

The Media Systems in Europe

Continuities and
Discontinuities

Stylianos Papathanassopoulos
Andrea Miconi *Editors*

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Continuities and Discontinuities



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488

What does it aim at

- Presents the evolution of media systems in Europe
- Discusses the media systems of the European Union member states through a regional perspective
- Based on a systematic collection of data related to statistical trends in media production and consumption
- This book is open access one, which means that you read it anytime at your own convenience
- It represents an unprecedented perspective of communications field evolution with respect to all types of media

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From where it comes from: European Media Platforms: Assessing Positive and Negative Externalities for European Culture

- This book is part of the project EUMEPLAT (European Media Platforms: Assessing Positive and Negative Externalities for European Culture) that has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101004488.
- It aims to present an account of the contemporary media field focusing on the trends as well as on the challenges the national media systems within the European Union face.
- It covers a wide range of media markets, highlighting the new sectors that are emerging and outlining the factors driving the media business into the digital era.
- It finally examines the current structure of the various sectors that make up the European media market (broadcasting, the press, the Internet including platforms), identifies and assesses the major issues as well as provides a cohesive overview of each sector of the industry.



What is about & how is structured

- The book is organized in five chapters, introduction and conclusions.
- On the one hand it deals with the theoretical evolution of the media models envisaged by the seminal work of Hallin and Mancini, and
- on the other it attempts to discuss the validity of these models in the age of media convergence, digitalization and platformization.





Who are the contributors

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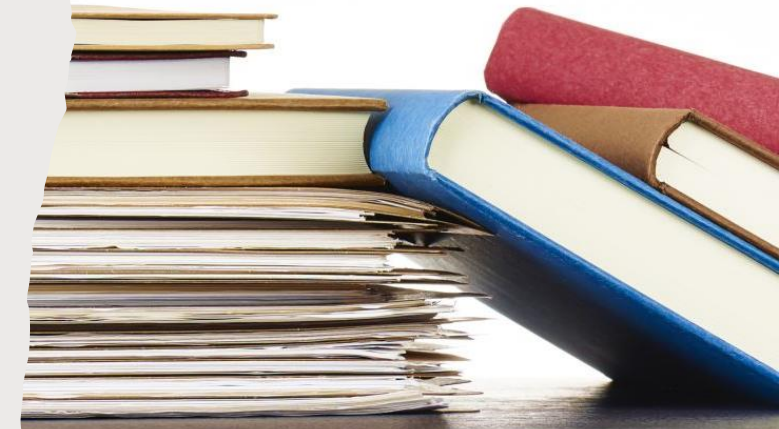
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What is our hope

- This *book* contributes to stimulating ongoing conversations in comparative media analysis, and we thank our colleagues for their contributions given the many challenges they surpassed in producing this work.
- Within this context, we should note that the task of collecting data for such a long period of time and incorporating so many countries was proven extremely and, surprisingly, difficult.
- We were astonished by the lack of available data, their compatibility, even in the case of 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 other-cases the continuity of data, and thus their validity, ceased in 2014
- When it comes to newspapers field, the providing institutions did not allow us to publish them, or in some other cases, they changed the methodology they followed for a decade.
- Even so, we have tried with our colleagues to integrate the most available data and to offer to the European media research community at least some continuity regarding the contemporary history of the European media.



What can
we see
looking
backwards?

In remembering the past, we must keep in mind that, while it is no illusion, it is elusive, a collection of shadowed memories immersed in ambiguities, wish fulfilments, and over-simplifications.

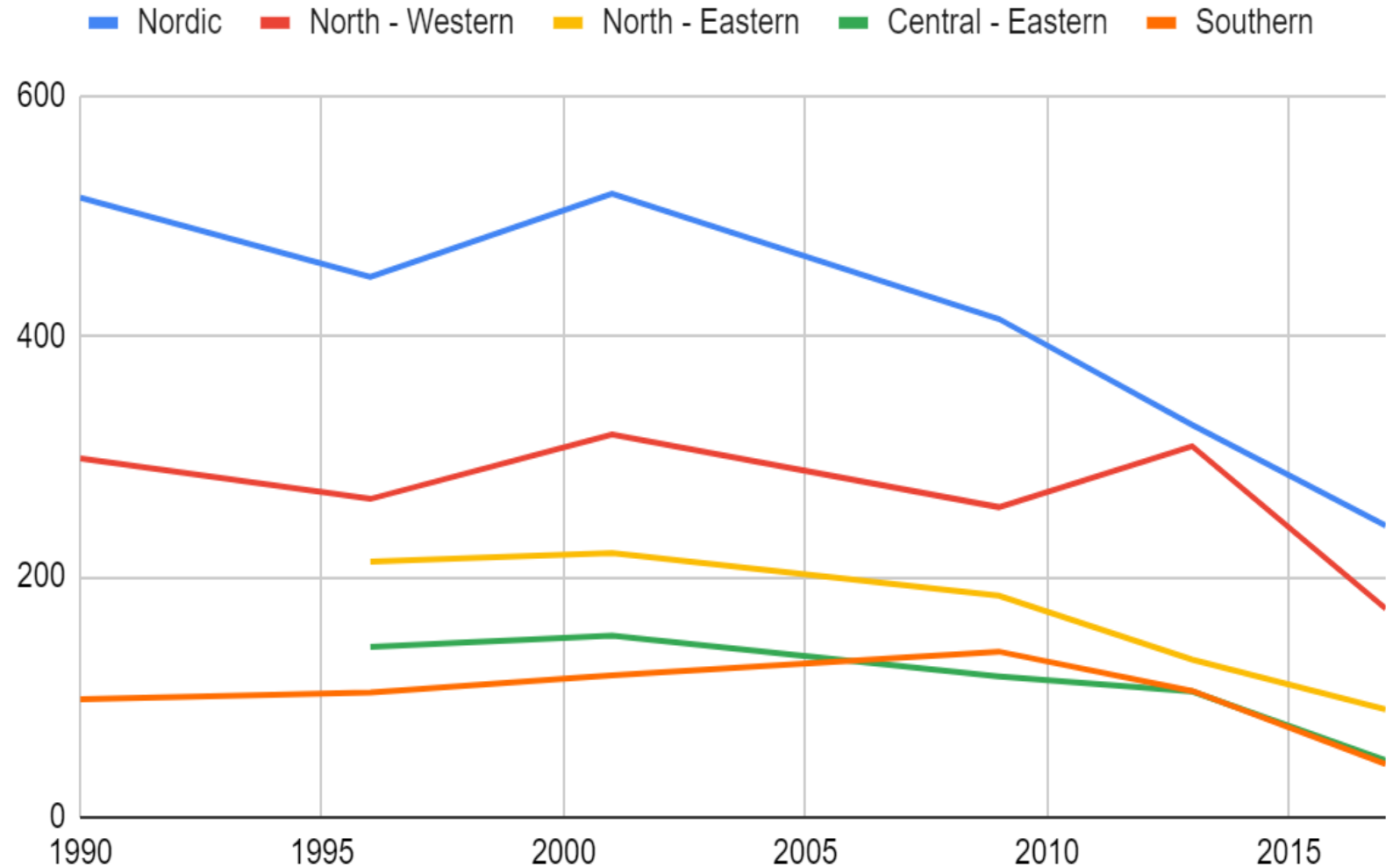
Nonetheless, there is something there to see, to learn from, to provide material for new myths.

*Neil Postman, *Building a Bridge to the 18th century*; How the past can improve our future.*

Press in decline

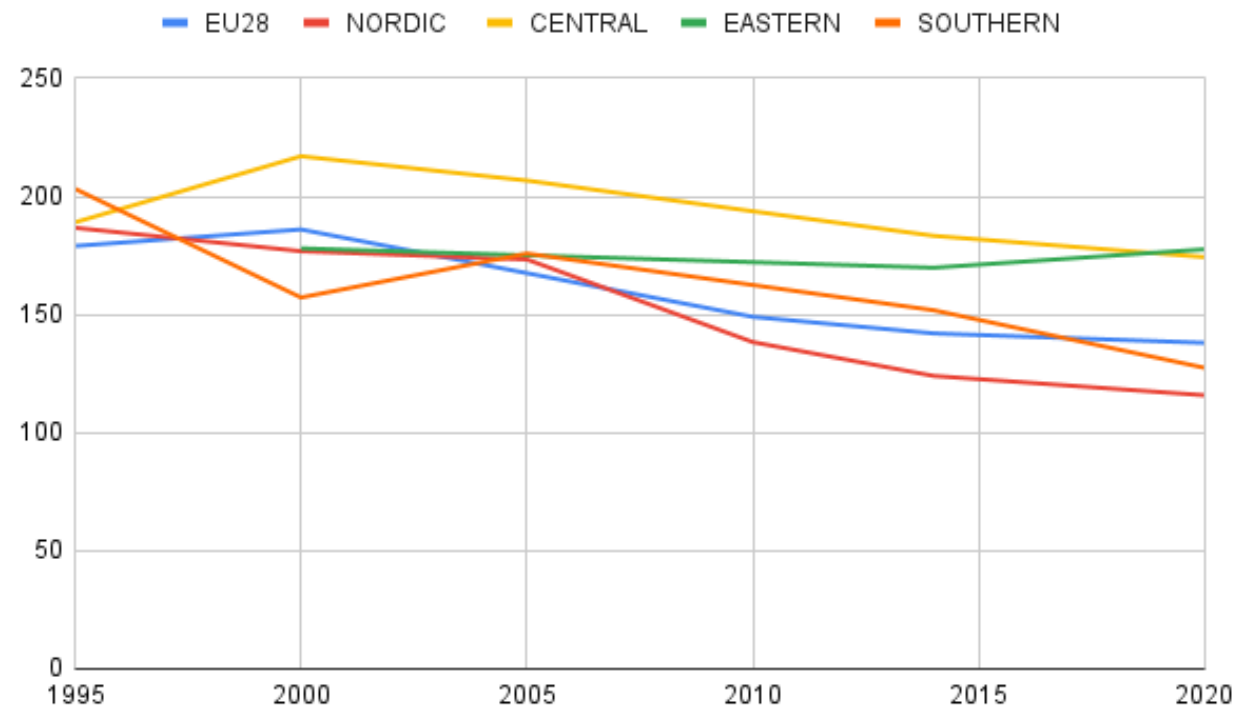
Graph: Dailies average circulation / Adult population (copies per thousand)

Newspapers avg daily circulation / adult population by region (copies per thousand)



Radio: Still resilient across Europe

- Radio *listenership has slightly diminished* in the last 30 years, with the biggest drop in Nordic and Southern Europe from 2005 to 2019.
- For **Southern Europe**, the biggest drop in radio listenership was noted in *Portugal* and *Spain*.
- In **North – Western** region there is also a drop during the same period, however not as sharp.
- On the contrary, in **Eastern Europe** and after a small drop, listenership in 2019 is back in 2010's levels.

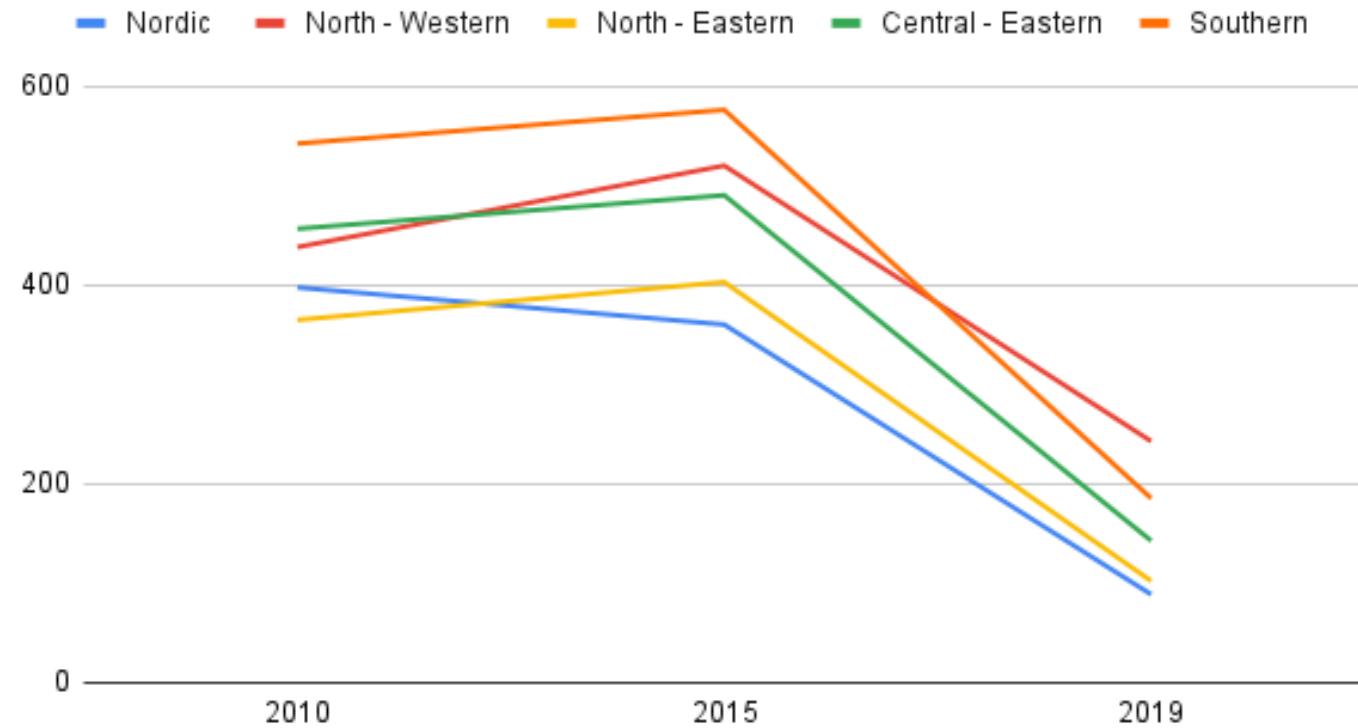


TV: Continuities and challenges in the era of “digital disruption”

The rise of thematic channels

- By **2015**, the thematic TV market had reached its **saturation** in most European regions.
- 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.
- Overall, news and business channels seem to be under threat, while **film** and **sport** channels are still resilient in most countries.

Avg number of thematic channels by region (2010 - 2019)



TV license at stake?

(+) 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. Statistics 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.

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

OTT/IPTV fast forward

OTT/IPTV (HH in thousand)

Sources: Ampere Analysis, OBS in EAO 2020 Yearbook

Table: OTT / IPTV (HH in thousand)

GEO / TIME		2005	2010	2015	2019	Change% 2019/15
North – Western Region	Austria	NA	151	269	324	+20.45
	Belgium	33	839	1 414	1 630	+15.28
	Germany	NA	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
Nordic Region	Denmark	NA	218	433	548	+4.2
	Finland	40	170	380	467	+2.0
	Norway	32	225	502	650	-4.7
	Sweden	20	532	952	1 338	+4.3
Southern Region	Cyprus	7	62	81	91	+12.3
	France	2 986	12 177	17 441	19 060	+ 9.3
	Greece	NA	55	75	208	+177.3
	Italy	162	651	76	208	+173.6
	Malta	NA	NA	19	57	+200
	Portugal	NA	648	1 518	2 098	+38.2
	Spain	207	858	2 896	4 237	+46.3
	Turkey	NA	NA	533	1 497	+180.8

Sources: Ampere Analysis, OBS in EAO 2020 Yearbook.

Europeans migrate on-line

Percentage of households with broadband Internet (%)

	GEO/TIME	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
	EU 27 (from 2020)	70	74	79	81	82	85	87	88	90	92
	EU 28 (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
	Czechia	78	:	:	:	79	:	:	:	83	85
	Estonia	65	:	:	:	87	:	:	:	90	89
	Lithuania	56	:	:	:	67	:	:	:	81	82
Eastern Region	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
Southern Region	Slovenia	67	:	:	:	78	:	:	:	89	90
	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

Source: Eurostat

The Social media are here to stay

Table 15: Percentage of Daily /Weekly Social media users

	GEO/Time	2010	2015 *	2019*
	EU28 (2013-2020)		35/15	48/16
North – Western Region	Austria	14/20	28/24	47/25+
	Belgium	21/16	36/20	59/19+
	Germany	12/17	26/14	46/16+
	Ireland	24/22	47/14	65/17+
	Luxembourg	19/17	43/13	63/17+
	The Netherlands	30/22	53/16	64/16+
	UK	25/15	44/15	NA
Eastern Region	Bulgaria	NA	32/15	54/12
	Croatia	NA	37/11	53/11
	Czechia	NA	28/17	44/20
	Estonia	NA	42/11	55/12
	Hungary	NA	31/18	44/23
	Latvia	NA	44/12	55/11
	Lithuania	NA	38/12	57/10
	Poland	NA	28/20	39/22
	Romania	NA	31/13	48/12
	Slovakia	NA	32/18	52/11
Slovenia	NA	32/13	46/13	
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, (+): data for 2020

What have we seen?

Technology has taken the lead toward the **harmonization** of **media systems** in the EU.

The EU with its initiatives, policies and supervision has also played a significant role in the **harmonization** of **media systems** in Europe.

Globalization was an important driver for these processes.

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Europe offers an ideal context for examining interactions between global, regional and national media processes



**The question is to
what extent
European media
are ready for the
'platformization'
era**

The challenges, to a certain extent, are similar to the ones Europe has faced in the analogue era.

The European Union remains fragmented in terms of market and culture.

This makes the creative content a high-risk investment sector, whereas development and production of quality creative content is often very costly to produce.

The concerns of the analogue era are not too far away, but in a different way

- the advent of streaming TV platforms has resulted in a sharp increase in the total volume of programme hours and consequently an increase in demand for programmes.
- European TV producer income is still dominated by programme commissions and re-commissions from the main traditional networks in each market.
- The problem of Europe lies in that it is difficult to compete with the so-called 'défi Américain' at this stage.
- So, what we should do?



US dominates the fiction programming market

Most of the fictional programming is going to be distributed through IPTV platforms, smart TV sets or OTT connected devices.

Hollywood studios still dominate the world & European market.

Europe is the major importer, and in effect consumer, of US fiction programming.



Renew trust and support to PSM

- Public broadcasters continue to have an important role in the media market of Europe.
- They are currently going through probably the most significant period in their long and distinguished history because of **fundamental changes leading** to an unprecedented technological development.
- In this situation public service broadcasters face new challenges and threats since their operating costs are constantly rising while their revenues remain stable.
- Moreover, as the general offers of programs are growing, their TV market share is declining.
- This means that public service broadcasters should be transformed to **public service media platforms** to cope with the challenges the new media ecosystem.



Why?

- They have and produce in most of the cases more domestic/European programming
- Offer a diversity of genre mix
- Achieve better audience reach
- Promote European culture
- Play central role in platformization of the national and EU media systems, where citizen should come first

Renew trust and support to PSMP

- The EU should upgrade the 'Protocol of Amsterdam' (annexed to the E.U. Treaty of Amsterdam, October 2, 1997) considering the new developments, otherwise the public service media, an important component of European societies, will be lost in the pay-society era.

***The EU should
renew its trust,
commitment and
support on public
service media
platforms and will
safeguard their
public funding and
mission***



Safeguarding the Press

- The gradual disappearance of the newspapers in Europe would be a major upset for the European media landscape and culture.
- Newspapers like public service broadcasters have faced considerable problems for their survival in the age of new media, globalization and digitalization.
- Newspapers are part of the European culture
- **The European Union, regardless the difficulties, must make a difference and promote the survival of the newspapers in some forms, probably through projects that will connect newspapers to education.** Since the media develop and become older with their audiences, newspapers need new younger audiences.



Support 'smaller' media markets

- The developments in the communications field cannot easily be followed by the 'smaller' European countries in terms of power, resources and market size.
- The policies of the 'smaller' countries must take in account the policies of 'larger' countries, rather than the other way round.
- The result is that those countries, in most cases, try to cope with the changes in the European media landscape.
- *The EU must adopt a policy framework that will help with **funding and expertise smaller EU members to better adjust their policies to the new initiatives and developments.***
- The experiences from the Euro-crisis could be an example.



New regulatory bodies needed

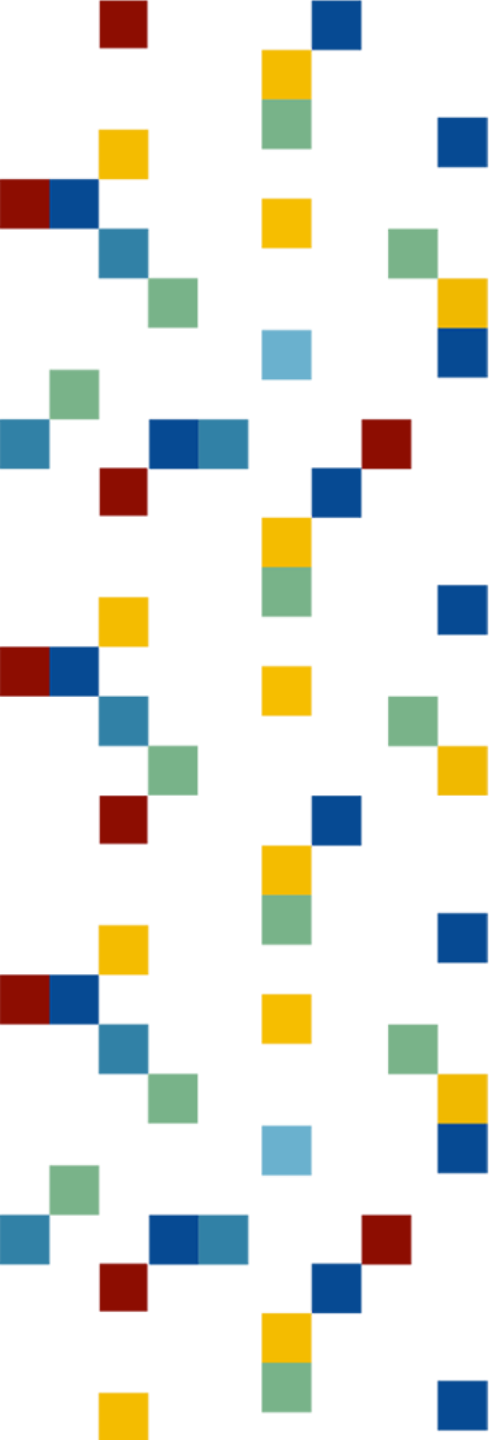
Europe has witnessed an impressive array of new media developments in the last 30 years.

In the same period, the EU has expanded its policy to provide with a framework favorable to the development and harmonization of the communications.

The new Audiovisual Media Services Directive has expanded its provision not only to television, but also to online media. But we need more.

In the new convergent communications environment, the EU should take the initiative to convince its member states to adopt a new way of regulating the industry.

The EU might search for the formation of new regulatory authorities that will oversee the entire communications sector and not only parts of it.



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