92.20
Malta	:	11.20	17.07	19.86	32.65	34.81	57.20	56.61	62.30	74.78	84.41	84.84	87.23
Portugal	:	:	20.46	24.22	27.67	33.00	37.22	45.65	53.25	62.73	69.15	73.84	79.06
Spain	:	:	9.87	23.43	36.73	52.62	66.84	77.81	83.63	89.00	93.52	98.48	102.94
Turkey	:	:	3.45	9.98	20.03	26.42	31.84	41.90	49.75	64.81	70.20	74.20	74.80

6 Discussion & Concluding Remarks

The regional media systems approach, as described by Hallin and Mancini (2004), has to be modified due to the advent and development of the digital transformation of the economies and subsequently of the media landscapes. The dimensions that have been employed for comparing media environments over the last two decades - political parallelism, state's role, journalistic professionalism and reach of the media market - remain, for the most part, operational. However, in the age of platformization of communication when investigating media ecosystems and forming typologies the emphasis should also be given to the impact that communication technologies and digitalization have on the structure and performance of the media systems. This gradual shift, in terms of the dominant dimension of comparison is reasonable, since the development of communication technologies has changed how media content is produced, disseminated and consumed. In other words, technological innovation, on the one hand, and industry developments and strategies, on the other hand, determine "what is available for media use" (Hasebrink et al., 2015, p.437). Additionally, in all media systems competition has been intensified due to the rise of diverse digital players against an ever-changing platformized background on which traditional media organizations and digital intermediaries coexist.

In this diachronic and synchronic analysis of the European media landscape, we regard media usage and infrastructure over the last thirty years as key indicators to compare the four typologies of countries, inspired by the theoretical framework of Hallin and Mancini, but without neglecting a series of limitations, dictated by the digital transformations. Mapping media environments in this way let us understand the shifts in media usage patterns as the communication field transitions from the analogue to the digital age. The differences and similarities between the clusters of countries, emerged by the available data analysis, can disclosure important issues regarding the resilience of media over time and especially against the backdrop of the so-called process of platformization of communication.

From our analysis, it has become evident that *technology takes the lead toward the harmonization of media systems in the EU. The EU and globalization have, hoverer, also played an important role since they have created the framework for the homogenization of media systems, at least in Europe*.

In all EU countries under study, *newspapers are in sharp decline*. Citizens read less and buy much fewer copies per day. The steepest declines in newspaper sales seems to be common in media systems with turbulent political history: ex Eastern and Southern European EU countries' media seem to present a common trend in this respect. In several media markets of the Eastern region, the downward trends of the press during the second half of the 1990s (1995-2000) are so intense that they testify to a structural change in the way citizens are informed about current affairs. One reason could be the fast digital transformation (as in the case of Estonia), another, the continuity of government intervention in the media sector (as in the case of Hungary). During the second half of the 1990s similar trends are reasonable to be observed in some Southern European countries where the deregulation of television landscape gave rise to a dominating culture of heavy television use. This convergence of trends in terms of declining newspaper sales partly reflects the fact that throughout the former communist and socialist states of Central-Eastern Europe the dependence on Western models has been a common feature (Broughton Micova, 2012).

However, according to recent data (Accenture, 2021), globally, paying audiences for news continue to grow, an increase that is mainly guided by digital circulation. More precisely, data reveals that between 2013-2018, digital circulation volumes increased by 307% to reach 31.5 million paying subscribers. With the majority of news publishers considering that reader revenue will become their most stable stream of revenues, offering a variety of subscription and membership options, such as multi-newspaper or multi-user subscription seems to be at the core of a strategic shift to convert readers into paying audiences (Accenture,2021).

When it comes to *radio* production there are big differences among EU member states, regarding the number of radio stations and employees in the industry, but despite the fact that radio is less appealing than it used to be, it *continues to be the most trusted medium for 24 countries of EU28.*

Regarding *television*, its consumption, market share and overall impact, research has shown that *TV still occupies an important part of the daily lives of Europeans*. Since the mid-1990s television has been developing as a niche medium. New technologies (digital) and new business models (pay TV, PPV) have allowed up to a point TV channels to be sustainable with smaller audiences (Papathanassopoulos, 2002). In effect, the traditional general – entertainment - family television channel is becoming an endangered species. *The new European multichannel environment is constituted by digital platforms* with more than 300 channels transmitted mostly through Astra and Eutelsat satellites. Their arrival has opened up the way for increasing specialisation in their content. In fact, digital technology has enabled the analogue thematic channels of the 1990s to proliferate and achieve even more specific levels of segmentation. Nowadays, there are channels specialising on news, music, sports, children, lifestyle, home shopping, animals, wildlife and documentaries, history, science, and so on.

SVOD services now allow a new sort of differentiation which is not only determined in terms of content offering, but under the scope of the *experience*; that is SVOD offers a video experience that is appealing to the audience, which is inclined to pay for it, an experience that linear media cannot imitate (Lotz et al., 2015, p.21).

The media companies are facing a changing environment due to technological advent and high InternetInternet penetration in our lives, which requires a new strategy built upon new platforms and new possibilities that were not possible within linear media. As the importance of non-linear media keeps growing, media companies will have to target fragmented audiences by offering content through a variety of channels and platforms (Telkmann, 2019). As Lotz et al. suggest *the new technological framework in the media industry and the shifts from national to multinational business operation demand a policy modernization,* and the latter can only be really effective if "*derived from an understanding of how significantly video industry dynamics have been altered*" (2021, p.3).

National and subsequently regional media systems have followed the developments in technology and globalization processes, resulting in the fading of concrete borderlines between different media systems. This seems to be a reason that explains why recent research on media systems either trace the vanishing of media models (i.e. the liberal model as originally described by Hallin and Mancini) or the emergence of new hybrid types (Humprecht et al., 2022).

Still, however, some observations regarding countries' similarities are of use. The first important remark is that Nordic countries seem to have stable media systems throughout the years and were better prepared to face the so called "digital challenge". The stability of the Nordic cluster has been reaffirmed by previous studies as well, which had applied different operationalizations of media systems (Perusko et al., 2015; Humprecht et al., 2022).

The second observation is that Eastern European media systems are not homogenous, and despite of their position in the same geographical region, they differ significantly in the context of their historic traditions, political standards and press freedom, economic development, resulting in differences in their respective media systems (Dobek-Ostrowska, 2015, p.36). Jayaram, Manrai & Manrai (2015) argue that these countries should be not treated as a single, homogenous market, proposing that Eastern European countries could be grouped according to a three speed model, comprised of a high, medium and a low speed cluster.

Especially, if we look at these countries' performance on several indexes that reflect the transition to the digital era, it is clear that significant differences exist not only between North and East EU countries, but within Eastern European countries, as well; for instance, the Baltic countries have far higher scores, compared to the rest countries of the region. In their concrete analysis of the digitalization process in East EU countries, Ragnedda and Kreitem (2018) pointed out the digital inequalities existing in the eastern European region, not only at the Internet penetration level, but also at the digital skills level and the subsequent ability of people to use digital services, so to benefit in their everyday life.

In other words, as Dragulanescu suggests there are "many 'digital divides' –at local, national, regional or world levels, between inhabitants, countries, and regions-each such divide having its *specific background, phenomena, evolution trends and perspectives, as well as its specific bridging solutions and initiatives*" (2013, p.140).

In their analysis, Humprecht et al. (2022) suggest that Eastern European media systems are divided between the polarized- pluralist model and a hybrid cluster. According to the authors, the media systems of Hungary, Romania, Bulgaria, Montenegro, Croatia, Slovenia and Slovakia seem to have commonalities with the media systems of Southwestern European countries, such as Spain or Greece, while Estonia and Lithuania share more common traits with US or the UK. From their part, Herrero et al. (2017) provide another classification of Eastern European systems, comprised of three different types. Still in their analysis though, Estonia and Lithuania, with Latvia and Slovakia comprise a cluster with similarities with other European countries of the North, such as higher level of press freedom and lower level of political parallelism. Estonia stands out a unique case, even in this more advanced countries' grouping, following the paths of Scandinavian countries.

Furthermore, Puppis (2009) suggests that small states share some common issues that have an impact on their corresponding media systems. More precisely, he describes four structural peculiarities that distinguish small media systems; a) shortage of resources, which reflects the limitations on the production side (not only in the form of capital, but with respect to skilled media professionals, as well), b) small domestic demand, reflecting the limitations on the consumption side (advertising and audience), c) dependence and d) vulnerability, both of which are reflected in the way that capital and media content flow from the larger states to the smaller ones. As Ibrus and Rohn point out, the results of this domination are often seen on screen and on media ownership (2019, p.53).

This is because the globalization of the audiovisual economy and the integrative action of the EU eventually promote the marginalization of both production and culture in smaller countries (Papathanassopoulos & Negrine, 2011).

Smaller European countries are producing fewer films than larger member states and import a host of both American and European films. Smaller states seem to be "penalized" in terms of media scale economies and have very limited possibilities of exploitation to be credible and profitable in a European single market (for a thorough discussion see WP D1.3 on Patterns in Movie Production, Distribution and Consumption). Moreover, the smaller states face internal difficulties which are a consequence of internal structural weakness, resulting in inadequate national policies, with plenty of irrationalities and paradoxes (Burgelman& Pauwels, 1992, p.181).

The result is that small states, in most cases, have gained little or nothing from the changes in the European media landscape (Meier &Trappel, 1992). On the contrary, they need to follow and implement policies that do not really need them. This can result to extremely negative effects for their industries such as heavy cross-ownership by local dominant groups or a sharp decline of their public broadcasters. One example of how the trends in larger EU states affect the developments in the smaller states is provided by the latest data regarding the license fee as a form of supporting the PSM. According to the Media Intelligence Service (2022), the license fee was collected in 25 of the 56 EBU countries (44.6%) but was not necessarily the main source of PSM income. In fact, license fee was the principal source for PSM revenue in only 20 EBU countries (37.7%). *"However, four of the Big Five markets- France, Germany, Italy, and the UK- mainly rely on license fee revenue. That explains why the license fee remains the main source of PSM income in the EBU as a whole, even if it is no longer the most widespread* (Media Intelligence Service, 2022, p.11).
Another example is provided by the digitalization process in the EU; big countries had already paved their way into a smooth digital transition, by investing in infrastructure and adopting policies for the consolidation of a truly digital society. On the contrary, as we have already seen for smaller countries of eastern (for a discussion of these patterns on Eastern European Region, see Hallward-Driemeier et al., 2022) and southern region *catching up* with these trends comes first.

Yet, if we look at the Nordic countries, we can see strong media organizations. In the Nordic case, the peculiarities of the countries, belonging to this geographical cluster, became the force for development and consolidation of Nordic media companies in the media market. By capitalizing cultural and language proximity, media companies in these countries have managed not only to grow, but also to stand out as strong regional media groups (Ibrus & Rohn, 2019, p.53). As Ibrus and Rohn suggest the "long term welfare society policies and their path dependencies can be understood to have conditioned growth, dynamics and international success for the AV media sector of the Nordic countries" (2019, p.51). The case of the Baltic countries, with the exceptional standing of Estonia in the digitalization process is another example of how economic stability can trigger steady growth and accelerate future developments in the media landscape, even in a smaller media market.

In other words, political, cultural and economic "legacy" affects to a certain degree the future paths of media market developments in each member state. After all, even if we are witnessing a homogenization process of media systems driven by the advent of digital technology, Esser and Vilegenthart's (2017, p.23) remark is still of value: "Countries are exposed to similar trends and developments, but those developments play out differently in different contexts". In addition, such an approach highlights the facts that "producers, products and audiences are no longer primarily defined by the membership to national communities, but other forms of belonging come to forefront".

In view of the Europeanisation process and of the growing internationalization of digital communications, it is likely that in the near future, new criteria will emerge for the studying the transformations in the media landscape on a comparative scale, opening the discussion for the emerging of truly European Media Systems.

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Part two

EUMEPLAT
European Media Platforms: assessing positive and negative externalities for European culture

Report on North-Western Media systems

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Contents

Introduction

In this report, we want to give an overview, how the media systems in North-Western Europe developed during the last thirty years and what are the main characteristics of this development with respect to the model of Hallin and Mancini (2004). We also want to draw attention to long durée developments which led to the situation we describe. In the first chapter we will argue how to situate the selected countries in the model of Hallin and Mancini. In the next chapter we look back at the 20th century in order to explain how the Democratic Corporatist Model, to which our countries of analysis of this region belong, evolved, including a historical view on how important religion was for this process. This chapter also gives a general overview of how we refer to Hallin and Mancini and their main categories. The next chapter will shortly sketch the main characteristics of the North-

Western European Region, which will be detailed in the main part of the report, and point to the issue of trust in the media and how it developed in the respective countries. According to Hallin and Mancini the development of media systems is dependent on four variables, i.e.,

(1) the development of media markets *(addressed in the separate WP1.2 market report);*

(2) the degree and nature of the links between the media and political parties;

(3) the development of journalistic professionalism and journalistic autonomy;

(4) the role of the state in the function of the media.

We will look at these variables by presenting how newspapers developed in the countries of analysis. The degree and nature of the links between the media and political parties will be analysed with respect to political parallelism, and a detailed view on media concentration will be added. As a counterweight to media concentration we look at Public Service Broadcasting and the effects of deregulation on it. Also here different forms of influence of political parties on media will be illustrated. The following is an analysis of the development of journalistic professionalism. Finally, the chapter on the relation between the media and the state will be complemented by a presentation of new forms of clientelism which play out in systematic forms of exerting influence on journalism and public opinion through advertising, lobbying and funding. We conclude with some remarks on the most important developments and on the state of research on media systems.

1 The North-Western European Region

Looking West to East, the region encompasses Ireland, the United Kingdom, Belgium, the Netherlands, Luxembourg, Germany, and Austria. It groups together seven countries that are direct neighbours, therefore strong cultural and economic interactions are to be expected.

Geographic proximity cannot *a priori* be assumed to lead to similarities in media systems. Hallin and Mancini (2004) in the beginning of their analysis of eighteen countries were puzzled by their findings that they reached. At the end, they realised that underlying historical developments along geographical patterns accounted for groups of countries forming similar media systems, including the occurrence of Protestantism and industrialization in the north rather than the south and the Napoleonic invasions. “Their development was deeply intertwined, and the relations among them did clearly follow geographical patterns.” (Hallin and Mancini 2004: 73)

This also accounts for somewhat larger difference between the islands in this region separated by the English Channel and the countries that share a common land border. In fact, Britain and Ireland belong to Hallin and Mancini’s Liberal Model whereas the five countries on the continent belong to the Democratic Corporatist Model.

Hallin and Mancini call their three models “ideal types” the purpose of which is not to classify countries and make them fit a model, but rather to identify “characteristic patterns of relationship between system characteristics,” (ibid.: 11) to show commonalities but also differences.

Comparison, they argue, allows to debunk commonly held misconceptions. An example is the notion of a single Anglo-American style of journalism. “The British and American media systems (which we will discuss as examples of the Liberal Model) are in fact quite different in many ways, even though it is common to talk about the Anglo-American model of journalism as though it were singular.” (ibid.: 11). They present evidence of significant differences between the US-American and British media systems.

At the same time, UK and Ireland have much in common with the Western European countries. As to the press, “the political orientations of British newspapers today are as distinct as anywhere in Europe” (210), whereas for US American newspapers it would not even make sense to characterize them “as Europeans commonly do theirs, by assigning them distinct locations on the political spectrum” (208). As for broadcasting, Hallin and Mancini describe the BBC as the foremost example of the professional model that should largely insulate broadcasting from political control. The continental West-European countries in their classification belong to the “civic” corporatist model. Here, broadcasting is neither controlled by government nor in proportional representation by parliament, but by “socially relevant groups”. At the same time, the BBC served as the model for the reform of the broadcast system after 1945 in Germany and Austria, if not in governance structure then in professional journalistic spirit.

There have been doubts as to whether the UK belongs to a set whose ideal expression is the US. "Critics point out that Great Britain varies from the ideal type of this model. For instance, Humphreys (2012) and Norris (2009) argued that Great Britain is characterized by a strong PSB and has an ideologically polarized press, and thus does not fit the liberal model. Moreover, Nielsen and Linnebank (2011) find that Great Britain shows high amounts of indirect press subsidies" (cited from Büchel et al. 2016: 225). When Büchel et al. (2016) reviewed Hallin and Mancini's models using the method of Qualitative Comparative Analysis (QCA), they included the UK in the Corporatist Model.

Their analysis also led them to suggest breaking down the Democratic-Corporatist Model with its supposedly low political parallelism and high press subsidies into two: while Britain is the only member of the purely Corporatist Model with a regulated press market reflecting the role of the state, the Netherlands, Belgium and Portugal form the Press-Oriented Model with a strong press and a highly deregulated market reflecting the journalistic side of media systems. The Nordic countries, Switzerland and Germany belong to both of these new sub-models (ibid.).

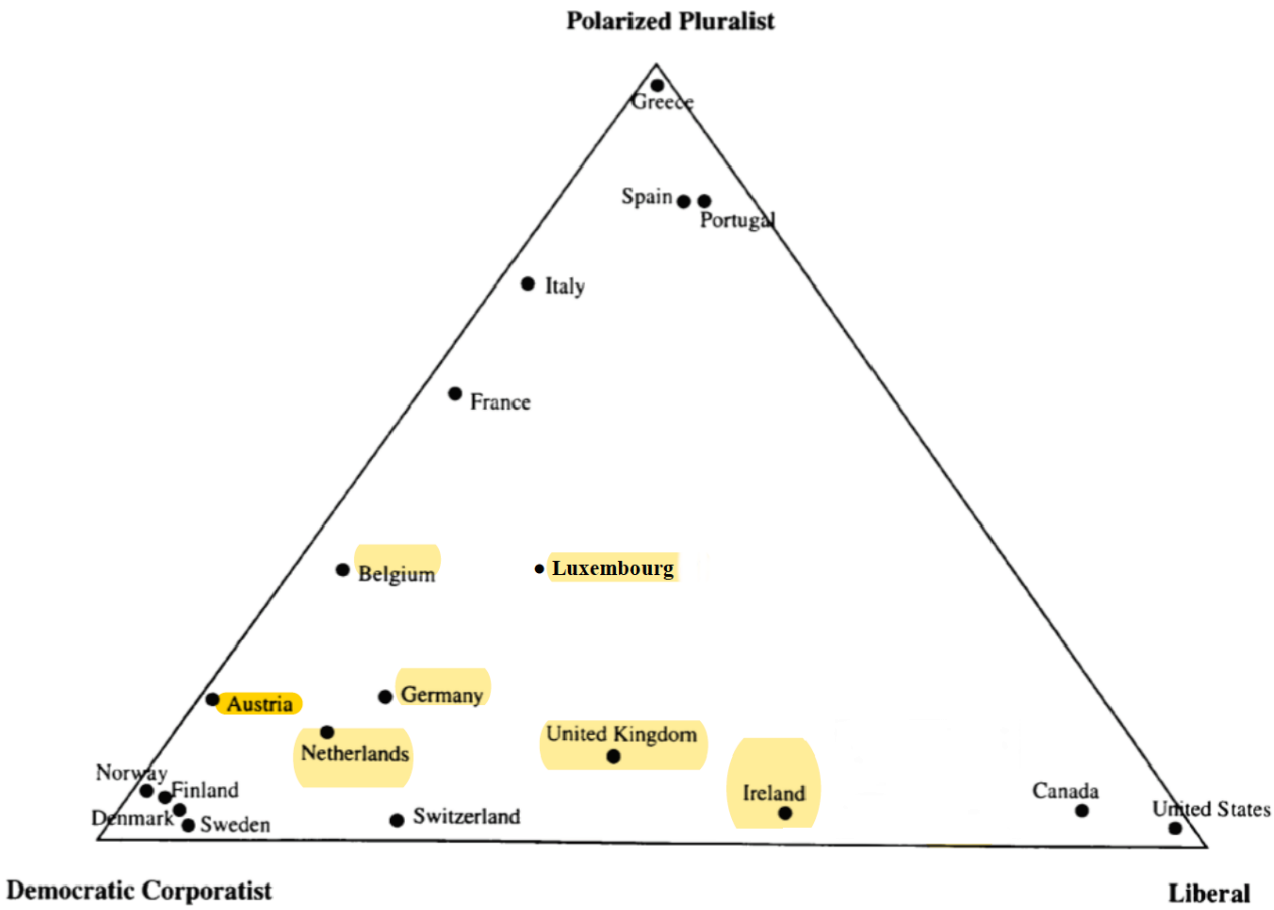
Also Hallin and Mancini's classification of Austria into the Democratic-Corporatist Model has been criticised. Research found that Austria shows similarities to the Mediterranean Model, for example regarding journalistic professionalism (Karmasin et al. 2011). Büchel et al.'s (2016: 225) data also lead them to state that Austria clearly belongs to the Polarized-Pluralist Model while it also shares characteristic of other models like low political parallelism and a higher degree of regulation of the press market. It also has an inclusive press market similar to the Democratic-Corporatist countries but different from the Polarized-Pluralist ones (Büchel et al. 2016: 225). In sum, we find the arguments convincing to keep Austria within the Democratic Corporatist group and therefore the North-Western European Region.

Hallin and Mancini furthermore find "that globalization and commercialization of the media has led to considerable convergence of media systems." (Hallin and Mancini 2004: 12) The dynamics of deregulation indeed started during the rise of neoliberalism under conservative leaders Thatcher, Reagan, Kohl in the 1980s and under social-democrats Blair, Schröder, Clinton in the 1990s. In this sense, the Liberal and the Democratic Corporatist Model as well as countries under their influence across the planet were converging already before Hallin and Mancini's 2004 modelling.

Afterwards the dynamics of deregulated markets accelerated with cross-border acquisitions of media by other media and non-media companies and increasing concentration.

At the same time, Hallin and Mancini find marked differences between the Scandinavian countries and the others in the Democratic Corporatist group. E.g.: "the Nordic countries could probably be said to tend more in the direction of the professional model" of the Liberal group (ibid.: 167).

Therefore, it intuitively makes sense to move Britain and Ireland to the left along the bottom axis of Hallin and Mancini's triangle of media systems and position them closer to the Western continental countries of the Democratic Corporatist Model. Luxembourg is predominantly Catholic and pillarised as the Netherlands and Belgium with parallel newspapers, unions, parties etc. It has high newspaper consumption and press subsidies, nearly no public service broadcasting (PSB) and commercial broadcasters primarily directed toward audiences in other European countries. The four Nordic countries are at the very tip of the Democratic Corporatist Model and while they obviously share the characteristics of the other seven countries, they also form a region of their own.



Modified from: Hallin and Mancini 2004: 70

2 Cultural and Political Heritage

The subtitle of Hallin and Mancini's 2004 book is: "Three Models of Media and Politics". Clearly, their main focus is on the interaction between the two, on how politics shapes not only the regulatory framework of media but also the public debate about their functions and remits and how media give space to and shape the political debate.

Hallin and Mancini do not call politics "the environment" of the "functional system of mass media", that against which the media are "operatively closed", in short, they do not deploy systems theory jargon. Yet both the mechanisms of journalistic professionalism and their positioning of politics as the "context" of media systems indicate a certain degree of affinity.

They state that the political factors could be called the "independent variables", implying that the characteristics of a media system causally depend on its political environment. They reject this notion:

> We see the relation between media and political systems more in terms of coevolution than of strict causal ordering. Indeed, the relative influence of the media system on political institutions and vice versa may vary historically, with political forces dominating the media system in some periods, while in other periods the media system is more independent (or more determined by economic forces), and may exercise greater autonomous influence on the political world. (H&; 2004: 47)

Instead they argue "that common historical roots shape the development of both media and political systems, and are crucial to understanding the relation between the two" (ibid.: 46), or rather three as economic forces become a factor of its own, impacting both politics and the independence of media.

Hallin and Mancini identify the common roots of both political and media systems in "in major social transformations: the Protestant Reformation, the industrial revolution, the democratic revolution, and the formation of the nation-state." (ibid.: 62)

Hallin and Mancini find religion a strong determinant of the media system that develops, or more specifically the degree to which Protestantism has replaced Catholicism in a given country. This, of course, points to the dynamics that Max Weber analysed as the Protestant ethics of capitalism. The *Protestant Reformation* started in what is now Germany (Martin Luther, Philipp Melanchthon, Martin Bucer in Strassbourg), in what is now Switzerland (Huldrych Zwingli, Johannes Calvin), in Scotland (John Knox) and in England (Thomas Cranmer). And it started from Martin Luther's creed that every believer should be able to read the Bible him- or herself without the intermediation of a priest. The new form of Christian belief is inherently linked to Gutenberg's invention of moveable type printing and its first killer application, an affordable Bible not in Latin but in the people's language. This led to alphabetisation efforts by church and state from the 16th century, resulting in a higher *literacy* rate compared to predominantly Catholic countries.

The clearest geographical pattern Hallin and Mancini noted is the difference between north and south: "Protestantism and industrialization … occurring together in the north rather than the south." (72) This pattern is true of the entire region. The Low Lands split into the Netherlands and Belgium out of the conflict of Calvinist provinces in the North and those loyal to the Catholic crown of Spain in the South. The Netherlands today has one of the least religious and confessionally affiliated populations in Europe while still retaining the division with more Catholics in the south of the country and more Protestants in the north. The nation states of Germany and Austria formed based on the spheres of influence of the empires of Habsburg and Prussia and along the dividing lines of the confessions. Within Germany to this day, the population in the south is predominantly Catholic and Protestant in the north. The pattern repeats in the most western country of the region with the Catholic Republic of Ireland and the Protestant and British Northern Ireland.

Long-distance trade in the sea-faring countries of the north led to a need for long-distance information. Financial innovations like limited liability trusts and stock exchanges increased this need.

The centres of Protestantism were also the cradle of enlightenment: From the Reformation in the 16th century establishing *freedom of religion* as one of the earliest *human rights* to the Enlightenment in the 18th century establishing a secularised, rational, scientific approach to the world and the idea of fundamental human rights and freedoms of citizens and a *rational-legal state* serving first the king then, after the *formation of the democratic nation-state*, the common good (on the different waves of nationalisms s. Anderson 1983).

These laid the ground for the *industrial revolution* and the age of discovery or rather more precisely of colonisation.

High literacy facilitated the development of *mass circulation newspapers* in the late nineteenth century and a growing number of journalists and writers and had a lasting effect on the national media culture (see Figure 3.1 showing the correlation between literacy rates in 1890 and newspaper circulation rates in 2000 (Hallin and Mancini 2004: 64)).

"That historical difference is reflected today in sharply different rates of newspaper circulation, from a high of 720 per thousand adult population in Norway to a low of 78 per thousand in Greece." (ibid.: 22) "So far as we know no country that did not develop mass circulation newspapers in the late nineteenth to early twentieth century has ever subsequently developed them, even if its levels of literacy and pattern of political and economic development have converged with those of the high-circulation countries. And we will argue that the presence or absence of a mass circulation press has deep implications for the development of the media as political institutions." (ibid.: 24)

The origin of newspapers is twofold: 1. commercial information for traders and stockbrokers, starting as private correspondence, as secondary use newspapers directed at the general public. 2. the democratic bourgeois revolution and nation-forming with its nationalist, conservative, royalist, liberal, social-democratic, communist, anarchist etc. factions who all advocated for their positions (Habermas 1962, Anderson 1983)

> Journalism has always had many functions: it provides information for economic actors, … From the beginning of the print era, particularly from the time of the Reformation, political advocacy was also a central function of print media, and by the late eighteenth to early nineteenth century, when the newspaper began to emerge as a force in political life, this became its principal function in every country in this study. The political journalist was a publicist who saw it as his or her role to influence public opinion in the name of a political faction or cause, and in many cases, newspapers were established on the initiative of political parties or other political actors, or supported by them." (Hallin and Mancini 2004: 26)

Newspapers were originally founded in the 18th and 19th century as public voice of political parties and social organisations in what Hallin and Mancini refer to as political parallelism. They were also the ones fighting for the fundamental right of press freedom (cf. Wilke et al. 2020)

Journalists and other media personnel themselves tended to be active in political life, often serving in party or public offices, seeing their role as "publicist" or commentators trying to influence public opinion, rather than as providers of neutral information or entertainment (Hallin and Mancini 2004: 28f.). The affiliation is, of course, also expressed in the content published by these media and in the partisan expectations of media audiences, with supporters of different parties or tendencies buying different newspapers or watching different TV channels.

Parallelism takes different shapes. The Netherlands were characterized by a "**pillarization**" (*verzuiling*, Lijphart 1968), i.e., a strict separation of the social milieus of Protestants, Catholics, liberals and socialists. Society was segregated into parallel social organisations in each pillar including political parties, educational institutions, banks, churches, football clubs, chambers of commerce as well as newspapers and broadcast stations. One gets the impression of a society divided into what today might be called collective 'filter bubbles', where everyone gets their news coloured by one's own world views and parliament is one of the few places where the different pillars meet, negotiating compromises, unified under the queen. The pillars in the Netherlands began to dissolve in the 1960s.

By the late nineteenth century a contrasting model of political journalism was beginning to emerge, in which the journalist was seen as a neutral arbiter of political communication, standing apart from particular interests and causes, providing information and analysis "uncolored" by partisanship. This was often connected with the development of a commercial press, whose purpose was to make money rather than to serve a political cause, and that was financed by advertising rather than by subsidies from political actors. It was also often connected with the development of journalistic professionalism (Hallin and Mancini 2004: 26)

Those were times of great innovations and upheavals. The nation-states were born in conflict, like the German nation that was formed by means of a war against France. Even before, the European powers divide the rest of the world up among themselves as colonies. As Marx famously observed the original accumulation of capital was achieved by colonising and enslaving the global south. While official colonialism ended in the 1960s, its legacy still shapes North-Western European societies and thus their media systems from the BBC World Service that started in 1932 as the "BBC Empire Service" via the multiculturalism of today's societies to the intense current debate about the restitution of looted cultural property.

The First World War saw the development of propaganda in US and UK (Ribeiro et al. 2020) and the beginning of radio communication. This was at first point-to-point "wireless" telegraphy used for military and commercial purposes and by amateurs. Pioneer

Guglielmo Marconi gained a monopoly in UK. Others like Telefunken and Lorenz in Germany tried to do likewise. Failure to pick up the SOS signal of the sinking Titanic led to the first Radio Act of 1912 in the USA, requiring radio operators to be licensed by the Department of Commerce.

Broadcasting in Europe, in contrast to the US, started in a non-market form. But it was nonetheless shaped by an experience in the US. in the mid-1920s courts had ruled that the government had no power to regulate radio use, annulling the 1912 Radio Act. Thus for a few years every applicant was granted a broadcast licence with no conditions on frequency, broadcasting strength or broadcasting hours. Over 600 new radio stations emerged across the USA broadcasting with hundreds of kilowatts in order to drown out all others. The result was that no one could be heard. This period is remembered as the days of "confusion and chaos" (Annual Report of the Federal Radio Commission 1927). They ended with the US Radio Act of 1927 that established the Federal Radio Commission that in 1934 was succeeded by the Federal Communications Commission (FCC) (Pobst 2009).

Broadcasting in Europe emerged from various dynamics including enthusiastic amateurs, radio manufacturers who wanted stations in order to sell their receivers, radical political groups in the aftermath of the First World War who wanted to have their voices heard and governments that did not want to repeat the experience of the regulatory chaos in the US.

In the UK, the Post Office as regulator of cable and wireless communication in 1922 invited radio manufacturers to form a broadcasting syndicate, the British Broadcasting Company (BBC) that received a monopoly license. It was financed by a royalty on the sale of radio receivers and a share of the license fee that the Post Office collected from listeners. The BBC was banned from broadcasting controversial political programmes, and since newspapers and news agencies feared competition, the BBC was only allowed to broadcast one daily news summary provided by the agencies (Arnold et al. 2020: 81). The initiative everywhere was from device makers who pushed for radio content to be created so people would buy their receivers.

In Germany also the Post Office, the Reichspost, was in charge of cable and wireless communication. In order to avoid the interference chaos in the USA it was tasked with the technical operations of the national broadcast infrastructure. For providing broadcast programming, the first license application came in 1922, one by two radio manufacturers, Telefunken and Lorenz, the other by a news agency close to the Ministry of Foreign Affairs. The first regular radio programme started in 1923 in Berlin, followed by other regional broadcasters. In federal Germany, programming companies were set up in the different Länder. These were joined under the umbrella of the Reichsrundfunkgesellschaft in 1925 as public-private partnerships with the Post Office holding 51% of the shares (Arnold et al. 2020: 84).

Also in the 1910s and 1920s, Alfred Hugenberg erected the first media conglomerate in Europe. He was a lawyer, industrialist and co-founder and later head of the nationalist party DNVP. His media empire included wire-services, advertising agencies, newspapers, magazines and movie studios. Controlling half of the German press, he contributed significantly to the destruction of the Weimar Republic with nationalist and anti-democratic propaganda. In 1933 he sold the Hugenberg Konzern to the NSDAP and became minister in Hitler's first cabinet.

Already holding the key to the national media sphere, Minister of "Public Enlightenment and Propaganda" Joseph Goebbels then systematically boosted the production of radio receivers branded "Volksempfänger". Radio became the primary means of synchronising the population through propaganda in Germany, Austria and in the occupied countries.

This marks the point zero of media: total concentration of media as mouthpiece of a totalitarian fascist regime prohibiting listening to enemy radio stations under pain of death. It is what all democratic policy must prevent from ever happening again.

The **Democratic Corporatist Model** to which the countries of this region belong, developed in Scandinavia, the Low Countries, and Switzerland in the 1930s (Katzenstein 1985, cited from Hallin and Mancini 2004: 183). Its origin was the compromises between factions of society in order to address the economic crisis of the Great Depression while avoiding the polarization and collapse into fascism in Germany, Austria, Spain and Italy. These involved "industrial peace agreements, cross-class agreements on plans for economic and political stabilization, and in many cases broad political coalitions incorporating both left and right, many of which continued to work together as governments in exile during the Nazi occupation." This system of continuous political bargaining between interest groups continued after the Second World War, when also Austria and Germany adopted the Democratic Corporatist Model (ibid: 185).

After the Second World War, as Thomass shows, the media systems in Western Europe developed in a shared economic, political and cultural framework. They are based on common legal principles and a democratic regime. They are market-driven with the exception of broadcasting, and they are increasingly legally framed by European laws and regulations. Yet at the same time, significant differences between regions and countries remain (Thomass in Thomass 2013: 221 f.).

With the Nazi regime fresh in mind and the guidance of the occupation forces, PSB in Austria and in West-Germany was constructed precisely to keep the state at distance and prevent media concentration. Yet the structural incentive for politicians in office to utilise PSB as their mouthpiece remains.

That Austria and Germany joined the Democratic Corporatist Model is indicated by a two-party system with ensuing periods of grand coalition governments in both countries. The post-war period was a time of rapid growth and advances in professionalisation and institutionalisation of journalism. This was overshadowed by the cold war. Broadcasters had joined together in 1925 to form the International Broadcasting Union (IBU) based in Geneva. When the Iron Curtain went up, the IBU fell apart. The Eastern bloc countries founded the Organisation Internationale de Radiodiffusion et de Télévision (OIRT) and in the Western European countries together with Syria, Tunisia and Turkey formed the European Broadcasting Union (EBU).

Three caesurae during the second half of the 20th century were decisive for the media systems: 1.) the neoliberal deregulation in the 1980s and 1990s leading to the rise of multinational media corporations. 2.) the fall of the Berlin Wall in 1989 and thereby the end of the Cold War and the USSR. In 1993 the OIRT dissolved into the EBU. Its membership grew from 35 to over 60 establishing common ground for cooperation and projects like Euronews. 3.) the Internet turning from a means of information and communication for academics and business to one for everyone.

It needs to be recalled that Hallin and Mancini mentioned the "new Internet industries" only in passing (2004: 230). They describe the Internet as a "powerful instrument for the spreading of common procedures and skills", and thereby of the Liberal Model of journalism (ibid.: 260) but they do not include online media in their analysis. Thus this region report as well will address them only as a look ahead on the analyses to be conducted in the following Work Packages. For the sake of comparison, the Internet – the space of the most powerful dynamics in media during the two decades since Hallin and Mancini presented their framework – will therefore only appear on the horizon of this report.

3 Main characteristics of the North-Western European Region

The region consists of countries that share the Democratic Corporatist Model. The two Liberal countries, UK and Ireland, as we have argued in the introduction, share many of the traits of this model and can, contrary to Hallin and Mancini but justifiably, be sorted into the Democratic Corporatist Model. This model is characterised "by a historical coexistence of commercial media and media tied to organized social and political groups, and by a relatively active but legally limited role of the state." (Hallin and Mancini 2004: 11)

There is an early and strong tradition of rational-legal authority and welfare-state where the three powers of the state follow democratically agreed rules and serve the public interest (55 f.). With an early rise of literacy and mass newspapers in the region, there are high levels of journalistic professionalism both in commercial and non-market media. With the decline of the membership of mass organisations like churches, unions and political parties from the mid-20th century, strong ties between social pillars and media disappeared. New social movements brought forth new parties and parallel media. Thus, an overt colouring of newspapers, and therefore soft political parallelism persists and there are no indications of its fading away towards a liberal, neutral media landscape. At the same time, the North-Western European Region has come under the dominance of the market that characterises the liberal model, particularly in the phases of neoliberal deregulation in the 1970s through the 1990s.

There are two different traditions of corporatism in the region. One is strongly segmented or pillarised (NL, BE, LU, AT), the other is less clearly segmented (DE, UK). Or in the terms of Lijphart (1984, 1999) one is a consensus democracy, the other a majoritarian democracy. The first is a multi-party system with an orientation towards bargaining, compromise and power sharing that supposedly leads to neutral journalism as segmented external pluralism. A majoritarian democracy is characterised by a system of two catch-all, centre-left and centre-right, "people's parties" (Tories & Labour in UK, CDU & SPD in DE, ÖVP & SPÖ in AT) and supposedly leads to neutral journalism and catch-all media while in fact newspapers are professional and politically coloured and thus externally plural in the entire region.

The two-party countries Germany and Austria have seen extended periods of grand coalition governments, creating a similar compromise and power sharing dynamics as in the multi-party countries. Also the two-part structure is changing. The social movements of the 1970s (environment, feminism, anti-nuclear power, gay/lesbian) led to the founding of a new-left national newspaper (die tageszeitung (1978)) and of a parallel Green political party (Bündnis 90/Die Grünen (1980/1991)). After reunification the former East-German party SED turned into the PDS (1990) and then into Die Linke (2007) with its parallel newspaper (Neues Deutschland). From the growing digital rights movement, the Pirate Party, originally founded in Sweden in 2006 around issues of transparency and participation, access to knowledge and privacy, spread throughout Europe (DE, AT (2006), LU, BE, UK, IE (2009), NL (2010). Currently the Pirate Party is represented in national parliaments in Luxembourg and the Czech Republic, and with four members in the EP. Finally, out of the new-right movement of the 21st century the populist extreme right party AfD (2013) was founded with its parallel media. Similarly, in Austria new parties formed (FPÖ (1955), die Grünen (1986), the liberal Neos (1993), Piraten (2006))

The difference between strongly segmented consensus democracies and two-party majoritarian democracies and thereby the tendency of Democratic Corporatist countries toward moderate rather than polarized pluralism (Hallin and Mancini 2004: 191) is fading.

In the entire region, the party landscape has shifted towards fragmentation with mass-parties losing voters to more radical parties on the left and the right. Particularly the rise of right-wing populist parties (AT: FPÖ, DE: AfD, NL: Partij voor de Vrijheid, UK: UKIP) during the last decade shifted the societies in the region from moderate towards polarized pluralism. "In polarized pluralism, according to Sartori (1976: 135) 'cleavages are likely to be very deep… consensus is surely low, and… the legitimacy of the political system is widely questioned. Briefly put, we have polarization when we have ideological distance.' Polarized pluralism is characterized by the existence of significant anti-system political parties." (Hallin and Mancini 2004: 59 f.) Today, comparisons to the Weimar Republic can often be heard which is one of Sartori's models for polarized pluralism.

The increased segmentation of parties and parallel media goes along with a growing percentage of the population expressing distrust in government institution and in mass media. These audiences get their news from alternative media and from peers on the Internet. While the "echo-chamber" hypothesis is still under debate and empirical scrutiny, there are first studies confirming it. Ceron & Memoli (2015) use Eurobarometer survey data from twenty-seven European countries from 2007 on trust in government and model how that is affected by the political slant of the newspapers and PSB stations that respondents consume. Their results show that the pro- or anti-government slant of media outlets interacts with the individual ideological views of each citizen and confirm that media act like "echo-chambers" that reinforce pre-existing attitudes.

A recent Eurobarometer (2018) survey from November 2017 showed that the trust of Europeans in the traditional media had improved slightly or stabilised. Radio remains the medium that Europeans trust the most (59% "tend to trust") followed by television (51%). Trust in the written press had risen to 47% from its low at 40% in 2012, while an equal share of 47% "tend not to trust" this medium.

Looking at the countries in the North-Western European Region, we find that trust in the press is above EU28 average (47%) with NL (71%) and AT (61%) taking the lead and two exceptions: East-Germany (44%) and the UK with a trust level of merely 23%. The pattern repeats with trust in political parties, where all countries in the region were above EU-average (18%) with NL (43%) in the lead followed by West-Germany (36%) and the UK at an under-average 13%. And the same for trust in government: EU average: 36%, frontrunners: LU (68%) and NL (65%), UK: 34%. Already in the 2007 survey the UK had been on the low end of the trust scale just before PT and IT. We can assume that the cleavages over Brexit strengthened distrust in 2017[1]. Since then, the Corona pandemic heightened the polarising effect across Europe.

QA8a.1 I would like to ask you a question about how much trust you have in certain media and institutions. For each of the following media and institutions, please tell me if you tend to trust it or tend not to trust it. The written press:

	UE28 EU28	BE	D-W	DE	D-E	IE	LU	NL	AT	UK
TOTAL	28055	1005	1045	1565	520	1001	507	1034	1016	1334
Plutôt confiance	13044	597	611	870	228	506	301	734	616	309
Tend to trust	*47%*	*59%*	*59%*	*56%*	*44%*	*50%*	*59%*	*71%*	*61%*	*23%*
Plutôt pas confiance	13222	373	399	640	269	447	167	254	369	968
Tend not to trust	*47%*	*37%*	*38%*	*41%*	*52%*	*45%*	*33%*	*25%*	*36%*	*73%*
NSP	1789	35	35	56	22	48	38	45	32	57
DK	*6%*	*4%*	*3%*	*3%*	*4%*	*5%*	*8%*	*4%*	*3%*	*4%*

Source: EB88, November 2017

QA8a.6 Political parties:

	UE28 EU28	BE	D-W	DE	D-E	IE	LU	NL	AT	UK
TOTAL	28055	1005	1045	1565	520	1001	507	1034	1016	1334
Plutôt confiance	4998	225	379	523	116	202	155	442	343	173
Tend to trust	*18%*	*22%*	*36%*	*33%*	*22%*	*20%*	*31%*	*43%*	*34%*	*13%*
Plutôt pas confiance	21681	758	604	950	377	734	294	538	612	1109
Tend not to trust	*77%*	*76%*	*58%*	*61%*	*73%*	*73%*	*58%*	*52%*	*60%*	*83%*
NSP	1376	22	63	91	27	66	58	53	61	52
DK	*5%*	*2%*	*6%*	*6%*	*5%*	*7%*	*11%*	*5%*	*6%*	*4%*

Source: EB88, November 2017

[1] Cf. Sentiment analysis reveals consistently negative coverage of Brexit and EU in UK press, Pressgazette 08.04.2021.

QA8a.12 The national government:

	UE28 EU28	BE	D-W	DE	D-E	IE	LU	NL	AT	UK
TOTAL	28055	1005	1045	1565	520	1001	507	1034	1016	1334
Plutôt confiance	9950	472	607	852	207	451	346	671	471	454
Tend to trust	36%	47%	58%	54%	40%	45%	68%	65%	46%	34%
Plutôt pas confiance	16629	513	366	611	287	502	113	324	468	824
Tend not to trust	59%	51%	35%	39%	55%	50%	22%	31%	46%	62%
NSP	1476	21	72	103	27	47	49	40	76	56
DK	5%	2%	7%	7%	5%	5%	10%	4%	8%	4%

Source: EB88, November 2017

The region, like the rest of the world, has seen a strong decline in the circulation of newspapers. Digitisation and the Internet have revolutionised media operations from research, requiring new skill sets from journalists, through distribution and interaction with "the people formerly known as the audience" (Jay Rosen) to advertising funding. Over the last 30 years, press publishers, broadcasters and journalists have been struggling to adapt to the new media environment. We may include media researchers in this list.

3.1 Newspapers

Protestantism, literacy and industrial revolution in northern Europe provided the ground for the development of mass circulation newspapers.

Language is an important factor in countries with two or three official languages (IE: EN & IE, BE: FR, NL & DE, LU: LU, FR & DE; plus regional official languages in AT: Croatian, Slovenian, Hungarian), dividing media markets into separate segments and increasing cross-border influence from strong neighbouring language media (UK in IE, DE in AT, BE & LU, FR & NL in BE). In Ireland that was a British colony until 1921 and left the Commonwealth in 1949. Newspaper development was delayed because of the countries poverty and the competition from British imports (209)

Size certainly matters (Trappel 2015, Lowe/Nissen 2011). Some media markets are simply bigger than others, which can have important implications for the number of media outlets, and hence for both state regulation of media and the relation of media outlets with political actors (Hallin and Mancini 2004: 25f.). Luxembourg is the smallest country in the region. Newspapers are parts of the externally plural societal pillars. Declining sales are particularly threatening in a small market. In order to maintain the opinion diversity, the country introduced press subsidies (Pressehilfe) in 1976.

Newspaper markets also vary in the balance of local, regional, and national newspapers. Some (Britain, Austria) are dominated by a national or super-regional press, none in the region by local papers and some (Germany) have a combination of both. National newspaper markets tend to produce a more politically differentiated press (Hallin and Mancini 2004: 25).

The strongest determinant of the media system Hallin and Mancini find in religion. While the smaller countries in the North-Western European region Ireland, Belgium, Luxembourg and Austria are predominantly Catholic, the most populous countries UK and Germany as well as the Netherlands are mostly Protestant. Hallin and Mancini's data from 2000 on Newspaper Sales per 1,000 Adult Population clearly show the correlation for Belgium and Ireland with sales below 200, while all the others are above 300.

Table 1: Newspaper Sales per 1,000 Adult Population

	2000	2017
Belgium	186.5	120.86
Ireland	191	116.29
Netherlands	345.9	174.56
Luxembourg	n.a.	264.55
Austria	374.3	242.06
Germany	375.2	202.66
United Kingdom	408.5	145.05

Sources: 2000: World Association of Newspapers, World Press Trends, cited from Hallin and Mancini 2004: 23; 2017: SGI from various sources

With ongoing secularisation and an overall decline in sales of printed papers, the data from 2017 also show a declining difference between Protestant and Catholic countries, indicating a further homogenisation of media systems. The UK had the highest sales in 2000 and experienced the biggest drop. Only IE and BE now sell less newspapers. Surprisingly it is now two Catholic countries, Luxembourg and Austria, that in 2017 had the highest sales.

Hallin and Mancini furthermore find the national commercial newspaper markets in Northern Europe to be segmented by class and by political affiliation. The strongest separation between a sensationalist mass press and quality papers addressed to an elite readership they identify in the UK, while other Northern European countries are dominated by newspapers that serve elite and mass readerships simultaneously (Hallin and Mancini 2004: 25). Political parallelism will be discussed in the following section.

The most important trend in the last two decades has been a decline in membership of traditional civil society organisations like churches, unions and parties and thereby their funds and societal impact and the rise of the Internet. This went along with a quite dramatic decline in newspaper circulation, in turn leading to heightened competition, newspaper closures and increased concentration.

In the UK, "in August 2015, the year-on-year decline for most newspapers was in the double digits, with the *Sunday People* losing a record 18% followed by the *Sunday Mirror* that lost 13.5%. The best performing newspaper were *The Times* and *Sunday Times*, with losses of 1 and 4.7% respectively with projections for a further 50% decline in the next five years." (Oggolder et al. in: Arnold et al. 2020: 336)

Part of the cause is the shift from advertising revenues from print to online and from media to tech companies. In the Coronavirus year 2020, ad revenues in UK of national news media dropped by 24%, those of regional news media by 35% while the drop for electronic media was less steep. At the same time, Google ad revenues on search rose by 7.1%, that of Facebook by 10.4% (Pressgazetta 29.04.2021)

In Germany, Mast et al. (2019) show an equally steady decline. "Actual closures of national media organisations such as the *Financial Times Deutschland* or the news agency *dapd* – both in 2012 – may be fairly rare, but the print circulation of local and regional subscription newspapers in western Germany fell from 14 million in 1995 to 9.6 million in 2017. Some 12 per cent of papers were discontinued or lost their independence. Local newspapers, in particular, saw young readers turn away (ibid.)." (cited from Dachwitz & Fanta 2020: 6)

The CEO of the *Tageszeitung* in 2018 proposed a "Scenario 2020" where only the weekend edition will still appear in print while the daily edition will become online-only (Karl-Heinz Ruch, Szenario 2020, 13.08.2018). This has not happened yet, but the possibility of printed daily newspapers disappearing is quite real.

3.2 Political parallelism

"Political parallelism" refers to the ties between media and political actors. Originally it was developed for links between parties and media (Hardy 2008, Seymour-Ure 1974). Hallin and Mancini (2004) extended it to imply an instrumentalisation of media by political and economic interests seeking to wield political influence (37) and they include media parallel no longer to specific parties but to more general political orientations. They see the end of ownership of media by parties as a general trend starting in the 1960s and 1970s caused by commercialisation of media and the membership decline of the mass organisations political parties, churches and unions.

With Seymour-Ure's strongest link between media and parties gone, a political affinity between content and readership remains. Parallelism is now seen as driven by market segmentation and by the political involvement of owners and journalists (Mancini, 2012, p. 267). An example here is Rupert Murdoch using his UK papers to openly campaign for Major and Cameron while at the same time waging relentless campaigns against the BBC.

Hallin and Mancini write that media in some countries have distinct political orientations, while media in other countries do not. The latter refers primarily to the US. Their argument is derived from Patterson and Donsbach (1993) who found that journalists they surveyed in Europe placed the major national newspapers across a wide political spectrum, while their US counterparts located all the major news organizations in a small range between the Democratic and Republican parties (208). Parallelism in the Democratic Corporatist region today appears as newspapers with recognizable general political tendencies. Journalists tend to work for and audiences tend to read those papers whose colouring matches their own political affinities.

The **British press**, Hallin and Mancini write, "is still characterized by external pluralism. It is no coincidence that the concept of "party-press parallelism" was developed in Britain, where despite their commercial character and despite the importance of the fact-centered discourse stressed by Chalaby, the press has always mirrored the divisions of party politics fairly closely." (208)

This is most pronounced in the case of tabloids. Tabloids everywhere are characterised by "reject[ing] the constraints of objective reporting", by populism, often in a tone of outrage, launching campaigns around causes they expect to be popular. "In Britain as in Germany, this most commonly takes the form of a right-wing populist stance, emphasizing nationalism, anticommunism, traditional views on gender and on many social issues, and hostility to politicians." (211) Different from German tabloids, their UK counterparts are also intensely partisan, particularly in election periods. Rupert Murdoch's *Sun* had claimed credit for the Conservative victory in the general elections in 1992. In the 1997 election, *The Mirror* campaigned for Tony Blair (ibid.). In 2016, Murdoch again put the weight of his newspapers behind the Conservative candidate, David Cameron.

Britain had a significant labour press. Its fate can be exemplified by two examples, one given by Hallin and Mancini: "Its most important representative in the twentieth century, the *Daily Herald*, was owned by the Trades Union Congress (TUC) from 1922 to 1929, and the TUC retained editorial control until 1961, when the paper was absorbed by the Mirror group (later to be sold to Murdoch and transformed into *The Sun*)." (205) They explain its demise by the fact that advertisers disliked its politics and had little interest in its overwhelmingly working-class readership. Their table (7.1, p. 213) shows that in 1997, Labour-leaning readers read the *Mirror* (72%) or the *Sun* (52%) and as broadsheet *The Guardian* (67%).

The other example is the *Morning Star*, the longest-running socialist newspapers in UK. Originally founded in 1930 as the *Daily Worker* by the Communist Party of Great Britain

(CPGB), ownership was transferred from the CPGB to an independent readers' co-operative in 1945. The paper was then renamed and reinvented as the *Morning Star* in 1966. Still a reader-owned co-operative, in 2011 it nearly went out of business and was saved by donations from its readers. In 2015 it sold about 10,000 copies and had a staff of 30. Advertising revenues had also risen, though remained modest because most of the ads are placed by trade unions, "solidarity bodies" and individual readers. Regular advertisers avoid the paper for the same reasons they avoided the *Daily Herald* (New Statesman 04.08.2015). By 2019, the *Morning Star* reported to have increased print sales in 2015-16 and since maintained them without giving a number. It also found that the paper is read by far greater numbers online than it is in print. Yet it was still struggling and therefor decided to increase the weekday price of its print edition from £1.00 to £1.20 and introduced a metered paywall to its online-version, allowing readers to access to 20 articles a month free and prompting them to buy an online subscription from £4.99 a month (Morning Star 27.04.2019). This is a new variant of parallelism where a newspaper is not owned by a party but by its devoted readers who want their paper to survive. The same model applies to the German *Tageszeitung* which is also owned by a co-operative.

Hallin and Mancini's concluding remark on the UK press landscape at the turn of the century read like forebodings of the Brexit desaster: "Since the rise of the Labour Party there has been a strong partisan imbalance, with most of the press – with only the exceptions of the Mirror, Guardian, and Independent – clearly on the political right (Negrine 1994; Curran and Seaton 1997)." (215)

The pillars in the **Netherlands** began to dissolve in the 1960s. Most national dailies gradually redeveloped distinct profiles with recognizable ideological positions and a partisan audience. The landscape remains today as Hallin and Mancini describe it based on Van der Eijk (2000)

> *Trouw*, for example, is clearly progressive Christian in character and makes much of its sympathy for Third World causes, environmental protection and progressive theology. *De Telegraaf*, by contrast, is socially and politically more conservative in tone, even evincing a certain dislike for all political parties and their strategic and tactical maneuvering. Of the national dailies, the *Volkskrant* is most strongly oriented toward postmaterial values such as

> education, multiculturalism and socioeconomic equality, in addition to having a positive fascination with the political world that it shares with the more conservative and academically-oriented *NRC-Handelsblad*. (Hallin and Mancini 2004: 329)

Content analysis showed that newspapers were more critical of parties with political different from their own. That this pattern persists and shows no signs of fading has been confirmed in a study by Van der Pas et al. (2017) who have researched political parallelism in the Netherlands using a political agenda-setting approach. The authors consider the Netherlands to be a critical case. After the depillarisation, i.e. the end of strong segmentation and strong links between parties and media, the Dutch media system "is nowadays characterized by independent media and high levels of professionalization. Mainstream media might have a certain political leaning or orientation, but lack a clear partisan bias." (Van der Pas et al. 2017: 492)

They analysed the weekly question hours in parliament and respective reporting in two national daily newspapers, the centre-right *De Telegraaf* and the centre-left *De Volkskrant*, in the period from 1995 to 2010. "The results show that parties respond only to issues raised in newspapers their voters read, and that newspapers only respond to the agenda of parties their readers vote for. This demonstrates that even in mediatized, professionalized media contexts, parallelism is still of importance to understand the relationship between media and politics." (ibid.: 491)

Additionally, in **Luxembourg** the pillars begin to fade. The most influential newspaper is the *Luxemburger Wort* with a daily reach of a third of the population with articles in German, French and Luxembourgish. It was founded in 1848 and until recently was owned by the Catholic Church. Like the Christian Social People's Party (CSV), which Jean-Claude Juncker had shaped for decades, and the union LCGB it belongs to the Catholic pillar of Luxembourg. The newspaper of the social-democratic pillar is the *Tageblatt*. In April 2020, the *Wort* was sold to Belgian Mediahuis NV which assured the very conservative Catholic stance of the paper would be continued.

The pillar system in **Austria** with respect to public offices is called *Proporz*. In the 1950s newspapers were dominantly party press. Today by far the largest national daily in Austria with a reach of a third of the population is the tabloid *Kronen Zeitung*. It had originally been founded in 1900 and re-established in 1959 by journalist Hans Dichand with support by the Austrian Federation of Trade Unions and the social-democratic party (SPÖ). In 1989 half of its shares were taken over by the German WAZ publishing group which is close to the German social-democratic party (SPD). An attempt to set up a conservative newspaper in 1954, the *Bild-Telegraf*, failed after ten years. Its editor-in-chief, Gerhard Bacher, would later briefly become editor-in-chief of the *Kurier* and a long-standing Director General of the Austrian PSB (ORF).

The third-largest national paper, the liberal *Der Kurier*, was founded in 1945 by the US occupying forces with a press officer as editor-in-chief. The newspaper had an unusually colourful layout and is therefore considered Austria's first tabloid newspaper. It was bought in 1954 by the owner of a film company with support by the union ÖAAB linked to the conservative party ÖVP. In 1973 it was sold to an industrial group close to the Austrian banking company Raiffeisen. In 1988 the *Kronen Zeitung* and *Kurier* founded a joint production and distribution subsidiary, Mediaprint, with the participation of the German WAZ group.

Fourth in line is the left-liberal *Der Standard*, founded in 1988 by journalist Oscar Bronner based on the model of the *New York Times*. Originally, German Axel Springer Verlag held a 50% stake in the company. In 1998 Bronner transferred that share to the German Süddeutscher Verlag which he bought back in 2008. *Der Standard* is now almost entirely owned by Bronner or his foundation.

The smallest national daily and the oldest is Die Presse. It had been founded in the 1848 revolution after French models and represents a bourgeois-liberal view. In 1991 the majority stakes were acquired by the Catholic media holding *Styria Medien AG*, that also published a business daily, *Wirtschaftsblatt*, from 1995 till 2016.

Finally, the second-largest national paper in Austria is *Österreich*, that gives away a large share of its print run free. The tabloid was founded by journalists Wolfgang Fellner and Werner Schima in 2006 based on the model of *USA Today* and targetting 20 to 49 year old readers. The newspaper is financed by loans of 50 million euros from a consortium of eight Austrian banks. In 2016 *Österreich* in cooperation with CNN launched the 24h news

channel oe24.TV. CEO is Fellners son Niki Fellner. *Österreich* has been criticised from the start for its low quality of reporting and
violations of journalistic standards and is regularly reprimanded by the Press Council.

We can conclude that in Austria links between newspapers and tradition political pillar organisations remain, but they are primarily run by professional journalists vying for market shares. The Corporatist culture of compromise and power sharing allows for cooperations even between competing newspapers.

Germany was never as clearly pillarised as NL, BE, LU and AT but also here there were papers parallel to political parties and other social organisations. E.g. the Protestant and Catholic church each operate a news agency (epd and KNA) and a media journal (EPD Medien and Medienkorrespondenz). Also here, social-democrats, liberals and conservatives like to read a paper of their political leaning.

The landscape is essentially unchanged from what Hallin and Mancini described in 2004: the *Frankfurter Allgemeine* is right of center, the *Süddeutsche Zeitung* left of center; *Die Welt* further still to the right and the *Frankfurter Rundschau* further to the left (27, 181). The *Frankfurter Rundschau* had been founded in 1945 by social-democrats and communists and was owned by its editor-in-chief and publisher Karl Gerold and then a foundation in his name. Only in the beginning of the newspaper crisis in 2004, the SPD-owned media holding stepped in to save it only to sell its shares to publisher DuMont two years later. After further crises the paper had to declare insolvency. In the end, in a move allowed by the Federal Cartel Office the *Frankfurter Allgemeine Zeitung* to take over the *Frankfurter Rundschau* in February 2013. The FAZ declared that it will not influence its left-liberal political profile. Just as in Austria, the crisis enables industry cooperations across party lines.

While the *Frankfurter Rundschau* represents the old left, die *Tageszeitung* stands for the new left and social movements of the 1970s and emerged in parallel to the Green party. It was founded in 1978 as the first new national newspaper in decades. It is owned by a cooperative and, like the UK *Morning Star,* is supported by a small but loyal range of conscientious advertisers and by its readers. Finally, Springer's right wing populist *Bild* must be mentioned that dominates the tabloid market. In federal Germany, the local press used to constitute a counterweight to the national papers but is hardest hit by the crisis and by concentration.

As a trend for the region, we can summarise that while organisations from the traditional pillars remain, their relevance for the ownership of media has disappeared, giving way to a market with cooperation across the lines of political affinities. These affinities remain and continue to serve different the audience segments. It should be noted that segmented external pluralism does not imply a lesser degree of social cohesion. In Lane and Ersson's (1991) index of polarization, which reflects the ideological distances between parties and the strength of antisystem parties (Hallin and Mancini 2004: 60 f., 130), the Catholic countries in this region (IE, BE and AT) were the least polarised, while the Protestant ones are more so with NL the most polarised in the region. At the same time as we have seen from the Eurobarometer (2018) data, that NL has the highest levels of trust in the media and in political parties and is second in trust in the government only to LU.

Van der Pas et al. conclude that in the differentiation of societal systems, a structural linkage has grown between the functional systems of mass media and of politics that serves both sides and therefore shows no signs of disappearing.

> It is particularly important to notice that political parallelism matters for agenda-setting in both directions, ... Both kinds of actors benefit from the mutual linkage: politicians as they are granted space for the dissemination of their issues in the media to an audience that might vote for them in upcoming elections, and journalists as their reports are legitimized by the adoption of parliamentarians. As the linkages are beneficial to both, they are likely to remain intact. There is thus good reason to expect that political parallelism will continue to matter in the future. (Van der Pas et al. 2017: 506)

As long as our societies are organised as representative democracies where political opinion and will is formed and voted in political parties, parties will inherently have a relationship with media – as sources of information, as objects of reporting and as 'primary definer' of news.

3.2.1 Media concentration

Throughout the region, a rational-legal tradition, a self-confident and self-organising professional journalism and media regulation developed over decades of conflicts in order to shield press freedom from interference and instrumentalisation and to prevent the formation of a dominant opinion power. Ensuring a public sphere with reliable information and a diversity of opinions so that citizens can freely form their opinion and participate in democratic decision making is the overarching goal of media policy in all the countries of the region.

Focussing on press and broadcast, Hallin and Mancini discuss media ownership and its concentration, particularly with respect to political parallelism. Since they do not look at other media like movies, transport media like the Internet and other branches of media businesses like advertising they also do not address horizontal and vertical integration.

The Euromedia Research Group's "Media for Democracy Monitor 2021" considers the level of media concentration for selected countries on the national and on the regional level. In all of the countries under study here, ownership concentration on a national level is remarkably high as a few big media companies divide the market among themselves. This is true for Austria, Germany, increasingly for the UK while Belgium, due to its multi-lingual media landscape, still is quite diverse. A difference can be made with respect to the markets for TV, radio and print. Media concentration is the highest in the TV sector, only in Germany a higher competition among several media houses provides a greater variety of radio stations and newspapers.

As for the regional level the picture is more differentiated. Regional media ownership concentration is high again in Austria, Belgium and the Netherlands (print), as well in Germany whereas the UK and the Netherlands (TV and radio) have less concentration in the regional market.

The European Audiovisual Observatory (EAO) finds a general decrease in the concentration of the European audience market due to a continued fragmentation. From 2012 to 2017, average audience market shares of the four leading TV channels in the EU's national markets have contracted by 10.2 per cent (ibid: 19). EAO's analysis of 2017 audience data using the Herfindahl-Hirshman Index (HHI) showed a high degree of audience concentration in terms of shares held by the 4 main TV groups in each country in Flemish Belgium, the UK and Germany. Moderate concentration was found in the Netherlands, French Belgium and Austria and a low concentration in Luxembourg and Ireland (ibid.: 27). Growing internationalisation manifests itself in increasing market power of non-domestic TV channels in national markets. This is the highest in Luxembourg (67%), French Belgium (63%), the Netherlands (53%), Austria (47%), Ireland (38%) and less so in the UK (25%), Flemish Belgium (18%) and Germany (7%) (ibid.: 38). The overwhelming majority of these foreign services are US-American in the UK and in Germany while in all other countries of the region they are predominantly European (ibid.: 39)

In the 1980s, satellite technology opened the possibility of a European television to complement the economic European Union by bringing about a European identity. At the same time the European audiovisual industry was fragmented and not competitive with its US-American counterpart. The European Commission therefore wanted to facilitate the growth of the industry and in particular of large European media companies, starting with the Television without Borders Directive (1989) that in later versions turned into the Audiovisual Media Services Directive (AVMSD). As consequence of these measures, the ensuing liberalisation, particularly of broadcasting, and the loosening of media ownership rules, media concentration in Europe increased while the accompanying efforts to defend media pluralism and diversity failed to produce any concrete legislative measures as Artero et al. (2020) note.

With the Internet boom of the late 1990s and again in the mid-2000s, media acquisitions and mergers boomed and have led to European multinational companies and to the presence of non-European companies, particularly in entertainment and advertising, but also in news, most notably Rupert Murdoch's News Corporation. "As of 2016, News Corporation's News UK subsidiary is the largest UK print player accounting for 34% of daily and Sunday national newspaper sales and, through a 39% stake in Sky Television, for 5% of total broadcasting revenues (though not audiences). Sky's circumvention of regulatory prohibitions in its UK activities (achieved by initially broadcasting from Luxembourg) secured a foothold in that market." (Artero et al. 2020: 302) Sky is also the market-leading pay-TV operator in UK, Ireland, Germany and Austria.

In Germany, the introduction of commercial broadcasters in 1984 brought forth a number of providers that soon consolidated into two "families", Bertelsmann's RTL Group and the Kirch Group out of whose insolvency in 2002 emerged the ProSiebenSat1 Group. The latter was owned by Anglo-American investment funds that started to sell their shares in 2013. The free float is now 100 per cent.

As media companies started to be traded at the stock exchange they were also drawn into the effects of financialisation. This was enabled by the liberalization of financial markets and fuelled by the dot.com bubble in the late 1990s with its high investments in expectation of even higher returns. Dwayne Winseck (2010) summarises the effects on media:

> The logic of financialization is particularly important to recent developments across the media industries because it has, paradoxically, created greater media concentration but also bloated media giants that have sometimes stumbled badly and occasionally been brought to their knees by the two global financial crises of the twenty-first century (2000-2002; 2008). (Winseck 2010: 366 f.)

Winseck argues that the media were not only swept up in a general financialization of the economy but were on the cutting edge of this process. "The intensity of investment driving media consolidation has been wholly out of proportion to the media industries' weight in the 'real economy.'" (ibid.)

The IfM Media Data Base on the 50 largest media corporations in 2019 is led by US-American and Asian technology companies like AT&T, Alphabet, Comcast, Facebook, Tencent and Sony. Among the European media and knowledge corporations on the list, the UK is present with three corporations, the Netherlands and Germany with two each. Only France and Sweden also have have players in this league. Thus, the North-Western European Region emerges as the centre of global European media power in the world.

The European companies include science and education publishers (RELX Group (UK), Pearson (UK) and Wolters Kluwer (NL)). Two of them provide news media. The largest is the Dutch company Altice. It was founded in 2001 by Moroccan-born Swiss-Israeli

Patrick Drahi buying and selling cable and pay TV providers in France, Belgium, Israel, the Caribbean and the USA including *Cablevision* in New York. Altice is headquartered in Amsterdam. It's media holdings include magazines like *L'Epress* and newspapers like *Libération* in France and the products of the Newsday Media Group in New York, TV and radio stations including the news channel *i24news* founded in Israel as a counterweight to *Al Jazeera*, that now has French and British versions and replaces *Al Jazeera* in most US cable packages, and original content production studios (Hachmeister & Wäscher 2017: 175 ff.)

The second largest is Bertelsmann. Originally founded in 1835 by the printer Carl Bertelsmann for publishing Protestant literature in Gütersloh, it is still headquartered there today while it consists of about 1,200 individual companies and company participations with subsidiaries in more than 50 countries. Bertelsmann grew as a book publisher after 1945. Today it owns the scientific Springer Verlag and Penguin Random House, the world's largest trade book publishing group with offices in every continent, while Gruner + Jahr, Bertelsmann's magazine publishing division, operates in over 20 countries. Also in the 1950s it entered the market for music records. In 2004 it had merged its Bertelsmann Music Group (BMG) with Sony Music but sold its 50% share to Sony BMG in 2008.

After the liberalisation of the broadcast market in 1984, Bertelsmann acquired shares in RTL from the Compagnie Luxembourgeoise de Télédiffusion (CLT). In 1997 it merged its UFA Film- und Fernsehgesellschaft with the CLT and in 2000 with Pearson TV to form the RTL Group. RTL today holds stakes in 60 TV stations and 31 radio stations across 10 countries in Europe and South-East-Asia. It also owns Freemantlemedia, one of the largest producers and distributors of international TV formats (Hachmeister & Wäscher 2017: 183 ff.; Artero et al. 2020: 304). In February 2021, Bertelsmann announced that its daughters Mediagroup RTL and Gruner + Jahr will merge into a "national champion" that is supposed to stand up to global tech platforms such as Google, Facebook & Co.[2]

2 Günter Herkel, Das Imperium bröckelt. Bertelsmann: Gruner+Jahr und RTL im Fusionsfieber, in: M3 1.2021, 19.03.2021

Not on the top 50 list but noteworthy as a leader in a parallel niche market is Antwerp-based Mediahuis NV. It owns *De Standaard* in Belgium and *NRC Handelsblad* in the Netherlands. In 2019 it had bought, among others, the *Irish Independent* and the *Belfast Telegraph*. In April 2020 it acquired from the Archbishopric of Luxembourg the Saint-Paul Group and with it the most influential daily newspaper, *Luxemburger Wort*. Since then, Mediahuis NV owns the three leading newspapers in the Benelux region and likely the largest number of Catholic media outlets in Europe (Süddeutsche Zeitung 27.4.2020).

National regulation of media concentration, Artero et al. conclude, does have an effect while on a European level it is rather lenient. "The fact that UK media markets are markedly more concentrated than those in Germany, despite roughly similar market sizes, emphasis how the regulatory environment can influence the precise degree of ownership concentration." (Artero et al. 2020: 302). The European competition regulator did block a joint Kirch-Bertelsmann-Deutsche Telekom bid to establish a pay-TV service in 1994, but permitted Bertelsmann's acquisition of RTL in 1997. In the interest of the European Single Market and its international competitiveness for the most part they assented to increasing concentration.

3.3 Public Service Broadcasting

Diversity of political opinions in a national public sphere can be achieved by external or internal pluralism. In the market-based press, a diversity of newspapers each with their recognizable affinities allows readers to get news framed by their own leaning but also inform themselves how the world looks like for other factions of society.

Broadcasting in Europe developed in the form of a limited number of non-market organisations. In this case, pluralism has to be organised internally, within each individual PSB. The only exception is the Netherlands that developed an externally plural system with separate pillarised broadcasters. Many of the Dutch stations still on the air today were founded in the mid-1920s, including the Liberal-Protestant VPRO, the Orthodox-Protestant NCRV, the Catholic KRO and the worker's radio association VARA. Belgian PSB is segmented by language groups with each of the three stations internally plural: VRT

(Vlaamse Radio- en Televisieomroep) for Flanders, RTBF (Radio Télévision Belge Francophone) for French-speaking Wallonia and BRF (Belgischer Rundfunk) for the German-speaking community.

For the other European countries, it is the statutory task of the state to bring about a diverse PSB system. Therefore, the internal pluralism is primarily threatened by interference and instrumentalisation by political actors. Hallin and Mancini (based on Humphreys 1996) distinguish *four models of public broadcast governance*: 1.) the government model, i.e., state broadcasting; 2.) the parliamentary model where the directors of the broadcast organisation are appointed by proportional representation and therefore change with every newly elected parliament. In the Austrian *Proporz* system this leads to a power sharing with the TV director of ORF close to the SPÖ and the radio director close to the ÖVP or vice versa. 3.) The civic model where PSB is not controlled by state or parliament but by "society" represented in a corporatist model of society by social groups like trade unions, business associations, religious organizations and political parties. This is exemplified by Germany where these "socially relevant groups" each appoint their representatives to the PSB governing bodies, the Broadcast Councils. Here opinion in content is not avoided but balanced "for instance, one current-affairs program may be run more by journalists from one political orientation, and one by journalists from another orientation." 4.) The professional model where the broadcast organisation is insulated from political and social control and run by broadcasting professionals, exemplified by the UK and Ireland (Hallin and Mancini 2004: 30 f.). Here, "pluralism is, in theory, achieved by keeping politics out of the governance of broadcasting, leaving it to neutral broadcasting professionals to represent the diversity of society." (ibid.: 166)

The BBC model of an independent PSB was influential everywhere. In Germany and Austria, it served as the standard by which the broadcast system was remodelled after 1945. Even if countries in the North-Western European Region have elements of the parliamentary or the civic models, they all give broadcasting professionals fairly high levels of autonomy. In this sense, Hallin and Mancini write, the BBC "may have contributed to the 'secularization' of society in Northern and Central Europe among other things by introducing a model of nonpartisan journalism that eventually influenced the professional culture of the news media." (ibid.: 170)

Hallin and Mancini posit the **British BBC** as the primary example of the professional model where "in theory" politics is kept out of the governance of broadcasting. This refers to influence not only from the government but also from organised social interest groups. This is the dividing line between the organised pluralism of the Democratic Corporatist countries where a diversity of social forces is included in the governance and the individualised pluralism of the Liberal Model. As evidence, Hallin and Mancini cite John Reith, the BBC's founding director from 1922 to 1936, who has infused the Corporation with an ethic of hostility to pressure from organized social groups. This includes the trade unions as exponents of collectivism while the BBC was the upholder of liberal individualism (ibid.: 241 f.).

As for the theoretical exclusion of state influence, Hallin and Mancini note that the BBC's formal structure is no different from government-controlled or parliamentary systems: The director general and board of governors are appointed by the Queen in Council, also known as Privy Council – in effect by the prime minister, and by convention with the consent of the opposition. Yet, they argue, a strong cultural norm ensures that both at the helm and in the ranks of the BBC people are selected for their professional esteem not their party affiliation (ibid.: 235).

At the time of Hallin and Mancini's writing, the BBC was governed by the Board of Governors that had been established in 1927. In January 2007 it was replaced by the BBC Trust which in turn was replaced by the BBC Board in April 2017. Of the Board's fourteen members, the Chair and four members for the Nations (England, Northern Ireland, Scotland and Wales) continue to be appointed by the Privy Council. The other non-executive members and the executive members, including the BBC Director-General, the Chief Content Officer and the Director News and Current Affairs, are appointed by the BBC Board through its nominations committee which consists of five members of the Board.

The Privy Council is the oldest part of British government dating back to the Normans when the privy counsellors were the rulers's Cabinet. And in legal terms, the Cabinet is still the executive committee of the Privy Council. Today, there are about 600 privy counsellors appointed for life, including all present and former prime ministers and cabinet ministers as well as royals like Prince Philip and Prince Charles, the current and former Speakers of the House of Commons, senior Bishops, senior courtiers, leaders of the opposition, senior backbenchers and senior judges. In practice, its monthly meetings, presided over by the Queen, are only attended by Cabinet ministers who are also accountable to Parliament for all matters conducted through the Privy Council. Most of the council's power have moved to the Cabinet. What remains is its responsibility for the Chartered bodies, about 1000 institutions, which are incorporated by Royal Charter, including charities, universities and companies and the BBC. The Privy Council is thus a representation of society like the Broadcast Councils in Germany. Only that in Germany they are an image of the corporatist model of society of the 1950s and 1960s, while in Britain it is an image of the society of the Middle Ages with the monarchy and its elites.

Despite the supposed insulation of the BBC from political and social control, Hallin and Mancini point out that there has been political interference, in particular during the years of Margaret Thatcher's premiership. In 2003 Tony Blair's government attacked BBC coverage of its handling of intelligence on Iraq. Also Boris Johnson left no doubt that he is no friend of the BBC.

The most recent appointment of Director-General of the BBC by the BBC Board is Timothy Davie who succeeded Tony Hall in September 2020. Most, like Hall and his predecessor Mark Thompson, came to head the BBC after a life-long career in the institution. Davie had been a marketing manager and a politician for the Conservative Party in the 1990s and only joined the BCC in 2005. One of Davie's first measures was to issue new guidelines prohibiting BBC staff from expressing their personal views on current political issues on their private social media accounts and from taking part in public demonstrations. He called this 'virtue signalling', a popular term on the right. Davie said this was to reduce accusations of revealed political bias by the BBC at a time when it is under attack from the Conservative government and right-wing media outlets (The Guardian 29.10.2020).

The chairperson of the BBC Board typically has been either a politician, like Chris Patten, the last Governor of Hong Kong, Michael Lyons, former Labour Party councillor, or the former Minister of State Rona Fairhead, or an economist or business executive like Diane Coyle or the most recent chair David Clementi. Johnson had initially favoured Charles Moore as BBC Chair, his former editor at the *Daily Telegraph*, but Moore declined (*The Guardian* 27.09.2020). In February 2021 the Privy Council approved Richard Sharp as Clementi's successor as BBC Board Chair. Sharp falls into the second group with over 30 years of experience in the financial sector, including JP Morgan and 23 years at Goldman Sachs. He was also a member of the Bank of England's Financial Policy Committee (*Gov.UK News* 17.2.2021).

The third key institution with a say over the BBC, aside from the Director-General and the Board, is Ofcom, the government-approved regulatory and competition authority for the broadcasting, telecommunications and postal industries of the UK. Johnson's preferred candidate to head Ofcom is Paul Dacre. Dacre was long-serving editor of the right-wing tabloid *Daily Mail*, before he became chair of its publishing group in 2018. Dacre has accused the BBC of a "kind of cultural Marxism" that distorts political discourse and runs counter to the views of millions of licence fee payers. With its "institutional left-wing bias", the broadcaster was undermining conservative society and turning its values upside down. In a speech in 2007, Dacre called the BBC "too bloody big, too bloody pervasive and too bloody powerful." (*Financial Times* 03.02.2021). Putting him in control of the BBC regulator is like setting the cat among the pigeons.

UK media makers and academics are alarmed about the future of the BBC. In an open letter in May 2021, a group of 128 British writers like Salman Rushdie, actors like Hugh Grant, the Oscar-winning film producer Simon Chinn, former Financial Times editor Lionel Barber and former Guardian editor Alan Rusbridger warned that the public service principles are "under severe threat, from streaming services, big tech companies and the government." They criticise that BBC funding has been cut by 30% over the past 10 years, diminishing local and regional broadcasting at the "very moment when more investment is needed to support local democracy and accountability." They are particularly worried about a Public Service Broadcasting Advisory Panel that Johnson's government has set up and that meets in secret without any public record, even rejecting a freedom of information request on revealing anything about it. The signatories to the letter instead call for an open public debate: “We believe that this is the moment – in an era of misinformation and the ‘weaponised’ politicisation of news and opinion – to build up our Great British public service broadcasters rather than diminish them.”

The BBC was the PSB avant-garde in Europe. It is now again at the forefront of its current reconfiguration. Johnson’s attempt to place right-wing figures in key positions will shift the perceived bias from left to right. The perceived unfair competition for newspapers and other commercial media is targeting the compulsory license fee. The debate to move toward a subscription system has already started. The principle of the licence fee is secured by the BBC Charter until its review in 2027. But there is a mid-term review due in 2022, which will set its level and review BBC governance.

In the **Netherlands** the Media Act of 1969 established the NOS (Nederlandse Omroep Stichting) from two precursors as management organisation of the Dutch public broadcasting system. Its statutory tasks are twofold. One is to provide daily news broadcasts on radio and television and a news format for young audience, sport and parliamentary reporting and reporting of national holidays and commemorations. In 1995 a separate statutory PSB was set up, NPS (Nederlandse Programma Stichting), to take over the information, education, art and culture and youth and diversity programmes from the NOS. NPS merged with the two educational broadcasters Teleac and RVU in September 2010 to form NTR which has the same remit as laid out in the Media Act of 2008.

As manager of the PSB system, NOS’s other main task is to provide for the currently nine public broadcasting associations. NOS is the licensee of radio and TV frequencies and allocates broadcast time on the NPO channels as well as public funding to the PSB broadcasters based on the number of their members as reflected in subscriptions to their program guides. NPO’s double task is thus providing societally essential programming and “promoting cooperation and cohesion between the national broadcasters, programming the media offer, distributing the budgets for the various broadcasters, providing distribution, supporting broadcasters in subtitling, buying and selling programmes and, finally, conducting independent research into the quality and image of the radio, television and internet platforms.” (NPO: Over NPO)

A third element of the PSB infrastructure independent of NPO is Ster (Stichting Ether Reclame) responsible for selling advertising time in the Dutch PSB system. NPO, i.e. the PSB family, had the largest market share for television in the Netherlands in 2019 with 34.6%, and the second largest market share for radio with 30.8% (Commissariaat voor de Media: Mediamonitor).

The Dutch PSB system currently consists of the two statutory stations NOS and NTR and the pillar stations founded in the 1920s already mentioned, although with some reconfigurations. KRO (Katholieke Radio Omroep) merged with NCRV (Nederlandse Christelijke Radio Vereniging) in January 2014 to form KRO-NCRV. VARA (originally: Vereeniging van Arbeiders Radio Amateurs) merged with BNN (Bart's Neverending Network) founded 1997 targeting young audiences, in January 2014 to form BNNVARA. Two stations have their origins in "pirates" broadcasting from outside Dutch territorial waters: TROS (Televisie Radio Omroep Stichting) was founded in 1964 in reaction to the shut-down of the pirate *TV Noordzee*. TROS was outside the pillars, like the pirate provided popular programmes and quickly gained subscribers and thereby the status as an A-broadcaster in 1974. TROS merged with AVRO (Algemene Vereniging Radio Omroep) that was founded in 1927 and is also independent of the pillars, in January 2014 to form AVROTROS. VOO (Veronica Omroep Organisatie) was founded in 1973 by the pirate *Radio Veronica* that had broadcast from a ship since 1960. In 1974, the Netherlands ratified the 1965 Strasbourg Treaty prohibiting cooperation with radio broadcasts from international waters. Thus Veronica had to cease its activities and applied for a license. The station grew over the 1980s and in 1992 was the broadcaster with the most members (1.25 million). In September 1995 it left the PSB system and became a commercial broadcaster.

The most recent PSB stations are Omroep MAX, founded in 2002, targetting people aged 50 and older, PowNed, founded in 2008 by two Internet media companies that strive to become the first web-only public broadcaster which the current media law does not allow, and WNL (Wakker Nederland) founded in 2009 by the editor-in-chief of the newspaper *De Telegraaf*. Its chairman is the director of the newspaper, which profiled itself as "The newspaper for a waking Netherlands". WNL positions itself politically on the right and wants to counterbalance an alleged “one-sided left-wing sound” that, according to the founders, dominates the Dutch public channels.

Austria is the clearest representative of a consensus democracy with a parliamentary model of PSB regulation. It leads us to expect each new government to appoint its parallel directors of ORF. This was indeed the situation in the early days after the precursor of the ORF had been founded in 1957.

From 1949 to 1966, Austria was governed by a “grand coalition” of the two largest mass-parties, the conservative ÖVP and the social democratic SPÖ. In ministries, the minister usually came from one faction while the State Secretary came from the other. The same applied to the heads of administration and of public enterprises including the ORF. Together with a “social partnership” between the Chambers of Commerce and of Labour, *Proporz* with proportional party protection and post trading was seen as creating stability, avoiding conflict and centrifugal forces.

Proporz was a public secret. But when it became manifestly public it triggered change. During the coalition negotiations in 1963, a secret agreement was negotiated according to which every senior post in radio and television was to be filled twice: A red head and a black deputy, or vice versa. The text of this agreement was leaked to the daily *Kurier* that initiated a referendum with the aim to make the ORF more independent of party politics. The ORF, major newspapers and political parties hushed up the referendum, fearing a loss of influence, but it clearly expressed popular sentiment. In October 1964, The 200,000 signatures required for the petition were far exceeded with more than 830,000 signatures. This eventually resulted in the passage of the ORF Act in July 1966. It detailed the ORF’s remit, including impartial and objective reporting, transformed it into an institution under public law with a Director-General at its head, declared its full programme, staff and financial autonomy and led to a general reform of the ORF. It became more neutral, even though elements of the *Proporz* can be found to this day.

In July 2001 a new ORF law was passed that constitutes the ORF as a foundation under public law. It is controlled by the ORF Foundation Council that elects the Director-General. To replace the former Listeners’ and Viewers’ Representation, an Audience Council has been set up, whose 17 members are partly appointed by the Federal Chancellor and partly directly elected by the fee-payers. The new structure has not abolished the influence of political parties. 24 of the 35 Foundation councillors are selected by the federal government, provincial governments and parliamentary parties, 6 by the Audience Council and 5 by the ORF Central Works Council (ORF: Stiftungsrat). Thus a majority can be directly or indirectly assigned to parties.

The conservative Gerd Bacher was Director-General of the ORF with interruptions for a total of 15 years (1967–1974, 1978–1986, 1990–1994) under varying governments (ÖVP, SPÖ, SPÖ/FPÖ and SPÖ/ÖVP). Since 2007, the social-democrat Alexander Wrabetz is ORF Director-General, also under different coalition governments.

In 2013 an idea from the 1960s was discussed again of installing two Director-Generals, one of whom was supposed to be black the other red (Profil 26.10.2013). Currently, the ruling ÖVP in the second government of Prime Minister Sebastian Kurz has a comfortable majority. Whether Wrabetz will be confirmed or replaced by a conservative Director-General (DWDL 06.05.2011) will be a test as to how strong the party parallelism of the *Proporz* system still is in Austria.

In **Germany**, like in Austria, broadcasting after 1945 was re-established by the allied occupation forces in order to ensure the population would be re-educated to democratic values. The BBC served as model. German PSB was organised as a public law institution controlled by society in a kind of broadcast parliament. Broadcasting is characterised by its topicality, its reach and its suggestive power. Its abuse by the Nazis led the German Federal Constitutional Court to argue that this power did not permit for it to be left to the market. Therefore, it should be a public service where the control over the organisation is to be distant from the state (staatsfern) and the journalistic-editorial operations are to be free from the state (staatsfrei). The German constitution is unique in that next to the freedom of the press it also explicitly guarantees the freedom of broadcasting (Art. 5 Grundgesetz). This is the legal source of the mandate to the state, more precisely: the federal states to establish broadcast organisations in distance to the state.

Just as in the 1920s, the Allied Forces decided on a centralised control over the technical transmission infrastructure by the Bundespost and a distributed prerogative over content of the Länder. Assuming that different parties would rule in the federal states, they would have to find consensus on the national public sphere infrastructure. Article 5 GG thus translated into the Interstate Broadcast Treaty that is negotiated and unanimously agreed by the Prime Ministers of the Länder and then typically rubber-stamped into word identical federal media laws by the parliaments of the Länder.

Since elected politicians bring about a PSB system, the challenge was to ensure that PSB fulfils its public remit in journalistic autonomy while at the same time making it accountable – not to the state or Parliament, but to "society", to the people, the public it should serve. But who should be members of the Broadcast Councils that mandate and supervise the broadcast organisations? Direct elections of candidates by the people just as in parliamentary elections would have been an option. But this would likely have led to candidates forming factions similar to, if not directly aligned with, political parties. If parliamentary and Broadcast Council elections were held at the same time, citizens would likely vote for their preferred party candidates in both, creating a strong political parallelism. Instead, in a time that envisioned "society" as corporatists, a number of organised socially relevant groups were identified, including churches, unions, professional, business and sports associations and political parties who internally decide on their delegates to the Council.

The ARD was established in 1950 as a "working group" of the PSB stations in the federal states who jointly operate one national channel and one in each of the Länder. In 1963, a second national channel was added, the ZDF.

With all the checks and balances, the desire of politicians to exert influence on PSB remains. In February 2009, the conservative-party majority of on the ZDF Administrative Council, in particular its deputy chairman Roland Koch, then CDU Prime Minister of Hesse, announced that they would not renew the contract of editor-in-chief of ZDF Nikolaus Brender. The non-party affiliated Brender had been editor for nearly ten years but his critical reporting had made him politically unpalatable for the CDU. The sacking caused an uproar against this encroachment on the freedom of broadcasting by journalists, legal scholars and civil society, and a lawsuit with the Federal Constitutional Court for a review of the law. The Federal Constitutional Court plays an unusually important role in Germany in setting central broadcasting policy and in protecting the independence of PSB. In 2014 it ruled that a Broadcast Council should not be composed by more than a third of politicians in public office and leading party members. Furthermore, it ruled that as society gets more diverse, the social groups represented in the councils should also get more diverse. This led to changes in the Interstate Broadcast Treaty. Broadcast Councils like that of ZDF now including representatives from organisations of migrants, LSBTTIQ, regional and minority languages and for "the Internet". Also, in 2013 the Pirate Party in NRW decided to hold a public tender and vote on its council seat.

Another link between government and PSB is the "revolving door", e.g., when in 2010 Ulrich Wilhelm, the Spokesman of the Government Merkel after a grace-period of half a year became Director-General of the Bavarian PSB broadcaster.

At the same time media outlets diversified, also European societies changed from mono- to multicultural and brought a new task to public service broadcasters. Integration is one of the core remits of PSB, e.g., the German Interstate Broadcast Treaty stipulates that "they are to promote international understanding, European integration and social cohesion at the federal and state levels." (§ 11 Abs. 1 RStV; cf. Lilienthal 2009). This had now in all Western European countries to be applied to the diversified societies.

Migration in the North-Western European Region stems from the colonial past, the migrant labourers recruited by many European countries from the Mediterranean European countries, Turkey and Morocco in the expanding economies of the 1960s until 1973, in the freedom of movement and residence for persons in the EU established by the Treaty of Maastricht in 1992 and in war refugees from Vietnam, Afghanistan, Syria etc. seeking asylum.

In Germany, Austria, Belgium and the Netherlands today the percentage of citizens with a migrant background is about one-fifth. In the Netherlands, the majority have their origins in Turkey and Morocco as well as its former colonies Indonesia and Suriname. In the UK only 14 per cent have a migrant background with the majority from its former colonies in India, Africa and the Caribbean.

This creates cultural tension with the other often being depicted in stereotypes. "Media are a factor and forum where these images of otherness are constructed and negotiated." (Thomass/Moe/d'Haenens 2015: 189). Since integration is one of the core remits of PSB, Thomass et al. argue that "PSM have to answer to diversity requirements in migrating societies." One of the successful approaches, they point out, is the German federal North Rhine-Westphalia. It is the state with the highest percentage of the population with a migrant background. "The regional broadcasting corporation WDR hence is one of the federal broadcasters within the ARD, which has the comparatively most advanced policy in Germany. Here 13.9 per cent of the staff has a migrant background and the corporation has an authorized representative for migrant issues and a developed human-resources approach to the issue." (ibid.: 190 f.) WDR also pioneered "Guest worker programmes" on radio in different languages, an offer that over various iterations turned into Funkhaus Europa, today Cosmo. "In the United Kingdom, the Diversity Strategy of the BBC includes not only gender, sexual orientation, age and handicapped people but also ethnicity, and obliges the corporation to refine policies to promote and showcase diversity." (ibid.: 191)

Among the segments of society that PSB finds harder to reach are migrants, the less educated and younger audiences. As Lilienthal (2009) pointed out, half of the PSB's audience is over 65 years old, only five per cent under 30. These did respond already in the 1980s with radio channels dedicated to young audiences. Today, they are eager to connect to young people and lifestyles on the Internet (e.g., BBC Three and funk, the joint offer of ARD and ZDF)

Given all these challenges, PSB remains significant throughout the EU. In only one of the European countries covered in Hallin and Mancini (2004) does the audience share of PSB in the year 2000 fall below 20 per cent (Greece: 12%) and in most cases it is in the range of 30 to 50 per cent – in contrast to 9 per cent in Canada and 2 per cent in the United States (Hallin and Mancini 2004: 43). Since then, even though nowhere in the region PSB still reaches 50 per cent, it still stands its ground. In Thomass et al.'s classification into strong, weak and minimalist PSB systems, the entire North-Western European Region with the exception of Luxembourg comes out in the strong group (Thomass/Moe/d'Haenens 2015: 187).

The European Audiovisual Observatory (EAO) reported that over a six year period from 2012 to 2017, average audience market shares of PSBs in the EU have contracted by

5.5%. Seven of the top ten TV channels were public channels. In 15 EU countries, including Germany, PSBs represented the single largest broadcasting group in the national market in 2017 (EAO 2019: 31). PSB audience share in 2017 in our region was highest in UK and Germany at about 46% followed by Flemish Belgium (37%), Austria (33%), the Netherlands (32%), Ireland (27%) and French Belgium (23%) (ibid.: 33).

PSB by now have transformed into Public Service Media (PSM), yet its basic challenge still is to remain independent from both the state and the market and fulfil "the democratic, social and cultural needs of each society". PSM have come under increasing pressure with various forces, sawing at their foundations. At the same time, they are confronted with the challenges of reaching out to all parts of society, of countering the polarisation and right-wing shift of society and the deluge of disinformation and hate, of Europeanizing the public sphere (Thomass/Moe/d'Haenens 2015: 192 ff.) and of developing themselves further onto the yet uncharted territory of the digital public sphere.

Hall's call from 1992 for PSM to turn from distribution to interaction rings only more true today: "In a 1992 article titled 'Which Public, Whose Service,' cultural studies pioneer Stuart Hall criticized the BBC and argued the united national public had always been a construct and public service could only survive if it adapted by 'pluralizing and diversifying its own interior worlds.' (1992, p. 34) Broadcasting, Hall continued, needed to be turned into 'the open space, the 'theatre' in which this cultural diversity is produced, displayed and represented.' (Hall, 1992, p. 36)" (cited from Thomass/Moe/d'Haenens 2015: 182 f.).

The North-Western European Region's PSB had been under the BBC's guiding star from the outset. The BBC is again the avant-garde of its current reconfiguration. A perceived left-wing bias of PSB is countered by a shift to the right. BBC funding, as the civil society pointed out in its warning letter, has been cut by 30% over the past 10 years with similar cuts across the region. The compulsory license fee has been under attack for decades as perceived unfair competition for commercial media. For instance, Rupert Murdoch's newspapers has been waging a campaign against the BBC since he entered the television business in the early 1980s. At the same time, societies turned multicultural, making new demands on PSB. And then there is the Internet that changed everything and requires the institutions to change from Public Service Broadcasting to Public Service Media. The big change for PSB started with deregulation.

3.3.1 Deregulation

In most countries of the region and, in fact, the entire EU, except Luxembourg and UK, PSB was the only service licensed to use the public airwaves until the mid-1980s. Deregulation of broadcasting started from two main dynamics: There was a push to end the PSB monopoly from press publishers, audiovisual producers and advertising groups as well as out-of-territory "pirates", commercial stations transmitting from Luxembourg or from off-shore ships or platforms (NL, UK) and from social movements demanding their share of the electronic public sphere, and there was a pull from the new transmission technologies cable and satellite from the 1970s that made available additional broadcast channels. Both effects played out in the neoliberal political atmosphere of the 1980s at the beginning of large-scale privatisation of public infrastructure and deregulation in many sectors.

In the 1970s free radio groups sprung up in Germany, Belgium, the Netherlands and elsewhere in Europe. These non-profit local community radio and then also TV stations demanded legal access to the public sphere as well (Franquet et al. 2020: 258 ff.). In 1983 they formed the World Association of Community Radio Broadcasters (AMARC). In deregulation, citizen media or Open Channels became the third pillar in the dual system. Cable providers must carry the PSB stations and provide one channel for open access that also receives a share of the broadcast fee. In Germany e.g. they are organised in the Federal Association of Citizen Media.

Cable TV with signal injection via satellite and later direct satellite broadcasting into the home allowed to carry all existing PSB channels and a range of additional ones. The growth of cable services differed across the region by size and policy of a country. It was the most rapid and extensive in the Benelux countries, reaching 93% of households in Belgium in 1991 and 80% in the Netherlands in 1990. Germany and Ireland belong to the middle group of cable countries, while the UK less than 13% of households had subscribed to cable in 1987 (Franquet et al. 2020: 269 f.)

The additional channels were licensed to commercial and often local broadcasters under a public regulator to ensure minimal diversity requirements in the programming even of private enterprises. This led to the creation of a whole range of providers from media but also non-media sectors like banking, construction, telecommunications and other public utilities and to a “shift from broadcasting towards narrowcasting – from service intentions for broad, large audiences to targeted audience segments”. (Hujanen 2020: 34 f.; cf. Franquet et al. 2020: 260 ff.)

This development was hailed by some for creating growth, jobs and most of all freedom of choice. More channels were supposed to translate into more diversity. Broadcasters focussing on popular content would provide alternatives to the perceived elitist PSB programming. “Consumer sovereignty” would finally reign in media. Skeptics feared that commercialisation would lead to a dumbing-down of the public sphere. The incentive to provide the lowest common denominator in order to reach the largest possible audience would only produce a constant flow of ‘more of the same’ in a few profitable genres.

It also led to an increased internationalisation of the European mediascape. Even in the PSB-only days many of the series and movies were US-American. With cable and satellite new actors needed content to fill the new channels. European production capacity was no able to fulfil the demand. US American content produced for a large domestic market and a large global English-language audience is both globally appealing and offered cheaply.

The European Union was primarily founded as an economic alliance, and the Single Market is still its focus today. It has no competence in media which like culture and education remains the responsibility of its member states. It can therefore view broadcasting only as service in a market like any other. When it passed the Television Without Frontiers Directive in 1989, the goal was to nurture a common European audiovisual market that would be capable of competing with US media conglomerates. Its main instruments are subsidies for audiovisual production and distribution and imposing quotas for European content on broadcasters.

The smallest country in the region, **Luxembourg**, is an outlier. The precursor of RTL, the Compagnie Luxembourgeoise de Télédiffusion (CLT), was established in 1931 as the first private radio broadcaster in Europe. In exchange for the monopoly use of the spectrum it does have legal public service requirements but since its creation has been fully funded by advertising. The shareholders of CLT were mainly Belgian and French media companies, eventually joined by Bertelsmann. In the 1990s, Bertelsmann acquired a majority stake in the German television channel RTL and in 1996 contributed UFA's television businesses to the CLT-UFA joint venture. In 1997, the Luxembourg-based CLT-UFA was created through a merger with the German UFA Film & TV Produktion GmbH Hamburg, which finally became today's RTL Group in 2000 through a buyout and merger with Pearson TV, the TV division of the British media group Pearson at the time. The Bertelsmann RTL Group is headquartered in Luxembourg and Cologne.

RTL's monopoly ended in 1992. RTL Radio Lëtzebuerg is still the most popular radio station today with an audience share of 65%, but it was joined by new stations, the most successful of which are Eldoradio, the Portuguese-language Radio Latina and the free and alternative Radio ARA and Radio Aktiv. In addition, in 1993 a public radio station was established for the first time with a cultural programme mandate, radio 100,7.

Britain ended its monopoly of the BBC in 1955 when Independent Television (ITV) started. Originally it was a network of separate television companies which provided regional television services and also shared programmes between each other to be shown on the entire network. Each franchise was originally owned by a different company, but after several mergers the fifteen regional franchises are now held by two companies, ITV plc and STV Group. ITV, like CLT, relies on advertising, yet for the permission to use the public spectrum it is bound to similar PSB obligations as the BBC, including requirements for impartiality and balance in news and public affairs. For ITV's oversight, the Independent Broadcasting Authority (IBA) was established, as Hallin and Mancini, mention: "It was not a mere regulatory agency, but held the license for commercial broadcasting, contracting with the ITV companies to provide programming and retaining ultimate authority over programming decisions. For this reason, it has been common to refer to the BBC and ITV together as the 'public service system' in British broadcasting." (Hallin and Mancini 2004: 231 f)

The British "PSB family" gained a new member when the Sound Broadcasting Act of 1972 ended the BBC's radio monopoly. The IBA put out to public tender for medium-term contracts to provide programmes in given areas, e.g. in London one for "news and information" and one for "general and entertainment". Political parties and churches were banned from applying. These commercial radio stations are collectively called Independent Local Radio (ILR). As a result of the buyouts and mergers permitted by the Broadcasting Act 1990, and deregulation resulting from the Communications Act 2003, most commercial stations are now neither independent nor local.

In 1982 a fourth television service next to BBC One and Two and ITV was set up with a remit to produce "high quality and distinctive programming". The commercially funded Channel 4 was originally owned by the IBA and then transferred to a public corporation established in 1990. IBA later became the Department for Digital, Culture, Media and Sport (DCMS). In 2010, Channel 4 extended service into Wales and became a UK-wide television channel.

The Broadcasting Act of 1990 transposed the 1989 EU Television Without Frontiers Directive. The aim of the Act was to liberalise and deregulate the British broadcasting industry by promoting competition. It stipulated that the BBC, which had previously produced the vast majority of its television programming in-house, was now obliged to source at least 25% of its output from independent production companies. It also replaced the IBA with the Independent Television Commission (ITC) that had much reduced competences. Furthermore, the Act allowed for the creation of a fifth analogue terrestrial television channel in the UK. Channel 5 was launched in 1997. It is owned by Channel 5 Broadcasting Ltd that was acquired by the RTL Group in 2002, by billionaire businessman and publisher of celebrity and pornographic magazines Richard Desmond in 2010 and by Viacom-CBS Networks UK & Australia in 2014. Channel 5 is a general entertainment channel that shows both internally commissioned programmes and imports from the United States in particular.

Oversight over the commercialised and deregulated PSB family in UK today rests with Ofcom, the now unified government-approved regulatory and competition authority for the broadcasting, telecommunications, and postal industries.

The **Netherlands** like Belgium actively encouraged cabling the nation. Market leader in commercial TV is RTL that began to broadcast in 1989, much of it US-American content. The second largest provider is SBS Broadcasting Group, owned by ProSiebenSat.1 Media AG. TV exports from the Netherlands are dominated by TV production conglomerate Endemol, founded by media tycoon and billionaire John de Mol who developed the reality show *Big Brother* and the theatrical producer Joop van den Ende. Endemol has around 90 companies in over 30 countries that create and run reality, talent, and game show franchises worldwide.

In **Germany** it was again the Constitutional Court that paved the way to commercial broadcasting. In its ruling in 1981 the court declared it consistent with the constitution, but it called on the federal legislature to bring about a broadcasting order that ensures "that the overall offer of domestic programmes essentially corresponds to the existing diversity of opinion. Furthermore, the legislator must make binding principles of management which guarantee a minimum of balance in terms of content, objectivity and mutual respect." It must also provide for limited state supervision and make selection regulations for access to the provision of private broadcasting (BVerfGE 57, 295).

In its 1986 ruling, the Constitutional Court defined the role of commercial broadcasters as ancillary to that of public service broadcasters. In the new dual order, the fundamental service (Grundversorgung) is the responsibility of the PSB. Because of their universal reach and their ensured fee funding they are able to offer a comprehensive range of programmes. "The task thus set encompasses the essential functions of broadcasting for the democratic order as well as for cultural life in the Federal Republic." The court expected that the advertising-funded stations would provide mass-attractive programmes that promise to reach the largest possible audience at the lowest possible cost, but not programmes of interest to a smaller audience that often, like cultural programmes, are costly to produce. "Only with them, however, can the whole breadth of comprehensive information be achieved, without which there can be no 'formation of opinion' in the sense of the Basic Law." The court therefore ruled that commercial broadcasting is permissible only as long as and insofar as PSB ensures the provision of universal fundamental informational service to the citizens (BVerfGE 73, 118).

In its next and final 'deregulation ruling' in 1987, the Federal Constitutional Court clarified that "fundamental service" does not mean a minimum service to which PSB could be reduced. Neither does it mean a division of tasks according to which certain 'public service programmes' are reserved to PSB and all others to commercial broadcasters. Rather, it means that programmes are offered to the entire population which inform comprehensively and in the full breadth of the classical broadcasting mandate and give expression to the diversity of existing opinions in the broadest possible range and completeness. In addition, the court clarified that the concept of broadcasting is open to new technical developments and thus also includes "communication services similar to broadcasting" such as digital online services (BVerfGE 74, 297). For public oversight of commercial broadcasters, a media authority was established in each of the *Länder*.

It took until 1987 until the rulings of the Constitutional Court were transposed into the first Interstate Broadcasting Treaty, yet commercial broadcasting commenced in January 1984, first on cable, then soon on satellite and eventually also on terrestrial transmission. Among them was RTL that originated as an offshoot of the German-language radio programme Radio Luxemburg that at that time was owned half by CLT and half by Bertelsmann. Even earlier was SAT.1, a joint venture of various publishing houses whose programming included old films mainly from the archives of KirchMedia. Leo Kirch had established himself as leading film distributer in the 1950s. At the end of the 1980s, Kirch joined Sat.1, and in the mid-1990s he founded the pay-TV provider DF1 (now Sky). Eureka TV was founded in May 1987 as a news station. Due to a lack of viewers and scarce advertising revenue, it looked for investors, and found Thomas Kirch, the son of Leo Kirch. In January 1989 Eureka TV was relaunched as ProSieben.

Thus, the introduction of commercial broadcasters in 1984 brought in Germany forth a number of providers that soon consolidated into two "families", Bertelsmann's RTL Group and the Kirch Group out of whose insolvency in 2002 emerged the ProSiebenSat1 Group. The latter was owned by Anglo-American investment funds that started to sell their shares in 2013. The free float is now 100 per cent. RTL holds stakes in 60 TV stations and 31 radio stations across 10 countries in Europe and South-East-Asia. It also owns Freemantlemedia, one of the largest producers and distributors of international TV formats.

In **Austria** the radio monopoly of ORF ended with the passing of the Regional Radio Act of 1993 that permitted regional and local commercial and community radio stations (Franquet et al. 2020: 267). Commercial TV channels from neighbouring Germany have been present in Austria on pay-TV and via terrestrial overspill since the 1980s, but it was one of the last countries in Europe to end the PSB TV monopoly with the 1997 Cable and Satellite Broadcasting Act. Yet this did not permit terrestrial commercial broadcasting.

Salzburg TV was founded in 1995 as a local cable broadcaster out of a film production company by two former ORF editors. In protest against being excluded from the airwaves, it started illegal terrestrial transmission in October 2000. After five days the transmission facility was seized, after which the CEO of Salzburg TV went on a hunger strike for two weeks. This actually led to the passage of the Private Television Act in 2001. In 2002 Salzburg TV received a terrestrial broadcasting licence and was back on air by December. The political success was followed by commercial failure. Banks and the Chamber of Commerce had to save the station from insolvency in 2004. In 2007 it was acquired by Red Bull, the energy drink and sports empire of Austrian billionaire businessman Dietrich Mateschitz, and renamed ServusTV

ServusTV is today one of the most important commercial stations in Austria next to ATV and Puls 4. Both Puls 4 and ATV are owned by ProSiebenSat.1 Media SE, since 2007 and 2017 respectively. In addition, there are several stations by the German RTL Group and ProSieben Austria and Sat.1 Österreich, Austrian editions of the German stations on cable and satellite that mostly only localise their advertising.

It has become evident that commercial providers in broadcasting emerged under very different circumstances than in the press. The crucial nexus for the much larger role of the state is the *electromagnetic spectrum*. While there is abundant shelf space for newspapers and magazines there is only one spectrum with a limited range of frequencies useable for broadcasting, dividable into bandwidths, each with a safety margin to the neighbouring range, can be used by only one signal at a time without causing interference. It is therefore considered a public resource and frequency allocation to put it to best use a public prerogative. This nexus ended with cable and satellite. Also terrestrial broadcasting was digitised in the mid-2000s in most of the region with the UK lagging behind. The digital switchover released spectrum. In the general drive towards privatisation of public resources also the airwaves were privatised. Frequency bands that became available were no longer licensed for a limited time but auctioned off to mobile phone providers.

Deregulation changed the broadcast landscape fundamentally. The new commercial broadcasters immediately gained large shares of TV and radio audience, particularly among young people. Commercial rivals for PSB also led to soaring prices for attractive sports, major movies and TV series as well as media personalities. At the same time, PSB was often criticized for responding to the challenges by lowering their traditional quality and becoming too commercial (d'Haenens/Sousa/Hultén 2011: 190).

Indeed, not only the environment, but PSB changed fundamentally. Tanja Meyerhofer (2016) analyses the *"marketisation" of PSBs* as a process driven by neoliberal public policy favouring the agile market over the inefficient bureaucracy. PSB came under pressure to outsource non-programme related activities, sell its popular programmes, e.g. on DVD, to generate ancillary revenues and to cut costs.

"In response to intensifying competitive pressure, most public service broadcasting corporations 'commercialised' their programming schedules by increasing the provision of entertainment-oriented programmes and cutting back on a variety of non-competitive genres, such as children's programming." (Meyerhofer 2016: 80) This led PSB, including the BBC, to enter strategic alliances with commercial partners to market their children's programmes internationally. This was criticised because if a PSB produces internationally appealing programmes these these might be less relevant to domestic child audiences.

Meyerhofer, citing a case from Australia, points out that this marketisation has a potentially detrimental impact on the public's perception of and support for PSB. She speaks of a "very strong sense of public ownership" that prompted citizens to speak out for the independence of their PSB (ibid.: 81).

Yet she does not agree with the common perception that marketisation is exclusively associated with deterioration of the public service mandate. Meyerhofer argues that after digitisation and the collapse of sectoral boundaries and territorial borders, both commercial and public broadcasters now interact and must coexist in the same operational space. She therefore advocates for "networks characterised by 'coopetition' – a complexity of interaction that is sometimes cooperative and sometimes competitive." (ibid.: 77)

In the competitive arena, commercial broadcasters, once had broken the PSB monopoly, started to complain that PSB is taking away their market. They attacked PSB as unfair competition. Consumers would not be willing to pay e.g. for news if they could get it free-to-air while having to pay for it through a compulsory fee. They invented the mantra of the "market failure": publicly funded broadcasting would only be justified where the market failed to deliver programmes necessary, as the EU had highlighted, to fulfil "the democratic, social and cultural needs of each society". By this rationale all programmes that can be paid for by customers or advertisers, most of all entertainment, fiction and sport, should be left to the market while the remit of PSB should be reduced to unprofitable yet societally desirable "merit goods" like information, education and cultural programmes (cf. Thomass/Moe/d'Haenens 2015: 185)

When from the mid-1990s the Internet emerged, it soon turned into contested territory. And because, while media policy, law and remit are still national, the entire legal framework by then had started to become thoroughly Europeanised, the struggle over what PSB should be allowed on the Internet played out in the European arena.

The European Union has no competence in media which, like culture and education, remains the prerogative of the member states. The EU does recognise the legitimacy of PSB or rather of its public funding. When laying out its constitutional framework in the Treaties of the European Union, in the interest of a level playing field in the Single Market it generally prohibited state aid with very few narrow exceptions. In the Protocol on Public Broadcasting in the Treaty of Amsterdam (1997: 109) it acknowledged that when making these exceptions it had forgotten about PSB. It recognised that PSB "is directly related to the democratic, social and cultural needs of each society and to the need to preserve media pluralism". And it annexed to the Treaty a provision that allows Member States to publicly fund their PSB on condition that they define its statutory remit as precise as to allow the European Commission to decide complaints about alleged violations of the EU state aid rules, and "insofar as such funding does not affect trading conditions and competition in the Community to an extent which would be contrary to the common interest."

In the Communication on State Aid (2001) and the Communication on the application of state-aid rules to public service broadcasting (2009), the EU specified the rules further. Member states are required to provide a clear and precise definition of its PSB's obligations, and an ex ante public value test was introduced for PSB's online offers. They have to prove, including in a public consultation, that the planned offer serves the given remit, its funding is proportionate and parsimonious and that it does not unduly harm the market. This last element, the requirement for predicting the market impact or a non-market offer, raised criticism (Grassmuck 2016; cf. Thomass/Moe/d'Haenens 2015: 184 f.). As a consequence, German PSB had to 'de-publish' up to 70 per cent of its web content.

This test, also called "Amsterdam test", introduced the concept of "*public value*" into the European media debate. Meyerhof (2016) analyses how neoliberal policy facilitated the fevered privatisation of public properties, including in broadcasting. "A co-related trend encouraged corporatising public organisations, in principle to raise efficiency by ending bureaucratic procedures associated with public administration and replacing them with entrepreneurial management techniques such as quality assessment measurements" (Meyerhof 2016: 79).

This refers to the New Public Management (NPM) movement promoted by politicians everywhere in the 1990s as the gold standard for administrative reform. The apparent deficiencies of this approach led Harvard University management scholar Mark Moore to present an alternative concept for the management of public institutions in 1995 that he called "Public Value": "As a starting point, let me propose a simple idea: the aim of managerial work in the public sector is to create public value just as the aim of managerial work in the private sector is to create private value" (Moore 1995: 28).

Mark Moore's concept is deeply democratic. Public value is the subject of public negotiation of the collectively articulated and politically mediated preferences of citizens and thus something other than the sum of individual interests. The negotiation process is controlled by politics ('governance'). The task of the public sector is no longer to implement predefined goals as efficiently as possible. Rather, its services become the subject of a negotiation of the mediated preferences of citizens. Its measure of success is not only results, but legitimacy, fairness and trust.

Moore addresses issues of city planning, police, public utilities etc. but not broadcasting. This transfer was achieved by the BBC it its 2004 Charter renewal document "Building public value. Renewing the BBC for a digital world". The BBC called its Amsterdam test a "public value test", at least for this one term. From the mother of all PSB the concept spread throughout Europe. Austrian ORF since then annually reports in a detailed matrix on the public value it delivers to individuals, to society and for European and international integration (ORF Public Value).

PSB's public value remit is closely linked to its *universal service* remit. This requires them to provide programmes to everyone in society, inform comprehensively and give expression to the diversity of existing opinions in the broadest possible range and completeness. This has become increasingly difficult with the *audience fragmented* by commercial channels for sports, music, film, children's programmes etc., the endless offers on the Internet and an increasingly individualising and diversifying society. As long as PSB had the audience to themselves they were clearly serving to integrate society. But now, "the nature of the media as a force that binds people together is weakened and the shared media experience risks disappearing." (d'Haenens/Sousa/Hultén 2011: 188)

The universal service remit is not only more difficult to fulfil but is also being challenged in principle. Based on the market failure mantra, PSB should move away from the comprehensive 'full portfolio model' to become complementary niche providers of 'merit goods' (ibid.: 196). In addition, it is argued that not only PSB can provide public value. This creates pressure towards the de-institutionalization of PSB and towards a 'distributed public service' which can be seen in the UK since the introduction of ITV. This has been taken a step further when the UK Department for Digital, Culture, Media & Sport introduced a "contestable fund" to which all producers can apply. After a public consultation in 2016, in October 2018 the Ministry announced a three-year pilot phase of the Contestable Fund worth up to £60 million. The bulk is assigned to public service content for audiences up to 18 years of age, parts to radio content and UK indigenous language content with a particular eye on small and emerging producers.

3.4 Journalistic professionalism

Journalistic professionalism refers to the differentiation of the functional system of the mass media by increasing self-referential operations (Habermas 1962, Luhmann 1995). These include establishing a professional ethics, bodies of self-regulation like press councils and editorial statutes and claiming autonomy from other functional systems of society like politics, law and business. Hallin and Mancini then look at the degree to which this autonomy of mass media is challenged by other powers in society.

"Professional journalism" implies a distinction to non-professional, hobbyist journalism, driven by passion for a cause not by the desire to earn a living. "The professionalization of journalism begins precisely when the first hired reporters enter the picture, and the occupation of the journalist thus begins to become differentiated from that of printer or politician/owner." (Hallin and Mancini 2004: 35)

This institutionalisation of journalism establishes a distinctive "media logic" (Mazzoleni 1987) replacing the logic of party politics according to which the media system had operated before. Stories are selected by journalistic criteria, by their news value and by media-based criteria of what is a good story, with a clear separation between news and comments and between editorial content and advertising. While the media logic has emancipated itself from the political logic, Hallin and Mancini see the strongest threat in the logic of commercialisation that rose together with professionalism in the 1960s and 1970s but accelerated in the 1980s and 1990s. It tends to undercut this form of differentiation, blurring the boundaries between news and entertainment and advertising with hybrids like infotainment, advertorials, product placements etc. "With the shift toward neoliberalism market logic tends to dominate wide swaths of society" affecting even public broadcasters like the BBC (ibid.: 290 f.)

And indeed, journalists perceive internal press freedom and editorial independence as jeopardised by commercial pressures. A survey of 2,500 journalists in Germany, Austria, and Switzerland conducted in 2014 and 2015 found that German journalists feel the economic influence of external actors, managers, and owners more strongly than journalists in the other two countries (Laurer & Keel 2019).

Journalism professionalism in our selected countries is quite high. The share of higher education among journalists is increasing such as in Austria or has been a given for long for the majority of journalists such as in Germany, the Netherlands and the UK, as the EMRG's "Media for Democracy monitor 2021" reports. Training, including ethics training, is freely available and used by a majority of journalists and self-reflection of the work is regular on editorial meetings, although it occurs mostly on an ad hoc basis. What is a burden for professional journalism in these countries of Western Europe is that time and resources as well as job satisfaction are on the retreat.

A strong element of defence against both political and commercial influence in the journalistic logic is the ethic of public service. A profession that claims autonomy and operational closure vis-a-vis the society it is part of legitimates this closure by the special function that it alone serves for society. Doctors heal the sick. Engineers build bridges. Journalists provide information about the society and the world. Hallin and Mancini discuss this as an "ethic of public service" of professions, which has been critiqued as an ideology that often conceals other ends. They grant that "nevertheless, the adoption of an ideology of journalism as a 'public trust' is an important historical development and should not be dismissed as 'mere ideology'" (Hallin and Mancini 2004: 36).

Inherent in this identity and narrative of professional journalism is the *watchdog role of media,* its function as "fourth power" in the state. Its task is to report on and hold accountable the other three powers: Is the Legislature making laws in the interest of the greatest number of citizens or of the few? Does the Executive serve the public interest or that of the most powerful lobby group? Is the Judiciary hard on the poor but lenient on the corrupt?

This principle of journalism as a fourth system in the division of powers, in the checks-and-balances of the state, has gained widespread official acceptance in the region.

This is expressed by Freedom of Information and Transparency laws and laws to protect whistle-blowers as well as by public funding for investigative journalism, all of which, as we have seen, can still be improved. Wikileaks, the Panama Papers and the Snowden leaks led to the recognition that – bizarre conspiracy narratives aside – there are in fact known secrets, loopholes, corruption, systemic abuses of power that can only be uncovered by an insider with a moral compass like Edward Snowden. Large caches of leaked documents on global activities and therefore of global interest like the Panama Papers also brought forth large-scale international investigative cooperation and therefore a heightened professionalism and internationalism of journalism.

In the EMRG's "Media for Democracy monitor 2021" all the countries in the region rank fairly high in the watchdog indicators. This time the UK takes the lead with 22 of 27 points and Belgium is at the rear with 16 points.

For example, the Press Code by the German Press Council (2017) commits to respect for the truth and for human dignity and truthful information of the public as the highest commandments of the press. It also proscribes duties of care and procedural safeguards. It serves both as a commitment to society and a canon of fundamental norms that members of the profession should internalise. Both journalism awards (e.g. the German Grimme Awards for TV and online productions and the European Civis Media Prize) and sanctions by press councils serve to reinforce these norms and the individual and collective identity as journalists. The self-regulatory system is prone to capture and can be more or less independent. It can also be irrelevant when it cannot impose effective sanctions other than public shaming.

Loosen & Hölig (2020) in their study match the expectations of journalism by both journalists and the audience in Germany. They find "a comparatively high degree of congruence regarding the tasks of journalism that are considered particularly important by both sides: What German journalists most want to do is also what they should do in the eyes of the German population. This includes first and foremost the classic journalistic tasks of objective reporting as well as analysis and classification. The promotion of tolerance and cultural diversity is also seen as a particularly important journalistic task, both by journalists and by the population. It is also particularly important in the eyes of the population that journalists make transparent the sources on which their reports are based."

There is some incongruence as the audience assigns more importance to certain tasks than journalists consider part of their work. This includes transparency of sources, providing information that enables people to make political decisions, engaging in a dialogue with the public about political issues, pointing out possible solutions when reporting on problems and the expectation that journalists educate the audience. In short, "the population attaches more importance to tasks that stand for a more controlling, political-activist journalism than journalists regard them as part of their tasks. This reveals a difference in the understanding of journalism in terms of content." (Loosen & Hölig 2020: 7).

In the North-Western European Region institutionalisation of journalism and respect for the autonomy of journalism are high. In the Reporters without Borders' World Press Freedom Index all the countries rank high (see below under "media and the state"). Where the freedom of the press is under attack, it is less from state actors but from civil society. Distrust in government institution and mainstream media fused with nationalist, racist, antisemitic, anti-muslimism, misogynist convictions and conspiracy narratives in the Corona denier movements across Europe. This has led to a level of hatred and violence against the media that currently allows journalists only to report from demonstrations with protection of bodyguards (WPFI: Germany).

The decline of newspapers and the rise of new online intermediaries have changed the journalistic occupation and the labour market. There is a strong trend towards precarisation of journalism with a growing number of free lancers who can no longer make a living from their profession. There is a growing gap between them and the stars in the field, top journalists who establish themselves as brands with their own production company surfing the market, selling to PSM one season, to commercial TV the next and to Netflix the following (cf. Morini et al. 2014; EMRG 2020; Bobkov/Herrmann 2020).

The most consequential dynamics of the last 30 years for both press and broadcasting arguably is digitisation. Digitisation and the Internet have revolutionised media operations from research and new skill sets required from journalists through distribution and interaction with "the people formerly known as the audience" (Jay Rosen) to advertising funding. Most of all, media have to connect to younger audiences who might be digitally native but need to learn to find high quality information and tell it apart from disinformation. These are new challenges for the professionalism of journalists. Furthermore, the Integration of TV, radio and online, first in the news room then in the entire media enterprise, is still under way. It challenges journalists in their professionalism in many ways as they have to overcome the hitherto media-specifics of writing and producing and include cross-media working procedures.

3.5 The media and the state

Hallin and Mancini compare media systems by the degree to which the autonomy of mass media, i.e. press freedom, is challenged by organised social powers like churches and unions, commercial interest groups, political parties, parliament and the state, i.e. by "political parallelism". In this range, civil society has essentially the moral weight of its arguments to move public opinion, commercial actors have money as lever to reenforce their interests whereas the legislative and the executive are imbued with special powers to regulate media, but in a democracy can legitimately only do so in the public interest.

Hallin and Mancini discuss the role of the state as one of their four dimensions of comparison of media systems under the heading "the degree and nature of state intervention in the media system". This framing implies that the default, the natural state of things is a media system without any role of the state, entirely operated by the market, and when the state does act in or upon media this constitutes an outside intervention. Here they seem to fall into what they themselves mark as a trap: the notion that the US-American Liberal Model is the norm against which other media systems are measured.

They contrast this with social democratic or dirigiste traditions manifested in a larger state role in the ownership, funding, and regulation of media (Hallin and Mancini 2004: 44). They describe the role of the state at different levels.

The strongest is **state ownership of media**. In its most extreme form, it refers to state capture of the entire public sphere as under fascism in the 1930s. This is the point zero of media systems that all democratic policy must prevent from ever happening again. While state capture in this extreme is not an issue in Europe at this point, the underlying incentive for state actors to grant favours for payments, e.g., in public procurement for managing the Corona crisis, still is.

In many countries the state at times has owned news agencies, newspapers or other media-related enterprises, either directly or through state-owned enterprises. In the North-Western Region, there were no state-owned press agencies with the exception of Austria. In all other countries of the region press agencies were established as private enterprises or by associations of press publishers. There were also no state newspapers after 1945 in the region.

Hallin and Mancini single out the state-ownership of PSB as the "the most important form of state intervention" (ibid.: 41). PSB in the region, again with the exception of the period of the NS regime, was in the technical sense state-owned but precisely constructed to prevent any total and tight control by the state (for a detailed discussion of PSB and its deregulation see above "broadcasting").

Looking from the normative vantage point of the Liberal Model, there is the widespread belief that public *press subsidies* constitute an undue state influence on the media, which should be prevented at all costs. This is echoed by some newspaper publishers. Mathias Döpfner, CEO of Springer and president of the German newspaper publishers' association, rejects press subsidies and in particular funding for digital media that could compete with paper publishers. In January 2019, he said in an interview: "I'd rather see newspapers go bankrupt than lose their independence through subsidies." (in Horizont 26.02.2019)

Research, however, does not support such fear. Hallin and Mancini pointed out that "critical professionalism" in journalism in Northern Europe grew in the 1970s when subsidies were highest. Since they are granted according to clearly established criteria consistent with rational-legal authority, pressuring media by means of subsidies is unlikely (Hallin and Mancini 2004: 163). Western democracies with a high level of press funding such as in the Nordic countries are characterised by a high degree of media freedom, a very professional media environment and a low degree of political parallelism as well as a high reach.

Cornils et al. (2021) combine a media scientific comparative analysis of press subsidies in seven European countries and Canada with a legal analysis on how such subsidies can be constructed in a rational-legal way while safeguarding fundamental rights and competition and first and foremost the requirement of state neutrality. The most dramatic market failure and therefore need for public support they find in local media.

They distinguish different types of direct press subsidies. General distribution and print run subsidies are favoured by the industry. The effort involved in awarding and auditing is manageable due to the few quantifiable criteria used. Yet this model, as Cornils et al. point out, creates no incentives to establish digital distribution channels and excludes start-ups and online-only providers. Instead, it supports business models that are not sustainable in the long term (ibid.: 39 f.).

Their country analysis shows a general transformation in subsidy systems from circulation-orientated towards direct production support. In all of the media systems examined, specific requirements for eligible organisations are formulated. For example, they must be relevant for information and opinion-forming, they must employ an independent editorial staff on the basis of an editorial statute, consist predominantly of independently designed contributions etc. (ibid.: 45) In addition there are production project fund specific e.g. for the support of investigative journalism. The Stimuleringsfonds voor de Journalistik in the Netherlands for examples has a programme to promote platform-independent investigative journalism with a total budget of EUR 2.8 million, 75% of which goes to local and regional projects. An application is conditional on the commitment of a journalistic medium to publish the project (ibid.: 32).

Subsidies for journalistic innovation are clearly the weakest element. Many countries studied have set up innovation support programmes, albeit mostly with smaller budgets (EUR 0.8 million in the Netherlands) than those of production support. In Germany they find that established publishers invest their innovation budgets mainly in digital business fields outside journalism. Private funding for start-ups and individual media professionals is hardly available (ibid.: 40 f.). This funding gap for innovation in journalism is partly filled by online companies, as we shall see in the following section.

Cornils et al.'s (2021) conclusion: "The limited marketability of local journalistic media in particular threatens this diversity and the performance of the public task of journalism. State intervention with the aim of safeguarding existing journalistic services and compensating for information deficits in regions undersupplied with local information therefore seems legitimate. However, the media should not be supported merely 'because they exist.' Instead, direct support should be targeted and (also) based on journalistic qualification criteria." (63)

The EU, particularly under the digital strategy of the new Commission under Ursula von der Leyen, has stepped up its efforts to support media freedom and pluralism, which will not only affect the countries which we analyse in this report, but all the countries of our study. Its measures include a cross-border investigative journalism fund, the Media Pluralism Monitor and a planned Media Ownership Monitor, support for cross-border cooperation between media councils in the digital age, for data journalism, for minority language media, for media literacy and not the least for information measures relating to the EU cohesion policy. In response to the Corona crisis, the Commission in December 2020 adopted an action plan to support the recovery and transformation of the media and audio-visual sector. In its European Democracy Action Plan the Commission will work closely with Member States and stakeholders to improve the safety of journalists and provide sustainable funding for projects focusing on legal and practical assistance to journalists in the EU and elsewhere. Finally, the budget for the Creative Europe programme for 2021-2027 has increased by 80% compared to the previous period to approximately €2.5 billion (EC: Media freedom and pluralism).

The primary function of the state divided into the three powers Legislature, Executive and Judiciary is to **make, apply and interpret laws**. With respect to media, Hallin and Mancini mention laws on a range of issues. Aside from public funding discussed above, these include market regulation with laws on ownership, competition and media concentration. Others are intended to ensure the fairness and integrity of democratic elections by regulating political communication, particularly during election campaigns.

Some codify privileges of the journalistic profession necessary for fulfilling its function for society like professional secrecy laws (protecting the confidentiality of sources), "conscience laws" (protecting journalists when the political line of their paper changes) and laws regulating access to government information. Others protect the objects of journalism, including privacy, libel, defamation, right-of-reply and more currently hate speech laws (Hallin and Mancini 2004: 43 f.). EU Media law will be addressed in detail in WP 1.4 EU Media Policies.

All these ultimately derive from the fundamental right of the freedom of the press. The **state as censor** and source of propaganda has affected journalism from its outset. The struggle for press freedom was arguably the single decisive element in the professionalisation of journalism. It is now enshrined in the constitutions of the EU member states and in the Charter of Fundamental Rights of the European Union. Reporters without Borders in its 2021 World Press Freedom Index ranks the countries in the North-Western European Region high. The Netherlands takes the lead in place 6 of 180 countries. The UK is the rearguard at place 33.

Journalists in this region were on the whole able to work freely, enjoying the respect of much of the population as well as legislative and institutional protection. In the Corona pandemic, governments classified journalists as essential workers so that they could work relatively freely during the lockdown. All the countries have freedom of information laws but the actual practice leaves much to be desired, with documents requested by journalists often arriving late and incomplete or being denied. There is a growing concern about mass data collection by intelligence agencies that violated the privacy of journalists and threaten to the confidentiality of their sources. Aside from advertising revenue declining during the Corona pandemic, journalists in the region were confronted with populist politicians attacking the legitimacy of established media outlets. Physical attacks on journalists increased in 2020. Online attacks have become commonplace especially against female journalists and journalist with a migrant background.

In Belgium, Reporters without Borders noted that a photojournalist was detained by police at a Black Lives Matter protest in Brussels. The Walloon regional parliament passed a resolution calling on the Walloon government to explicitly condemn arbitrary arrests of journalists and other press freedom violations (Reporters without Borders 2021: Belgium). In Ireland, the concerns are primarily directed at the 2009 Defamation Act that with its cripplingly high damages poses significant threats to journalists reporting on high-profile public figures and private interests. It has created “a prolonged climate of self-censorship, in which prominent individuals known to be litigious have become largely untouchable by the Irish media.” Additionally, the highly concentrated media ownership in Ireland and economic difficulties presented concerns for the plurality and independence of media with many regional titles on the brink of financial collapse in 2020 (ibid.: Ireland).

Moreover, in Germany, Reporters without Borders finds media pluralism eroding for economic reasons, especially as regards local newspapers. German laws on access to information are weak by international standards. At the same time there is a push for a range of security, data retention and surveillance laws, including a recent “provision criminalising the handling of leaked data as well as a draft law aiming to allow German intelligence services to hack into computers and smartphones or intercept encrypted communications without judicial oversight, thus potentially enabling authorities to circumvent existing protections for journalists’ sources.” (ibid.: Germany)

In Austria, there was critique that the health minister at an early stage of the pandemic, gave information only to certain media outlets. The slump in advertising revenue during the pandemic is likely to leave media outlets dependent on state subsidies over which there has been an ongoing debate in Austria (ibid.: Austria). In Luxembourg, the biggest issue was the state’s information policy. During the first few weeks of the pandemic, journalists often struggled to get information about the spread of the virus and how it was being managed politically. It was only by chance that some of the expert reports used by the government were published (ibid.: Luxembourg).

The taillight of the region is UK in place 33 of 180 countries. Also here, there were problems with access to information. “A secret government unit appeared to serve as a clearing house for freedom of information requests, and critical media outlets found themselves blacklisted or facing other restrictions. Critical reporting on the government’s Covid-19 response was met with vindictive official reactions.” The UK’s press freedom record was particularly blighted by the detention of Wikileaks publisher Julian Assange.

"Assange's extradition proceedings were marred by extensive barriers to open justice. Despite deciding against the US extradition request in January 2021, the court denied Assange's bail application. Assange's mental and physical health remain at high risk in Belmarsh prison, where Covid-19 infections have been rampant." Finally, with tensions rising again in Northern Ireland over Brexit, journalists working there are under increasing threat by both paramilitaries and the police, with death threats frequently reported. Reporters without Borders calls the establishment of the National Committee for the Safety of Journalists in July 2020 and publication of a National Action Plan in March 2021 "welcome steps" towards a climate in which journalists can work safely (ibid.: UK).

"The state always plays an important role as a *source of information* and 'primary definer' of news (Hall et al. 1978), with enormous influence on the agenda and framing of public issues." (Hallin and Mancini 2004: 44) The state being the means of society for dealing with issues of national and public interest, this cannot be otherwise. While Hallin and Mancini find it "not clear" whether the state is less a 'primary definer' of news in liberal systems, after the US presidency of Donald Trump we can clarify that this is indeed not the case.

In summary, the region is characterised by strong guarantees for the freedom of the press and no state-ownership of media. Press subsidies and public funding of PSM do not threaten but ensure the diversity of media offerings. The watchdog function is increasingly legally recognised but needs to be developed further.

3.5.1 Clientelism, lobbyism and the new patrons of journalism

Clientelism is a system of give and take. One side, e.g., the state, controls resources and grants access to the other in exchange for favours. In contrast, rational legal authority strives to replace the relation of patron and client by that of rational state and citizen. Access to resources is based on equality, fairness, explicit criteria, and transparency, e.g., press subsidies granted or appointments made without fear or favour. With the shift in the resources that states control towards those of corporate interests, also the incentives of journalists rise to serve the interests of patrons and thereby undermine the "ethic of public service".

The influence of corporations and rich individuals on media after the liberalisation of the market have been discussed above under "media concentration". This section addresses how this plays out in systematic forms of exerting influence on journalism and public opinion through advertising, lobbying and funding.

With a strong tradition of rational legal authority in the region, there are rules requiring publishers to strictly separate the work of their *advertising* department from the newsroom in order to avoid advertising customers influencing their content (cf. e.g. Section 7 of the German Press Code).

With the growing financial crisis, journalists are tempted by invitations to exclusive trips and by expensive gifts from marketers particularly in the sports, lifestyle, automobiles and electronics sections. Studies reveal that the "firewalls" that aim to prevent economic influence have become somewhat porous. In Oppong's study, which takes as its example event cooperation, he argues that "they may create opportunity structures that serve to align the interest of journalists and lobbyists, or otherwise limit a critical perspective" (Oppong 2016: 32; cf. Frühbrodt 2016).

Lobbyism has become a power of its own. Typically, an industry will demand measures from policy makers by putting on the scale the revenues and jobs it contributes to the GDP. Dominant industries like automobile in Germany are the most effective in this.

Being aware of the threat of lobbyists setting the agenda and influencing public policy, the EU has set up a Transparency Register in 2012. It serves to "ensure balanced representation and avoid undue pressure and illegitimate or privileged access to information or to decision-makers" and allows citizens and journalists to find out "what interests are being pursued, by whom and with what budgets." Austria introduced a mandatory lobby register in 2012, the UK in 2015, Belgium in 2018, Germany in March 2021, while the Netherlands still await one.

State subsidies, as we have seen, leave a large gap in supporting innovation in journalism. Over the past decade, tech companies and their founders have taken it upon themselves to push digitisation of media. They have spent billions buying media outright, donating to journalism institutes and *funding journalism*. Among them are the Gates Foundation and Craig Newmark, founder of Craigslist that took classified ads away from newspapers. eBay founder Pierre Omidyar supports non-profit journalism through Luminate.

And then there are direct grant programmes from technology companies: Microsoft with Microsoft News and LinkedIn, the Facebook Journalism Project and the largest of them all: Google's News Initiative. "Google is the world's biggest patron of journalism." (Dachwitz & Fanta 2020: 11)

Dachwitz and Fanta (2020) show how the initiative started in France with political pressure against Google. The company responded by setting up a 60-million-euro fund to support press publishers' innovation projects in 2013. The French fund was the blueprint for the Digital News Initiative (DNI) that Google launched throughout Europe in 2015 and whose core element was the 150 million euros Digital News Innovation Fund. In 2018, the company expanded the DNI to the Google News Initiative (GNI) through which it has committed a further 300 million dollars for the period from 2019 to 2021.

In Germany, the focus of Dachwitz and Fanta's study, Google provided 21.5 million euros of funding from its DNI Fund for media projects from 2016 to 2019. The 92 recipients include leading publishers such as the Frankfurter Allgemeine Zeitung, Der Spiegel, Zeit Online, the Funke Mediengruppe, DuMont, and Gruner + Jahr. Smaller and regional media organisations as well as journalistic start-ups received significantly less (ibid.: 4, 90).

They find this to actually worsen economic disparities among media companies. More than two thirds of DNI funds went to large, established, commercial publishers. Google is thus helping big publishers innovate. It does not direct its funds at helping weaker media organisations, non-profit journalists, new market entries or at closing gaps in press coverage or otherwise maintaining or increasing diversity. Dachwitz and Fanta conclude: "Overall, then, the corporation is making a negative contribution to the development of media pluralism in Europe, as it primarily works to consolidate the market power of established publishers." (ibid.: 93)

Google's initiatives consistently came about in response to growing political pressure. Two key issues in the debate were the introduction of a "Google tax" and of an ancillary copyright law. In the words of the manager responsible for the programme, it was designed to dispel "misunderstandings" between the corporation and the media industry. The news initiative, then, resembles a large-scale public relations exercise and is clearly not geared to improving the public good but toward benefiting and appeasing Google's political opponents.

This changed with the shift to the GNI, after the ancillary copyright for press publishers had been passed into European law in the 2019 Copyright in the Digital Single Market Directive and after the G7 in June 2021 agreed on a minimum corporate tax. The main link to media is Google's technical infrastructure. Of 22 of the media surveyed by the study's authors, 18 use Google products such as Analytics to understand visitor flows and 15 use the Google advertising network to monetise their content (ibid.: 91). Google managers, of course, deny that GNI is a means to embed its products within the media. But the authors find the programme in its current form to be far more directly geared towards Google's own interests than its predecessor. By financing new, high-quality YouTube formats or the optimisation of publisher's offers using the corporation's products and services, the grants serve to tie media organisations more closely to Google's product ecosystem. Google, say Dachwitz and Fanta, is out to become the dominant "operating system" for digital journalism.

They found no indication from the interviews that Google may have misused its funding programme to directly influence media coverage in Germany. However, in the interviews several journalists expressed concerns about compromising ties and potential self-censorship – especially where Google provides large sums of money or multiple grants to one organisation.

Digitisation and globalisation are, of course, general trends, but the North-Western European Region has the strongest newspaper publishers and the most vocal in the public debate. Springer CEO Döpfner in particular lobbied for the ancillary press publishers' copyright throughout Europe as direct contender to Google.

Clientelism today comes no longer in the form of the bribery and corruption of old. It creates dependence by means of technical infrastructure and golden handcuffs. It does not require instructions on desired content, as the clients on their own do not want to bite the hand that feeds them.

4 Developments

The seven countries of the North-Western European Region have a common past and share many of their traits and challenges. The press is in dire straights, still searching for sustainable business models in the digital environment. PSM are under increasing pressure, its legitimacy called into question by neoliberal forces while right-wingers attack the trust in traditional media entirely in order to market their own. Media concentration and influence by non-media capital and financialization increases.

Political affinity parallelism in the region has proved beneficial to both politics and press and meets the expectations of the audience. The audience, at least in Germany, would like journalists to be more opinionated than those themselves see fit. As long as societies are organised as representative democracies, political parties and the state will be closely linked with media – as sources of information, as objects of reporting and as 'primary definer' of news.

The social democratic or dirigiste tradition of the region manifests itself in a larger state role. Freedom of the press was originally freedom from the state. With PSB the notion emerged that it is the positive duty of the state to create a space where freedom of the press is facilitated in material reality. Today the state serves to protect against physical attacks of journalists, to keep concentration at bay and as an enabler facilitating a diverse public sphere. Funding has started particularly for regional and local journalism, investigative journalism and innovation. The debate on how to support a public infrastructure for the digital European public spheres and achieve technology and data sovereignty has only just begun.

The landscape of media and politics has become more complex and confusing. Building on Hallin and Mancini's comparative models, Esser & Pfetsch (2020) propose to develop it further with the concept of a "political communication ecosystem" in which political communication is created, shaped and disseminated among actors from the political system, the media, industry, civil society and the public at large. Their approach allows to address a desideratum in Hallin and Mancini's work, the question of discursive power which here refers to controlling the flows of information in this ecosystem.

As we have seen, Hallin and Mancini's pioneering comparative models have already brought forth a whole wealth of research following in their footsteps (cf. Hallin and Mancini 2017). It continues to inspire research and enrich our understanding of the systems of media and politics.

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EUMEPLAT
European Media Platforms: assessing positive and negative externalities for European culture

Report on Nordic Media systems

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Introduction

The Nordic countries, which include Denmark, Finland, Iceland, Norway, and Sweden, are typically viewed as located in the periphery, enduring a harsh climate and an earlier history marked by violence and autocracy, while relations have been overly peaceful in the more recent past. From the late 19th century onwards, the region developed strongly both in terms of economic growth and social cohesion. Although the resulting “welfare regime” displays commonalities with market-oriented democracies more broadly, the Nordic model carries its particular features.

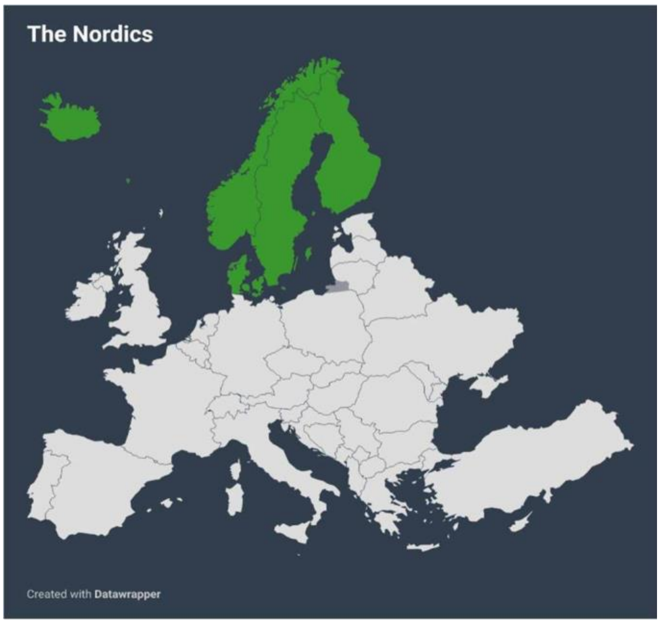
In this paper, we reflect on the origins and special nature of the political media model of the Nordic countries. Reflecting the special evolution and features of Nordic institutions, and the way they are manifested in the media landscape, their media model has commonly been referred to as “corporatist” (Hallin and Mancini, 2004). Its stylized characteristics, shaped in the second half of the 20th century, comprise a high circulation of written press tightly linked to political parties and other mainstream social organisations, a high degree of journalistic professionalism and self-regulation, along with strong government influence associated with financial dependency as well as influential public broadcasting.

According to this framework, each country may be positioned relative three extreme stylised reference cases, comprising the South European Polarized Pluralist and the Liberal Anglo-Saxon, apart from the Nordic “corporatist”. Figure 1 illustrates the original mapping of individual countries based on the degree to which their characteristics fit with the dimensions of each model, as set out by the authors. As can be seen, all the Nordic countries were mapped as close to the extreme Nordic model, and consistently more so than the countries associated with the other two models.

Figure 1: Regional Models Triangle (Hallin and Mancini, 2004)

While we will be taking partial note of variation across the individual Nordic countries, an exhaustive coverage in this regard goes beyond the scope of this presentation. The general description comes the closest to the case of Sweden, being the largest of the Nordic countries. Key features of the other national systems will be highlighted where most relevant. Denmark, Norway, Finland, and Iceland will all be referred to, along with Sweden, in scoping out the Nordic media landscape. Map 1 is depicting the European continent while highlighting the Nordic countries, which are of particular interest within this report, all marked in green.

In the following, after providing a historical overview of the Nordic institutional landscape and how it shaped the emergence and further development of the corporatist model, we further analyse the media landscape of the Nordic countries, primarily focusing on the production side. In this, we examine each of the four dimensions identified by Hallin and Mancini (2014), namely: 1) the development of media markets, 2) the development of journalistic professionalism, 3) the degree and nature of links between the media and political parties, and 4) and governmental influence. We refrain from any thorough consideration of consumer behaviour, which is the subject of a forthcoming complementary report.



Map 1: Study Scope in the Nordics (self-illustration with Datawrapper)

Subsequently, we consider the influence of more recent developments, including commercialisation and digitalisation, and also the way in which the media landscape and the corporatist model itself have become interrelated with the rise of the so- called "knowledge society". In what sense the corporatist model can be seen to still matter for the contemporary media landscape is further reflected on in our last chapter.

1 The Nordic Institutional Landscape and the Corporatist Model

In this chapter, we initially review the mainstream institutions that matter for shaping the broader societal framework of which media form part, and how these have become associated with a "Corporatist model" in the Nordic countries. In the second part, we outline the broader implications of that model.

1.1 Institutions, Leadership and Policy

Historically, the Nordic countries' governance model was autocratic with national authorities wielding strong centralist powers, no more perfected than with the prominent 1700-th century reforms of Axel Oxenstierna in Sweden. The result was a highly effective, steamrolling corporatist regime where the objectives of the ruler and the upper classes encompassed the church, the military, and all major institutions. Contributing to making this possible was the absence of an urban middle-class, a predominantly rural population and the constant pressures and threat of external conflict. There is a direct link between this historical context and the rise of "big government" in the Nordic countries. As the old class society and its rigid separation of social classes - the "four estates" - retreated (Osterud, 1978), however, an independent agricultural class arose, income differences became modest in international comparison (Ringen and Hannu, 1992), and "constructive" social relations and participatory governance arose (Kuhlne, 2016).

Broad-based educational reforms took place in the early 19th century, encompassing general schooling, combined with ambitious investment in basic infrastructure (electricity, railways). In this context, a series of technological and commercial innovations occurred in the next half-century, coinciding with an entrepreneurial spurt (Andersson, 2014). From the early 19th century to the 1970s, the Nordic countries developed strongly in terms of economic growth as well as social cohesion. Their way of combining the two has sometimes been referred to as the 'Nordic model', or 'welfare regime type' (Alestalo et al., 2009). Social innovation was seen as aligned with charity, responding to gaps in existing policy by diminishing poverty and supporting unprivileged classes, but also to boost general well-being.

Following an early precedent in Denmark in 1899, the representatives of employers and of trade unions initiated central agreements in the latter half of the 1930s, regulating procedures for addressing possible industrial conflicts across Norway, Sweden, and Finland.

The resulting model featuring collective bargaining, was marked by strong but indirect influence by the government, was coined by Heckscher (1957) as corporatism.[1]

The key thrust of corporatism in the Swedish set-up was an approach to governance capable of achieving compromise by mandating capital and labour to engage in mutual consultations, tacitly mediated by the government. At the time, the Nordic labour movements had gained sufficient strength to present capital owners with serious resistance and take a stance in bargaining for better wages. The institutionalisation of corporatism was interwoven with mechanisms to formalise a culture of consensus. These included general acceptance of solidaristic principles for wage policy, as embedded in the Saltsjöbaden agreement of 1938.

On this basis, it is only partly the case that policymakers delegated the responsibility for wage negotiation to the industrial parties, along with related issues such as work security. The process was managed in an orderly fashion, in search of economically viable wage increases, based on the assumption that delegation favoured constructive collaboration. Thus, while interest groups convey autonomy, Nordic governments exert influence through discrete links with the relevant organisations. Laws, meanwhile, tend to settle for suitable self-regulation e.g., in the field of workplace co-determination. In Denmark and Norway, the shop floor-level is left to collective agreements between labour market parties. In Sweden and Finland, framework laws introduced in the 1970s only stipulate the duty to negotiate on these issues.

The corporatist model cuts much more broadly than industrial relations, however. A number of analysts identified systematic webs entailing interest groups, civil servants and other powerful insiders and influencers in key sectors and organisations, framing close

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[1] The term originally arisen in Central Europe in the 19th century, depicting an alternative “political economy” which aspired to shape a middle-way between a classical liberal economy and radical socialist transformation.

relations and unholy alliances to exercise mutual privilege. Most assessments landed on Norway and Sweden ranking as the most corporatist societies in the world, with Denmark also among the top five and Finland slightly behind (Rokkan, 1966; Schmitter, 1979; Lijpmar, 1999, Siaroff, 1999; Lijphart and Crepaz,1991; Armingeon, 2002; Christansen and Nørgaard, 2003).

In terms of political structure, notwithstanding the notion of pervasive government, the trend has led towards competing power circles, within each of the Nordic countries. For long, the structure was stable with opposing centres of gravity following the lines of two-partite corporatism, linked with leading trade unions vs. employer organisations respectively. Gradually, the political landscape has become more volatile, however, involving green and populist movements and opening for new alliances. See Box 1 for some brief reflections on the journey that Sweden has undergone.

Notwithstanding the variation between countries and over time, however, Nordic governments have generally remained hesitant to act in fields where self-regulation of corporate actors seems possible, particularly with structures that allow for centralised decision-making that reflect the general interest. According to Kettunen (1997), collective agreements are seen as a higher, more desirable form of regulation than direct state intervention through legislation.

1.2 On the implications of the Nordic Model

The associated 'spirit' remained the symbol of the Nordic political model until Denmark let go of centralised wage-setting in the 1980s. Although, the Swedish Employers' Confederation similarly withdrew from centralised wage-setting a few years later, however, the two countries pursued contrasting strategies in the ensuing years. The Danish government proceeded with a series of reforms in support of more flexible labour markets, whereas the Swedish government, along with the industrial parties, continued to embrace more stable conditions. In Finland, stable corporatist structures evolved at a later stage, in the late 1960s, and had never been equally embedded.

As an additional feature, since 1954 the Nordic countries have operated with a common labour market, in which citizens of any Scandinavian country can move and work freely across the region. Today, all the Nordics participate in the common labour market of the EU, and the European Economic Area, although Norway and Iceland have opted not to be part of the European Union.

As for outcomes of the Nordic model, labour force participation consistently run among the highest in the world (cf. Figure 2 for comparisons in the European context). In 2017, it ranged from 77.4% in Norway to 88.3% in Iceland, higher than the US and most other EU countries.

Box 1: A political model under development, Sweden and the Nordics

In the Swedish parliamentary system, the prime minister is not elected but appointed by the party or parties represented in the government. Elections are proportional with people voting for the parties listed, even though they may express a preference for individual candidates. As the old class society retreated, the Social Democrats attained political dominance in the 1930s. The party landscape remained virtually intact to the end of the century, with seven parties represented in parliament and the Social Democrats mostly in the rule. In the 1970s, however, a more volatile economy was accompanied by a more radical twist to the Social Democrats agenda to “nationalise” industry by shifting profits to the unions. The centre-right led by Torbjörn Fälldin, a farmer taking down the arrogant intellectual, Olof Palme, eventually defeated them. From there on, the right and the left have taken turns to run the government, pursing modestly varying policies in support of long-term stability. The right- centre government of Fredrik Reinfeld who ousted Göran Persson of the Social Democrats in 2006, for instance, proclaimed a stance so far to the left on some issues, that the Social Democrats complained of trouble to differentiate themselves.

By the time of the last national election, in 2018, the share of the Social Democrats had shrunk to 28 percent of the votes. Minority governments are not new in Sweden (Luengo 2008), but in the recent period, the emergence of the populist "Sweden Democrats" means that neither the right nor the left are able to secure majority support in parliament. Meanwhile, the Swedish electorate has become more volatile, with party identification declining due to a decrease in trust in the mainstream parties (Allern et al., 2007). The European refugee crisis in 2015 worsened the volatility (Kelly 2018; Duxbury, 2018).

Yet, thus far the populists are equally unable to muster support for their core positions, as anti-immigrant and anti-European. This contrasts with the situation in Finland and, in particular, Denmark, where anti-immigration policies have moved to the mainstream of the political spectrum (Damon and Hume, 2016). Norway and Iceland, due to their more remote geography, have been less affected by this transformation of the geopolitical impetus.

A prime reason is some 5-8 percentage points higher work force participation by women, although that gap diminished in recent years. The same applies to unemployment rates, though the difference decreased in that case as well. In 2018, Nordic unemployment rates varied between 2.7% in Iceland to 8.6% in Finland.Sweden at 5.5% and Finland. 6.2%, on the other hand, struggle with their higher unemployment numbers since the 1950s.

Other features of the Nordic labour regimes include high union density, extensive worker representation in corporate strategy, high protection for social and family life and a balance act in managing work life, the welfare state and macroeconomic policies. Parallel multilevel combinations of centralized coordination and decentralized negotiations allow for a holistic approach to promoting restructuring, training, and productivity (Dølvik, 2008). Social mobility is high, competence development combines with restructuring and transition to new employment, so- called "flexicurity". Today, the Finnish government and industrial parties collaborate in an experiment with basic salary for citizens. In Sweden, major unions take a stance on considering ways to accommodate the rise of a so-called “gig”, or “platform” economy (Andersson, 2017).

While each of the Nordic countries is marked by its own special origins and subjected to diverse external influences over time, the fabric linking diverse actors and interest groups have changed and adapted. Rommetvedt et al. (2013), among others, verify how the weakening of the traditional corporatist model has led interest groups in Denmark and Norway to adapt their public relations and lobbying activities. Through revised mechanisms, the various influences of state and stakeholders remain intertwined. Key institutional bodies and individuals wield continued influence in hammering out joint strategies and agreements. Official consultation processes maintain a kind of consensus-building before formal decisions are made. Corporatism, or neo-corporatism, initially associated within industrial relations, remains relevant in a range of areas, like agriculture, traffic, environment, and many others. Alternative terms (e.g., ‘negotiating economy’, ‘mixed economy’, or ‘mixed administration’) are sometimes used to depict the somewhat altered but continued practices (Christiansen et al., 2010; Öberg et al., 2013).

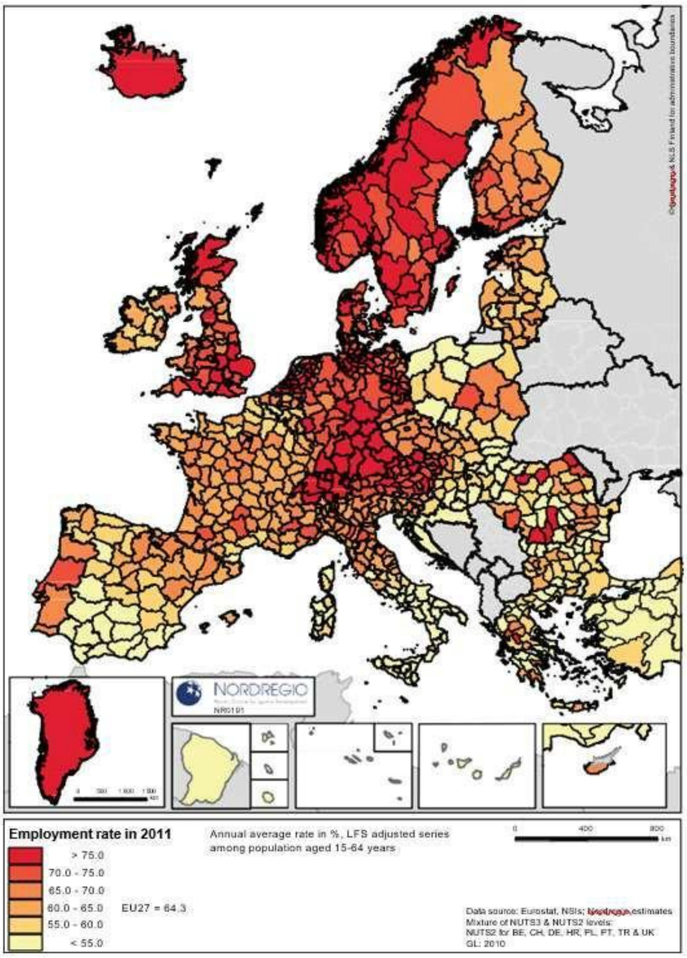

Figure 2: Employment Rates in Europe (Nordregio)[2]

[2] www.nordregio.se

2 The Nordic Media Landscape

Corporatism is about the influence of organisations and interest groups on policy making. The Nordic countries have long been viewed as strongly associated with a particular such model, the origins and legacy of which have been briefly introduced in the previous chapter.

By way of specific building blocks, the democratic corporatist model of the Nordic media has, at least historically, been associated with a strong newspaper sector (press), influential public media in broadcasting, strong political parallelism, a high degree of professionalisation and a strong state role in media policy making. In reality, the Nordic countries never looked the same, but, from the start, all have been marked by their own specific features. Meanwhile, in recent years, the system has undergone significant change. To some extent, that may reflect changes in corporatism itself, as indicated above and which will be further returned to in Chapter 4. In the case of the media sector, the changes underway have commonly been viewed as convergence with the liberal model of the Anglo-Saxon world. We will come back to the nature and implications of the changes under way.

In this chapter, we next provide some summarising observations and reflection on the Nordic media landscape. We then proceed by providing brief observations on features that relate to the main variables traditionally listed as fundamental for determining the development of media systems (Hallin and Mancini (2004), i.e., (i) the development of media markets – (ii) the development of journalistic professionalism and journalistic autonomy, (iii) the degree and nature of the links between the media and political parties, and (iv) government influence.

2.1 The Development of Media Markets

Attention to the importance of diffusing information to the public appeared in the 18th-century, with weakening royal autocracy, the idea of human or citizen rights, and the rise of political parties. In Sweden, the launch in the 1830s of the first proper daily paper, Aftonbladet, is seen as the earliest explicit ambition to present proper "news", in contrast to previous provision of information for the purpose of "campaigning" (Weibull and Wadbring, 2020).

The stylized characteristics of the Nordic media landscape, in formation since the 19th century, include a high circulation of subscribed local morning papers, marked by close and highly transparent links to political parties and also other mainstream social organisations. While the well-developed Nordic newspaper market – the first mainstay of the Hallin and Mancini model - indeed has held up for some time, it has given way in recent years. Yet, relatively speaking, newspaper circulation remains high compared to other parts of the world. As a growing share of the public goes online, however, the newspaper media have become more concentrated. At the same time, the leading tabloid newspapers, Aftonbladet and Expressen, perform well in online advertising and are able to keep expanding their audience. Similarly, the leading quality-oriented morning newspapers, Dagens Nyheter and Svenska Dagbladet, dominate online newspaper subscriptions. Local press, by contrast, is weakening. Some observers view these developments as linked to the appearance of new social gaps, partly between urban and rural areas, similarly to those seen in most other developed countries.

As shown by Figure 3, the circulation of newspapers per inhabitant has been decreasing consistently since 2000 in all four Nordic countries displayed. While the decline has been about equally steep across the board, the level of circulation has been the lowest in Denmark since the start. As a matter of fact, however, all the Nordic countries retain a relatively high level of press circulation, compared to other parts of the world. Norway displays a level hardly seen anywhere else (Hatcher and Haavik, 2014). Part of the picture is a higher number of newspapers, applying per capita as well as their regional diffusion and embeddedness in regional context. The situation reflects high autonomy for regions and the country's more active regional context. The situation reflects high autonomy for regions and the country's more active regional policy, especially compared to Denmark or Finland.

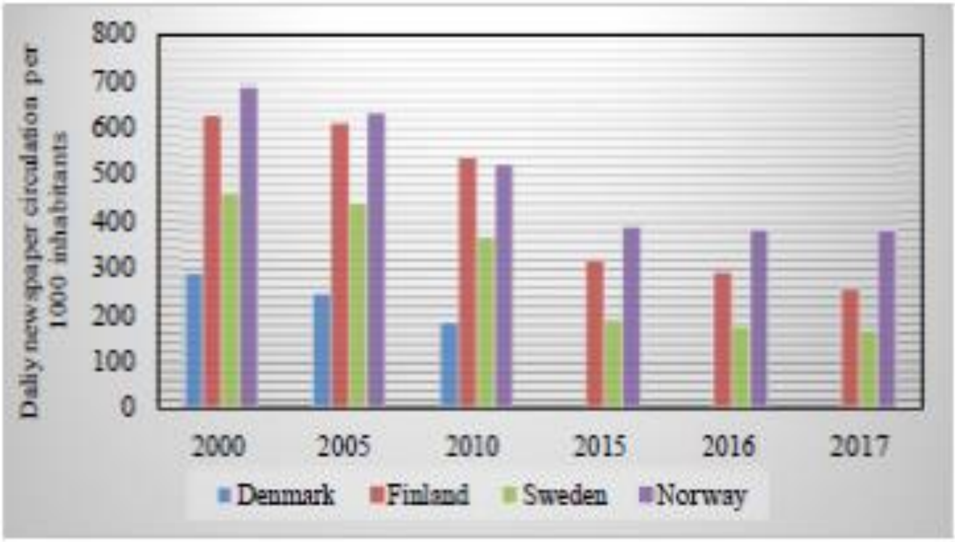

Figure 3: Nordic Press Circulation (Harrie, 2017)

As for broadcasting, commercial television and radio were banned in Sweden until the late 1980s. In contrast to the market for newspapers, radio had been dominating from the start by a single public provider and network in each Nordic country, with both national and regional coverage. While multiple competing providers were gradually allowed, private entries naturally focused on entertainment. No competition arose regarding news, or in terms of national commercial radio either. The development of digital radio, initially attempted, was halted in 2006, in the face of new demand. New listeners have instead been reached by streamed radio or radio-on-demand. Innovations have targeted niche groups, particularly among younger cohorts, but news over radio in the Nordics remains singlehandedly provided by the national public service channels. Daily listening has nevertheless remained high in the Nordic countries, at up to eight in ten on average, although with Finland at a lower level. This is in stark contrast to most other countries, including southern Europe where the ratio often hovers around two out of ten (Harrie, 2013).

Television is a different case. First, by way of usage, in this case the Nordics are attending less, and south Europeans more. Southern Europe in fact deregulated in the 1970s already, when satellite technology arrived. In the Nordics, by contrast, the public broadcasting monopolies tried to maintain the old order, backed by determined national policymakers (Nord, 2011). Even as the first commercial terrestrial television station could open in 1991, competition was firmly restrained. Satellite and cable TV became increasingly accessible, however, making the public stance unsustainable. At the turn of the millennium, Sweden thus fast-tracked digital terrestrial television (DTT), from 2007 nation-wide on a government-owned network.

Following the gradual entry of new actors and the arrival of digital television, competition for viewers inevitably strengthened. The variation between countries in numbers watching television remains limited, with about eight or nine out of ten watching TV on a daily/almost daily basis (Harrie, 2013). As shown by Figure 4 though, the daily reach of public television did decline markedly in the Nordic countries over the past decade, especially in Sweden and Denmark. Finland has seen a smaller shift, but with numbers still going down in the last five years. Norway, too, experienced a late decline but still maintains a quite high reach. Meanwhile, Norway invests considerably more than the other Nordic countries in public service provision of news and, together with Iceland, has the most dominating individual such provider of such type, NRK1 (Olsson, 2015). The onset of digital TV Channels does not set the Nordic countries aside from others in terms of numbers, but the way competition has been managed and public service supported nevertheless continues to display differences, as will be returned to.

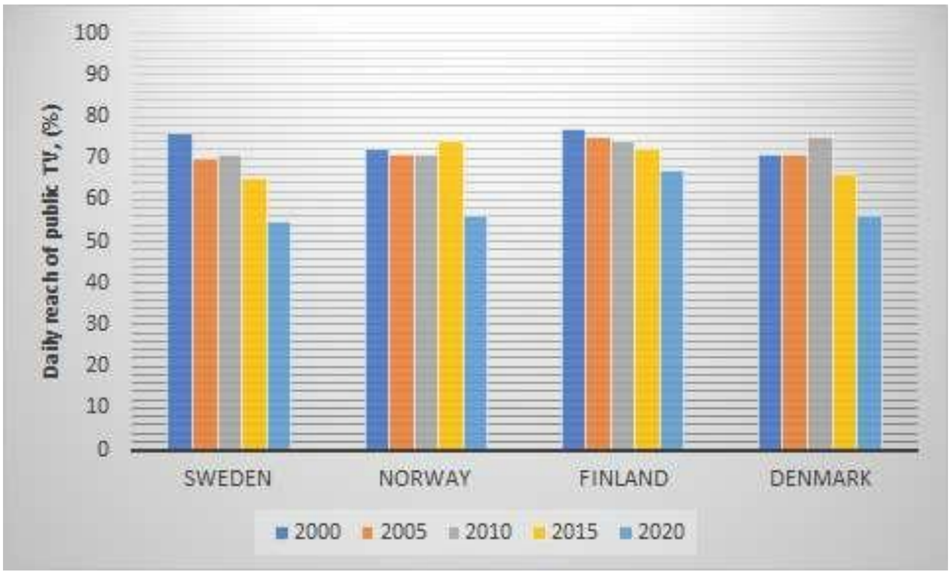

Figure 4: Daily reach of public television, as % of population (Nordicom, 2021)

2.2 The Development of Journalistic Professionalism

The second aspect, a high degree of journalistic professionalism and self- regulation, has commonly been associated with a strong ethical norm stressing journalistic objectivity (Petersson et al., 2005), applied across the media landscape. A high degree of autonomy coupled with a strong public service orientation are other traditionally recognized features.

Specialised tertiary education in journalism has been offered in Sweden since the 1960s, moving swiftly at the time into a position as one of the most well-regarded high-quality programmes in higher education. Most Nordic journalists are educated in their home countries. The function of journalists is to be a critical voice and third estate in society (Ohlsson, 2016). In the Nordics, as in many other parts of the world, journalists generally operated without special training or education. Despite having similar media systems, journalism education has developed rather differently in the Nordic countries.

In Sweden, an apprenticeship normally constituted the beginning of a career as journalist. Short courses were arranged by press organisations. It was commonly thought that a specialist education to practice journalistic tasks risked serving as an obstacle to freedom of thought and speech, as well as threatened the freedom of the press. In fact, only totalitarian countries exercised rules at the time which made journalism education obligatory (Gardeström, 2016). In the post-war years, and with the media expansion and commercialisation, the formal apprentice system for journalists broke down in Sweden. The emerging press wanted to train their own journalists, to guide and socialize with them for natural adoption of their particular regional or political culture. Since apprentices were commonly lost to other newspapers, paying higher wages when the media sector expanded, trained journalists became scarce, and the system crumbled. To take back control over the content of journalism training, in 1959 press organisations moved in support of a formal journalism education. On that basis, they managed to avoid that other actor (universities, Nordic Council, private entrepreneurs, or the like) would take charge and devise an education fitting with their agenda. After the Second World War, the educational systems expanded across the Nordic countries, thereby reorienting itself towards the mass education seen today, a development that journalism education had little other choice than to comply with (Gardeström, 2011).

The starting point in journalist training in all the Nordic countries was short courses to support the apprentice system: young people were accepted as apprentices by newspapers at reduced wages for a couple of years. They were basically educated "on the job", depending on helpful colleagues or simply fending for themselves. Finland was the first of the Nordic countries to establish an education (Tommila, 1988ab). Organised courses began in 1925 at the College of Social Affairs. Denmark was second, with the joint initiative in Aarhus 1946. Norway was third in 1951 and Sweden fourth in 1959, although it is sometimes claimed that the College of Gothenburg integrated journalism education into an academic degree already in 1946, in cooperation with local newspapers. Iceland is a different case, where journalism education came about much later (Gardeström, 2016).

Journalism education has historically emerged following a similar pattern across the Nordic countries:

1. Apprentice system + short courses arranged by press organisation or other interests (All Nordic countries).

2. Apprentice system, combined with three- to ten-month courses at independent schools founded by press organisations themselves (Norway, Sweden), or in cooperation with universities (Denmark), or at semi-academic institutions (Finland).

3. Nationalisation or major state funding of journalism education, two- to four- year journalism programmes (all Nordic countries).

4. Integration into universities (Finland 1960, Sweden 1977, Iceland 1987, Norway 1994).

Internationally, journalism programmes were first established in the United States. During the Second World War, journalism education became an issue within UNESCO where it was shaped as a substantial journalist training, seen as a tool to guarantee global freedom of information, and to prevent propaganda in newspapers (Desmond, 1949; UNESCO, 1958).

As for gender divisions, it is estimated that some 2/3 of all news diffused through Swedish media are produced by male journalists. The ratio has long been considerably more skewed in sports related news, although a turn for enhanced balance has been observed (Enbom, 2016). It is estimated that women reporters accounted for 37% of all news stories in the latest Global Media Monitoring Project (GMMP), a share that stayed rather stable until the most recent date of measurement, in 2015, compared to 2000 (WACC, 2015). Finland is the only Nordic country where the share of reporting by female journalists, at 40 percent, surpasses the global average. The share of female presenters, as distinguished from reporters, is generally higher, however, reaching almost 50 percent worldwide. Again, this share has been largely unchanged over the last decades. Among the Nordics, in this case Sweden has the highest percentage of news presented by females on TV (62% in 2015). The shares of female presenters in the other Nordic countries were lower than the global average (Nordic Council of Ministers, 2017).

According to the global GMMP numbers, female reporters mostly report on news about science and health. In Iceland however, more men than women report on this topic, whereas female reporters tend to report more stories about the economy, politics, and government than men. In Finland and Sweden, it was observed that many female reporters write news stories about crime and violence. The majority (67%) of the reporters on these news topics were women in Finland and 46% in Sweden.

2.3 The Degree and Nature of Links between the Media and Political Parties

Political parties and the press used to have a close relationship, referred to by Hallin and Mancini (2004) as a third pillar of the Nordic model. From early on, liberal and conservative newspapers dominated. Yet, social democratic newspapers and newspapers from the Agricultural Centre Party profiled themselves already at the end of the 19th century. In all the Nordic countries, the socialist press related closely to the party organisation from the start, with success spreading from the capital to smaller towns. Links between political parties and journalism arguably grew the strongest in Norway, although the party press was also important in Denmark and Sweden. In Denmark, Socialdemocraten, a Labour Party newspaper, achieved the highest circulation of any daily paper in the early 20th century (Høyer, 2005).

At the end of the 1970s, party newspapers remained the dominant form in the Nordic countries, accounting for 92% in Denmark, 57 % in Finland, 69 % in Norway, and 50% in Sweden (Syvertsen et al, 2014). Change set in during the 1970s, however. The leading Swedish daily paper, Dagens Nyheter, declared itself independent from party affiliation in 1974. Twenty years later, only 30 % of the Finnish language press and less than 40 % of Norwegian newspapers had formal ties to political parties. The party press dissolved consistently under the influence of both internal and external factors (Allern and Blach-Ørsten, 2011). The rise of television coupled with changing ethics in journalism were strongly contributing factors (e.g., Høyer et al., 1975). While the institutional links have weakened dramatically, however, parallelism remains in terms of content (Allern and Blach-Ørsten, 2011). Some owners retain mission statements that reflect ideological and political roots, as will be returned to.

What explains the loosening association between newspapers and the political parties in the Nordic countries. There is hardly a single explanation, but several factors are at work. Some of these have to do with changes in the party system itself. While the standing of the political parties used to be relatively static in the Nordic countries, as manifested by the stability of voters in terms of their preferences for a particular party, as well as the quite stable size of the various parties relative each other, more lately they have all entered a stage of greater fluidity. Not only can more voters be seen to display varying loyalties, but parties have become more volatile in their positioning, with the left-right wing scale attaining reduced relevance for explaining their position (Bäck et al., 2015; Bäck and Hellström, 2018). Rather than ideologically oriented, the success of political parties has become more dependent on their ability to build viable coalitions and compromises. Volatility has, moreover, increased due to the rise of new parties, Finally, voters have become more prone to split their votes between national, regional and local levels (Oscarsson and Holmberg, 2016). All these factors are in discord with reliance by media outlets on stable long-term relations with political parties.

Another explanation has to do with changes in finance. Political parties used to represent important sources of financial support for media. Press subsidy systems were introduced in all the Nordics from the 1950s, however, in order to ensure political diversity of the newspaper landscape. As a result, funding by political parties became less important. Adding to that, the perceptions of political influence in media have changed (Nord and Grusell, 2021). Increased scrutiny of financial books and motives created new risks and could turn dependency on funding from political parties into a liability, undercutting trust and also the morale and reputation of journalists and other professionals.

For such reasons, few ownership linkages remain between political parties and newspapers. On the other hand, more and more local newspapers are owned by self-governing foundations, many of which have at least indirect links to the political arena (Ohlsson, 2016). Finally, although the presence of institutional links has weakened dramatically, parallelism remains in terms of content (Allern and Blach- Ørsten, 2011). Some owners retain mission statements that reflect ideological and political roots, as will be returned to.

To sum up, the strong affiliation of newspapers in Sweden to political parties used to be mirrored in their respective circles of readership, as well as the political disposition of journalists and the content of news articles (Nord, 2001). During the last few decades, the presence of such links between newspapers and political parties have mostly weakened, with most leasing contemporary newspapers being politically independent.

2.4 The Role of the State – Government Influence

Regarding the fourth dimension, government influence, state subsidies have been offered since the early 1970s for the purpose of enabling the survival of economically weak newspapers, many of them dependent on limited local audiences (Ohlsson, 2015). Gradually, however, the support schemes grew in scope and reach, leading to the rise of a sizeable, subsidised public-service sector, along with far-reaching offerings of special funding for private news media.

Over the past decade, the subject of media subsidies has become highly politicised. While the overall support levels declined (Ots et al., 2014), the Nordic countries nevertheless continue to shore up the sector through various mechanisms. Although similar efforts prevail elsewhere in Europe, together with Austria, France, and the Netherlands, the Nordic countries arguably run the most efficient support system (Lund et al., 2011). Reduced VAT, which applies in all Nordic countries, is more important financially than direct subsidies. All in all, public support structures have acted so as to maintain an ecology of geographically disbursed papers, particularly in Norway and Finland, which goes well beyond what can be found in most other countries, where national newspapers are more dominating.[3]

Meanwhile all Nordic public service companies offer channels with nationwide penetration. They initially opened single channels in the 1950s and 1960s, with Finnish YLE and Swedish SVT the first to proceed with additional ones at the start of the new Millennium. These countries similarly were first out with conversion to digital terrestrial distribution, with Denmark and Norway following suit in 2007-2009.

About a quarter of all television viewers in the Nordic countries keep using public TV, while three quarters of radio audiences listen to national radio. Both spheres have regarded communication services as a public good, a cultural policy extended to media. While unlimited reach of commercialisation has been energetically resisted, as already noted, editorial freedom was taken seriously. Along with the BBC in the UK, Denmark's DR1, YLE in Finland, RÚV in Iceland, NRK in Norway, and SVT/SR in Sweden evolved with a universal orientation which matured in the early 20th century.

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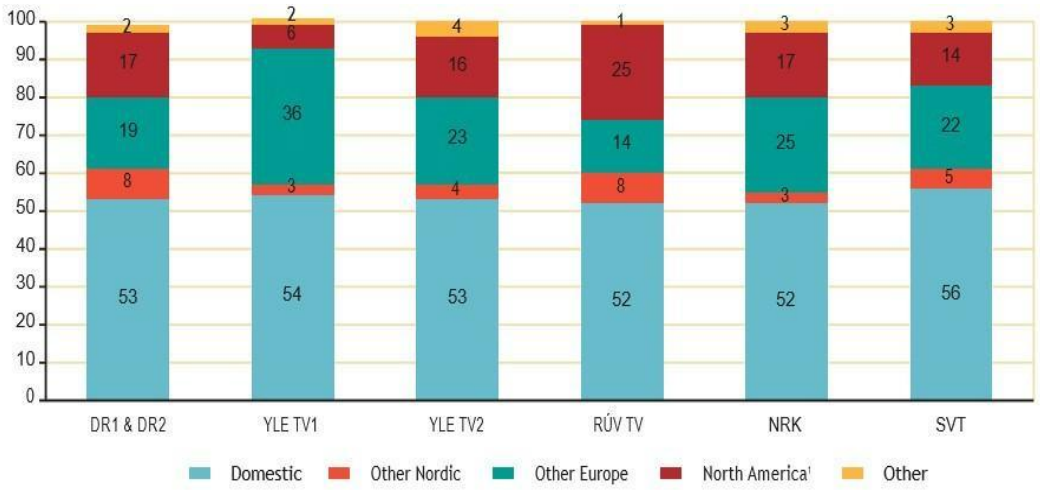
[3] For more information on state subsidies in the Nordics, see: https://quod.lib.umich.edu/n/nmw/12367206.0001.001/1:4/--media-welfare-state-nordic-media-in-the-digital- era?g=dculture;rgn=div1;view=fulltext;xc=1

As seen from Figure 5, the Nordic public service companies further have a high share of domestic programmes, taking up more than half their transmission time. This is in line with responsibilities to maintain public information and cherish domestic culture, including language. Foreign programmes are normally broadcast with subtitles. On the other hand, the established practice in the Nordic countries is to not use language dubbing except in children's programmes, a fact that is widely viewed to have helped underpin children's ability to master foreign languages. In line with European legislation, broadcasters are similarly obliged to ensure that most transmission time is devoted to programmes produced in Europe.[4] In reality, the European share of Nordic public service companies is parked around 80 % on average.

The national dominance in broadcasting is associated with differences in content. In most Nordic countries, the majority of public service programming, public affairs as well as drama, consists of domestic productions (Hujanen et al., 2013). The output is characterised not only by domestically produced programmes, but also by an extensive share of public service companies' own productions.[5] The balance between the companies' own productions and acquisitions is exemplified by the content of DR1, YLE TV1, NRK1 and SVT1 (the Nordic public service channels with the highest viewing share in each country). These channels' own production accounts for an average of more than two-thirds of the first transmissions. Less than a third is acquired programming.

[4] This is in line with EU audiovisual policy – the Audiovisual Media Services Directive, AVMS – incorporated into Member States' legislation, embraced also by the EEA, thus including Norway and Iceland although not members of the EU.

[5] Most public service channels display less than 40 % dependence on acquisition to build their schedules. In-house production comprises the lion's share, while most acquired programming is picked up from foreign markets (Harrie 2012).



1 Category represents USA for DR; North America for YLE, RÚV, NRK and SVT.
Note: YLE data based on four to seven sample weeks. RÚV is transmission time less advertising.
Sources: TNS Gallup Denmark, YLE, Finnpanel, Statistics Iceland, NRK (processed), SVT (processed).

Figure 5: Public service TV programming by origin in each country (Harrie, 2013)

The diversity of offerings by the public service providers relative to their commercial competitors, applying to both information and entertainment, is illustrated by Figure 6.[6] SVT's main channels, SVT1 and SVT2 lead in both respects. Yet, the difference is much greater in regard to diversity of information compared to entertainment. Several of the commercial channels are almost as diverse as the public providers when it comes to entertainment, while way behind in regard to information. It can further be noted that Kunskapskanalen, SVT's theme channel for culture and science) provides an alternative for viewers, offering broad factual scope without entertainment. SVT24, which broadcasts news and repeats, is in the middle range. TV4, meanwhile, exemplifies a generalist commercial alternative that offers high diversity in entertainment coupled with

[6] Data were taken from a survey by the Swedish Radio and TV authority, which indexes Swedish television channels on an annual basis according to how information-oriented versus entertainment-oriented their content is (Harrie, 2013)

narrow coverage by way of information (Harrie 2013).

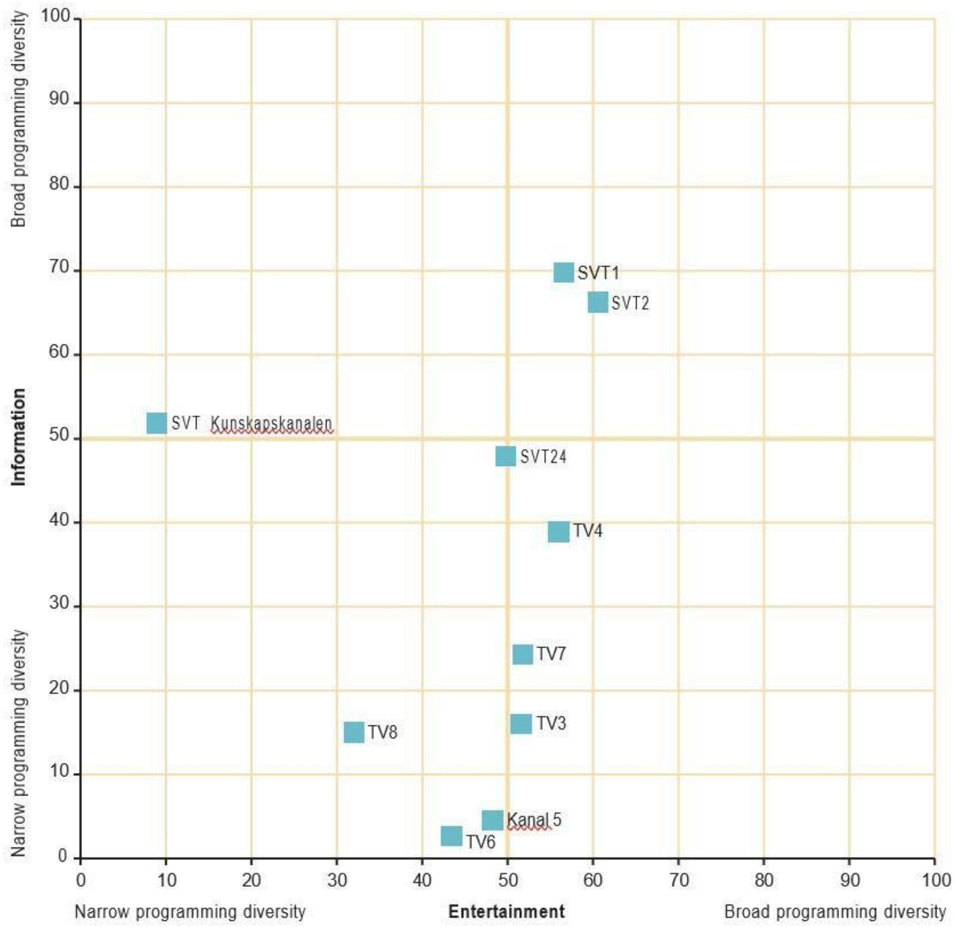


Figure 6: Programming diversity in Swedish TV, 2011, based on data from The Swedish Broadcasting Authority (Harrie, 2013)

While the adoption of digitalisation in television around the turn of the millennium expanded the portfolio of niche channels, the development was basically controlled and actively coordinated for the purpose of transforming the Nordic public service broadcasters (Nord, 2011). They all introduced new services online and adopted far- reaching changes both to diffusion and content. The concept of "public service broadcasting" has since been applied as an umbrella term that spans television and radio as well as online services (Syvertsen et al., 2014).

The arrival of digitalisation, although rolled back in the case of Swedish Radio, nevertheless represents a generic cross-border influence, spanning advertising on- line, accessing user data, interactivity with users, social media, and so forth. The consequences apply to all regions. In the Nordic media landscape, however, thetransformation did not happen by chance, but clearly reflect the particularities of the Nordic corporatist model. The impacts are returned in the next section.

With the onset of COVID-19 and the subsequent lockdowns, much of the experience-based industry has been brought to its knees, causing a dramatic drop in advertising for media companies. Following an intense debate on media subsidies, the outcome was direct state support for private news media in all the Nordic countries to the record tune of €275 million, about a third of it in the form of special pandemic funding. State funding for private news media went ten times higher per capita in Sweden and Denmark compared to Finland. Bigger audiences have been observed in the Nordic countries for public-service and private news media during the pandemic, compared to other countries, again naturally reflecting the stance and the missions of these organisations.

3 Beyond the Corporatist Model in the Nordic Countries

To what extent the Nordic countries deserve continued unabated reference to corporatism still raises important questions, including reference to the Nordic media model. As has become apparent from Chapter 3, the traditional hallmarks of the Nordic media model have clearly been subjected to change. Some analysts argue that the Nordic model has to a certain extent evaporated or is under way to do so. Others argue that the model remains, but is changing shape, possibly developing into a new hybrid model.

In the following subsection, we will further examine whether the special underpinnings of the Nordic media model have retreated, or if the changes observed should rather be attributed to other factors. The transformation of the channels for communication that we associate with the era of digitalisation, for instance, clearly influence the pre- conditions for - and role of - all media models, although in which way and with what consequences merit further consideration.

In this context, we will revisit and compare perceptions of how media systems perform, after which we come back to the contemporary role of the Nordic model. On this basis, we conclude the chapter with some key observations whether and in which respects the Nordic media model still deserves serious attention.

3.1 Signs of De-Corporatisation

The heyday of corporatism in the Nordic region lasted from the 1930s until the 1970s, i.e., through a period broadly characterised by economic stability and public sector expansion. Those conditions are no longer present. It is beyond doubt that the Nordic countries have gone through, and keep experiencing, important institutional change. This is of course unique to the Nordics but, in fact, applies to most societies around the world. Having said that, most assessments of corporatist arrangements keep ranking the Nordic countries in the top, particularly Norway and Sweden with Denmark slightly behind, and Finland somewhat further down the list (Siaroff, 2017). There is no indication that this picture is about to fundamentally change in the foreseeable future. This may not be surprising, as corporatism has a way of attaining path-dependent and be self-sustaining. Its fabric had become embedded in culture as well as institutions and lifestyles (Lijphart and Crepaz, 1991).

To what extent the Nordic countries deserve continued unabated reference to corporatism still raises important questions, including reference to the Nordic media model. The previously observed structures for integration of particular interests in policy formulation and implementation are arguably gone. This applies in politics itself, where the previously dominating right-left competition, closely inter- related with industrial relations, has lost its traditional rationale.

Rather than two political blocks, the political landscape has become volatile, and less predictable. Voters can no longer be expected to vote for the same party as in the past, they do not associate themselves with a particular class, and the arrival of populism has led to the lasting presence of non-traditional politicians, a phenomenon that is basically identical to what can be observed all over Europe, and in other developed countries as well. On the other hand, a reduced formal representation in policy-preparation processes has partly been compensated for in other ways. Personal connections remain and key organisations devise other approaches for lobbying and maintaining established positions (Rommetvedt et al., 2013; Öberg, 2013; Christiansen 2018). Informal contacts, for instance with members of parliament, have found new forms while evolving as well with stronger engagement of "new" actors, such as representatives of civil society (Schelin et al., 2017).

Significant changes have nevertheless come about at the heart of corporatism. The privileged position of incumbent organisations can no longer be taken as given, requiring adjustment in many cases. This very much applies to the trade unions, which remain highly influential but frequently finding themselves on the defensive. As already indicated, some of the unions have rethought their strategy, some have reorganised, in effect giving way on previously entrenched positions. Compared over time, and also relative other parts of the world, unions in the Nordic countries have become better represented in the management of companies, partly backed by law, while also less rigid and more accepting of increased labour market flexibility. At the same time, they seek out new channels to advance employee interests, protect security and influence, along with local communities and civil society.

These developments reflect a more general tilt in what comprise viable mechanisms to underpin successful enterprises along with cohesion, in sync with the plurality of civil society associations. Social innovation, while a broad concept that assumes many shapes, and which served important purposes in the Nordic countries for many years, is similarly on the rise. While generally emanating from the initiative by individuals, or a group of individuals, social innovations may carry through irrespective of the support by public authorities and be able to initiate new action in response to outstanding problems and issues (Andersson et al., 2015).

The above developments in some sense represent manifestations of de- corporatisation. Their relative strength varies between the Nordic countries, as well as between regions, and differ between the regional and national levels. While Hallin and Mancini take into consideration the specifics of each individual country, their characterisation of regional groupings provides little direction how to examine in what ways a regional model might split up from within, and possibly develop into new variants. Clearly, the Nordic countries cannot be viewed or treated as homogeneous. Whether the significant differences that existed between them from the start, merely remain, or whether they are taking the Nordics in different directions, and then with what implications for the Nordic model as such, will be returned to below.

3.2 A Corporatist Model in a Knowledge Society

In a knowledge economy, the notion of people taking centre stage has arisen as a central tenet. The question arises how this relates to the corporatist actors and interests in the national-industrial state? Some observers have taken a highly critical stance of Sweden and the Nordics in this respect. The original analysis by Rokkan (1966) of the drivers in Norwegian power relations were highly critical. Much of the subsequent literature, including Schmitter (1979) and Lijphart (1999) who depicted the Scandinavian countries as the most corporatist found anywhere, shared much of the critical assessment while also recognising many benefits. Some observers, however, have portrayed an outright dark situation, notably in Sweden, according to which the state manoeuvred since centuries to link up all major institutions in a systematic web depriving individuals of any free space or will (Huntford, 1972). The presence of so serious downsides is hard to reconcile with the position of the Nordic countries in a range of indices benchmarking standard of living, happiness, innovativeness, experience-industry, etc. Yet, corporatism clearly has downsides and features challenges, visible in diverse institutional landscapes (Andersson et al., 2010).

Coming to grips with such aspects implies rethinking the policy model founded on the exercise of power through the bureaucratic structures of corporatist organisations. Voluntary and open market-based communities of knowledge practice stand to overtake those corporatist interests that operate in sheltered markets, or will things turn out in another way? The former outperforms the latter with a view to the flexibility of process and openness to draw on the wealth of experience that resides in diversity and pluralism, promoting a greater range of ideas plugging into innovation (as opposed to more rigid processes of forced allegiance, such as those to the guild). The philosophy of communities evolves as a set of practices that gradually become established through trial and error as expected patterns of knowledge innovation. On the other hand, one cannot rule out the influence of vested interests, which may also twist information, and perceived reality, to their advantage. The last decade has in no small way seen populism and autocracy claw back across much of the world as we know it, turning the new information and communication tools to their advantage in the process, speaking volumes to the dangers that are at hand (Ginsburgh, et al., 2020; European Parliament, 2019). Who knows who will be next in the White House, or in any of the major capitals of the world, in the next stage?

While the corporatist model is not gone, society is staged in a process of far-reaching change associated with the ongoing rise of a so-called “knowledge society”. While this concept has many connotations, knowledge is well understood to differ from traditional production factors. Its value tends to increase as it is used and accumulated. At the same time, with the benefits “spilling over” to others, there is a strong tendency for the private sector, as well as for individuals, to underinvest in generating knowledge, through education and training, research, innovation, and so forth. This creates a rationale for government to step in to subsidise or in other ways enhance such investment, in the interest of the public good. Yet, the ability of such policies to result in “additionality” and generate such benefits, is far from given. Meanwhile, the value of knowledge is not given or static, but the nature of its formation, accumulation and distribution is key. Control of knowledge, or the functions commonly associated with “gatekeeping” in the case of media, has enormous implications.

What information and content are actually conveyed, much depends on the presence of competent and outward-looking knowledge brokers. Additionally, the presence of media outlets and channels for information whose mission is understandable for users, with transparency in purpose, represents a key building block of the media landscape.

The role of media is interwoven with the “knowledge society” in two basic ways: i) the extent to which it helps educate the public by facilitating their access to media and interpret and process information, and; ii) by the way it is influenced by citizens as well as various stakeholders, in how to process and transmit information. In this sense, the media may both contribute to breeding a stock of knowledgeable citizens and itself depend on whether citizens represent “knowledgeable customers”.

Table 1: Percentage of Households with Access to the Internet

Countries	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Sweden	88	91	92	93	90	91	94	95	92	96	94
Denmark	86	90	92	93	93	92	94	97	93	95	95
Norway	90	92	93	94	93	97	97	97	96	98	96
Finland	81	84	87	89	90	90	92	94	94	94	96
Iceland	87	92	93	95	93			96	97	95	97

Sources: ITU, 2021; Statista, 2021.

Table 2: Percentage of individuals using the Internet

Countries	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Sweden	90	93	93	95	93	91	90	93		94	95
Denmark	89	90	92	95	96	96	97	97	97	98	97
Norway	93	93	95	95	96	97	97	96	96	98	
Finland	87	89	90	92	87	86	88	87	89	90	
Iceland	93	95	96	97	98	98	98	98	99		

Source: ITU, 2021.

The Nordic countries have long scored high on indicators at the core of the knowledge society, such as R&D expenditures relative to GDP, patents, or training. They similarly excelled in ICT from early on, as reflected in Internet usage, broadband penetration, mobile penetration, mobile networks, e-commerce, hardware installation in homes, and public services on-line (OECD, 2016, 2019 and 2020). In due time, the diffusion of ICT accelerated worldwide and the standing of the Nordic countries in ICT is no longer exceptional, although still generally near the world's best. Tables 1 to 3 demonstrate how household's access to the Internet, individuals' internet use, and broadband subscription rates all parked at a high level in the Nordics throughout the past decade. In the case of social media, as seen from Table 4, the share of the population taking part displays stable growth at a comparable level across-the-board.

Table 5, meanwhile, shows the 10 highest ranked countries in e-government and "e-participation", as of 2016. As can be seen, three of the Nordics, Finland, Sweden and Denmark, featured on this list for e-government. In regard to e-participation, however, only Finland qualified for the top layer, and then was able to barely squeeze in on this list. Rather than the advance of technology itself, the knowledge society critically depends on how information and knowledge are used, by whom, and for what purpose. How this plays out in Nordic media, compared to other countries, is returned to in the separate regional report, which addresses consumption of news.

As the applications of ICT keep developing, what we refer to as the digital transformation gradually cuts through the entire spectrum of activities, in all societal spheres. Narrowly speaking, digitalisation is the process of converting information into a digital format, with information organised as bits, i.e., a series of numbers that can be used to describe a discrete set of points or samples (objects, images, sound, documents, etc.). When combined with big data, interactive communication, social media, artificial intelligence, platformisation, misuse of data and outright cybercrime, however, the consequences are far-reaching, including for the media. In order to gauge the impact of digitalisation, globally, as well as in the context of a particular industry or region, such as the media of the Nordics.

Table 3: Number of Broadband Subscriptions per 100 people

Countries	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Sweden	117	121	124	125	127	129	128	126	127	128
Denmark	116	128	130	125	126	124	122	125	125	125
Norway	115	116	116	112	112	110	109	108	107	107
Finland	156	166	172	136	139	135	131	130	129	129
Iceland	106	106	108	109	113	116	121	120	122	122

Source: ITU, 2021; World Bank, 2021.

Table 4: Number of Individuals Participating in Social Media per 100 people

Countries	2011	2013	2014	2015	2016	2017	2018	2019	2020
Sweden	54	57	65	62	70	71	70	72	73
Denmark	55	64	66	65	74	75	79	81	85
Norway	59	68	71	73	76	83	82	86	88
Finland	45	51	56	58	62	66	67	67	75
Iceland	72	79	83			89	91	92	94

Source: Eurostat, 2021

Table 5: E-ranking, 10 leading countries, 2016

Score e-government		Score e-participation	
Topp 10	Index	Topp 10/11	Index
UK	0,9193	UK	1,0000
Australia	0,9143	Japan	0,9831
Korea	0,8915	Australia	0,9831
Singapore	0,8828	Korea	0.9661
Finland	0,8817	Netherlands	0,9492
Sverige	0,8704	New Zeeland	0,9492
Netherlands	0,8659	Spain	0,9322
New Zeeland	0,8653	Singapore	0,9153
Denmark	0,8510	Canada, Italy	0,9153
France	0,8456	Finland	0,9153

Source: United Nations, 2016.

In raising questions about the stability or changes in the Nordic model, it is necessary to take a closer look at the question whether it is viable to speak of a single Nordic model or not? As we have seen, the differences between the five Nordic countries are too big to make them fit into one uniform model. General models, such as Hallin and Mancini's (2004), may in effect serve to mask important national differences (Nord, 2008; Strömbäck, Ørsten and Aalberg 2008). According to Hilson (2008), it is appropriate to refer to the "Nordic welfare systems", then interpreted as "a model with five exceptions".

Others confirm the viability of the Nordic model concept. While agreeing that each country is unique, Syvertsen et al., (2014) argue that national differences are more significant in specific policy domains than when it comes to overarching principles and empirical realities. They further observe that recognizing a Nordic perspective adds insight. Media structures, institutions, and user patterns display common traits.

4 Modern Governance-Building

In this chapter, we build on the findings of this report by offering some additional considerations of the fourth variable determining the development of media systems, as identified by Hallin and Mancini (2004) – the role of the state in the function of the media. That this is here placed in special focus is partly motivated by the fundamental role it plays in influencing the other dimensions referred to.

Many would argue that modern governance-building institutions have, at least in part, failed to put in place the prerequisites for enabling media to fulfil their potential of the knowledge era. In this regard, the Nordic countries assume a special position in the light of their unique corporatist model, and how it has developed over time, as is further commented on below.

Commonly argued issues, in terms of weaknesses or outright failure of policy to address contemporary challenges, can be observed in the following respects:

- Need of underpinning "public goods" related to, e.g., research, infrastructure and social cohesion, to underpin socially beneficial investment and diffusion of new knowledge.

- Within organisations, lack of leadership to take charge of information management. This results in weaker rights, obligations and strategic leadership and lack of accountability, which is visible in multiple spheres – business, politics, universities.

- A risk of "shallowness" in many activities, a thinning of professional skills and an expansion of meaningless or even destructive services, as observed in areas ranging from legal services to manual work.

- Issues with regard to authenticity and quality of work, paralleled with challenges to verifiability and accountability in data governance, feeding plagiarism in one sphere, cybercrime and fraud in others.

- Failure to observe and take action to manage and preserve public goods for the long term, while their protection requires investment in the short term. The impacts span societal and environmental assets and inherited cultural assets along with sound media systems. Pressures for short-term benefit nag on the basis of such assets, whose resilience may be long-lasting, reflecting the rich eco-systems of natural and human evolution that underpin them. Conversely, their decay may be gradual but, over time, open for irreversible and far- reaching destruction with consequences in the medium- to long-term. Future generations are not here today to protect the social fabric of their future, so the full force of what is lost will not be heard when decisions are made today.

- The media industry has evolved with the uptake of new technologies and organisational models, allowing for new forms of citizen participation while also strongly impacted by evolving tensions between public service and commercialisation. The professional and ethical codes of journalism have run into new challenges.

- The European Union has arisen as the main bulwark in defence of personal integrity, privacy, and sound data governance at a time of intense cross- border exchange and intensifying disinformation. Yet, the culture and institutional heritage that underpin the media landscape harbours weak support for the pan-European project and collaboration. The issue of how to link and cross-fertilise between the regional sub-systems of the European media landscape, so to bridge divergent interests and build common understanding and identity, will be at the core of the continued work.

The implications for public policy are far-reaching. Policymakers have a distinct role to play in creating and ensuring the presence of sound institutions and effective markets while also protecting public service and putting up defences against misuse and unethical behaviours. The corporatist model of the Nordics has, in effect, played the role of a cradle for the gradual appearance of a unique public policy approach in managing the modernisation of media systems. In particular, the Nordic countries have opened up for extensive liberalisation and scope for market forces and new technologies (e.g., commercialisation and digitalisation) while enacting strong policy interventions in support of public service through the media, pluralism, professionalism in journalism, and so forth. In this sense, as documented in the previous chapters, despite its partial dismantlement, the Nordic corporatist model has brought a legacy which keep influencing policies while also placing limits to the role of market forces.

The Nordic countries appear rather closely aligned in this respect, although each of them features its own specific characteristics. How their particular approach can be further built upon for favourable outcomes in the years to come, while tackling downsides and pitfalls, remains to be seen. Specific issues additionally present themselves with regard to the position of the Nordic model in the wider European context. Here we are dealing with a new and challenging phase, in which tensions between markets and social considerations, national and regional, inward, and outward-looking, and also between policy concerns in support of broader societal development vs. populist movements are serving vested interests.

5 Concluding Observations

Various observations have been made in the previous chapters, on the many features differentiating the Nordic model from others, and whether they have continued to remain valid in more recent years. Our focus has been the association of the Nordic countries with a “Corporatist model”, and how that has played out in shaping the media landscape. In considering how the role of that model has evolved over time, we have taken note of the growing importance of commercialisation, digitalisation and the rise of a knowledge society. In reviewing the main dimensions traditionally applied to capture the essential differences between regional media models, and particularly their role in shaping the production of media, we conclude on the following:

- Traditional public media, in the press, radio and television, remain strongly present with high reach and service levels. Their standing has been scaled back in some respects but compared to other regions, their position remains quite formidable in the Nordics. Moreover, they have adopted to the new media landscape and made digitalisation a force that drives improvement also within their realms;

- The connection to political parties is much weakened, and no longer a factor in differentiating the Nordics from others. Having said that, the influence of the corporatist model lives on, with a continuation of strong linkages among various actors and interest groups, partly informal but yet very much real;

- The standing of journalists, their profession, status, ethics and ways of working, has been subjected to change, as in other regions. Other actors have entered the arena of producing news and the entire landscape has become more interactive and volatile.

Content development, verification and quality are subject to multiple challenges. Yet, journalists in the Nordics probably fared better than in many other regions, although further assessment and consideration is required in this context;

- Governmental influence remains present in many respects, as in the past. Public funding remains a factor, but more than that, the corporatist model seems at work in holding up governance, linkages, strategies, taking initiatives to defend the vitality of media in support of diversity, in response to new challenges such as digitalisation and pandemics, as well as keeping control and maintaining the system.

In a separate, complementary report of the Nordic media model, we shift the focus to the user side, the consumption of media, after which we again return to contemplate the extent to which a particular Nordic media model remains relevant.

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EUMEPLAT
European Media Platforms: assessing positive and negative externalities for European culture

Report on Eastern Media systems

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Contents

Media are an integral part of democracy. We somehow take for granted the fact that media function as the bridge between the government and the people. We also know that they call the press the *fourth pillar* of democracy. Therefore, it is logical to conclude that the state of the media market is in a strong relation to the state of democracy in each country. Press freedom in many Eastern European countries has increasingly come under threat in the recent years.

The process of transition from socialism to democracy includes deep changes in media market and policy along the process of democratization and accession to the European Union – and free press is one of the prerequisites.

Moreover, the transition of those countries goes through two flows, known as the "Eastern Enlargement". In 2004, during the *Fifth Enlargement* of the EU, Estonia, Latvia, Lithuania, Poland, Czech Republic, Slovakia, Slovenia, and Hungary became member - states. In 2007 with the *Sixth Enlargement* Bulgaria and Romania also became part of the European Union. In addition, with the *Seventh Enlargement* in 2013 Croatia joined the Union.

Those dates are important as political changes affected dramatically the media market, especially in the post - socialist countries. One of the main facts, which we can highlight from the beginning, is the lack of data for the media market in the region. Moreover, although the media gradually should have become more democratic and freer, in the past few years some disturbing signs from Eastern Europe became rather obvious. The situation in Poland for example, pushes the EU to "slam newly passed law in Poland that could limit media freedom"[1]. Regarding the media situation in Bulgaria, academics and institutions raise the alarm about the problems: "Bulgarian media are still the least free in the EU and in Southeast Europe (SEE) as the few outspoken journalists are victims of smear

[1] EU slams newly passed law in Poland that could limit media freedom, https://www.euronews.com/2021/08/12/poland-government-in-chaotic-parliamentary-tussle-over-disputed-media-ownership-bill, accessed on 13.08.2021

campaigns, harassment by the state, intimidation and violence" according to RSF.[2] Hungary has problems too - "Since 2010, the Hungarian government has systematically dismantled media independence, freedom and pluralism distorting the media market".[3] Unfortunately, we can say that the Covid-19 crisis made the situation worse not only in Eastern Europe but all over the world. At the same time, journalists are trying to answer the question: "How are governments using COVID as an excuse to crack down on the public's right to know?".[4]

PRINT MEDIA

Press freedom is something that we discuss a lot, but somehow, we do not pay attention to the fact that that press - printed on paper - is no longer the major player in the media market. Digitalization and other changes in our lives make the print media business much more difficult, especially since the press industry has not succeeded yet in finding a viable business model. Although we do lack some data about newspapers sales in the recent years, the trend is in table 1. We can see that the biggest drop in sales took place between 1995 and 2000. We can dispute that sales are not equal to readership, but for the press, market sales are a very important part of their revenue.

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[2] Ralev, Radomir, Bulgarian media least free in EU, SEE amid smear campaigns, state harassment, https://seenews.com/news/bulgarian-media-least-free-in-eu-see-amid-smear-campaigns-state-harassment-rsf-738504, accessed on 13.08.2021

[3] New report: Hungary dismantles media freedom and pluralism, https://europeanjournalists.org/blog/2019/12/03/new-report-hungary-dismantles-media-freedom-and-pluralism/, accessed on 13.08.2021

[4] Torsner, Sara and Harrison, Jackie, Press freedom: how governments are using COVID as an excuse to crack down on the public's right to know, https://theconversation.com/press-freedom-how-governments-are-using-covid-as-an-excuse-to-crack-down-on-the-publics-right-to-know-159298, accessed on 13.08.2021

Table 1: Number of annual newspaper sales (in mil.)

GEO/TIME	1990	1995	2000	2005	2009
Bulgaria (BG)	-	n.a	n.a	n.a	n.a
Croatia (HR)	-	150	163	n.a	195
Czechia (CZ)	1248	890	509	506	409
Estonia (EE)	231.3	65	75	75	66
Hungary (HU)	n.a	672	488	445	381
Latvia (LV)	n.a	104.3	65	73	n.a
Lithuania (LT)	-	n.a	215	n.a	n.a
Poland (PL)	n.a	1777	846	807	702
Slovakia (SK)	434	328	138	140	n.a

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2011

Inconsistency of data is another important element of the media market in the region. For example, in Bulgaria the National Statistical Institute published data about newspaper sales together with data about books, newspapers and magazines; book and stationery and materials.[5] As we can see in table 1, in Slovakia between 1995 and 2000 the newspaper sales dropped by nearly 60%. In some countries, there was an increase in sales, but that is only to prove the tendency of less newspaper sales in the region. However, that is a tendency noticed on a global level. In 2017, 536.6 million units of print newspapers were sold - around 700 thousand copies less than the previous year.[6]

During the first period of political changes in Estonia, in the period 1990-1995, the drop in newspaper sales is even higher - nearly 72%. The biggest challenge in newspaper market

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[5] NSI, Bulgaria, https://www.nsi.bg/bg/content/1623/%D0%BF%D1%80%D0%BE%D0%B4%D0%B0%D0%B6%D0%B1%D0%B8-%D0%BD%D0%B0-%D0%B4%D1%80%D0%B5%D0%B1%D0%BD%D0%BE, accessed on 13.08.2021

[6] Print daily newspaper circulation worldwide from 2013 to 2017, https://www.statista.com/statistics/456482/worldwide-daily-print-newspaper-circulation/, accessed on 13.08.2021

was to enter the digital world and to still playing the important role of the fourth pillar of democracy. The data shows that information websites (the sites of newspapers, magazines, etc.) are the most popular internet sources (26%, unchanged since autumn 2018).[7] That is different from reading a newspaper on paper. "The proportion of Europeans reading the written press daily or almost daily is unchanged since autumn 2018 (26%). In contrast, a longer-term analysis shows that newspapers continue to lose readers: since autumn 2010, the proportion of respondents reporting that they read the written press at least once a week has fallen by 18 percent (from 73% to 55%)."[8]

Table 2: Dailies' average circulation/Adult population (copies per thousand)

GEO/TIME	1990	1995	2000	2009	2013	2017
Bulgaria (BG)	NA	158	203	131.1	136.4	NA
Croatia (HR)	NA	110	127.8	141.1	122	46.3
Czechia (CZ)	307[1]	254	205.9	152	143.6	98
Estonia (EE)	NA	171	233.7	199	162.7	120.9
Hungary (HU)	NA	161	199	125	150.6	93.5
Latvia (LV)	NA	NA	184.1	112.8	NA	NA
Lithuania (LT)	NA	NA	NA	201.8	87.1	49.9
Poland (PL)	NA	105	91.8	98	76.6	39.4
Romania (RO)	NA	NA	70	66.2	38.7	10.5
Slovakia (SK)	NA	174	117.1	94.4	65.2	NA
Slovenia (SI)	NA	NA	214.4	169.1	143.3	NA

Sources: World Association of newspapers – World Trends Report 1991, 1996, 1998, 2002, 2010;
*Total paid-for and free dailies, total average circulation (000) - World Press Trends 2014, WAN-IFRA, 2014

[7] EuroBarometer 92, Autumn, 2019, page 53, https://europa.eu/eurobarometer/surveys/detail/2255, accessed on 13.08.2021
[8] Ibid, p. 9

With that tendency in reading written press, it comes as no surprise that the daily average circulation in most of the countries in the region is dropping. That is a clear mark of the situation in the press market; people are reading newspapers, but not on paper. Digital platforms are very quick in delivering the news in your pocket - literally. Most of the readers use their mobile devices to get everyday news as they happen.

Table 3: Daily readership/ Weekly readership of newspapers (%)

GEO/TIME	2013		2015		2019	
	D	W	D	W	D	W
Bulgaria (BG)	10	42	10	37	5	30
Croatia (HR)	22	33	24	35	25	26
Czechia (CZ)	19	47	15	47	14	35
Estonia (EE)	41	33	44	31	31	35
Hungary (HU)	24	37	22	30	16	32
Latvia (LV)	17	48	21	43	14	34
Lithuania (LT)	28	45	31	44	17	42
Poland (PL)	10	41	12	41	9	36
Romania (RO)	14	27	11	30	9	25
Slovakia (SK)	22	48	19	37	16	30
Slovenia (SI)	35	37	33	31	28	33

Sources: Standard Eurobarometer 76 Autumn 2011, Standard Eurobarometer 84 Autumn 2015 Media Use, Standard Eurobarometer 92 Autumn 2019

That is not the situation when we focus on weekly newspapers. Weekly newspapers have a broader readership than the dailies. Moreover, they are not competing with digital media on the grounds of speed in delivering the news, as they offer readers a deer analysis and more details about what is happening in the world. The weekly readership of newspaper**s** is higher than the one of dailies in all countries in the region, except for Estonia (2013, 2015), but in 2019 the situation has changed. The biggest difference - 6 times more - is in Bulgaria in 2019.

On the contrary, the number of daily newspaper titles looks stable compared to the numbers of circulation and readership. The Czech Republic is the only country in the region where the number of titles in the period has grown more than 3 times. Estonia and Croatia are the countries with the least changes in the number of titles.
An interesting fact is the number of people in those countries who answer with "Never" to the question: Could you tell me to what extend you … read the written press?". Over 30% answered with *never read written press* in Hungary (31%), Bulgaria (33%) and Romania (39%). Most of the people read written press in Croatia (only 16% never), Slovenia (16%) and Estonia (14%).

Chart 1: Percentage of people saying: "Never Read written press"

Sources: Standard Eurobarometer 92 Autumn 2019

As the newspaper market shifts to digital more each year, new generations have already got used to consuming information through their mobile devices. The number of daily newspaper titles looks stable compared to the numbers of circulation and readership. The Czech Republic is the only country in the region where the number of titles in the period has grown more than 3 times. Estonia and Croatia are the countries with the least changes in the number of titles (table 4a).

Table 4a: Number of Daily Newspaper Titles

GEO/TIME	1990	1995	2000	2005	2010*	2015	2017
Bulgaria (BG)	-	NA	43	60	71	NA	NA

Croatia (HR)	-	9	12	13	17	NA	13***
Czechia (CZ)	26	23	75	84	81	81	80
Estonia (EE)	10	15	13	11	11	37	37
Hungary (HU)	NA	43	40	38	30	31	30
Latvia (LV)	NA	8	21	22	NA	12	11
Lithuania (LT)	-	-	377	21	18	11	11
Poland (PL)	66	84	59	43	38	35	35
Romania (RO)	-	-	46	NA	59	42**	21
Slovakia (SK)	-	20	29	10	9	NA	NA
Slovenia (SI)	-	-	5	8	NA	NA	NA

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011
* Total paid-for and free dailies, number of titles - - World Press Trends 2014, WAN-IFRA, 2014 ** Data for 2014. *** Data for 2016.

When we look at the titles of weeklies, non-dailies & Sunday's newspapers, we can see one trend - the changes in non-dailies & Sunday's newspaper titles are small although as their total number. Hungary is the only country where there is an increase in titles in this segment (from 3 to 6).

Table 4b: Number of Weeklies/Non-dailies & Sundays Newspaper titles

GEO/TIME	1990		1995		2000		2005		2010*	
	W	S	W	S	W	S	W	S	W	S
Bulgaria (BG)	-	-	n.a	n.a	114	6	363	n.a	-	384
Croatia (HR)	-	-	52	n.a	245	n.a	132	n.a	-	n.a.
Czechia (CZ)	189	26	171	1	62	1	234	4	-	459
Estonia (EE)	42	3	71	n.a	49	n.a	27	n.a	-	28
Hungary (HU)	n.a	n.a	103	3	n.a	2	n.a	6	-	4
Latvia (LV)	n.a	n.a	101	n.a	59	n.a	64	n.a	-	n.a.
Lithuania (LT)	-	-	-	-	n.a	n.a	n.a	n.a	-	256

Poland (PL)	149	n.a	203	n.a	460	n.a	15	n.a	-	18
Romania (RO)	-	-	-	-	78	n.a	-	-	-	29
Slovakia (SK)	-	-	56	15	2	14	n.a	1	-	1
Slovenia (SI)	-	-	-	-	14	1	178	1	-	n.a.

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007

*Non-dailies, number of titles + Sundays, number of titles - World Press Trends 2014, WAN-IFRA, 2014

As readership declines, which means that revenues from the sales of newspapers are dropping, advertising becomes an even more important part of the newspapers' business models. As more and more people are consuming information from newspapers online, we can expect that the share of newspaper advertising revenue coming from digital advertising will grow.

As we can see the share of advertising expenditure in the press is dropping more than half in most of the countries in the region. In 1995 for example 51.5% of all advertising expenditure in Latvia was in newspapers. By 2005, that percentage dropped to 29.03. The lowest percentage is in Slovakia. The advertising market is very dynamic, and newspapers and magazines are in direct competition for expenditures with global social platforms like Facebook, Instagram, and Twitter.

Table 5: Advertising expenditure in Press (newspapers/magazines) (%)

GEO/TIME	1995		2000		2005		2010*		2015		2019	
	N	M	N	M	N	M	N	M	N	M	N	M
Bulgaria (BG)	NA	NA	NA	NA	14.2	8	10.3	7.9	5.4	3	1.7	1.3
Croatia (HR)	NA	NA	24.6	5.6	14.3	11	15.5	11.2	11.4	7.6	6.3	4.2
Czechia (CZ)	27.3	18.7	19.4	20.3	18.6	20.1	13.9	9.6	8.3	8.5	5.2	5.6
Estonia (EE)	55	6	46.2	14	44	11.7	28.6	6.4	21	6.8	16	4
Hungary (HU)	45.2	NA	14.1	14	20.9	21.4	15.6	18	13.9	10.3	9	7.3
Latvia (LV)	51.5	8	36	8	29.3	13.2	11.3	8.9	5.7	9.5	3.6	4.9
Lithuania (LT)	NA	NA	38.6	8	14.8	5.9	18.5	10.5	10	10.8	6.8	7

Poland (PL)	17	14	12	15.1	13.5	15.8	9	10	4	8.3	2.1	4.6
Romania (RO)	NA	NA	12	NA	15.7	13.5	4.5	4.5	2.7	2.6	1.3	1.3
Slovakia (SK)	30	15	11.1	8.1	6.6	7.9	12.5	12	8.5	7.8	2.8	3.6
Slovenia (SI)	NA	NA	12	16.1	20.6	10.2	26.6	21	12	8.5	7.9	5.7

Sources: World Association of newspapers – World Trends Report 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2015, 2017;
*Newspaper advertising expenditure (US$, million, current prices) - World Press Trends 2014, WAN-IFRA, 2014

From the advertisers' point of view, reaching their target audience via the corresponding channels is their main goal. The Covid-19 crisis made the situation even more complicated, since despite of people consuming more news, advertising expenditure dropped. Some scholars called the situation a paradox, as media have had larger audience but less advertising. Now the situation is a little bit better, as the advertising expenditures in newspaper and magazines are slowly going back to their previous levels. According to a forecast by the Japanese international advertising and public relations company *Dentsu* "overall, 2021 global ad spend is forecast to remain below the pre-pandemic level of US$600 billion recorded in 2019."[9] The forecast presses attention in one more important thing - according to *Dentsu* the share of global ad spend in newspapers and magazines will continue to drop in 2022. This tendency press newspapers and magazines to find a working business model, which will help them to sell successfully their content to the readers and advertisers - this time online or more precisely - on mobile devices.

The proportion of Europeans using the Internet every day or almost every day has been rising almost continuously since the autumn 2010 survey (EB74), gaining a total of 24 percentage points (69%).[10] The question of trust is also important when we talk about

[9] Global Ad Spend Forecast, Dentsu, 2021, https://assets-eu-01.kc-usercontent.com/10d7369f-8efe-0138-86fd-fa454acd4299/408c0a3d-f3c1-434a-86cc-4b3478ee382e/Adspend_Report_2021.pdf, accessed on 13.08.2021

[10] EuroBarometer 92, Autumn, 2019, page 53, https://europa.eu/eurobarometer/surveys/detail/2255, accessed on 13.08.2021

information. Just under a third of Europeans (32%) say that they "tend to trust" the Internet. Although the proportion of people who tend to trust this medium remains unchanged since the autumn 2018 Standard Eurobarometer survey, levels of mistrust are increasing (55% "tend not to trust", +2 percentage points).[11] The newspapers websites tend to fill the trust gap and transfer the trust in their print content to the content published on their websites. With tradition in journalism and "selling" information to the public, newspapers' websites became a new platform for sharing content and selling advertising - online. Although data is incomplete, we can assume that no media now-a-days can survive on the market without a website.

[11] ibid

RADIO

The trust issue looks much better when we focus on radio. Since 2018 trust in radio has been growing in Romania (61%, +10 percentage points) and Bulgaria (51%, +6).[12] There are 5,017 enterprises operating as radio broadcasters across the European Union (EU) in 2017. This is 300 fewer than in the previous year and 11% fewer than the 5 641 enterprises in 2013.[13] Therefore, the tendency of dropping in numbers is correspondent to radio stations too..

Table 6: Number of radio broadcasting enterprises (both public and commercial)

GEO/TIME	2010	2015	2018	Change rate 2018/10 (%)
Bulgaria (BG)	95	67	51	-46.32
Croatia (HR)	187	165	158	-15.50
Czechia (CZ)	74	53	46	-37.84
Estonia (EE)	13	12	9	-30.77
Hungary (HU)	421	321	289	-31.35
Latvia (LV)	45	47	39	-13.33
Lithuania (LT)	29	24	21	-27.59
Poland (PL)	125	117	101	-19.2
Romania (RO)	202	175	154	-23.76
Slovakia (SK)	12	21	34	+183.33
Slovenia (SI)	131	159	153	+16.79

Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: https://appsso.eurostat.ec.europa.eu

[12] EuroBarometer 92, Autumn, 2019, page 53, https://europa.eu/eurobarometer/surveys/detail/2255, accessed on 13.08.2021

[13] Radio broadcasting in the EU on the decline, Eurostat, https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20200213-1, accessed on 13.08.2021

Among the EU member countries with highest numbers of radio enterprises from Eastern Europe is Hungary (310), compared to Estonia (10), Slovakia (16) and Lithuania (23).[14] Considering population size, the number of radio broadcasting enterprises per million inhabitants also varies greatly between countries. The highest ratios were recorded in Slovenia (76 radio broadcasting enterprises per million inhabitants), Croatia (38 per million inhabitants) and Hungary (32 per million inhabitants), while the lowest ones were observed in Poland and Slovakia with 3 radio broadcasting enterprises per million inhabitants.[15] Slovakia and Slovenia are the only two countries with positive change rate in the period 2010-2018.

Table 7: Number of employees working in the radio industry

GEO/TIME	2010	2015	2018	Change rate 2018/10 (%)
EU28 (2013-2020)	n.a	58,984	56,509	-4.2
Bulgaria (BG)	641	519	436	-31.98
Croatia (HR)	n.a	930	904	-2.80*
Czechia (CZ)	n.a	257	146	-43.19*
Estonia (EE)	n.a	180	113	-37.22*
Hungary (HU)	1,930	856	n.a	-55.65**
Latvia (LV)	243	186	230	-5.35
Lithuania (LT)	217	151	105	-51.61
Poland (PL)	4,044	3,799	5,109	+26.34
Romania (RO)	3,493	2,995	2,917	-16.49
Slovakia (SK)	68	60	40	-41.18
Slovenia (SI)	426	389	406	-4.69

*2018/2015; ** 2015/2010
Sources: Eurostat (2021). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: https://appsso.eurostat.ec.europa.eu

[14] ibid
[15] ibid

In 2017, radio broadcasting enterprises employed 48,345 people in the EU, 14% less than in 2013.[16] The tendency is visible in Eastern Europe too, as Poland is the only country in the region with a positive change rate in the period 2010-2018. For example, in 2017 in Slovakia just 63 persons were employed in the radio broadcasting sector.[17] The number of persons employed as a percentage of total employment is low in all EU Member States, and almost zero in Czech Republic and Slovakia.[18]

Table 8: Radio advertising expenditure (%)

GEO/TIME	1995	2000	2005	2010	2015	2019
Bulgaria (BG)	NA	NA	1.8	1.9	1.2	0.9
Croatia (HR)	NA	NA	7.1	8.5	9	7.4
Czechia (CZ)	7	3	7	5.5	4.7	3.4
Estonia (EE)	8	11.03	8.7	9.8	10.5	11.3
Hungary (HU)	8	5.03	10	6.5	5.4	3.6
Latvia (LV)	4.05	16.03	11.7	11.5	12.5	13
Lithuania (LT)	NA	5.05	7	8	8.4	9.4
Poland (PL)	8	6.08	7.3	7.5	8.3	7.8
Romania (RO)	NA	5.02	5.6	6.9	6	5.9
Slovakia (SK)	12	5.08	6.4	10.3	6.3	4.9
Slovenia (SI)	NA	NA	7.2	7.3	4.6	4.5

Sources: a. European Media Handbook (1997), b. European Media Handbook (2004), c. European Audiovisual Observatory, e. Data for 2019 retrieved from Statista (2021) MAR-AD Advertising expenditures by media (2001-2019) / Source: Warc / © European Audiovisual Observatory / Yearbook 2020

[16] Radio broadcasting in the EU on the decline, Eurostat, https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20200213-1, accessed on 13.08.2021
[17] ibid
[18] ibid

According to *Dentsu Forecasts*, we can see that the global ad spend in radio (2019-22) as a percentage is not declining in the present and near future (-0.8 in 2019, -10.1 in 2020, +4.7 in 2021 and +1.6 in 2022).[19] The other good news about radio is that the share of global ad spending remains nearly stable - 6.0% in 2019 to 5.5% in 2022.[20] From the countries in the region, Romania has the biggest growth (23% in 2015). In all other countries the radio market remains stable and with no big changes, at least in the share of ad expenditure. We can say that radio ads engage the imagination of the listeners and make radio an effective marketing instrument and an integral part of our society.

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[19] Global Ad Spend Forecast, Dentsu, 2021, https://assets-eu-01.kc-usercontent.com/10d7369f-8efe-0138-86fd-fa454acd4299/408c0a3d-f3c1-434a-86cc-4b3478ee382e/Adspend_Report_2021.pdf, accessed on 13.08.2021
[20] ibid

TELEVISION

Across Europe, an increasing number of governments are trying to silence opposition voices by restricting freedom of the press and exerting undue influence on public service media. Recently the independence of the public service media and Czech television was under threat.[21]

Table 9: Number of public TV channels

GEO/TIME	2005	2010	2015	2019	Change 2019/2005
Bulgaria (BG)	2	3	4	4	2
Croatia (HR)	-	4	4	4	0
Czechia (CZ)	2	4	6	6	4
Estonia (EE)	-	2	2	2	0
Hungary (HU)	3	4	5	6	3
Latvia (LV)	-	2	2	2	0
Lithuania (LT)	-	2	2	2	0
Poland (PL)	-	6	10	12	6
Romania (RO)	2	4	2	3	1
Slovakia (SK)	2	2	2	2	0
Slovenia (SI)	4	5	5	5	1

* 2019-2010
Source: Eurodata TV Worldwide/Nielsen Television Audience Measurement, EAObservatory, Yearbook 2020

Since the political changes in Eastern Europe, private TV stations have become part of the media market. The processes of integration of those media by global media conglomerates

[21] PUBLIC SERVICE MEDIA IN THE CZECH REPUBLIC UNDER THREAT, EBU, https://www.ebu.ch/news/2021/04/public-service-media-in-the-czech-republic-under-threat, accessed on 13.08.2021

are still in action up to today. The fact that in most of the countries in the region private TV channels have over 50% of the audience reach shows us the importance of those TV channels. Private channels in five of the countries in Eastern Europe have audience**s** smaller than 50% - Estonia, Hungary, Latvia, Slovakia and Slovenia. Romania is leading the private channels market with 71,8% daily audience and we have to say that in the same period private TV station**s** in Romania increased their audience by 20.1%. The biggest drop in audience reach is in Hungary, where for the same period private TV channels lost audience and fell by 23.4%.

Geographical obstacles no longer limit the TV market. Hungary has the biggest daily audience of foreign TV channels - 27,4% and a growth of 19.5%. The connection between the media legislation imposed by the government and the growing audience of foreign channels is logical, although we need more research to find if there is a connection between both events. Although in 2019 Estonia has a slight decline, during the period 2005 – 2019, this is the country with the most stable daily audience of foreign TV channels.

"Follow the money" is a catchphrase that should not apply to public TV stations. However, there are two types of control: financial control over how funds are used, and content-related control aimed at guaranteeing the fulfillment of the public service remit. Organs of the Council of Europe have dealt with the financing and supervision of public service broadcasting with several recommendations.[22] Some EU member - states have recently moved away from the traditional licence - fee model that still exists in countries such as Germany and Austria. Alternative funding models are possible, in principle, under European rules.[23] Comparing the amount of money, which public audiovisual media get from

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[22] For general information about the Council of Europe’s role in public service broadcasting, see: Nikoltchev, “European backing for public service broadcasting, Council of Europe rules and standards”, in European Audiovisual Observatory (ed.), IRIS Special: The Public Service Broadcasting Culture, op. cit. (footnote 2), pp. 7 ff.
[23] IRIS plus 2010-4 Public Service Media: Money for Content, https://rm.coe.int/1680783bb5, accessed on 13.08.2021

governments is not practical, is not practical if we do not take under consideration the specific differences in each country. However, comparing the percentage of funding coming from each government will help in forming a clearer picture of the situation.

Table 10: Financing of the public audiovisual media sector

GEO/TIME	2008		2009		2010		2011		2012		2013		2014	
	M	%	M	%	M	%	M	%	M	%	M	%	M	%
Bulgaria (BG)	68,3	92,4	65	93,6	61,1	92,3	58,9	92,3	60,6	92,7	57,6	92,7	56,4	90,9
Croatia (HR)	149,8	69,8	159,2	79,8	163,8	81	158,9	82,7	162,5	84,5	161,4	86,5	161	88
Czechia (CZ)	270,2	74,9	281,3	81,3	303,1	84,3	301,8	83,8	319,3	91,3	308,4	87,9	301.9	90,6
Estonia (EE)	29,3	91,8	27,2	91,3	24,7	86,9	25,7	90,5	26	91,2	28,8	94,5	27,6	94
Hungary (HU)	192,3	83,6	178,3	87,8	150,5	84,8	214,5	66,7	238,4	75,2	235,5	77	235,2	81
Latvia (LV)	20	66,5	18,7	76,2	15,4	71	15,5	71,8	17	75,3	18,7	78,1	21	78
Lithuania (LT)	15,6	59	12,7	65,4	10,5	60,8	12,2	63,8	13,5	65,1	14,3	68,2	15,2	68,1
Poland (PL)	168,6	23,6	110,9	23,6	101,5	19,5	88,9	18,7	105,7	27,2	129,4	30,2	154,1	35,8
Romania (RO)	n.a.	n.a.	208,4	90,8	207,6	90	212,3	91	207,1	91,6	203	94	202,1	93,6
Slovakia (SK)	78,5	75,8	92,4	89,7	92,4	90,7	107,7	94,1	91,5	93,8	95,4	94,9	97,7	93,8
Slovenia (SI)	88,7	72,3	96,7	75	95,2	71,3	89,1	68,1	99,4	75,4	96,5	76,7	97,6	76,9
average %		70,97		77,68		75,69		74,86		78,48		80,06		80,97

Source: European Audiovisual Observatory Financing of the public audiovisual media sector © European Audiovisual Observatory, Yearbook 2015

Public media in Bulgaria and Slovakia receive the biggest percentage of their revenue from governments and that percentage is over 90%. In Poland, that percentage is the lowest during the aforementioned period but has been growing during the past years. Due to the economic crisis and the following decrease of the advertising market, states had admitted to limit PSB revenue coming from advertising, in favor of the commercial channels. Between the lowest percentage of 18,7% in Poland in 2011 and the highest of 94,9% in Slovakia in 2013, there is a big opportunity for better models. Public broadcasting stations play an integral role in democratic societies and in supporting the production and distribution of content that would not appeal to commercial broadcasters.

Table 11: TV Licence fee (in EUR)

GEO/TIME	1995	2000	2005	2010	2019
Bulgaria	n.e	n.e	n.e	n.e	n.e
Croatia	n.a	91.18	n.a	n.a	129,41
Czech Republic	n.a	28.75	32	n.a	84,15
Estonia	n.e	0	n.e	n.e	n.e
Hungary	n.a	0	40.1	n.a	n.e
Latvia	n.e	0	n.e	n.e	n.e
Lithuania	n.e	n.e	n.e	n.e	n.e
Poland	n.a	n.a	44.5	47.4*	63,39
Romania	n.a	n.a	n.a	12.1*	n.e.
Slovakia	n.a	21.54	n.a	144*	55,68
Slovenia	n.a	126.4	n.a	n.a	153

n.a= non available
n.e= none exists/abolished
Sources: EAO – Trends in European Television 2006, vol.2, EAO – Trends in European Television 2011, vol.2, EAO – Yearbook 2015, 2019

The debate about public funding is in place within the EU. However, this debate should not be only about the funding of public television services. It should take in consideration the financing of other audiovisual media services in the public interest, such as digital platforms which provide an important part of the content consumed by the European citizens. In 2019, households in European Broadcasting area (EBU) countries with a licence fee paid on an average of EUR 121 for public TV. This was EUR 0.33 per day per household in the European Broadcasting area (EUR 0.37 in the EU).[24] From the data we can see that in the Eastern region, the fee for public television is under the EU average, with the exception of Croatia, where the fee is slightly higher (table 11).

Table 12: Number of commercial TV channels

GEO/TIME	2005	2010	2015	2019
Bulgaria (BG)	14	26	32	31
Croatia (HR)	-	2	18	13
Czechia (CZ)	2	12	23	28
Estonia (EE)	-	13	20	22
Hungary (HU)	17	32	48	48
Latvia (LV)	-	8	15	22
Lithuania (LT)	-	10	12	13
Poland (PL)	-	17	88	93
Romania (RO)	16	21	66	74
Slovakia (SK)	3	5	8	7
Slovenia (SI)	2	15	83	83

Source: EAO – Trends in European Television 2006, vol.2, EAO – Trends in European Television 2011, vol.2, EAO – Yearbook 2015, 2019

[24] EBU, EBU-MIS_Licence_Fee_2020_public_.pdf, accessed on 13.08.2021

Commercial TV channels are also facing some difficulties. As we can see from table 11, the number of commercial channels is stable in most countries during the period from 2015 to 2019 (table 12). Of course, the remarkable growth from 2005 to 2015 should not be ignored. During this period, most of the Eastern European countries became part of the EU broadcasting market and new players appeared on stage. The was a small decline in Croatia, Slovakia and Bulgaria (only by one channel), in Slovenia and in Hungary there was no change, whereas in all other countries we see a slight increase in the number of channels. The biggest increase was in Romania with 8 new channels in 2019.

Local players and traditional linear TVs have historically dominated the region of Eastern Europe, but Digital TV Research predicts that the injection of major US players will enter Eastern European market, following the example of the West, especially concerning SVODs.[25] Neverthless, until that moment comes, cable TV remains the most used form of watching TV in the region. We can see the trend of decreasing number of households which are subscribers of analogue Cable TV. Now, the number of digital subscribers is growing but is not bigger than analogue. In table 12 we can see the total number of subscribers of cable, both analogue and digital. From the data, we can see that in some countries that number is decreasing by nearly two times in the period under study – specifically in Bulgaria and Slovakia, and a significant increase in Romania.

[25] Easton, Jonathan, TBI Tech & Analysis: How Eastern Europe is embracing SVOD, https://tbivision.com/2021/04/01/tbi-tech-analysis-how-eastern-europe-is-embracing-svod/, accessed on 13.08.2021

Table 13: Households subscribing to cable (Analogue & digital, in thousand)

GEO/TIME	2007	2008	2009	2011	2012	2013	2014	2015	2016	2017	2018	2019
Bulgaria (BG)	1 280	1176	1196	904	827	820	816	634	607	584	572	564
Croatia (HR)	133	136	141	147	145	150	154	156	159	169	178	177
Czechia (CZ)	818	842	821	800	770	739	707	875	845	841	837	817
Estonia (EE)	220	231	209	208	199	199	211	213	211	210	206	203
Hungary (HU)	2165	2204	2185	2004	1947	1951	1847	1893	1906	1905	1967	1951
Latvia (LV)	320	329	338	315	302	300	299	215	224	217	210	204
Lithuania (LT)	383	422	420	437	444	443	428	398	377	376	350	332
Poland (PL)	4380	4440	4485	4480	4450	4400	4350	4600	4600	4480	4440	4426
Romania (RO)	3550	3490	3410	3570	3790	4120	4375	4560	4740	5000	5270	5430
Slovakia (SK)	743	758	745	874	870	689	834	320	312	320	323	327
Slovenia (SI)	303	290	254	260	257	263	286	272	260	258	251	250

Source: IHS, European Audiovisual Observatory, Yearbook, 2015, Ampere Analysis, IHS, OBS, Yearbook 2020

Table 14: Level of TV digitalization

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
BG	0.0	0.2	1.0	1.9	2.6	4.7	6.5	9.6	13.9	19.9
HR	0.0	0.1	0.3	0.7	0.8	1.8	3.3	5.9	8.4	12.0
CZ	0.4	1.1	3.9	7.7	11.8	7.7	11.5	18.7	29.4	45.4
EE	1.0	1.6	2.3	2.6	3.2	0.5	1.0	2.1	3.3	5.0
HU	0.8	1.5	3.1	4.7	6.3	3.0	6.2	11.9	19.0	29.7
LV	0.2	0.4	0.9	1.3	1.4	0.6	1.3	2.5	3.8	5.8
LT	0.3	0.4	0.6	0.8	1.0	2.2	3.9	6.9	9.7	13.9
PL	17.1	25.3	42.0	43.8	54.2	60.1	86.1	123.2	180.4	245.0
RO	0.1	0.1	2.2	5.9	10.8	5.9	14.5	23.6	34.2	48.8
SK	0.7	1.1	2.6	4.3	6.2	4.1	5.8	8.9	13.4	19.8
SI	0.8	1.2	3.0	4.0	5.5	4.0	5.2	7.3	9.7	12.9

Source: IHS, European Audiovisual Observatory, Yearbook 2015

If we look on the data on table 14, we can see that in more than half of the countries the level of TV digitalization is over 50%, whereas in Slovenia it is 90,3%. Digitalization is one of the processes that has started at the same time in nearly all EU members, no matter of the size of the market in each country. Unquestionably, the Covid-19 crisis was (and still is) a major opportunity for all on-demand audio-visual services. "The Eastern European OTT market is set to triple by 2025", claims a new report.[26] According to new figures from Digital TV Research, Russia and Poland will generate two-thirds of the total by 2025 – 40% for the former, and 27% for the latter. For sure the market is changing and new on-demand services, which are part of the culture for the new generation, will step firmly on the media market not only in Eastern Europe. The growth in revenues is remarkable in all countries, and the highest is found in Poland - the increase is almost 15 times up.

As shown in table 15, Bulgaria is the only country in the region where advertising expenditure in TV is above 70%. In 2019 that percentage increased to 86%. The data about Bulgaria can explain the bad situation of the press in the country, as nearly all advertising money are directed to TV. In all other countries, the percentage allocated in TV is around 50% of the market. Estonia and Hungary are the two countries with the lowest percentage of TV advertising, below the average for the region. TV in advertising market is dropping in most of the countries of the region, except for Bulgaria, Romania, Slovakia and Slovenia. TV stations will have to find ways to compete against new audio - visual platforms which attract more and more of the attention of advertisers all over the world. According to *Dentsu Forecast* the share of Digital in global ad spend will grow from 42.8% in 2019 to 51.2% in 2022[27]. From experience, we know that global trends in media advertising will affect all countries sooner or later.

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[26] Easton, Jonathan, OTT market in Eastern Europe set to triple by 2025, https://www.digitaltveurope.com/2020/04/16/ott-market-in-eastern-europe-set-to-triple-by-2025/, accessed on 13.08.2021

[27] Global Ad Spend Forecast, Dentsu, 2021, https://assets-eu-01.kc-usercontent.com/10d7369f-8efe-0138-86fd-fa454acd4299/408c0a3d-f3c1-434a-86cc-4b3478ee382e/Adspend_Report_2021.pdf, accessed on 13.08.2021

Table 15: Advertising expenditure in mill EUR/%

GEO/TIME	2010		2011		2015		2019		% Change 2019/2011
	M	%	M	%	M	%	M	%	%
Bulgaria (BG)	240,5	**74**	260,7	**74**	371,7	**81**	690,5	**86**	12
Croatia (HR)	107,6	47	105,9	50	97,3	51	103,5	44	-6
Czechia (CZ)	358,9	39	376,3	41	352,4	36	584,1	32	-9
Estonia (EE)	21,1	32	22,9	**32**	25,4	**30**	26,3	**27**	-5
Hungary (HU)	198	33	214,1	35	185,1	**30**	241,7	28	-7
Latvia (LV)	-	36	31	45	33,3	43	34,9	41	-4
Lithuania (LT)	-	42.6	47	48	46,1	46	52,3	44	-4
Poland (PL)	-	51.5	920,8	46	984,6	41	1037,8	37	-9
Romania (RO)	-	65.2	213,6	53	216,2	67	308	64	11
Slovakia (SK)	-	68	229,5	47	315,3	49	805,4	68	21
Slovenia (SI)	-	31.9	72,5	38	136,7	59	179,7	58	20
~		47.3%		46%		**48,5%**		48,1 %	

Source: European Audiovisual Observatory, Yearbook 2015, 2016, 2020

INTERNET

The digitalization of ex Eastern European countries present major differences. According to the New Yorker, Estonia is a "*Digital Republic*"[28], which shows the degree of

[28] Heller, Nathan, Estonia, the Digital Republic, The New Yorker, https://www.newyorker.com/magazine/2017/12/18/estonia-the-digital-republic, accessed on 13.08.2021

digitalization processes in the country and how far ahead they are compared to others in the region. More than 25% of the Eastern European households have subscribed to fixed broadband services with average connection speeds faster than 15 Mbps.[29] The number of *UHD ready* broadband subscriptions in Eastern Europe markets has risen by 286% over the last three years from 3.7 million in 2013 to 14.2 million in 2016.[30] Moreover, the connection speeds have been rising constantly over the recent years, with Romania, Czech Republic, Latvia, and Bulgaria leading the pack. Those four countries have an overall average speed exceeding 15 Mbps. Croatia is lagging far behind with an average speed of 8.6 Mbps as of the first quarter of 2021, the only Eastern European country below double-digit speeds.[31] As we can see from data in table 15 the percentage of households with broadband internet is nearly over 80% in all countries. That is to show that new technologies entered in the Eastern countries with the same speed as in the rest of EU members.

Table 14: Percentage of HH with broadband internet (%)

Country	2011	2015	2019	2020
Bulgaria (BG)	40	59	75	79
Croatia (HR)	56	76	81	85
Czechia (CZ)	78	79	83	85
Estonia (EE)	65	87	90	89
Hungary (HU)	59	75	86	87
Latvia (LV)	59	74	83	88
Lithuania (LT)	56	67	81	82
Poland (PL)	61	71	83	90
Romania (RO)	31	65	82	84
Slovakia (SK)	55	78	80	85
Slovenia (SI)	67	78	89	90

Source: Statista.com

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[29] Gaber, Piotr, Eastern European Fixed Broadband Connection Speeds on The Rise, https://www.spglobal.com/marketintelligence/en/news-insights/blog/eastern-european-fixed-broadband-connection-speeds-on-the-rise, accessed on 13.08.2021
[30] ibid
[31] ibid

Fixed broadband subscriptions include the total number of subscriptions to the following broadband technologies with download speeds of 256 kbit/s or greater: DSL, cable modem, fibre-to-the-home and other fixed technologies (such as broadband overpower lines and leased lines). This indicator shows the number of subscriptions per 100 inhabitants (table 15).

Table 15: Fixed broadband subscriptions per 100 inhabitants

GEO/TIME	2000	2005	2010	2015	2019	Change 2019/2005
Bulgaria	n.a	2.15	15.15	22.42	28.78	26.63
Croatia	n.a	2.65	19.36	23.3	27.96	25.31
Czech Republic	0.02	6.91	21.46	27.79	34.98	28.07
Estonia	n.a	13.22	26.12	29.67	32.53	19.31
Hungary	0.03	6.46	21.75	27.81	32.94	26.48
Latvia	0.01	2.70	20.52	25.2	26.69	23.99
Lithuania	n.a	7	21.75	28.42	28.69	21.69
Poland	n.a	2.46	15.28	19.10	20.54	18.08
Romania	n.a	1.76	14.66	21.39	27.25	25.49
Slovakia	n.a	3.36	16.23	23.43	29.05	25.69
Slovenia	n.a	9.86	23.03	27.47	30.21	20.35

Sources : 2019 https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2019&start=1998, 2015 https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2015&start=1998, 2010 https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2010&start=1998, 2005 https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2005&start=1998, 2000 https://data.worldbank.org/indicator/IT.NET.BBND.P2?end=2000&start=1998

The reach of the fixed broadband connection in Eastern Europe has dramatically changed from 2000 to 2019. An interesting fact is that Estonia, which was far ahead of other countries in the region in 2005, is no longer the leader in 2019. The biggest increase is in the

Czech Republic - the country with the biggest number of subscriptions in 2019 - 34,98 per hundred inhabitants.

Mobile broadband is the marketing term for wireless Internet access via mobile networks. Mobile Broadband keeps Wi-Fi devices connected when you're on the move. Mobile broadband subscriptions have encountered a tremendous growth during the period (2010-2020) in all countries under examination (table 16).

Six countries have reached a result over a hundred in 2020, and Estonia is the leader in that indicator with 164,8%. Slovenia is following with 86,8%. The Czech Republic, which leads in fixed broadband subscriptions, is far from the top in mobile. In the next years more and more inhabitants will use 5G.

Mobile access to Internet is the preferred way for young people and those numbers will continue to grow in the next years. Mobile data usage soared by more than 30% on average in 2020 across the 35 OECD countries, with 29 countries showing an increase of over 20%.[32] Mobile broadband subscriptions grew by almost 3% in 2020 across OECD countries. Estonia is one of the three countries with highest mobile internet penetration and with subscriptions per 100 inhabitants at 165% in 2020[33].

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[32] OECD broadband statistics update, https://www.oecd.org/digital/broadband-statistics-update.htm, accessed on 13.08.2021

[33] Ibid.

Table 16: Mobile broadband subscriptions per 100 inhabitants

GEO/TIME	2010	2015	2019	2020
Bulgaria*	34.8	80.3	105.6	106.4
Croatia*	7.6	73.6	83.2	105.7
Czech Republic	5.2	73.6	92.7	94.5
Estonia	17.5	101.1	157.7	164.8
Hungary	7.8	40.1	73.4	75.4
Latvia	36.4	80.1	132.4	140.2
Lithuania	8.86*	76.6	104.4	114.2
Poland	48	61.5	117	124.6
Romania*	10	69.1	87.5	92
Slovakia	20.8	68	89.2	88.3
Slovenia	24.2	47.8	83.7	86.8

Source: *data is from https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx
Mobile-broadband subscriptions (excel) divided by population from https://www.worldometers.info › world-population; https://data.oecd.org/broadband/mobile-broadband-subscriptions.htm

The *Digital Republic* - Estonia - is the leader in the region in numbers of individuals who are using the Internet - nearly 90% of the population. At the lower end is the population of Bulgaria with 68% of population using the internet. As we can see from the data in table 17 in eight of the countries that percentage is over 80%, which clearly shows that the Internet is used as a main tool for work, information, and entertainment. That percentage for all countries in the region is higher than the world average. According to Statista "as of January 2021 there were 4.66 billion active internet users worldwide - 59.5% of the global population. Of this total, 92.6 percent (4.32 billion) accessed the internet via mobile devices".[34] That number is growing very fast. "More than 330 million people started using the Internet in the past 12 months, taking the total number of global internet users up to 4.72 billion by the start of April 2021".[35] The average for Eastern Europe in 2019 is 80,88%, which is significantly higher than the average for the global population. Itis possible that the growth will be even faster than in the past years, especially because the access to the Internet has become even more important during the pandemic of Covid-19.

Table 17: Percentage of individuals using the Internet (% of population)

Source: International Telecommunication Union (ITU)

GEO/TIME	2000	2005	2010	2015	2016	2017	2018	2019
Bulgaria (BG)	5,371	19,97	46,23	56,656	59,826	63,41	64,782	67,947
Croatia (HR)	6,645	33,14	56,55	69,845	72,697	67,096	75,295	79,08
Czechia (CZ)	9,781	35,27	68,82	75,669	76,481	78,719	80,688	80,867
Estonia (EE)	28,577	61,45	74,1	88,41	87,24	88,102	89,357	89,532
Hungary (HU)	7	38,97	65	72,835	79,259	76,751	76,074	80,372
Latvia (LV)	6,319	46	68,42	79,201	79,842	80,114	83,577	86,135
Lithuania (LT)	6,427	36,22	62,12	71,378	74,377	77,615	79,723	81,582
Poland (PL)	7,285	38,81	62,32	67,997	73,301	75,985	77,542	84,516
Romania (RO)	3,614	21,5	39,93	55,763	59,504	63,747	70,681	73,657
Slovakia (SK)	9,427	55,19	75,71	77,635	80,476	81,626	80,449	82,854
Slovenia (SI)	15,11	46,81	70	73,099	75,449	78,885	79,75	83,108

[34]https://www.statista.com/statistics/617136/digital-population-worldwide/#:~:text=How%20many%20people%20use%20the,the%20internet%20via%20mobile%20devices.
[35] DataReportal, https://datareportal.com/reports/6-in-10-people-around-the-world-now-use-the-internet, accessed on 13.08.2021

The percentage of individuals participating in social networks has nearly doubled in all countries for the mentioned period (from 2011 to 2020). Apart from 2019, during all other years the average percentage in Eastern Europe is lower than the one of EU27 and EU28. In 2020, Hungary has the highest percentage (74%), and Bulgaria (55%) and Poland (55%) the lowest. With more than half of the individuals participating in social networks, those platforms became more and more important in shaping public opinion not only in Eastern Europe, but all over the world.

Striking the balance between innovation and regulation is the key for the future of social media and networks. The key competence for responsible use of social media platforms is media literacy, which is in the focus of many EU initiatives. Regarding the Eastern European countries, only Estonia (3rd) is in the top of the ranking of the Media Literacy Index 2021.[36] Compared to 2017 Lithuania (+2) index has improved.

In terms of decrease in the ranking, the highest drop over the years is registered in Slovenia (-5 positions), Poland (-2), the Czech Republic (-2) and Latvia (-2). In terms of decrease in scores, the biggest drop compared to previous years is registered in Slovakia (-6 points), Latvia (-4), Romania (-4), Slovenia (-3) and Czech Republic (-3). Romania and Bulgaria are at the queue of the index in 2021.[37]

[36] Media Literacy Index 2021, OIS, https://osis.bg/?p=3750&lang=en, accessed on 13.08.2021
[37] Media Literacy Index 2021, https://osis.bg/wp-content/uploads/2021/03/MediaLiteracyIndex2021_ENG.pdf, accessed on 13.08.2021

Table 18: Percentage of individuals participating in social networks

GEO/TIME	2011	2013	2014	2015	2016	2017	2018	2019	2020
Bulgaria (BG)	30	37	40	42	45	50	51	53	55
Croatia (HR)	32	38	40	45	50	47	54	58	57
Czechia (CZ)	27	36	40	41	45	48	56	59	59
Estonia (EE)	37	49	51	56	57	60	62	65	65
Hungary (HU)	51	56	60	61	66	65	65	69	74
Latvia (LV)	55	54	53	58	57	60	61	65	67
Lithuania (LT)	35	44	47	46	50	54	58	61	61
Poland (PL)	36	35	37	41	44	48	50	53	55
Romania (RO)	25	33	36	44	44	52	61	60	65
Slovakia (SK)	48	49	50	54	57	59	60	59	64
Slovenia (SI)	32	38	42	37	38	45	49	52	67
Average%	34.4	39.3	41.5	43.9	46.2	48.9	52.4	54.6	57.6

Source : Eurostat, http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do

Countries in Eastern Europe may have similarities, but at the same time present major differences. This reflects their media markets as well. Eastern Europe Media market grew from $47.43 billion in 2010 to $64.26 billion in 2019 at a CAGR of 3.40%. The Covid outbreak negatively affected the media market in Eastern Europe.

Uncertain economic conditions and decreased revenues of companies resulted in a decline in advertising spend. The market, however, is expected to grow in 2020 and to reach

$179.65 billion in 2030 at a CAGR of 10.40%.[38]. More people are willing to spend money on independent reporting and initiatives designed to create a change in the media industry. The media startups from Eastern Europe are growing in number and influence.[39] So we have to expect new players on the stage soon.

[38] Eastern Europe Media Market Briefing 2020: Covid 19 Impact and Recovery, Market Research, https://www.marketresearch.com/Business-Research-Company-v4006/Eastern-Europe-Media-Briefing-Covid-13366969/, accessed on 13.08.2021

[39] Media Startups from Eastern Europe, https://www.iac-berlin.org/assets/downloads/2106-Spotlight-Media-Startups-from-Eastern-Europe.pdf, accessed on 13.08.2021

EUMEPLAT
European Media Platforms: assessing positive and negative externalities for European culture

Report on Southern Media Systems

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Contents

1.1 The Media systems in Southern Europe: Introduction

The media systems of Portugal, Spain, France, Italy, Malta, Greece, Cyprus, and Turkey represent what Daniel Hallin and Paolo Mancini proposed as the *Mediterranean* or *Polarized Pluralistic* model. Despite this group not being completely homogenous, the media systems in Southern Europe tend to share a number of characteristics which distinguish them from the rest of the Central, Western and Northern Europe. According to Hallin and Mancini (2004, p.89), the mass media in the southern European countries were intimately involved in the political conflicts that marked the history of the region, and there is a strong tradition of regarding them as means of ideological expression and political mobilization. The inclusion of France and Portugal within the Mediterranean model is recognized as problematic, according to several key dimensions (Hallin & Mancini, 2004, p. 90; 2012, p.58). At the same time, the development of commercial media markets was relatively weak, leaving the media often dependent on the state, political parties, the Church, or wealthy private patrons, inhibiting professionalisation and the development of the media as autonomous institutions.

It has been suggested that political, social, and economic conditions, population and cultural traits, physical and geographical characteristics usually influence the development of the media in specific countries and give their particular characteristics (Gallimore 1983, pp. 53-62; Hiebert et al., 1982, pp.33-55). An additional factor, which may need to be considered for a better understanding of media structures, is that of *media consumption and the market size*. Across Europe there are significant differences between countries when it comes to penetration and consumption of traditional media, such as press and television. Other factors may play a part, but it seems that *economic conditions, religion, political freedom, and culture* are the main conditions influencing the development and the structure of most media systems.

Industrialism and the market were developed rather late in most southern European countries, and cultural life was dominated by religion, community and civil, political and sport institutions. In some cases, like Portugal, the counter – secularism tradition, discouraged the development of literacy, which affected the development of mass circulation press. In others, the devastation from World War II and subsequent civil wars or military coups, like in the case of Greece, stopped any attempt for social advancement. But in most cases, the countries comprising the Mediterranean model have undergone significant political instability, the road to modernity went hand in hand with authoritarianism and repression and their economies were significantly underdeveloped.

Liberal institutions were only consolidated in Italy after World War II, in Greece, Spain and Portugal from about 1975-1985, while Turkey has witnessed four military coups from 1960 to date. This link of *political authoritarianism to modernity* (Bauman, 1989) is of paramount importance to understand the media systems in the Mediterranean region. It is not a coincidence that *the development of the media has been deeply affected by the political patterns of polarized pluralism* since they have historically served and participated in this process of bargaining. This means that even though the media operate in a market framework, they offer information, analysis and comments produced by a few *elite* groups, which address other political, cultural, and economic elites to send messages and start up negotiations. This pattern has been most characteristic of Italy and Greece but seems to apply to the other Southern European countries too. Since *the state has played a central role in most aspects of social and economic development*, it has also affected the course of print and electronic media, either through heavy subsidies (in the case of the press) or through tight control and heavy interference (in the case of public / state electronic media).

According to Hallin and Mancini (2004) and Hallin and Papathanassopoulos (2000), the media in southern Europe share some major characteristics: *low levels of newspaper circulation, a tradition of advocacy reporting, instrumentalization of privately owned media,* *politicization of public broadcasting and broadcast regulation and limited development of journalism as an autonomous profession.*

The aforementioned elements will be examined more thoroughly in the following sections through the four dimensions provided by Hallin & Mancini (2004), namely political parallelism, the role of the state, journalists' professionalization and finally the state of the market, which is the focus of our research.

1.2 The Southern European Media Market

1.2.1 Low levels of newspaper circulation

Press in Southern Europe did not address the anxieties, experiences and realities of the common people, so when electronic media began to approach the public with a familiar language and modes of communication, they managed to become the true mass media. This period is described by scholars as a structural crisis, when print was challenged by TV commercial channels (Casero-Ripollés & Izquierdo-Castillo, 2013). Moreover, during the last fifty years deregulation and anti – concentration laws resulted in high cross – media concentration. Major industrialists dominated the media sector pushing out traditional publishers, casting further doubts on the credibility of the medium. (Palmer & Sorbets, 1997; Iosifidis and Boucas, 2015; Leandros, 2010; Antheaume, 2010).

The second big challenge publishers had to confront was the financial crisis of 2008 and the decrease both in sales as well as in advertising expenditure (table 1). From 2007 to 2012 the advertising expenditure decreased by -51% in France, -39% in Spain, and approximately -60% in Greece for the same period (Papathanassopoulos, 2013). In Italy between 2009 and 2015, the publishing industry lost about 50% of its total advertising revenues (Mancini & Gerli, 2017). As a result, many historical newspapers shut down.

Table 1: Advertising expenditure in Press (newspapers / magazines) (%)

	GEO / TIME	1990		1995		2000		2005		2010		2015		2019	
		N	M	N	M	N	M	N	M	N	M	N	M	N	M
Southern Region	Cyprus	NA	NA	NA	NA	NA	NA	10.9	9.1	7.4	6	5.7	5.2	3.6	3.4
	France	56.2	NA	14.6	15.4	18	32.5	16.5	22.3	37.3	16.9	11	10.2	7.4	5.8
	Greece	18	26.6	10.3	13.2	18.2	26.8	15	36.6	17.2	38	14.6	12.8	12.4	10
	Italy	24.6	17.9	21	13.3	22.9	14.6	19	13.3	16.9	11.4	9.7	6.2	6.4	4
	Malta	NA	NA	NA	NA	NA	NA	34.1	16.7	32.5	15.1	21.7	10.8	8.9	4.7
	Portugal	NA	NA	14	17	10.6	14	7.6	16.2	6.9	14.5	8.3	5.1	3.9	2.4
	Spain	37.6	15.4	33.8	13.5	30.2	13	25.2	10.2	20.1	7.9	13.6	5	7.4	2.8
	Turkey	47.1	8.7	44.9*	NA	34.3	6.3	35.8	3.7	21.7	2.1	15	1.4	5.7	0.8

Sources: World Association of newspapers – World Trends Report 1991, 1997, 2002, 2007, 2010, 2015, 2020. * Data for 1999.

The analysis of secondary data shows the downward trend of newspaper sales from 1990 to 2009 (table 2). However, this trend did not appear at the same time nor to the same degree across southern European countries. Overall, *the biggest effect was a change of reading habits rather than abandonment of newspapers* (figure 1). In Spain, Italy, and Portugal one in three citizens continues to read newspapers on a weekly basis. For France and Greece this number is lower, namely one in four and one in five respectively. It can be argued that the penetration of Web 2.0 and faster internet connections, as well as the economic crisis were the principal factors that led to lower newspaper consumption.

Table 2: Number of annual newspaper sales (in millions of copies)

	GEO / TIME	1990	1995	2000	2005	2009	Change rate 2005 – 2009 (%)
Southern Region	Cyprus	22.4	19	14	NA	NA	NA
	France	2 665	NA	NA	2 410	2 263	-6.1
	Greece	319.4	261	192	162	213	+31.5
	Italy	2 325	2 089	2 087	1 903	1 658	-12.9
	Portugal	NA	200	227	198	NA	NA
	Spain	1 080	1 337	1 593	1 520	1 417	-6.8
	Turkey	1 259	1 785	1 309	NA	NA	NA

Sources: World Association of newspapers – World Trends Report 1991, 1997, 2002, 2007, 2010, 2011.

1.2.2 TV dominates still in Southern Europe

As research has shown, television, its consumption, market share and overall impact occupies an important part of the daily lives of Southern Europeans (i.e. Hallin & Mancini, 2004). For 2010 alone, the global average of TV dropped slightly to 190 minutes per day. During the same year, the countries grouped into the Southern European model remained well above the global average with Greece on top of the list (274 min.), followed by Italy (246 min.), Spain (234 min.), Turkey (230 min.), France (212 min.), and Portugal (210 min.), (table 3). Cyprus was the only country of the model to score lower than the global average with 184 minutes. The picture is less homogenous regarding Public Service Broadcasters. In Italy, France and Spain PSBs receive more than a third of TV viewership. Smaller markets of Portugal, Malta and Cyprus follow close to 20% or even higher. Even though a downward trend is recorded in PBS popularity for all countries, this was reversed during 2020.

Table 3: TV daily viewing time (in minutes)

	GEO / TIME	1990	1995	2000	2005	2010	2015	2020	Change 2020/15 (%)
Southern Region	Cyprus	NA	NA	153	161	184	204	239	+17.6
	France	184	180	193	206	212	224	229	+2.23
	Greece	NA	194	191	245	274	269	318	+18.2
	Italy	191	213	207	237	246	254	292	+14.9
	Malta	NA	NA	NA	NA	NA	NA	100	
	Portugal	NA	192	NA	212	210	283	349	+23.3
	Spain	183	209	210	217	234	234	237	+1.28
	Turkey	NA	200	NA	216	230	243	293	+20.6

Sources: EAO - Trends in European Television 2006, vol. 2, EAO 2011 vol. 2, EAO – Yearbook 2020*;* EBU, TV Audiences, 2021

In Southern Europe broadcasts relied mostly on satellite transmission, therefore in most cases cable remained underdeveloped. However, by 2010 the majority of Southern European households had no access neither to cable nor to satellite TV (Papathanassopoulos & Negrine, 2011). By 2020, there are many reasons consumers are turning more and more to non – linear services, such as expensive pay TV packages or even lower pay TV penetration level, as well as consumers' changing behavior of TV viewing in multiple connected devices (Papathanassopoulos, 2020).

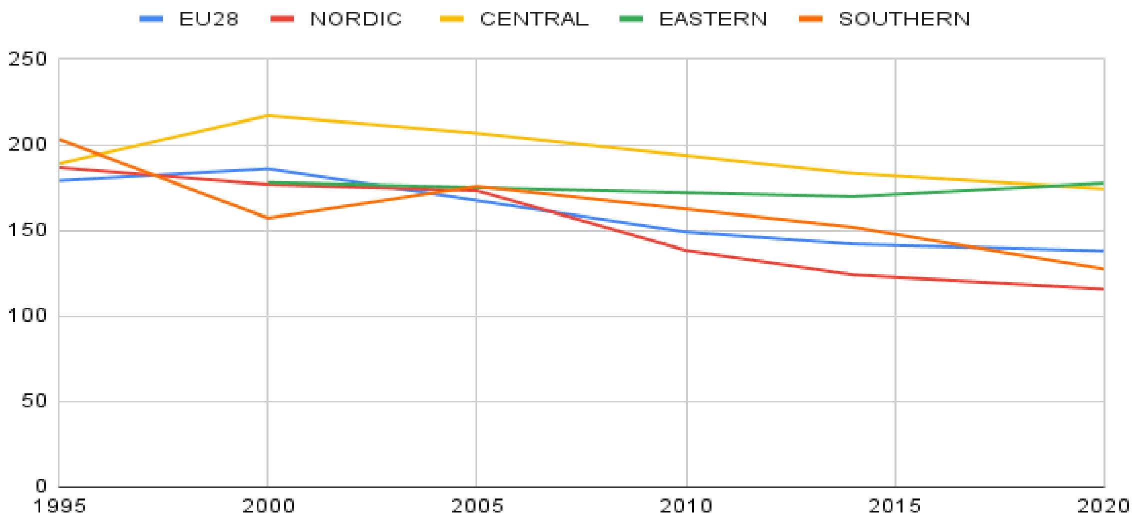
Considering the popularity of TV in Southern Europe, the fact that TV advertising expenditures dominate the total advertising spending shouldn't come as a surprise. Again, we can distinguish among two different groups; one consisting of large markets where TV advertising share decreased from 2005 to today, even though the change rate has been in most cases small. The other, from small markets where advertisers, regardless of the rise in new technologies and personalized services provided, continue to invest heavily in TV advertising, even more than 15 years ago. However, new opportunities such as data analytics, interactivity, targeting niche audiences, personalized and measurable advertising make the transition of investment to digital advertising only a matter of time.

1.2.3 Radio still the most trusted medium

When it comes to radio production there are big differences among EU member states. According to Eurostat (2018) Spain leads in radio production with 781 stations, followed by Italy with 701 and Greece with 614. Portugal follows in the 5th place with 298 radio stations. Only in the case of France we found a relatively small number of radio stations, considering the size and the population of the country. On the other hand, France is one of the major employers on radio within the EU.

In 2019 the amount of daily radio listening in the Southern European countries was on average 133 min (figure 1). *The Mediterranean trend is therefore a bit lower than the European median of 143 min. per day* (EBU, 2020). Daily radio listening habits range from 94 min. for Portugal, 97 min. for Spain, 116 min. for Malta (2015), 129 min. for France, 135 min. for Italy, 148 min. for Cyprus to 212 min. for Greece. Although radio is less appealing than it used to be, it continues to be the most trusted medium for 24 countries of EU28, including Cyprus, France, Italy, Malta and Portugal; 59% of European citizens say they trust the radio the most (EBU, 2020; Eurobarometer, 2018). Respondents in Portugal said they trusted radio as well as TV (both 68%).

Figure 1: Radio listenership in minutes*

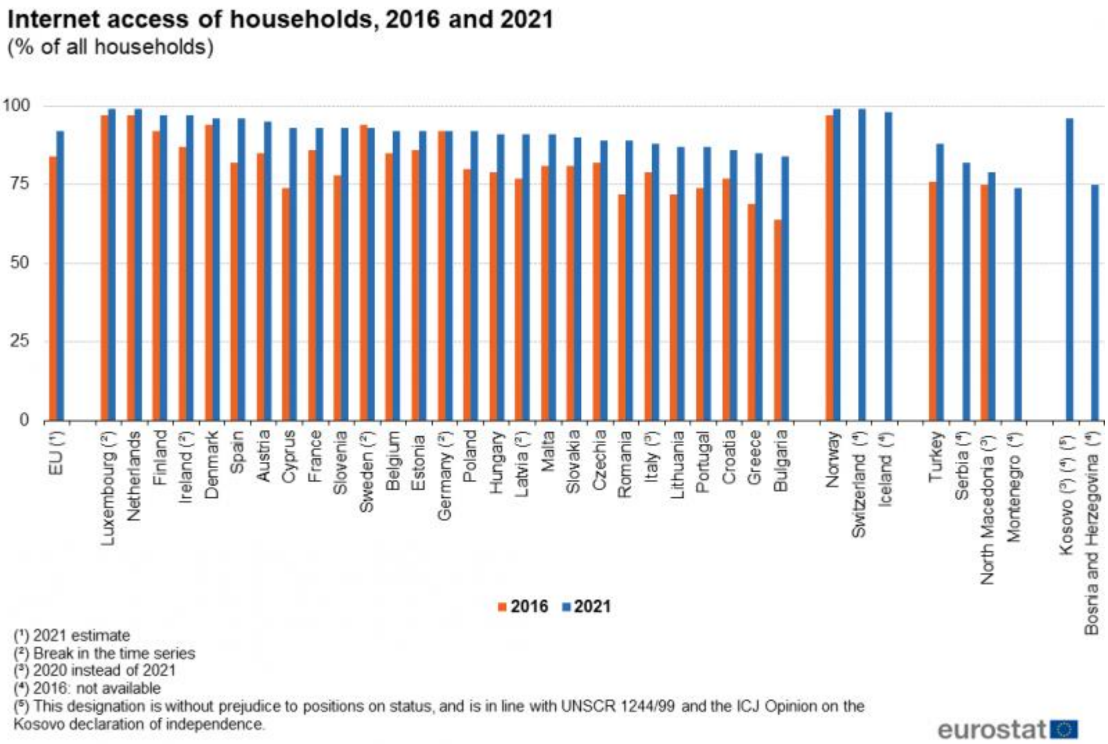


Sources: a: O. Debande & G. Chetrit (2001) *The European Audiovisual Industry: An Overview* – 07/09/01 – Final version data for 1985 and 1999 respectively b: EBU, (2007) *EBU Members' Audience Trends 1994-2006*, Grand-Saconnex: EBU. c: EBU, *Audience Trends*, 2015, 2020(*) & 2021 (+) data for EU 15. *Null values (EU28 from 2000 to 2010, Central Europe from 2005 to 2010, Eastern Europe from 2000 to 2010, Southern Europe from 2005 to 2015) plotted.

1.2.4 Digital connectivity: Steady growth, different levels of "digitization"

As far as it concerns broadband internet penetration in the Southern European countries, Spain holds the "lions' share", according to the latest data from Eurostat (2021). More precisely, in 2020, 97% of Spanish households have broadband internet connection, well above the European average, followed by Cyprus, where 93% of the island's households have broadband internet access. Greece and Portugal are standing near the bottom in this ranking with 85% and 87% of their national households having access to broadband internet connection in 2020, respectively.

Figure 2:



Source: Eurostat (isoc_ci_in_h)

A more detailed analysis of the broadband internet penetration, according to fixed broadband and mobile broadband subscriptions per 100 inhabitants, clearly manifests that the *mobile broadband internet has taken the lead in the national markets under examination* signifying perhaps the *orality* and *tendency to connectedness of the Mediterranean countries on an individual basis*. Cyprus has the best performance in the indicator of mobile broadband subscriptions per 100 inhabitants, compared to the other countries of this study. More precisely in 2019, Cyprus has 118,70 mobile broadband subscriptions per 100 inhabitants (compared to 38,72 in 2010), followed by Spain (102,94 mobile broadband subscriptions per 100 inhabitants in 2019) and France (96,99 mobile broadband subscriptions per 100 inhabitants). Italy also presents a big growth in this indicator with 92,20 mobile broadband subscriptions per 100 inhabitants in 2019 (compared to 38,54/100 inhabitants in 2010).

Malta, Portugal and Greece stand near the bottom on the ranking of this indicator, while Turkey has the weakest performance in this indicator, with 74.80 mobile broadband subscriptions per 100 inhabitants in 2019, although it seems to have covered a great distance compared to the 3,45 connections per 100 inhabitants in 2009. One interesting remark is, that in countries like Greece, Cyprus, Portugal, which have been affected disproportionally from the economic crisis, the growth of mobile broadband subscriptions had followed a more moderate growth during the years (2010-2014). However, the above noted countries have almost doubled their performance in this indicator during the period 2015-2019, whereas in other countries there has been a steadier growth during the entire time span under examination.

Europeans seem to "migrate" online, as there is a growing percentage of individuals accessing the internet (table 5). What is worth noting, though, is that smaller countries-with the exemption of Spain- seem to be the leaders of this trend. More precisely, in 2019, 90,72 % of Spanish people use the internet, followed by 86, 06% of Cypriots and 85,78 % of Maltese people. In France, the percentage of individuals using the internet has been doubled from 2005 to 2018 (from 42,87 % to 82,04 %). However, there was a twist in the country's population habits regarding the consumption of the internet. For seven years (2007-2014) France has the best performance in this indicator, with an ever-growing percentage of individuals using the internet. However, in 2015 the percentage of individuals using the internet fell to 78,01% compared to 83,75% the previous year. In the years to come, there has been a slow growth, while in 2019 the country has the same percentage of individuals using the internet as in 2014 (83,34% and 83,75%, respectively). Italians, Greeks, and Portuguese people use to a lesser extent the internet, compared to their counterparts under study.

Table 4: Percentage of individuals accessing the internet

	Country	2000	2005	2010	2015	2019
Southern Region	Cyprus	15.26	32.81	52.99	71.72	86.06
	France	14.31	42.87	77.28	78.01	83.34
	Greece	9.14	24.00	44.40	66.83	75.67
	Italy	23.11	35.00	53.68	58.14	NA
	Malta	13.11	41.24	63.00	75.96	85.78
	Portugal	16.43	34.99	53.30	68.63	75.35
	Spain	13.62	47.88	65.80	78.69	90.72
	Turkey	3.76	15.46	39.82	53.74	73.98

Source: ITU

Social media are here to stay in the Southern Europe cluster, although with a different degree of penetration in the respective societies (table 6). Malta and Cyprus are the leaders on social media use. It is worth noting that Cyprus is also known as a "social-media island', which according to the researcher and social psychologist Paul McEvoy could be associated with the social consequences of living in a closed society (Lebo, 2018). On the other hand, Italy and France have the lowest percentage of daily social media use, since in 2019 only 39 % of Italians and 47% of French people stated that they use daily social media.

Table 5: Percentage of Daily /Weekly Social media users

	GEO/Time	2010	2015	2020
	EU28 (2013-2020)		35/15	48/16
Southern Region	Greece	13/9	36/12	53/10
	Cyprus	15/8	40/9	63/8
	Italy	15/9	31/18	39/21
	Spain	20/9	38/11	50/13
	Portugal	12/7	35/17	60/9
	France	16/8	36/10	47/9
	Malta	28/8	50/11	68/6

Source: Eurobarometer 76, 84, 92, (+)

1.3 Political Parallelism

As Hallin and Mancini point out, the media in the Southern European countries are relatively strongly politicized, and political parallelism is relatively high. The style of journalism tends to give substantial emphasis to commentary. Newspapers tend to represent distinct political tendencies, and this is reflected in the differing political attitudes of their readerships; at times they play an activist role, mobilizing readers to support political causes. Public broadcasting tends to be party-politicized. Both journalists and media owners often have political ties or alliances (2004, p. 98).

In effect, most of the countries covered have traditions of advocacy journalism. In contrast with the Anglo-American model of professional neutrality, journalism in Southern Europe tends to emphasize commentary from a distinct political perspective. However, there is some variation in this trend as well. France offers some of the most renowned advocacy newspapers like *La Croix* (Catholic Church) and *L' Humanité* (Communist party) or the conservative-leaning *Le Figaro* or even the leftist *Libération*, as well as the satirical *Le Canard Enchaîné* and *Charlie Hebdo*. This comes as no surprise since in France the press has a strong tradition of advocacy journalism, as commentary and opinion, satire and sarcasm are often more valued than factual reporting (Kuhn, 2013). However, there have been some steps towards investigative journalism (Charon, 2009; Kuhn, 2013).

Advocacy traditions have been modified both by diffusion of the Anglo-American model of journalism and by traditions of precarious reporting that developed during periods of dictatorship. But, in general, *journalism in these countries tends to emphasize opinion and commentary and newspapers represent distinct political tendencies*. These tendencies, however, are not distinct to southern Europe, but are also characteristic of most of the continent, though over the last decade or so the movement away from advocacy journalism has probably been faster in northern than southern Europe.

The *extended character of state* in most Southern European countries has remained one of the most important features of the state electronic media. Public broadcasting systems in the Southern European region present a symbiotic relationship with the political controversies of their countries. Both public radio and television have been regarded as the "long arm of the state" and in many cases the debate about the electronic state media was focused on governmental control and interference in television, particularly in news programmes. This situation became part of post-war ritualized politics in France during the De Gaulle administrations. As Chalaby notes: "De Gaulle's communications strategy had one point in common with that of most of his American counterparts: the reliance on television to gain direct access to the electorate and bypass a hostile press" (2002, p. 203).

Although the state may no longer control political information on television to the extent that it used to do in the 1960s, 'government politicians still exert their power on public television managers (Kuhn, 2017, p. 67). It is worth noting, that the main commercial channel, TF1, has long been supportive to leading political figures of the French right such as Jacques Chirac and, more recently, Sarkozy (Kuhn, 2017). After all, public ownership is a major characteristic of the television and radio landscape in France, since almost half (44%) of the general information television channels are directly owned by the state (Cagé et al., 2017).

A similar 'attitude' by the government of the day took place, as well as in Greece, Portugal, and Spain after the restoration of their democracies. To stress the tight relationship between politics and broadcasting during the Franco dictatorship, de la Siera et al. (2010, p. 7) argue that the phases used to study the dictatorship usually coincide with those established for the study of television. In the case of Malta, media was run by the two political parties and the Church for three decades. The case of RAI's *lottizazzione* is another manifestation of the heavy use of the media by the political parties. In Turkey, regular public television broadcasts began in 1971 and appear to have been designed in such a way as to prevent the passing of control to overt party-political hands (Finkel, 2015, p. 12). Since then, TRT has been an instrument by both the military and the government it seems to continue "to be part of this order as facilitators and ideological communicators" (Sómer & Taş, 2020, p. 43).

Even after the commercialization period had started and the deregulation of TV market had taken place, most of the countries under study have retained their distinct ties to specific political parties or ideologies. In France, for instance, journalism is characterised by a strong political orientation if not outright partisanship. Even though after the 1980s commercialization period the French media followed the trend of autonomizing from political power, most of the news media can still be identified along the far left – far right axis. A recent study by Pew Research Center (2018) enforces this point: French citizens tend to think that the average citizen is less partisan in their ideology than the average news outlet. In other words, as Kuhn (2016, p. 61) puts it "one should be wary of simply equating economic with political liberalization". There are concerns on the horizontal concentration of the French media market (García – Graña et al., 2020). In France, the local press is characterized by a high degree of concentration, which is quite geographically localized, a consequence of the media concentration regulation, which set limits on concentration at the national, but not at the local level (Cagé et al., 2017). The most significant players in the field are mostly companies with interests mainly in the media market. One the other, hand national newspapers are less concentrated, but are almost all into the hands of non-media companies or tycoons (Cagé et al., 2017). However, in terms of plurality there is a variety of legal provisions reinforcing media organizations (transparency in public life, freedom of communication). Moreover, every media is obliged to have an ethics charter written jointly by the ownership and journalists' representatives. Further, committees for honesty, independence and pluralism of political information are mandatory on every outlet (García – Graña et al., 2020).

The media landscape in Spain retains, to a great extent, its wide ideological range on two distinct fields. On the one hand, from left to right media outlets in Spain represent the most progressive and the most conservative media. On the other hand, Spanish media also feature a conflict between constitutionalist and separatist / nationalist media (Salaverría & Baceiredo, 2017). Fuentes Aragones (cited in de la Siera et al., 2010, p. 7), best describes the partisan character of Spanish media by arguing:

> Possibly one could formulate a historical rule that, with exceptions, then became generalised: that newspapers and magazines linked to one ideology or other kept more radical and partisan views than those of the political parties or trade unions to which they were attached.

Proof of the close ties between media and political authorities is the creation of a *new power elite*, where politicians hold managerial positions in the media, while as in the Greek and Italian cases journalists become MPs (Papathanassopoulos, 2004; Mancini, 1993). This reality has caused the public to perceive the media as guided by political and business interests as well as clientelism.

It is worth noting that a study aiming at identifying ideological alliances between certain media and the political parties through web hyperlink analysis has shown that there are significantly more co-links between media and parties that share the same political orientation, than those existing between media and parties with different political orientations (Frias & Vaughan, 2012). Nevertheless, the country's fragmented Parliament and multi-party government reduced the ability of political control over the news media (Masip et al., 2020). It seems that in Spain pressures from media owners are related to both political and economic interests, hinting at a deeper systematic issue, extending further than control by political parties over the news media.

The political independence of journalism in Italy is also disconcerting, especially related to the lack of independence of the Public System Media (PSM). Similarly, to Spain and Greece, there are deep historical and structural issues pertaining to the autonomy of the private media. For example, only one of the main media owners is only a “publisher” with the entirety of the media owners’ group engaging in a wide range of other businesses from retail to construction (Mancini & Gerli, 2017). In addition to dependence on political decisions, Italy also scores very low regarding the state regulation of resources and support for the media sector which further strengthens their co – dependence (Brogi & Carlini, 2020). Legislation efforts to regulate conflict of interest have been hindered in Parliament with several proposals for new and more effective laws pending draft reforms for years now. The political influence of Silvio Berlusconi, despite the declining support to his party, is still central for the fate of any reform (Brogi & Carlini, 2020).

The risk to political independence in Cyprus is also perceived as problematic for a variety of reasons. To begin with, legislation regarding regulation of media ownership doesn’t exclude politicians, unless they hold public office (Christoforou & Karides, 2020). Adding to this, Cyprus features a strong informal network; politicians, media owners and journalists operate as in Greece under a strong culture of self – censorship even though there are no such legal caveats. Most of the daily newspapers are linked to various political parties, which both reflect private and/or pluralistic political opinions (Vassiliadou, 2007, p.202). Thus, the most salient trait of media has been an account and reflection of the dominant political forces “enhancing polarisation and strained relations, mostly leading to polemics, rather than to a productive exchange of views and ideas (Christophorou, 2010, p.243).

Greek media have been dominated by large media organizations since the 1980s characterised by excessive number of outlets for a rather small market, high production costs and close ties to the political and banking elites (Iosifidis & Boucas, 2015). Their operation served at times to exert pressures on the political landscape and at others to further the economic activities of media moguls in various sectors where investments were dependent to the state. During the economic crisis and the loss of the public trust, old players were side-lined by new who had little if any experience in the news industry. Moreover, the new owners range from controversial to having extensive legal conflicts. More importantly despite the media organisations presenting staggering debts and losses due to the advertising cuts, they were still able to secure financial lifelines due to their clientelist and political ties. Since 2019 the news media have come under more direct control of the government with the Prime Minister taking under his purview the only news agency in Greece (APE-MPE) with the Index on the editorial autonomy receiving a high-risk score as a result (Psychogiopoulou & Kandyla, 2020).

In Portugal, media political bias lost relevance once the normalization of the democratic regime has taken place, and the partisan press has virtually disappeared ever since the commercialization's drive of the 1980s. Since "political conflict does not sell", an adoption of a catch-all media perspective on politics is broadly used, in compliance with the catch-all rhetoric of the most important parties in the Portuguese landscape: PS and PSD (Santana-Pereira, 2015, p.13). A notable exception is the newspaper *Avante!* published by the Portuguese Communist Party (PCP) still produced and run by a professional newsroom (Correia & Martins, 2017).

Malta has slided recently towards an unlikely high risk in political dependence of the media. Legally, political parties and the government are permitted to own, control, and edit nationwide television and radio services, with the two main political parties owning their own media enterprises, making Malta a distinct case in the European family. As Borg informs us: “All Maltese papers are owned by the large institutions...and they are very strong on editorialising, even when they are reporting news (2009, p.27). The public service media are financed exclusively by the state and key appointments are made directly by the corresponding minister. News outlets keep internal codes of conduct that are not publicly available. In short, it is generally acknowledged fact that political influence in Maltese news organisations in not only prevalent, but dominant.

In Turkey political independence of the media is highly problematic. There is a clientelist relationship between media owners and the government, while seven out of the ten most watched TV channels being government affiliated. In 2018, the biggest media group was sold to an investor with personal ties to the government. More worryingly, the purchase was possible through a bank loan forwarded by a state bank with dubious repayment terms. The deregulation of media market in Turkey has marked a new era, which has been defined as “patrimonial/clientelistic” relationship between media and the state”, giving birth to media instrumentalization (Carkogly & Yavuz, 2010, p.618). As Irak (2016, p.343) points out, the uniqueness of the AKP in the media history of Turkey is that “for the first time after single-party regime of the 1930s, the government has its ‘own’ media[1], the function of which is to support the political party in power at all costs”. Furthermore, a survey which analysed the political connection of the state-run news agency, AA (Anadolu Agency- *Anadolu Ajansı*), members has revealed that the administrative level of the agency is comprised by a small network, which members belong to the “pool media” and the political circles related to Recep Tayyip Erdogan and Bulent Arinc (Irak, 2016).

[1] The leading companies of the pro-government media are: 1) Yeni Şafak 2) Star, 3) Akşam,4) Türkiye, 5) Sabah, 6)Yeni Akit (for a thorough analysis of the acquisition procedure and the political connection to Tayyip Erdogan’s environment see Irak, 2016, pp. 343-344).

Added to that, Turkey has also featured direct interference with media content, while there has also been a proliferation of lawsuits brought against journalists, academics, and human rights defenders. In 2011, watchdog groups reported that Turkey had the dubious distinction of holding "more journalists in prison than any other country" in the EU (Bayazit, 2016, p. 394). A recent example is the case of *Cumhuriyet*, with 13 journalists and an editor–in-chief put on trial and staying in jail for months under charges of aiding a terrorist organisation because of their critical stance to the government (Graña, Vedel, & Grassler, 2020). More diverse and vibrant views appear consistently at the local and regional outlets, but these have limited distribution. As Bilge Yesil notes (2016, p. 8):

> The highly politicized judiciary, through broad interpretations of the Press Law, the Internet Law, and the Broadcasting Law, as well as application of the Penal Code and Anti-Terror Law provisions, criminalizes media practitioners, bans and confiscates publications, shuts down websites, and prosecutes writers, publishers and artists.

1.3.1 Instrumentalization of Media

As already mentioned, countries of Southern Europe have had a history of strong partisanship that in most cases distilled to political parallelism. At the same time clientelism is deeply rooted in these societies. The wave of deregulation in the 1980s and 1990s, the 2008 economic crisis, along with distinct characteristics of the media market such as growing fixed costs, excess supply, price deflation, high risk of distribution success and convergence of technology, even government involvement (Noam, 2016) shaped a hardly sustainable business environment pushing old media owners out of the industry. At the same time, the door opened to businessmen coming from other industries, willing to acquire and finance media to better serve their business interests. *What makes instrumentalization so effective in some countries is that laws are not applied equally to all pressure groups*; public funds are often distributed based on political ties while there is room for informal contacts or without standardized legal procedures (Mancini, 2012). Direct ownership and / or political pressures are the main means of media instrumentalization, while lack of transparency in terms of media ownership is a thorn in media's side regarding audience trust and credibility (Mancini, 2012).

Based on the latest report conducted by MPM (2020), the countries of the Polarised model fall in a spectrum of low (Portugal, France) to medium (Spain, Italy, Cyprus, Greece) to high risk (Turkey, Malta) according to indicators measuring the political independence of media outlets. In any case, there is a strong tendency in most of the countries to "purchase" control and instrumentalize the media for political exploitation.

In France, although there are legal provisions for publishing companies to provide their readers with information on the composition of their capital, media ownership is characterised by lack of transparency. The media are run by companies with complicated shareholder structures and rarely by individuals, since as Cagé et al. (2017) point out "the big families that owned the media have gradually sold out to corporations". Half of the print and online news media are controlled by companies in the financial and insurance services sector, while information and communication sector are just 18%. However, concentration of media differs greatly from one industry to another. According to Badillo et al. (2016) concentration is relatively high in the newspaper market, though due to newspapers' financial difficulties the situation is expected to get worse; radio is becoming less concentrated, but there is strong concentration in TV news, while Cable and satellite TV are almost monopolies. Public ownership in print is only 1%, but in broadcast media is 43%. The Lagardère group with significant presence in book publishing and magazines was bidding contracts in the defence sector, Dassault with Group Figaro bidding in military aircraft production and sales, Bouygues with TF1 and telecoms bidding in public construction projects (Kuhn, 2010).

In Italy, during the 1980s and 1990s the regulatory framework for the media landscape has been shaped by several laws and Corte Costituzionale (Italy's Supreme Court) decisions that were characterized by discontinuities, partisan ambitions and private interests. As Tonello points out:

> There has never been a bipartisan plan to shape the Italian electronic media vis-à-vis the challenges of globalization. The turbulence in the political system, the lack of government clear-cut programmes, the strong lobbying by major operators and a general short-sightedness of the Italian political parties in this field are the reasons of the present state of uncertainty and fogginess in the media landscape (2008, p.245).

The Gasparri law enacted in 2004 and reformed in 2011, no entity is allowed to control more than 20% of the Italian media market. However, the TV broadcasting market is highly concentrated with Fininvest (Berlusconi family) owning three TV channels (Canale 5, Italia 1, Rete 4) through Mediaset, the commercial broadcaster, the Arnoldo Mondadori Editore publishing house among others (Richeri & Prario, 2016). In Italy too, the old media companies such as Mondadori, Rizzoli and Rusconi are now controlled by non-media businesses, such as Berlusconi (soccer, insurance, commercial television) and Fiat (automobile). Radio and television are rather fragmented in local and regional level, but that's not the case for print since daily newspapers, even on local and regional level, are owned by big corporations. For example, Carlo DeBenedetti of Olivetti controls *L'Espresso, La Repubblica* and its ten local editions; Agnelli family of Fiat controls *La Stampa* and, though RCS, with Benetton (apparel) and Dealla Valle (shoes), the largest Italian daily, *Corriere della Sera* and its 20 local editions; the Caltagirone Group (construction) daily, *Il Messaggero (Rome), Il Mattino (Naples), and Il Gazzettino (Venice)* along with two local newspapers; while *Il Giornale* is owned by Paolo Berlusconi, brother of Silvio Berlusconi, and the Italian Manufacturers' Association (Confindustria) publishes the best-selling financial newspaper, *Il Sole 24 Ore* (Richeri & Prario, 2016).

The “golden era” of the Greek media and journalism (1980s and 1990s) is characterized by a high degree of media-ownership concentration, but most worryingly by the consolidation of close relations between the media and the political elite. The so-called *diaploki* (intertwining interests) and cronyism or the domination of the media environment by wealthy businessmen with interests in shipping, energy and oil industries, transportations, telecommunications, construction and sports reflects this reality (Iosifidis & Boucas, 2015).

In Spain, as Sanders and Canel note, the governmental policies which were implemented during the transition to democracy left their “mark” on the national media scene, since “the successive *laisser faire* approach to media ownership, has enabled the emergence of cross-media ownership, with a relative ease” (2004, p. 198). In addition, legislation in Spain welcomed foreign investors resulting in foreign owners dominating TV broadcasting and book and magazine publishing sectors (Artero & Sánchez – Tabernero, 2016). Horizontal concentration of the media market is high with print and online media mostly concentrated in six domestic companies (Vocento S.A, Prisa, Editorial Prensa Ibérica, Grupo Unidad Editorial, Grupo Zeta and Grupo Joly), most of them turning also to Latin American markets (Artero & Sánchez – Tabernero, 2016). Of these only two own a broadcast medium as well, namely a television channel for Editorial Prensa Ibérica and a radio station for Unidad Editorial (Cagé et al., 2017). Most of the companies that own press and online news media come for the finance sector (37%), followed by the professional, technical and scientific activities sector (17.1%) and the information and communication sector (16.8%) (Cagé et al., 2017). However, the media are increasingly dominated by three broad multimedia conglomerates with strong political alliances; PRISA that includes companies from different economic sectors (banking, real estate etc.) owns most of the newspapers in Spain, including *El País*, SER radio and cable and satellite television, and whose owner was close to socialist President Felipe González. Planeta ranks among the top four in the following sectors: book publishing, terrestrial TV, and radio broadcasting. In addition, a new rival media empire is now emerging around the former state telecommunications monopoly, Telefónica de España, which was privatized under the conservative Partido Popular government. This conglomerate includes the private television company Antena 3, the newspaper *El Mundo*, which made its name breaking the news of several major scandals involving the PSOE government, the radio network Onda Zero and a satellite television platform. The two media empires have become intense rivals, as much in the political as in the commercial world. The conservative newspaper *ABC* and the Catholic Church's radio network, COPE, were also aligned with Telefónica in this conflict. Major banks also have ties to these conglomerates, and Spanish journalists and media analysts often describe them as a major power behind the scenes, though their role is very difficult to document.

In Portugal the transition to democracy began with a two-year period of revolutionary upheaval during which the media were, for the most part, taken over by radicalized journalists who conceived them as instruments of class struggle. Ownership of much of the media passed to the state when the banks were nationalized, and by the early 1980s, effective control had, to a significant extent, passed to the political parties. In the late 1980s, state-owned media were privatized, while the last years many mergers have taken place, resulting in few conglomerates dominating the Portuguese media landscape, causing debates among the regulatory authorities (Faustino, 2016). Media have to provide details on their shareholder structure, while it is forbidden for a media company to own more than 20% in private TV channels. One of the principal media conglomerates, Impresa, is owned by F. Pinto Balsamão, a former prime minister and leader of the (conservative) Social Democratic Party and belongs to a group of financial companies. Zon multimedia, leading cable TV provider belongs also to a financial group, while Media Capital is owned mainly by PRISA group. Cofina and Controlinveste are new groups in the media industry, while Renascença with three radio stations belongs to the Catholic Church. The state owns Radio e Televisão de Portugal (SGPS) with TV and radio stations and the news agency. Even though instrumentalization of the media in Portugal is perhaps less intense today than in the other countries of Southern Europe, the dominance of two media groups Impresa and

Media Capital, the small size of the media market and the high concentration of the advertising market cause worries about the future (Faustino, 2016).

In Malta, politics has used media as “technologies of othering”, meaning that while parties express their views on public issues media were used as ideological vehicles for the furnishing of stereotypical typifications of the “other”. According to Sammut, here the construction of the “othering” makes up for the lack of ideological footing, helping the parties to present themselves as a credible alternative to one another, thus sustaining the polarities (2007, pp.33-34).

In Turkey, all the major media groups, Doğan, Merkez, Çukurova, İhlas, Doğuş, etc., are large conglomerates and their activities expand to other sectors of the economy (tourism, finance, car industry, construction, and banking). Instrumentalization of the media is a keen practice among different pressure groups, further enforced by the lack of state regulation to counter cross – ownership. Even in cases where Turkey had to abide by EU rules, domestic media owners managed to find their way mostly regarding the lack of transparency of their shareholder structures (Bayazit, 2016).

Media proprietors in Turkey seems to use their media outlets to protect their interest in other sectors of the economy. As Sommer notes, most Turkish newspapers while privately owned, are vulnerable to political pressures, since the pursuit of their owners’ economic interests forces them to develop clientelistic relations with the government and other political actors (2010, p.560). Furthermore, politicians can exert their power on media owners by selectively enforcing broadcasting regulation, taxation, and other laws (Carkogly & Yavuz, 2010 p. 618). The dispute between the President Erdogan and Dogan Group is a clear example of the pressures of this latter type. In 2009, Dogan Group faced two successive tax bills for a total of about $3 billion (a figure roughly equivalent to the market capital of its parent company, a fine that was largely interpreted as retaliation for the group's opposition to the rise of the AKP (Finkel, 2015, p.16).

1.3.2 Politicization of Public Broadcasting and Broadcast Regulation

All public broadcasting systems are to some degree subject to political influence and manipulation, and disputes over the independence of public broadcasting are common to the history of European media. Most countries in Western Europe have succeeded in developing institutions which separate public broadcasting from the direct control of the political majority. From the countries of Southern Europe, France and Italy have moved the furthest.

In France, during the 1995 elections seem to shift its focus from public media reform. The election of Jacques Chirac proved that political forces in France had agreed on a political agenda of privatisation and deregulation. The period of policy debates on TV and press raging since 1968 had ended with the retreat of the state. In its place multimedia groups emerged taking advantage of a system of public fiscal aids and political connections with Hachette and Hersant emerging as leading actors in the new media landscape. However, a political consensus during the Rocard socialist government, led to the creation of CSA in 1989. This body ensured the independence of the public broadcast and offered transparency in the manner TV and radio licenses were being issued (Palmer & Sorbets, 1997). It is worth noting, that during his presidency, Sarkozy as a part of a reform process regarding the public broadcasting regained the responsibility for the direct appointment of the President Director General of the two public broadcasting companies, France Televisions and Radio France (Kuhn, 2010, p. 363).

The Italian public broadcasting company RAI was essentially under the control of the ruling Christian Democratic Party in the 1950s and 60s, but in the 70s, when a broader coalition was formed and the "historic compromise" allowed the Partido Comunista to share in the *lottizzazione* – the division of political power and benefits – control of RAI was divided among the parties, with the Christian Democrats retaining control of one channel, the "secular parties" the second and the Communists the third. Every change in the parliamentary majority had been triggering new cycles of turbulences in the management of RAI. According to Mazzoleni:

> Often it became a battleground or object of contention between governing and opposition parties, all convinced that keeping a controlling hand on Rai meant a guarantee of visibility, power and, in some cases, even survival. This arrangement has made Rai into something of an armoured fortress within the national broadcasting system (2000, p.162).

Over the past two decades, successive Italian governments seems to have been either incapable or unwilling to establish a regulatory framework which would pave the way of a "genuine public service broadcasting to flourish in Italy" (D'Arma, 2010, p.208). Such an ambitious venture would presuppose the ease off RAI's commercial and political pressures through changes in its funding and governance respectively and most importantly a clear governmental commitment to break the bond with the patronage culture of the past (D'Arma, 2010, p.208). In recent years, however the board of directors of RAI has been reduced in size, making proportional representation impossible, a move which is likely to require a degree of depoliticization of appointments to the board.

Spain, Greece, and Turkey meanwhile, are the countries remaining in Southern Europe in which the ruling party directly controls public broadcasters. In these countries the management of the news divisions of public television changes with a change of government.

In Spain, public Spanish Radio and Television (RTVE) is often criticized of biased reporting in favour of the government. Between the 1982 and the 1996 election, public TV stations were perceived by the public to "be the mouthpiece for the Socialist government (Sanders & Canel, 2004 p.202). This wide-spread conception of the Spanish society is fuelled by the appointing procedure of the Director General; The TVE1 post of the Director General is decided by the government for a four-year term and expires once a new government is elected. Zapatero's attempt in 2006 to limit state control by not directly appointing the president of RTVE did not manage to deliver the expected outcome in terms of media trust and credibility (Field, 2009; Lamuedra Graván, 2018). The two thirds parliamentary consensus was replaced in 2012 by simple parliamentary majority, allowing again the ruling party to appoint the RTVE head without wider political consent (Cagé et al. 2017). As a Spanish specialist in communication (Bustamante, cited in de la Siera et al., 2010, p.13) has argued:

> The history of Spanish radio and television during the last years of Franco and the transition, but also largely during democracy itself and at least until 2006, cannot be understood without taking into account the early framework created by the dictatorship and applied to television from its beginnings.

In Greece, news and editorial judgments are expected to be in close agreement with, if not identical to, government announcements across a whole range of policies and decisions. A governing board appointed by the parliament according to proportional representation therefore results in government control in the former, while it results in power-sharing in the latter (Iosifidis & Papathanassopoulos, 2019).

In Portugal the first television law passed in 1979 with the aim a to provide a safeguard to "ideological pluralism", yet between the state and the public broadcaster RTP there was cultivated an instrumental relationship, with the accusations of the opposition parties regarding the political manipulation of public TV being a constant phenomenon after the return to democracy (Traquina, 1995, p.224).

Same, as in other Southern European countries such as Greece, Portugal, and Spain, in Malta the political majority has control over public broadcasting. The government intervenes with the appointment of the board of directors and even after the advent of other TV stations, the state remains the primary definer of news and influences the agenda and framing of public issues (Spiteri, 2014).

In Turkey until 1990, radio and TV were monopolised by the state, "with an understanding of statist and socialist state principles" (Kars, 2008, p.28). TRT in Turkey has been always under tight state control, and its audience fell dramatically after the advent of private channels. The TRT, as Yesil notes:

> "… formulated its programming policies based on the priorities of the state, which meant that programs aimed to disseminate the official state ideology, shape national and cultural identity, and give audiences "what was good and right for them." (2016, p. 39).

In other words, in most countries politicization of regulatory bodies coexists with relatively weak regulation of private broadcasters in the sense that few public service obligations and few restrictions on commercialism are imposed, and many regulations are laxly enforced.

1.3.3 Clientelism and Rational/Legal Authority

The greater prevalence of clientelism in most Southern rather than Northern Europe is intimately connected with their historical development. Both are rooted historically in the fact that autocratic, patrimonial institutions were strongest in the South. Clientelism refers to a pattern of social organization in which access to social resources is controlled by patrons and delivered to clients in exchange for deference and various kinds of support. It is a particularistic and asymmetrical form of social organization and is typically contrasted with forms of citizenship in which access to resources is based on universalistic criteria and formal equality before the law. Clientelistic relationships have been central to the social and political organization in most, if not all, Southern European countries (Hallin & Papathanassopoulos, 2000).

The emergence of clientelism represented not simply a persistence of traditional hierarchical social structures, but as a response to their breakdown, in a social context in which individuals were isolated, without independent access to the political and economic centre, e.g. through markets, representative political institutions or a universalistic legal system, and in which "social capital" was lacking (see also Eisenstadt and Roniger, 1984; Gellner and Waterbury, 1977; Kourvetaris and Dobratz, 1999; Mouzelis, 1980; Roniger and Günes-Ayata, 1994; Putnam, 1993; Katzenstein, 1985).

Clientelism encourages the instrumentalization of the news media. The politicization of business is a result not only of the important role the state plays in the economy, but of the nature of the political process. Epstein (2003, 2009) considered clientelism as a symptom of weakly – institutionalized political parties that failed as aggregator mechanisms of political interests or as Keefer (2007) puts it "the inability of political competitors to make credible promises to citizens". In northern Europe clientelist relationships have been displaced to a large extent by a consensus-based authority and, especially in the smaller continental European countries, by democratic corporatist politics, both of which decrease the need for economic elites to exert particularistic pressures and form partisan alliances. In countries with a history of clientelism, consensus-based authority is less strongly developed. The judiciary and administrative apparatus are more party-politicized and there is often a tradition of conflict with authorities. The persistence of a power elite culture in which evasion of the law is relatively common means that opportunities for particularistic pressures also are common: governments can exercise pressure to the elites by enforcing the law selectively, and news media can do so by threatening selectively to expose wrongdoing. Legal proceedings against media owners are common in many Southern European countries.

Secondly, *it makes the media systems less self-regulatory* and the regulatory bodies less independent compared to their counterparts in liberal countries like the US, UK and in *democratic corporatist* countries. In Southern Europe, the regulatory institutions tend to be more party-politicized and more dependent in their ability to enforce regulations.

Thirdly, *clientelism has also affected the content of the media, especially newspapers, as means of negotiation among conflicting elites rather than means for the information of the public and, therefore, mass circulation*. It forces the logic of journalism to merge with other social logics – of party politics and family privilege, for instance. And it breaks down the horizontal solidarity of journalists as it does of other social groups. Thus, the journalistic culture of the Northern, corporatist countries which is manifested both in relatively strong journalistic autonomy and in highly developed systems of ethical self-regulation is absent in countries with a stronger history of clientelism because of the overriding importance of political interests or even survival in a highly intricate environment.

In the modern history of France, President Sarkozy has cultivated special ties with various commercial media proprietors, by establishing an exchange-style relationship with them over the years: positive coverage for Sarkozy in exchange of state regulations that privilege the companies' media, as well as their wider corporate industries in other entrepreneurial fields (Kuhn, 2010, pp. 360-361). As a commentator once remarked «The Dassault group needs the President of the Republic to sell its planes. The President needs *Le Figaro* to sell his policies» (Portelli, 2009 as cited in Kuhn, 2010, p.361).

In Spain media companies are powerful but still, they operate in an environment where "a great deal of power is vested to the government" (Sanders & Canel, 2004, p. 201). In addition, the press, as Bonet and Guimerà i Orts note, made a pact with the political forces during the first crucial years of transition to democracy to strengthen the new-born democracy, but it appears that this "pact" lasted too long, depriving from the press the opportunity to evolve towards a more mature and less partisan media system (2016, p. 419).

Historically, the Greek state has intervened in all aspects of economic and social life, with media not being excluded from this rule. The intertwining of the political elite and the media has paved the way of the prevalence of a journalistic ethos that keeps its distance from reporting news that state officials could find challenging. The media market deregulation has enabled clientelism to become deeper, as *diaploki* between large media organisations, their owners and the political elite has emerged as the dominant doctrine of the operation of the national media landscape (Iosifidis & Boucas, 2015). As Veneti and Karadimitriou suggest, "in a global free market environment, media organizations promote their extensive economic interests and have more to gain form business-friendly government. In turn, governments are now more in need of government–friendly media because they must pursue and retain mass electoral support (and control)" (2013, p.450).

Mark Nelson has made a crucial point when asking himself why so many countries fail to create independent media. Taking Turkish paradigm into consideration, he suggested that partly the answer to this question could be found in the concept of "media capture", which is defined as "a systemic governance problem where political leaders and media owners work together in a symbiotic but mutually corrupting relationship" (2015, p.1). As Arslantaş (2019) notes:

> AKP governments have frequently exchanged kickbacks with loyal businessmen, particularly in the construction sector (…) In return for these favours, loyal businessmen donate money to a "pool," which is used to fund election campaigns and the non-partisan press. The purchasing of ATV-Sabah media by Çalık Group best illustrates this.

Overall, in Turkey, there is a long-standing history of media and state power in a patron and client network. Until the 1990s, the state acted as a patron and media companies were its clients. It was the period of state monopoly when the governments exerted enormous power over media content. However, after the deregulation of the broadcasting market, in early 1990s and during the period of coalition governments, there was a shift in the power matrix; conglomerates started to put the pressure on politicians through their media outlets, thus resulting in the inversion of the relationship. Now the politicians had become media's clients. It is worth noting that for the major conglomerates, the main objective behind their involvement in the media sector has nothing to do with the media per se (i.e., a desire to develop pluralism), but it was mostly driven by the indirect benefits that their media ownership could safeguard for their economic interests in other sectors (Bayazit, 2016, p.393).

The above noted parameters serve to create a distinct understanding of journalistic professionalism where skills, ability and education are used for partisan or even group benefit.

1.4 Limited Professionalization

As we have already noted the high instrumentalization of the news media by oligarchs, industrialists, parties, or the state, characterizing the Southern European media model, implies that journalistic autonomy will be limited. Journalists will at times have to defer to their political masters.

As Hallin and Mancini (2004, p.111) point out:

> journalism originated in the Southern European countries as an extension of the worlds of literature and politics". However, as they argue, "this history of journalistic professionalization is closely parallel to what occurred in the Liberal and Democratic Corporatist countries .

The process did not develop as strongly in the Mediterranean countries, however, as in the north. The political and literary roots of journalism were deeper, and the political connections persisted much longer. Limited development of media markets meant that newspapers were smaller and less likely to be self-sustaining. And state intervention, particularly in periods of dictatorship, interrupted the development of journalism as a profession.

This, however, does not mean that the level of professionalization is lower. For example, journalists in the Mediterranean countries are not less educated than elsewhere – in Italy and Greece, for example, famous writers and intellectuals have often been journalists. On the other hand, the close connection of journalism with the political and literary worlds and the orientation of newspapers to educated elites have meant that journalism has in some sense been a more elite occupation in Southern Europe than in other regions.

1.4.1 Political and economic pressures shape the final journalistic output

The indicator of "professionalization" under the scope of Hallin and Mancini's theoretical framework does not put on the forefront of their analysis the existence of a specialized body of knowledge acquired through formal and/or professional education (a crucial perquisite of the classical theories of professionalization). Instead, it is mostly concerned with the issue of autonomy of the journalistic corps as professionals, within the media organizations and the society, as well as with the establishment of a set of values that make them perceive their professional role as providers of a fundamental service to the public, and the adoption of an internal code of professional guidelines.

In Greece, the promotion of the professional interests of the journalistic corps employed by newspapers and the electronic media is safeguarded by four regionally organized unions, of which the Journalists' Union of Athens Daily Newspapers (ESIEA) and the Journalists' Union of Macedonia-Thrace Daily Newspapers (ESIEMTH) are the most prominent. These unions also undertake the task of supervising journalists' compliance with the code of ethics, self-regulating journalists' professional behavior, and protecting the principles of journalistic autonomy and editorial independence.

However, in practice the professional activity of Greek journalists was and still is defined by a framework of alignment to the particular interests of the media owners (Papathanassopoulos, 2001, p.519).

In a quite a parallel trajectory, in Cyprus there seems to be an abundance of regulatory bodies (Cyprus Media Complaints Commission-CMCC, Cyprus Press Council) with a primary aim of safeguarding the free exercise of journalism. However, the presence of these institutions has not actually led to a transparent media system that could incubate the consolidation of an accountability culture in the national media scene (Millioni, Spyridou & Koumis, 2015). Despite the Cyprus Union of Journalists being active and respected, it is not able to effectively protect journalists' rights and benefits, nor to guarantee editorial independence. Furthermore, the economic crisis has deteriorated the journalists' ability to confront editorial or political pressures in the newsroom or even defend salaries and benefits against arbitrary cuts (Christophorou & Spyridou, 2016).

The politicization of Spanish journalism has also resulted in a low degree of professional autonomy for journalists themselves, which favors the control on behalf of political actors (Casero-Ripollés, García Santamaría & Fernández-Beaumont, 2015, p.98). According to the 2018 Annual report on the Journalistic profession (Informe Anual de la Profesión periodística), the pressures on the press can be traced in four distinct areas: political powers, economic powers, ownership, and press offices. It is worth mentioning, that according to the report, 75% of respondents gave in to pressures (MPM, 2020). Even though in Spain there is legal provision of the so-called "conscience clause", aiming at safeguarding the exercise of journalism, the conscience clause has scarcely been invoked by Spanish journalists (Masip et al, 2020).

Access to the profession is not totally open in Italy since enrolment in the *Ordine dei Giornalisti* (the association of Italian journalists) is perquisite if someone wants to become an accredited journalist. This Union regulates access to the profession, by defining who can become a journalist, based on a selection process that emphasizes the years of paid work into newsrooms and a final examination. It is worth noting that while The *Ordine dei giornalisti* claims for itself a role of ethical watchdog over its members, it has been particularly inefficient in defending in practice this aspiration (Tonello, 2008, p.248).

Regarding the perceived pressures to their daily tasks among Italian journalists, a recent study (Splendore, 2016) reveals that, overall, Italian journalists do not hold a high level of autonomy; Just half of them (49.5%) admitted that they had complete or a great deal of freedom in their selection of stories and just four out of ten said that they took part in editorial coordination activities (such as meetings and news management) "always" or "very often" (40.4%). As we have already seen, the Italian journalism is characterized by a high degree of political parallelism thus, the limited autonomy, reported by Italian journalists, should be interpreted under the scope of the political pressures they have to cope with (Hamada et al, 2019, p.143).

The strong presence of political parties and the Church in Malta's media system has prevented journalism from developing as an autonomous profession. Efforts to professionalize journalism began in the late 1980s with the establishment of the Malta

Press Club, subsequently the Institut tal-Ġurnalisti Maltin (Malta Institute for Journalists - IGM). A Code of Ethics was adopted, but there is little consensus on the powers of the Media Ethics Committee to enforce its decisions. In fact, according to Vassallo (2020, p.13), the commercial and owner influence over editorial content indicator scores a high risk of 73%, which is partly triggered by the inability of IGM to safeguard the working conditions of journalists (Simunjak, 2016).

Moreover, in Malta, pluralism in broadcasting allowed party media to flourish. As Sammut (2019, p.88) argues, "the boundary between party and editorial line became non-existent, and journalists are now often the foot soldiers of their party". In the same vein, Borg claims (2019) that most journalists have a stronger allegiance to the organization that they work for than to the journalistic profession itself. Thus, journalists act as propagandists. According to an editor in Malta Today (cited in Sammut, 2019, p.37): "Very few intellectuals stand up to be counted…We pay lip service to 'civil society' when there is a widespread apathy", a silence that should be interpreted as an attempt to stay away from politics of polarization.

French journalists seem to enjoy a high level of autonomy in their daily duties, under the protections provided by the clause de conscience and clause de cession, which is linked to the process of professionalization of journalism, which took place in the first third of the 20th century. In a 2007 study only 12% of the French journalists surveyed felt they generally lacked freedom to do their work, with 61% saying freedom to do their work was "mostly the case" (Weaver & Willnat, 2012).

Portugal is positioned far better, regarding this indicator, compared to the other countries belonging to the same geographic region (Santana -Pereira, 2016, p.792). It seems, that the legal framework, provisioning that all the professionals aspired to work as journalists ought to possess a credential ('*Carteira Profissional*', a sort of Press Card), has managed to work in a twofold way: This professional title acts as a shield of journalistic autonomy against political or editorial pressures, but at the same time, it ensures that all the possessors of this card are united under a common ethics of practicing journalism (Fidalgo, 2008, pp. 7-10).

As Figueiras puts it (2017, p.316), there is a strong "legacy of aversion to media instrumentality among journalists" that paved the way for the consolidation of the journalistic professionalism among the members of the journalistic corps. As a result, the media landscape in Portugal can be best described as a "hybrid and complex entity that incorporates some of the original features of the polarised-pluralist model and the professionalisation of journalism framed by self-regulatory practices and hetero-regulatory bodies, together with a market dependency" (Figueiras, 2017, p.317).

The process of journalism's professionalization in Turkey doesn't lag behind at least at a normative level, compared to the other European countries under examination. Press Council, which is the formal accountability system, was established in 1986, and ethical standards in the exercise of journalism have been laid down, both by the Turkish Journalist's Association and media groups. However, those guidelines have never been implemented into practice mainly, because of the political and economic pressures upon the media sector (Gencel Bek, 2011). According to Yesil:

> In Turkey's contemporary media landscape-that is, what remains as the outcome of the dismantling of state monopoly in broadcasting, the privatization of communication assets, and the adoption of market-friendly policies in the 1990s-commercial outlets have been simultaneously independent of the state and dependent on it. They are not formally owned, operated, or dominated by the state, yet their survival depends on their informal ties with the ruling elite, high bureaucracy, and judiciary (2016, p. 105).

It is also worth noting that since the start of 1990s membership in TGS (Journalists' Union of Tukey) has collapsed, as media owners have used a series of blunt tactics, aiming at intimating journalists, so to leave the Union. Some of these tactics are the complicated employment structures, with many journalists claiming to have no idea for whom they are working for, or the hiring of journalists on a temporary basis, thus eliminating the possibility of unionization (Christensen, 2007, pp.191-192).

1.4.2. Role conceptions: "Mind the gap" between rhetoric and practice

The way in which journalists perceive their professional role and the obligations arising from it towards society, directly affects the development and the implementation of the ethical guidelines and standards that journalists should follow in the exercise of their daily work (Singer, 2003, p.145).

The normative conception of the journalistic role among the members of the Greek journalist community does not lead to the anticipated journalistic style in the performative level of their work. In theory, Greek journalists claim that journalism should be neutral, objective and independent from political and social pressures, highlighting the importance of the watchdog function of journalism. However, in practice, they are forced to act in different way. According to Papathanassopoulos (2001, p.513):

> It seems that for Greek journalists' neutrality or objectivity are closely linked to freedom of expression and accountability in news reporting rather than to factuality. In other words, while neutrality or objectivity is supposed to refer to political pluralism and fair play, in daily practice political neutrality is (or is forced to be) abandoned for the political position of their news organization.

The same picture is also manifested in Spain, where Roses and Humanes (2019) found through their study a significant gap among the evaluative and performative dimension of journalistic role perception among Spanish journalists. The journalists highlighted the importance of being impartial observers (as the authors of the study argue this can be explained as a persistence of the objectivity myth in the professional culture of Spanish journalism), but at the same time, they are aware of the fact than in practice this is not always feasible, either because they submit to their own subjectivity or because they are obliged by their bosses to follow a specific ideological stance. Furthermore, many Spanish, as Greek journalists, not only have endorsed the role of political mobilizers for themselves, by blatantly taking the side of a certain ideological party but have also pursued political careers themselves (Roses & Farias Battle, 2013; Papathanassopoulos, 2001). However, there is now a younger generation of Spanish journalists who have only worked and been trained in stable democratic environment and who embrace the principles of impartiality and neutrality, so it seems that Spanish journalists are moving from the partisan paradigm towards a more adversarial-apolitical one (Sanders & Canel, 2004, p.204).

In a study investigating the "sins" of the Italian journalism that resulted in a "credibility crisis", the journalists' role has emerged as a fundamental condition for the perpetuation of public's mistrust; It seems that Italian journalists haven't made any progress in changing their well-established image as "being dependent, at times totally subservient" (Spalletta & Ugolini, 2011). Furthermore, with their tendency to self-referral, they seem to have made objectivity a "disclaimer", while stressing proudly their own bias (2011, p. 184). If they take a more independent stance, they are at risk of losing their jobs. It is worth mentioning, that in a survey exploring the journalists' perception of their role, the findings were in contrast with the typical representations of Italian journalism; the Italian journalists highlighted the importance of factuality (to report things as they are) and "to be a detached observer" about the things they report on, embracing, in other words, the dominant values of western journalism (Splendore, 2016).

As we have already highlighted above, the stronger engagement of Portuguese journalists in safeguarding through their regulatory bodies their autonomy, resulted in a consolidated journalistic ethos, where the majority of the press corps demonstrates a strong commitment to professional standards of ethics. With regards to professional role orientations, according to a recent study, Portuguese journalist highlighted the "classic" values of journalism, by stressing the importance of reporting things as they are, to be a detached observer, to provide analysis of current affairs, and to monitor and scrutinize political leaders (Novais & Henriques, 2016). The journalistic ethos that the Portuguese journalists embrace seems to have been recognized and appraised by the public as well. According to Santana-Pereira, relative data proves that the media even if they are not conceived by the public as an agent of change, are believed to be a "privileged actor that can retrieve information about the backstage of the political world and offer it to the citizens and democratic institutions that have the means to act" (2015, p.17).

On the contrary, French journalists seem to deviate from the western ideal of the detached journalist, as we have already seen, there is a strong tradition of "opinionated journalism, especially in the press, with individual journalists showing support for/or opposition to parties, policies or individual politicians. As Williams claims, the tradition of journalism in France is "associated with the writer rather than the reporter", where the collection of facts has been secondary to the publishing of critical essays on politics (2006, p.49). Hence, French journalists see themselves more as intellectuals than as reporters. Instead of merely reporting the facts, they often try to provide analysis of the events, thus influence the public with their own biases (Media Guide, 2008). In contrast, neither investigative nor watchdog journalism has ever been a particularly strong feature of the French news media culture, despite some progress from the 1980s onwards (Kuhn, 2016).

Turkish journalists are comparable to their French counterparts in the sense that they tend to deliver opinionated articles and view themselves as public intellectuals, closely tied to the political field (Somer, 2010, p.559). In addition, Turkish journalists make a division between "journalism as an ideal" and "journalism in practice". While the first approach refers to the journalists' conception of their professional role as telling the truth independently, the second one manifests the working reality, where journalists face limitations to their professional autonomy, since they are forced to pursue the interests of their bosses or succumb to politicians' pressures (Gencel Bek, 2011).

Advocacy journalism in Malta is also the mainstream or even, the professional paradigm that journalism students are trained to follow in their professional lives. More precisely, if someone wish to apply a categorization of advocacy on weak or a strong, he might notice that in Malta the partisan journalists take a strong stance, whereas a weaker advocacy role is mostly prevalent in non-partisan press (Sammut, 2007, p.7).

A study aiming at identifying the role conception of Cypriots journalists, given the specificities of their working environment, revealed that they share similar role conceptions with other western journalists. However, living in conflict-affected communities, seems to affect their role conceptions and performance, according to the political circumstances (Şahin, 2021). In effect, on both sides of the island, journalists believe that lies within their responsibilities the promotion of the settlement of the Cyprus problem, a fact that requires the adoption of different professional roles at times, such as advocating for a change or performing a watchdog function towards the political elite who lead the peace negotiations. (Şahin, 2021).

1.4.3 The financial crisis sets new challenges to journalistic autonomy and media freedom

What has emerged as a common trend between the countries that have been most affected by the financial crisis and the subsequent social and political turbulences is the deterioration of the working conditions for the journalistic profession, as well as the establishment of a more hostile and riskier environment for the press corps.

During the crisis the decline of the media market, resulted in the bankruptcy of numerous media outlets, which paved the way for the deterioration of journalistic autonomy in southern European countries. The closure of the public broadcaster ERT in 2013 was characterized as ‘a turning point in Greece’s media history’ (Reporters without Borders, 2014), leaving not only a huge “trauma” to the journalistic work force of the country, but also setting the alarm for the deterioration of media pluralism and freedom in the country. It is worth mentioning that in 2014 Greece has dropped 21 positions compared to 2010, in the press freedom index, annually published by the Freedom House.

Even in Portugal where journalists have important laws to protect their activity, the financial crisis has managed to put into test the journalists’ ability to maintain their autonomy, under acute economic pressures, paving the way “towards proletarianization than professionalization” (Fidalgo, 2011, p.259). The economic crisis has created a steep decline in media revenues forcing the journalists’ Union to launch a public debate on how to best finance quality journalism, while also safeguarding the ability to scrutinize political and economic power centers. Professional journalism has also suffered as journalists were threatened by job loss and salary cuts as well as the reluctance of Portuguese readers to pay subscriptions for quality journalism (Correia & Martins, 2017). This development has created blurry journalistic practices with the sharp increase of paid content and the domination of infotainment media logic (Cadima et al., 2020).

In addition, the fact that the Portuguese media market is also believed to have been flooded with young, educated journalists during the past decades, puts on the forefront one long-lasting threat for all the saturated markets: when the demand for a profession is much lower than the supply, then the members of the respective professions are more willing to cope with precarious working conditions (Santana- Pereira, 2015, pp.15-16).

Alonso (2015) argues that the worsening of journalists' working conditions, at the aftermath of the economic crisis has triggered a process of change within the journalistic culture in Spain, "producing a reduction of the level of professionalisation of journalism and the professionalism of journalists". Hence, the profession precariousness and the economic policy of media companies, had forced journalists to see their public primarily as consumers.

Violence and physical attacks against journalists have also seen an unprecedented growth in the era of economic recession. In France, the exercise of journalism under the tense political environment framed by the Yellow Vests movement has emerged as a risky endeavour (Newman et al., 2019). In the last two years there is a worrying growth of the number of threats towards journalists, in Italy too, where several cases of verbal attacks came from government officials (Brogi, & Carlini, 2020).

In Malta, there have been multiple reports of collusion between various media enterprises, leading to the assassination of an investigative journalist and activist, Daphne Anne Caruana Galizia in 2017 (Vassallo, 2020). The assassination of Daphne Caruana Galizia is considered as a clear message to the investigative journalism community, to remain silent, while many reporters are committed to follow her investigations despite the threat they have to face (Vassallo, 2020)).

The severe financial crisis of late 2000 and early 2001 in Turkey had a devastating effect on the domestic press corps; it is estimated that between 3,000-5,000 journalists and media workers lost their jobs. The job insecurity has resulted in the intensification of media owners' control, which being coupled with the lack of any union or labor support, has given birth to a suffocating working environment for the Turkish journalists (Christensen, 2007, pp. 192-193). As Yesil informs us:

> According to a report by the Turkish Journalists Union, seventy-seven journalists were fired or forced to resign in the summer of 2013 because of their Gezi coverage; the numbers are actually believed to be much higher (2016, p. 111).

As if the economic pressures from media proprietors were not enough, Turkish journalists have to face a more substantial threat to their independence and freedom, this time from another powerful actor, the state. The failed coup attempts in Turkey in 2016, stands as a landmark in the country's history of assaults against the press corps. The number of imprisoned journalists reached the highest level, at least 157, after the failed coup attempt. At least 179 media outlets were shut down. Tens of thousands of websites, most of them independent and/or Kurdish online news sites have been blocked by Telecommunications Communication Presidency (TİB). Anti-terror Law and the Penal Code have excessively cracked down on journalists (Inceoglu et al., 2016). According to the report of the Committee to Protect Journalists (2020), the number of journalists imprisoned in Turkey is 47. With this number, Turkey is categorized as one of the worst jailers of journalists in the world again (Brogi et al., 2020).

1.5 The role of the State

The interplay between the state and the media has largely arisen from the political tensions in most Southern European societies. These tensions, combined with the absence of a strong civil society, have made the state an autonomous and dominant factor. The over-extended character of the state has coincided, as noted, with the underdevelopment of capitalism. This makes the Southern European systems less self-regulatory than developed capitalist systems such as in the Liberal model. The lack of self-regulation is also noticeable at the level of politico-ideological superstructure, because with a weak civil society, even the economically dominant classes do not manage to form well-organized and cohesive pressure groups. As Hallin and Mancini (2004, p.119) note: “the state's grasp often exceeds its reach: the capacity of the state to intervene effectively is often limited by lack of resources, lack of political consensus, and clientelist relationships which diminish the capacity of the state for unified action”.

In the case of the media, the state’s intervention can be seen in various aspects (Hallin & Mancini, 2004, pp. 119-121). First, the state has played the role of censor. The direct authoritarian control of the years of dictatorship is presumably a thing of the past, but some remnants have carried over into the democratic period.

In the case of Portugal, even though there is a long history of political and religious oppression of free speech, the government has guaranteed a secure environment for journalists. However, upon governmental request journalists must reveal their sources to the authorities (Nobre – Correia, 1997). Based on the defamation law Silvio Berlusconi sued daily newspapers for unfavorable articles about his private life. Strict defamation laws are active in France where racial and religiously verbal or physical abuse, along with written or oral hate speech, Holocaust denial and other crimes against humanity are condemned (WAN – IFRA, 2010). The Spanish law explicitly prohibits prior censorship (Salaverría & Baceiredo, 2017). Everyone can openly criticize the government and state institutions, while from 2007 Holocaust denial is no longer punished by sentencing to two years jail time, since the Constitutional Court decided that it was against freedom of speech (WAN – IFRA, 2010).

In Greece and Cyprus, political and religious authorities can exert their influence on media. In Greece, criminal laws are in place to enforce censorship on a wide variety of misdemeanors ranging from slander and defamation to insulting religious authorities, the head of state and even more vaguely the public mores. In Cyprus, the use of certain terms in connection with the conflict with the north of the island is restricted, as well as the denial of the Armenian genocide and other war crimes not recognised by the state. This legal framework has resulted in trials and condemnations of both journalists and citizens, usually resulting in bail and fines, but not servicing actual jail time.

Blasphemy laws are also active in Malta, where vilifying or giving offence to Roman Catholicism is considered an illegal act. Also, illegal, but carrying a lesser punishment is blasphemy to any creed tolerated by Maltese law. As in the cases of Greece and Cyprus, offence to public morality or decency is also penalized.

In Turkey, there is an extensive and highly restrictive legal framework carrying heavy penalties for a range of offences like incitement to crime, hate speech, verbally insulting the president of the Republic, the Parliament, the army, the police and justice institutions, the "contempt" of the nation, to the state or security forces and for assisting terrorist organizations. Especially on the last part, the law prohibits both circulation of news that can be regarded as spreading terrorist propaganda or writing articles that can potentially result in jeopardising the unity of the nation. Turkish legislation is so extensive, that in 1998, Turkey was the number one country in jailing journalists and intellectuals (Yesil, 2016; Vlasidis, 2001). As Christensen notes (2007, p.195), the effect of Turkish Penal Code (TCK) on the practice of journalism is clear:

> Under these legal guidelines, it would be virtually impossible for investigative journalists to, for example, expose political or military corruption, or to implicate a public official in criminal activity, without running the risk of themselves being convicted of a crime.

State censorship and punishment varies significantly from one country to the other, but the lack of transparency in state business fires responses by both journalists and the public. The climate of mistrust towards the media by politicians (more profoundly manifested in the case of Spain), anonymous cyber-attacks, along with the mistrust of the public, mob attacks during the Covid period, as well as attacks by state authorities (especially in the cases of France, Spain, Greece and Turkey) are the common characteristics that form a growing minefield, where today's journalists are expected to navigate.

Secondly, the state has also played an important role as owner of media enterprises. The electronic media have traditionally been under the total and tight control of the state, but apart from the state-owned electronic media, the state has also had significant ownership in commercial media in the Southern European countries, including in the print press (for example, the Franco regime in Spain often had state-owned newspapers) and, of course, in news agencies (Agence France Presse, the Italian Agency AGI, EFE in Spain, ANA-MPA in Greece, Anadolu Ajansi in Turkey, Agência Lusa in Portugal). Publicly funded news agencies function both to maintain the presence of the national press on the world scene and as a subsidy to domestic news media which use the service.

Thirdly, in a more indirect but more effective way, the state acts to support its policies on ownership as well as to enforce the unwritten rules of power politics by using a wide range of means of intervention which are at its disposal. These means include sizable financial aid to the press, on which individual enterprises become dependent because they cannot cover their production costs.

For example, as Hallin and Mancini (2004, p. 121) note, extensive indirect subsidies have been provided to the press in the form of tax breaks, reduced utility rates and the like. In France, for instance, direct subsidies in 2005 amounted to 249,2 million euro, while the non-direct subsidies were far higher. The French subsidies system dating back to 1944 is essential for the newspapers and magazines' survival, however, it is strongly criticised since grants are directed to a few outlets.

Politics of subsidies are a topic of controversy for Spain, since national as well as regional institutions are accused of interfering with the editorial lines. In Spain, the state is the largest spender in the media, with over €2bn pumped in media operations annually. Among the forms of funding are state subsidies given to the national public broadcaster RTVE and to the network of regional public media companies, indirect state contributions disguised as taxes, as well as advertising in the media bought with public money (Campos-Freire et al., 2020, p.4). Governmental choices here are critical for the economic sustainability of some of the small and medium size media companies (Artero & Sanchez-Tabernero, 2016, p.328).

The topic of governmental interference with the media, aroused from its role as financial patron, has recently been again in the spotlight of the public debate in Greece, following the lack of transparency for the state's subsidies to newspapers and media to cope with the Covid pandemic. The Greek media have urged the government for support to sustain their business. The government took several measures, mainly to promote a major campaign. Adversarial media or media supporting the Opposition as well the major Opposition accused the government of discrimination regarding the allocation of the 'Covid-ads'. The pandemic has confirmed that the Greek media seem eventually to applaud the model of an interventionist state even in the digital age.

In Turkey, public funding is also a source of tension in the country's public scene. According to Nielsen's relative data, in the year 2015, 6 newspapers of the "pool media" (Yeni Şafak, Akşam, Türkiye, Sabah, Yeni Akit, Takvim) received 62.5% of printed media ads given by 16 government- run companies in the first half of 2014, even though the circulation of these newspapers barely exceeds 25 % of the total market share. On the other hand, six anti-government newspapers, Zaman, Bugün (pro-Gülen), Cumhuriyet, Sözcü, BirGün, and Evrensel (left-wing) received only 2.2 % of total ad revenues (Irak, 2016, p.344).

In Malta, there is neither legal framework nor transparency in the allocation of state advertising, while national media experts hold the opinion that the government uses state advertising in pre-election period, but also all year long, as a form of political advertising to channel money to certain media outlets (Nenadic, 2016, p.7).

Italy, during the last five years, is encountering major transformations regarding the system of public funding in the media: One was the establishment of the so-called Unique Fund for Pluralism and Information Innovation, with a primary goal of optimizing the system of public funding in the media, whereas political parties excluded from the system. Thus, the allocation of public funds to the media is now based on a set of newly introduced "merit-based criteria". In addition, the 2020 Budget Law introduced provisions, according to which direct funds to publishers are going to be gradually eliminated in the years to come and will have come to an end by the year 2024. Indirect public support has already been abandoned in 2020 (Trevisan, 2020, p.5).

In Portugal, this issue is not that controversial, since the state is engaged more into a system of incentives in areas such as technological modernisation, professional education, and media literacy (Correia & Martins, 2017).

By and large, state subsidies to the media, especially the press take the form of "soft" loans, subsidies both overt and covert, and state jobs and other subsidies offered to many journalists. Finally, the central role of the state in the Mediterranean media systems has no doubt limited the tendency of the media to play the "watchdog" role so widely valued in the prevailing liberal media theory. The financial dependence of media on the state and the persistence of restrictive rules on privacy and the publication of official information have combined with the intertwining of media and political elites and – especially in the French case – with a highly centralized state not prone to the kind of "leaks" of information that characterize the American system, to produce a journalistic culture which has historically been cautious about reporting information which would be embarrassing to state officials.

1.5.1 "Savage Deregulation"

Across Europe, broadcasting has been in ferment, as governments of every political spectrum try to cope with the stress and upheavals caused by the deregulation. In Mediterranean countries, broadcasting and politics seem to form an inextricable relationship. The imminent deregulation of broadcasting in most Southern European countries has been associated with progressive politics and eventually led by a haphazard reaction of the politics of the time, rather than a coherent plan. In short, the deregulation of Southern European broadcasting systems has led to an unregulated environment as market logic has in recent years been allowed to develop essentially unchecked. The dominance of private television as well as the downgrading of public broadcasters has increasingly forced politicians to have good relations with the media owners.

Italy never really developed a comprehensive plan as to shape the broadcast media. The laws approved in 1997 and 2004 didn't include any meaningful antitrust provisions. Unlike, France that has established advance policies for the deregulation of its broadcasting system, preparing the national media landscape for technological challenges that were about to come, Italy "has chosen a sort of normative Darwinism, effectively a non-regulation, which resulted in the consolidation of a mixed duopoly" (Mazzoleni, 2000, p.160).

In Greece, meanwhile, licence applications are not adjudicated, and large numbers of radio and TV stations continue for years in legal limbo. As Papathanasopoulos (1997, p.351) puts it "the deregulation of the broadcasting sector (in Greece) has been closely associated with politics rather than a well-organized plan according to the needs of the industry".

In Cyprus, the advent of private channels in the early 1990s took place in an almost fully deregulated environment. More precisely, the regulations allowing the establishment of private TV stations provided only the basic guidelines for licensing and operation and proved insufficient in dealing with the complexities of commercial broadcasting (Christoforou, 2010, p.240).

In Spain, as in Greece and Portugal, it could be said that public service broadcasting has in the full sense of the word never really existed. As Bonet and Guimerà i Orts note the deregulation of the TV media market in Spain was marked by a dual transformation: decentralization and liberalization. However, this procedure was not an orderly process, but was mostly the outcome of the "primacy of political interests over technical or legal ones, that is more political than rational" (2016, p.9). The lack of a consistent plan to address the challenges of the newly formed TV landscape in Portugal is best described by Traquina (1995, p. 237), by emphasizing that the deregulation has not been accompanied by a following process of "re-regulation", with the aim of specifying programme obligations to both private and public operators.

In Turkey, satellite TV channels started mushrooming in 1990, while there was neither a regulation for technical standards nor content when it all began (Sómer & Tas, 2020, p. 36). The de facto privatization by satellite channels was a major challenge for the Turkish public broadcaster. TRT has encountered- quite shortly after the launch of first private stations- not only a significant loss of the proportion of its viewers, but also of its advertising revenue. As Ürper (2016), puts it: "the privatization of broadcasting made it clear that TRT had neither the loyalty of its viewers nor the backing of the political elites".

As Hallin and Mancini (2004, p. 126) note, "It is probably significant that democracy was restored in Spain, Portugal and Greece at a time when the welfare state was on the defensive in Europe, and global forces of neoliberalism were strong; these countries missed the historical period when social democracy was at its strongest".

2 Development Trends

In the eight countries covered in this section, significant social forces have undermined the development of the media similar to North America or Western Europe. *Although the developments in the media sector may not entirely respond to the needs of their industry, yet their media systems have been surprisingly adaptable and flexible in the face of new developments*. To understand this, one must remember that most of the Southern European media systems have worked under western democratic rule for about 40 years now, and this has had suddenly to face all the upheavals that other western media systems have taken years to deal with.

The commercialization of their media systems may have led to a *de-politicization* of their content, the political affiliation of the media, especially newspapers, is always manifest in periods of intense political contention. This is also because *political parties still play an important role* in most Southern European countries. It is, therefore, as Hallin and Mancini (2004, p.140) note: "not surprising either that parties would have considerable influence on the media, nor that the media should focus to a significant degree on their activities".

However, *the logic of media markets* may under certain circumstances undermine these relationships. It can make media organizations less dependent on political subsidies, substitute marketing for political criteria in the making of news decisions and discourage identification with particular political positions. It may also make media enterprises too expensive for most politicians to afford or even for most industrialists to buy purely for political motives. Or it can exactly the opposite since *in the age of digital media and the* *subsequent plethora of digital media outlets and the meteoric rise of the social media one sees the emergence of echo champers leading to further polarization and the rapid development of the niche media market* with plenty of advocacy media and commentary. If it is so, the Southern European media are well ahead compared to their Western and Northern counterparts.

Here, Mattoni and Ceccobelli (2018) have made a crucial point when they state that digitization has led to a radical transformation of politics organized around stable institutions towards what they call "non-elite" politics, with an emphasis on grass-roots participation. In other words, to use Mancini's expression "one of the major consequences of the '*technology-critical juncture*" is that it produces a general process of de-institutionalization (2020, p.5767) within "single and disperse citizens can take an active role both in news media production and circulation and in politics (2020, p.5769).

In addition, the new economic pressures brought to legacy media by *the digital technology have paved the way for a kind of de-professionalization of journalism*, since we are witnessing the physical detachment of the journalist from the newsroom, but at the same an increased obedience to editors' or owners' control as a way to safeguard his job. *The advent of social media and the emergence of do-it-yourself journalism has made the news media landscape even more uncertain for the professional journalist*, as other actors producing content for on-line and social media call for a redistribution of power in the journalistic field (Linden et al., 2021). *The lack of journalistic independence leads inevitably to a decreasing trust in the media* and ultimately to the deterioration of the democratic debate. In this sense, media regulation should move towards a new approach that could guarantee media diversity and journalistic autonomy at the European level (Cagé et al, 2017, p.23).

Finally, “globalization” may under certain circumstances undermine the close relationship between media and the political world, but it seems it does not produce the results its proponents used to argue 20 years age. *Southern European media systems seem to be more affected by the EU Europeanization processes rather than globalization*, since the EU provides with a common legal framework for and all its member states, either northern, western, or southern, have to follow.

The “Europeanization” of the EU countries could be seen as an incremental process that re-orientates the direction and shape of politics to the degree that EU political and economic dynamics become part of the organizational logic of domestic politics and policymaking (Harcourt, 2002; Radaelli, 1997). The EU “Europeanization” process will certainly affect their media systems as well. At present, however, we believe that in order to understand the complexities and particularities of media systems in Southern Europe, the concept of Hallin and Mancini’s model remains crucial.

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