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The Media Systems in Europe

Continuities and Discontinuities

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Introduction

Stylianos Papathanassopoulos and Andrea Miconi

Abstract The media in Europe have radically changed since 1990. But even within Europe, the processes or mechanisms of "oversight" varied according to individual political and cultural traditions. In effect a major element of the European media has been that they have been characterized by great diversity. The media in Europe are not only different media systems between the West and the East but also among the southern, central and the northern European countries. Hallin and Mancini, in their seminal work *Comparing Media Systems*, have suggested three models which describe the media systems in mainly "old" Western Europe. 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. In effect, we consider that theoretical approach envisioned by Hallin and Mancini might still be a place for the concept of media systems among comparative studies in the digital era considering the new developments in the media systems. The latter are not simply a consequence of processes of globalization but also outcomes of technological change, policy making and economics and the Europeanization process which help give shape to the new world and to the media order. This book is based on some of the historical findings of a larger project entitled "European Media Platforms: Assessing Positive and Negative Externalities for European Culture" funded by 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 problems the national media systems within the European Union face.

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1 Introduction

The media in Europe have radically changed since 1990. The number of TV channels has increased dramatically, and at the same time privatization and commercialization have become dominant. In the same period, 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 hand, altering the dynamics of the existing structure. Nevertheless, these developments are not new. In effect, they have been refocused by several contemporary trends.

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 almost all aspects of the media sector—from technology developments, distribution, production to funding.

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 latter 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 and controlled by the Communist Party and fully subsidized from the state budget (Sparks, 2000, p. 45; Stevenson, 1994, pp. 194–195; Vartanova, 2002).

The second and in effect a major element of the European media has been that they have been characterized by great diversity. In effect, there are not only different media systems between the "old" and the "new" European countries but also among the southern, central and northern European countries. A multitude of examples illustrate this. For instance, 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 licence 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.

2 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 their approach, to a certain extent, might 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:

(a) 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.
(b) The "Democratic Corporatist Model" 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.
(c) And finally the "Liberal Model" 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, while 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 (Castro Herrero et al., 2017; Hallin & Mancini, 2012; Sparks, 2000; Thomass & Kleinsteuber, 2011) and to the diffusion of the web and digital media (Wessler et al., 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 book.

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 of fact, in Hallin and Mancini, it all began with this very oscillation (2004, pp. 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, Brüggemann et al. (2014) have tried to test it. As Mancini and Hallin explicitly have called for more data, the authors break down the 4 original dimensions into more than 20 measurable indicators, as shown in Table 1.

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

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 subsidies • Tax reductions

Source: adapted from Brüggemann et al. (2014)

Fengler et al. (2015) on 14 countries. 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).

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 15 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 et al., 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; Mancini & Zielonka, 2012).

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 Brüggemann et al. (2014)

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 13 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 et al., 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 analysed 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.

3 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 centre of their media market analysis as well as they tried to identify alternative patterns of news consumption diet, comparing newspaper and TV news.

Nossek et al. (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 et al., 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 favour 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, context-driven, with an emphasis on the audiences, market fragmentation, as well as the specific traits of the local advertising market (El Richani, 2012, p. 4).

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).

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 used 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 aimed 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 tried to examine if there is a concrete "response" to the "digital challenge" between the countries.

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. The digital disruption provoked by global intermediaries sets a huge challenge for the sustainability of small national media markets, and even transnational regulatory bodies like the EU are facing a hard time to regulate digital platforms that are based overseas. As a result, some scholars argue in favour of the "declining state thesis", while others suggest that at the national level, governments still exercise power in policy making (for a thorough discussion, see Iosifidis, 2016). Despite the need of a concrete supranational "answer" to the threat established by platforms like Facebook or Netflix, policy making in the regional level still matters (Enli et al., 2019). More than the diminishing role of state interventions in the shaping of media markets, we are witnessing a change in the form of these interventions.

As Mancini has suggested (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). Other, suggest that the dimension of "state intervention" is in fact a multidimensional category and propose its further distinguishment in three indicators in order to better standardize and measure the state's role in the media market (Brüggemann et al., 2014). More precisely, in their revised model for comparing media systems, Brüggemann et al. (2014) 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". Accordingly, 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 and cross media (print/broadcast) ownership regulation.

5 Journalistic Professionalism: A Prerequisite of Media Trust?

More precisely, 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 either limited by external forces, such as political or economic pressures, or 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). New technologies have altered the daily working routines of journalists, but overall, the role played by journalists in the news production cycle has not been replaced. As Wiik (2009) suggests, fears of deprofessionalization of journalism are groundlessness, since even if journalism is being reshaped as an answer to the critical changes in the journalistic field, it still holds its traditional professional ideals (at least in a theoretical level). These traditional journalistic ideals are the tools for the legitimizing of journalism. Thus, the indicators proposed by Hallin and Mancini for the evaluation of journalistic professionalism are still of value.

In their study, Henke et al. (2020) investigated how the use of evidence in journalistic outputs promotes the credibility of a news story and concluded that scientific sources, statistical information and the visualization of statistical data are all forms of journalistic evidence that can enhance the quality evaluation and the perceived credibility of a journalistic story. In other words, the issue of journalistic epistemology is now more crucial than ever. Or put it in Humprecht's et al. (2022) words, "the existence of quality criteria and norms that signal journalistic excellence for most journalists can still be regarded as an important dimension of journalistic professionalism".

6 The Organization of the Book

In effect, we consider that theoretical approach envisioned by Hallin and Mancini might still be a place for the concept of media systems among comparative studies in the digital era considering the new developments in the media systems. The latter are not simply a consequence of processes of globalization but also outcomes of technological change, policy making and economics and the Europeanization process which help give shape to the new world and to the media order. We consider 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).

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of the European Union. Neither the European Union institutions and bodies nor any person acting on their behalf may be held responsible for the use which may be made of the information contained therein.

This book aims to present an account of the contemporary media field focusing on the trends as well as on the problems the national media systems within 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 finally 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 provides an overview of each sector of the industry.

This book apart from the present Introduction is organized in five chapters and conclusions. The next chapter "On Western and Eastern Media Systems: Continuities and Discontinuities" deals with the theoretical evolution of the media models envisaged by the seminal work of Hallin and Mancini, and *then it* attempts to discuss the validity of these models in the age of media convergence, digitalization and platformization. Chapter "Europe and the Media in 1990–2020" is an overview of the state of the media developments in Europe between 1990 and 2020. Following chapters "The Media in North-Western Europe in the Last Three Decades", "Nordic Media Systems", "Southern Media Systems; Continuities, Changes & Challenges" and "The Media in Eastern Europe" are consist of more detailed reports regarding the development of media for each region, West, Central, North, Eastern and Southern Europe.

Our hope is that 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 with 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 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 they 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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On Western and Eastern Media Systems: Continuities and Discontinuities

Andrea Miconi and Stylianos Papathanassopoulos

Abstract This chapter aims to discuss the relevant literature related to Mancini and Hallin's comparative media systems model, taking into account the case of the Eastern European media as well. It is tried to draw the main features of the so-called post-Socialist media markets. After a brief discussion on how media systems change across time and vary across space, the chapter explores to what extent we can add a "post-communist" cluster to the initial Hallin and Mancini's classification. It is assumed that the post-Socialist transition has deeply changed the social and economic tissue of all ex-Eastern European countries. As the case of media in Eastern Europe reveals even in countries with a shared social political past, there is still ground for specificities to be flourished that eventually will lead to different paths of media market development. It is argued that even if we witness the triumph of certain general tendencies of what is described as the consolidation of media market globalization, this process could not be understood in its full potentials, without taking into consideration how the political, cultural, and economic "legacy" of each European member state.

Keywords Media models · Western model · Eastern media · Media systems

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1 Introduction

The aim of this chapter is to discuss the relevant academic literature related to the comparative media systems model, taking into account the case of the Eastern European media as well. In effect, we will try to sketch the main features of the so-called post-Socialist media markets. Based on scientific literature, Hallin and Mancini's model stands as the most significant framework for wide-scale comparative analysis. Their models, while being ultimately inspired by Wilbur Schramm's recognition on press systems (Siebert et al., 1956), make 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; and role of the State. As this book is focused on the European media, we will not consider the case of the North American media, as mentioned in the Introduction. When we narrow down the observation to the European context, the missing spot of the picture is, with no doubt, the case of the Eastern media. Here the methodological issues raised in the introduction of this book—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, p. 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, p. 32).

2 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 (Hallin & Mancini, 2013, p. 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 approaches, all originally inspired by this frame (Table 1).

A first relevant analysis has been realized by Castro Herrero et al. (2017), which 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; and use of online news outlets. With the exception of the latter, those

Table 1 Dimensions and indicators for Eastern media systems

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

Source: Adapted from Castro Herrero et al. (2017)

Table 2 Eastern media systems: a first model

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	–	–	+	+

Source: Castro Herrero et al. (2017)

elements seem to directly fit the historical case of post-Socialist countries. By also drawing on their previous research (Brüggemann et al., 2014), the authors list out a series of empirical indicators, synthetized in the matrix below (Table 2).

When we talk about 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 11 considered countries in terms of such general categories. Peruško, Vozab, and Čuvalo made a similar attempt, in their comparative analysis of 23 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 newspaper circulation; advancement of creative production; and index of globalization (Peruško et al., 2015, pp. 347–349). Based on these dimensions, they sort out the countries into four clusters, as in Table 3.

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 (see Allern & Pollack, 2017). The intuitive and empirically evident specificity of Scandinavian media is rarely accounted for, in comparative media studies. In their analysis on media systems in the digital age, Humprecht et al. (2022) combined the model originally conceived by Hallin and Mancini and operationalized by Brüggemann et al. (2014) with indicators that are better situated to describe the contemporary changes in the media market, such as online audience responsiveness. They also included in their study media freedom as a central variable, which used to be excluded from prior studies that were mainly focused on Western Europe or USA. But as the authors suggest when incorporating onto the analysis countries from Central and Eastern Europe, information freedom provides a crucial point of reference for comparing media systems. Their cluster analysis resulted in three groups of media systems, where the Eastern European media systems as seen below are divided between the polarized-pluralist cluster and a hybrid cluster. According to the authors, the media systems of Hungary, Romania, Bulgaria, 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 the USA or the UK (Table 4).

With respect to the main object of this chapter, 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,

Table 3 Eastern media systems: a second model

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

Source: adapted from Peruško et al. (2015)

Table 4 Eastern media systems: a third model

Cluster	Countries	Main characteristics in comparison
Democratic-corporatist	Finland, Denmark, Norway, Sweden, Austria, Germany, Switzerland, Netherlands	High degree of journalistic professionalism; inclusive media market; strong role of the state; low degrees of political parallelism
Polarized-pluralist	Bulgaria, Cyprus, Croatia, Greece, Hungary, Latvia, Montenegro, Poland Romania, Slovakia, Slovenia, Spain	Lower levels of journalistic professionalism; weaker media market; lower levels of state support; higher levels of political parallelism
Hybrid cluster (situated between the two extremes of democratic corporatist and polarized-pluralist model	USA, UK, Ireland, France, Italy, Portugal, Belgium, Czech Republic, Estonia, Lithuania	Lower state support and journalistic professionalism compared to countries of the democratic corporatist cluster and slightly lower levels of political parallelism, as well as weaker inclusiveness of media market

Source: adapted from Humprecht et al. (2022)

they "identified more with Scandinavia than with Soviet Union" (Jakubowicz & Sükösd, 2008a, p. 28, 2008b). 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., Castro Herrero et al., 2017; Dobek-Ostrowska, 2015, 2019; Jakubowicz & Sükösd, 2008a, 2008b; Peruško et al., 2015). 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 should rely on existing categorizations—which is what Hallin and Mancini have partially done, with respect to Giovanni Sartori's work (1976, p. 13) on political and societal pluralism. Upon the "relative independence" of any social field, to recall Pierre Bourdieu's legendary lesson (1983, p. 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, 2022). 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 5).

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, p. 5). One may put into question, on the other hand,

Table 5 Three empirical patterns

	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

Source: adapted from Peruško et al. (2015)

the choice of a typical categorization in terms of open versus closed systems, where—as Thomass and Kleinsteuber would put it (2011, p. 27)—"the western liberal model is the measure of classification and uses the binary code of 'free' and 'unfree' media".

What is equally interesting is how the above clusters neither respect the three spaces defined by Hallin and Mancini nor totally overlap with East/West territorial distinctions. In some way, 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, pp. 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, p. 382). Hence, Dobek-Ostrowska imagines four consecutive stages of institutional and societal reformation: pre-transition; primary transition; secondary transition; and late or mature transition. The specific position of each of the 21 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; and penetration rate of the Internet. Four different Eastern media systems emerge, which can be eventually identified as hybrid liberal, politicized, transition, and authoritarian (Table 6).

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 the 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 and Herzegovina, Kosovo, Moldova, and Ukraine are not considered in Peruško's two taxonomies.

Probably, the most controversial category is the last one to appear in Dobek-Ostrowska's scheme—that of *authoritarian* systems, sometimes including Hungary (Bajomi-Lázár, 2015, pp. 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 among three clusters (2008a, 2008b, p. 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. 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.

Table 6 Eastern media systems: a fourth model

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

Source: adapted from Dobek-Ostrowska (2015)

In Auksė Balčytienė and Kristina Juraitė's work (2015), 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 is that of transition (Table 7).

3 Media Systems in Transition?

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, p. 44). In the original Hallin and Mancini's theoretical framework, one may recall late and problematic transition to democracy was actually a feature of the polarized-pluralist system, including

Table 7 Clustering of eight Eastern European countries by public perception of media and democracy

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

Source: adapted from Balčytienė and Juraitė (2015) countries that restored their parliamentary democracies in the 1970s or underwent a turbulent post-War experience. To a certain 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 (Dobek-Ostrowska, 2012; Jakubowicz, 2008; Wyka, 2008). Analogous conclusions are reached by Peruško and Čuvalo (2014, p. 149) in their analysis of post-Socialist Croatian TV or 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, pp. 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 (Huntington, 1991, pp. 13–26). 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 (Table 8).

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, pp. 24–25). In his view, Eastern European transformation would belong to a third historical wave, following the first

Table 10 Eastern and Western European media systems

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

Source: adapted from Gross (2004)

Table 8 Democratization waves in Southern and Eastern European countries

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

Source: adapted from Huntington (1991)

Table 9 Three models of socialist TV systems

	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

Source: adapted from Mihelj and Huxtable (2018)

one in Spain, Greece, and Portugal, between 1967 and 1974, and the second one in Latin America, during the 1980s (2010, pp. 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 et al., 2015, p. 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"; and position in the core-periphery scheme (2018, pp. 81–87) (Table 9).

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 (2012), 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 et al., 2015, p. 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 (Gross, 2004, pp. 127–128). The same distinction between transition towards Western rules and consolidation of democratic media has been proposed by Bajomi-Lázár (2008, p. 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, pp. 230, 248–249) and in such a way to remind us that history does not follow 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 the main issue for both theoretical and methodological investigations.

What systemic analysis 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 et al., 2008, p. 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 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, p. 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 Table 10.

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, pp. 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, pp. 264–265) (Table 11).

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 Brüggemann et al. (2014) have already codified in terms of confusion between "news" and "commentary."

Regarding the overall utility of Gross' scheme, one might make are 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, p.184) we know as *orientalism*—with Eastern Europe sometimes being framed in a negative, generalized idea of "otherness" (low/high level of

Table 11 Level of politicization in Eastern media systems

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

Source: adapted from Dobek-Ostrowska (2019) 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, p. 143).

From the methodological standpoint, the most advanced attempt of dealing with the transitional nature of Eastern media system is probably that of Peruško et al. (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

Table 12 Indicators for former Yugoslavian countries transitions

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	Accommodative 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

Source: adapted from Peruško et al. (2021)

which the establishment of the press. A synthesis of the indicators is provided below (Table 12).

Against this backdrop, the authors perform a multi-factorial analysis, to 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 to be 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 13, as they identify the "sufficient conditions" necessary to the development of media markets of various types.

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 tell apart the role of agency and structure in the shaping of media systems (2021, pp. 194–200)—an intriguing task, the latter, that would probably require a more specific investigation (see Fu, 2003, pp. 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; and between the degree of literacy and the expansion of cultural markets (2021, p. 243). The presence of three advanced media and journalism markets back in the Socialist era—in Serbia, Croatia, and Slovenia—actually contradicts many

Table 13 State of media systems in former Yugoslavian countries

Dimension/country	Bosnia and Herzegovina	Croatia	North 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	–	+	–	–	–	+

Source: adapted from Peruško et al. (2021)

beliefs about the consubstantiality between open societies and information development while also reminding us what systemic analysis, counter-intuitively enough, should be about—*variants*.

4 Discussion and Concluding Remarks

As it might have been 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 (Mihelj & Downey, 2012), 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 is one with the epistemological one, as any ideal-typical model risks to favor a normative interpretation of the real. For 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, p. 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, pp. 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 view of 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, 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 (Kleinsteuber, 2004, pp. 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, 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 Brüggemann et al., 2014 empirical clusters can easily come to mind, here). Besides, Humprecht et al. (2022) suggest in quantitative approaches such as cluster analysis, the selection of indicators and countries "strongly affects the cluster solution."

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 since 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 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 (Moretti, 2013, pp. 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, p. 158). To our 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; and mental conceptions of the world (2011; 2015). We cannot 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 re-structuring of the systems 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 et al., 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 note, 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. As the case of media in Eastern Europe reveals even in countries with a share social political past, there is still ground for specificities to be flourished that eventually will lead to different paths of media market development. Even if we witness the triumph of certain general tendencies of what is described as the consolidation of media market globalization, this process could not be understood in its full potentials, without taking into consideration how the political, cultural, and economic "legacy" of each European member state affect the final outcome of this process, as manifested in the different shape and dynamics of the national media markets. This is the reason why comparative media analysis is still of value today, even if classic modes of analysis need to be refined to best captivate the contemporary media landscape.

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The Media in Europe 1990–2020

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Abstract The European media landscape has changed dramatically in the last 30 years. Initially were the privatization and commercialization of the broadcasting sector that led to an increase of TV channels and at the same time the decline of the press. The advent of the Internet has also 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. On the other hand, 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. This chapter tries to shed light on the emerging patterns in media production since 1990, across European countries. Initially, based on hard data, the chapter describes the changes in the media systems of the EU countries. Then it is attempted to group the similarities, continuities, and discontinuities of the media systems.

Keywords Advertising · Central · Commercialization · Eastern · European · Media models · Mediterranean · Newspapers · Northwestern · OTT · Press · Public broadcasters · Radio stations · Radio · Social media · Southern · Streaming · Thematic channels · TV channels · TV

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1 Introduction

The media sector in Europe has changed considerably in the last 30 years. The privatization and commercialization drove to an increase of TV channels and at the same time to the decline of the press. The advent of the Internet has transformed the analogue media world which has given 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. These new developments have, on the one hand, created a new market and, on the other hand, have altered the dynamics of the existing structure (Papathanassopoulos & Negrine, 2011, pp. 17–25).

There is no simple explanation for these complex processes of change. Neither one can say that there is a common universal trend, even a common model, across Europe. The media markets incorporated in this chapter 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 in the 1980s and early 1990s brought about the restructuring of the media systems. In terms of advertising expenditure, former communist countries, after the collapse of the USSR, for more than a decade have 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, is a feature 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 (Humprecht et al. 2022; Castro Herrero et al., 2017; 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.

This chapter tries 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 (2004). Then it is attempted to group the similarities, continuities, and discontinuities of the media systems.

2 The Press Market: A Downward Trend in Sales and Readership

Within the last three decades (from 1990 to 2020), 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 platformization of the communication landscape, the viability of the press market is still a matter of an open debate. Around Europe 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 Fig. 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.

Between 1990 and 2020, the press market in the Northwestern 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 onward. An

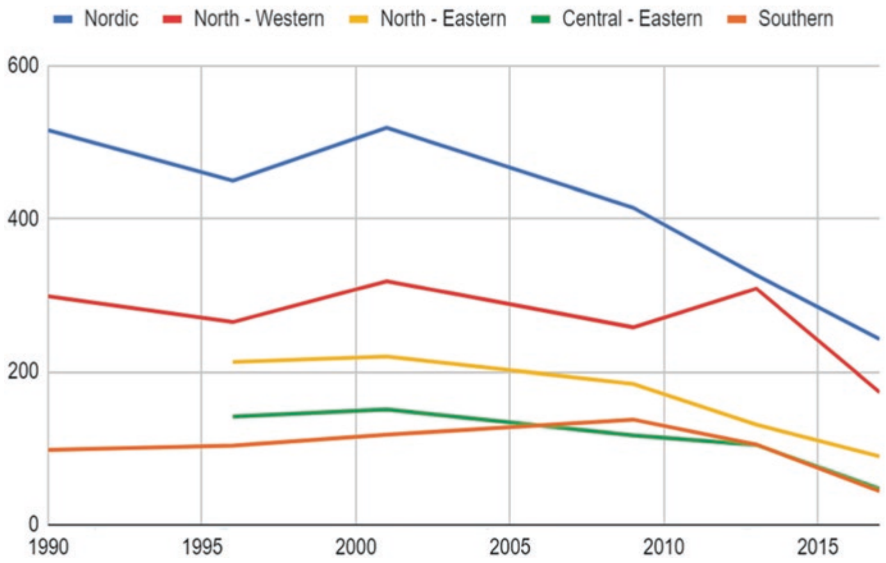

Fig. 1 Dailies average circulation/adult population (copies per thousand). Sources: World Association of newspapers–World Trends Report 1991, 1997, 2002, 2007, 2010, 2011, 2017. Compilation: Eumeplat Project

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 repeated 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 and 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 (see Chapter "Nordic Media Systems").

When examining the dailies average circulation per adult population at the four regions of the sample comparatively, one sees 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. 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, while Czechia and Lithuania also demonstrate a very high average circulation by 2009. The press market in the Northwestern European region was the first to be substantially affected by commercial TV and digitalization. Circulation of newspapers and magazines dropped during the 30-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 1).

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

Table 1 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
Northwestern 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. Compilation: Eumeplat Project

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 displays a level hardly seen anywhere else (see Chapter “Nordic Media Systems”). 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 1990–2022, one 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 and 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.

One interesting finding is that in all regions, the decline in sales and circulation is not reflected in the number of the newspaper titles (Fig. 2). In effect, 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. The number of paid-for newspapers published in the Nordic region has remained surprisingly stable since the turn of the millennium (see Fig. 2 and Chap. 5).

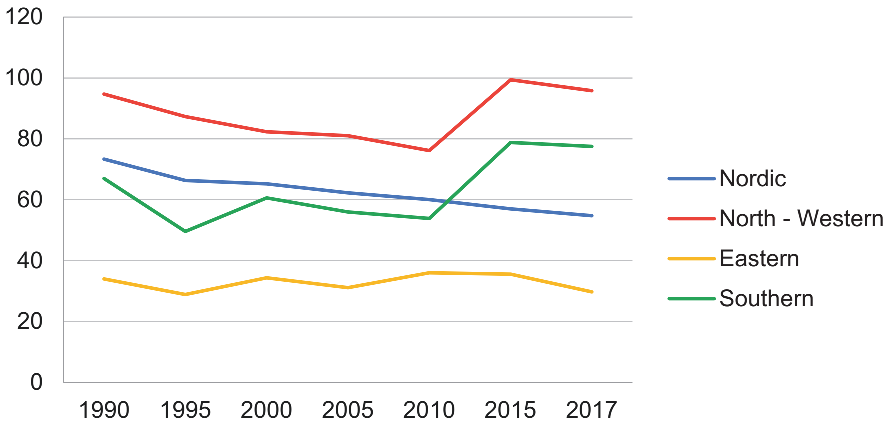

Fig. 2 The number of dailies titles (paid for) by EU region. Sources*:* World Association of newspapers–World Trends Report 2010, 2011, 2017. *Data for 2005. **Data for 2013. ***Data for 2014. Compilation: Eumeplat Project

2.1 The Press Goes Digital …

In all European countries, there is a clear shift from the print 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 Fatto Quotidiano* 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. 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, *Dagens Nyheter* and *Svenska Dagbladet*, dominate online newspaper subscriptions.

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), and in Italy (from 91 in 2002 to 108 in 2010) (data from the yearbooks of the *WAN*-IFRA).

In absolute numbers, it is reasonable that the presence of online newspapers' editions is more expanded in the larger markets of the Northwestern region, in several markets of the Nordic region, characterized by great tradition in Internet household penetration (Finland, Sweden, Norway) and in a few markets of the Southern region. It does not come as a surprise that *the advertising industry is more responsive than publishers to sales changes. 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 10 years, there have been huge declines in advertising expenditure too (see Fig. 3).

2.2 Strong Evidence of an Ongoing Shift Toward Online 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, 2010). 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.* Unfortunately, the increase of the advertising expenditure for the Internet

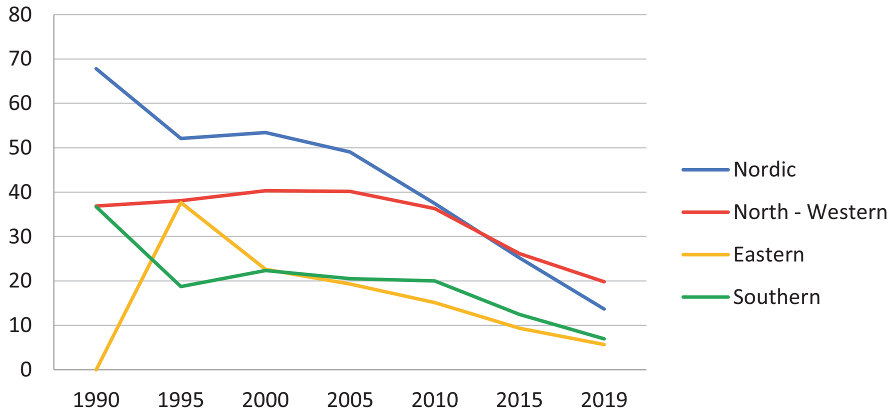

Fig. 3 Advertising expenditure in press (newspapers) by EU region (%). Sources: World Association of newspapers—World Trends Report 1991, 1997, 2002, 2007, 2010, 2015, 2020. Compilation: Eumeplat Project

was not as sharp, putting more pressure in publishers who saw revenues evaporating during these 10 years. Between 2007 and 2012, the advertising expenditure decreased by −51% in France, −39% in Spain, and approximately −60% in Greece for the same period (Papathanassopoulos, 2013). The share of advertising expenditure in press 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. 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 Northwestern Europe in the period of 2000 to 2005, with more than 60% of advertising spending allocated to 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 subsidized market of Austria, ending in mid to low single digits in 2019.

2.3 Toward 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 et al., 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* (Antheaume, 2010; Casero-Ripollés & Izquierdo-Castillo, 2013; Simon & Kadiyali, 2007). 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 1 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.

3 Radio: Still Resilient Across Europe

In Europe radio was born as a "national public institution," with the premise 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 and capture audience's attention. Nordic countries stand out as an exemption of this general trend, 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 afterward. 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 Northwestern Europe with a possible delay in Austria which was late in liberalization 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 2018, among the EU member countries with highest numbers of radio enterprises from Eastern Europe is Hungary (289), compared to Estonia (9) and Lithuania (21) (Fig. 4).

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),

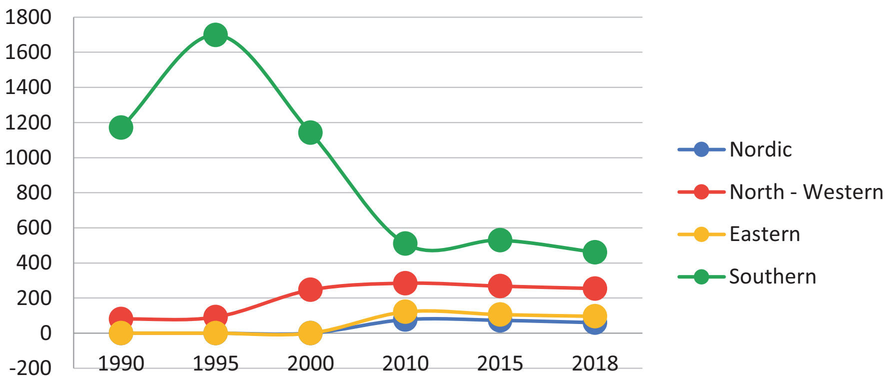

Fig. 4 Number of radio broadcasting enterprises (both public and commercial) by EU region. Sources*:* Eurostat (2021a, 2021b). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: https://appsso.eurostat.ec.europa.eu. Compilation: Eumeplat Project

Croatia (38), and Hungary (32), while the lowest ones were observed in Poland and

Slovakia with three 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).

According to Eurostat (2018), Spain leads in radio production with 781 stations, followed by Italy with 701 and Greece with 614. 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 financial crisis is also discernible to the radio market in Southern Europe. 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. According to relevant data from Eurostat, 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, while in Italy almost 40% of the employees were laid off. The tendency is visible in Eastern Europe too, as Poland is the only country in the region with a positive change rate (+26.34) between 2010 and 2018 (Fig. 5).

In Northwestern 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

[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.

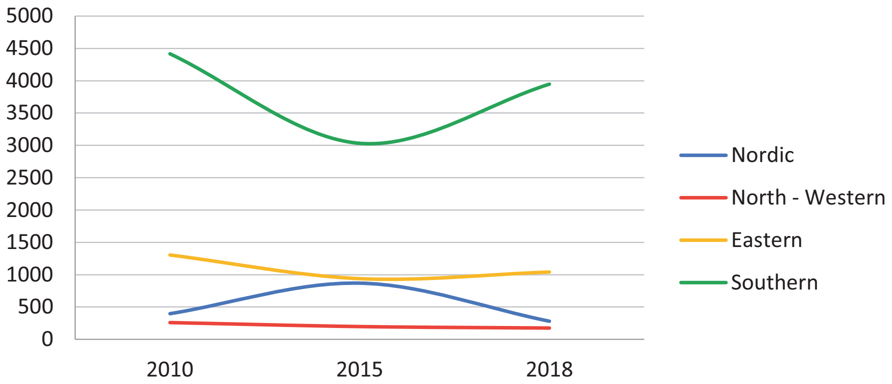

Fig. 5 Number of employees working in the radio industry 2010–2018 by EU region. Sources: Eurostat (2021a, 2021b). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: https://appsso.eurostat.ec.europa.eu. Compilation: Eumeplat Project

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 onward.

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 financial crisis. 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. 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.

Apart from Cyprus and Greece, all the countries in Southern Europe are below the EU28 median regarding the share of respondents who listen to the radio every day or almost every day (Statista, 2020). As seen in Fig. 6, radio listenership has slightly diminished in 30 years' time, 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 the Northwestern 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 at 2000's levels. In 2019 the amount of daily radio listening in Southern Europe was on average 133 min. The Mediterranean trend is therefore a bit lower than the European median of 138 min. per day (EBU, 2020a, 2020b). Daily radio listening habits range from 84 min. for Portugal to 148 min. for Cyprus and 198 min. for Greece. For Eastern Europe, Slovakia is the only one with an increase in the minutes of daily listening. The

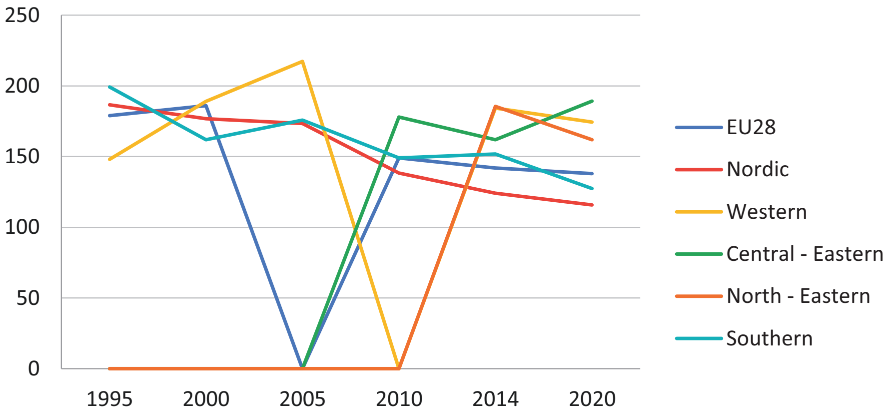

Fig. 6 Radio listenership by EU region (in min.). Sources: a: O. Debande and G. Chetrit (Debande & Chetrit, 2001) *The European Audiovisual Industry: An Overview*—07/09/01—Final version data for 1985 and 1999 respectively b: EBU, (2007) *EBU Members' Audience Trends 1994–2006*, Grand-Saconnex: EBU. c: 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. Compilation: Eumeplat Project

biggest drop is in Hungary with 82 min less. In all four countries of the Nordic region, listening time decreased from 2000 to 2019, with the biggest drop recorded in Denmark, corresponding to 90 min less listening time per day. Radio listenership in Finland has recorded the smallest drop. The developments in radio listenership have not been so dramatic in Northwestern Europe with all countries in this group well above the European average. Radio is most popular in Austria and Ireland and the least in French-speaking Belgium, the Netherlands, and the UK.

Overall, the available data regarding the advertising expenditure invested in the radio market suggest that the *radio still consists of an integral part of the media industry across Europe*. Even though terrestrial radio broadcasting 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).

4 TV: Continuities and Challenges in the Era of "Digital Disruption"

4.1 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 9893 compared to 220 in 1996 and less than 90 in 1989. Moreover, only 12% of the TV channels are public (EAO, 2011) (Fig. 7).

Almost a decade later, at the end of 2019, 11,418 TV channels were available in Europe, 4757 of them local (EAO, 2021). But most 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 program 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.

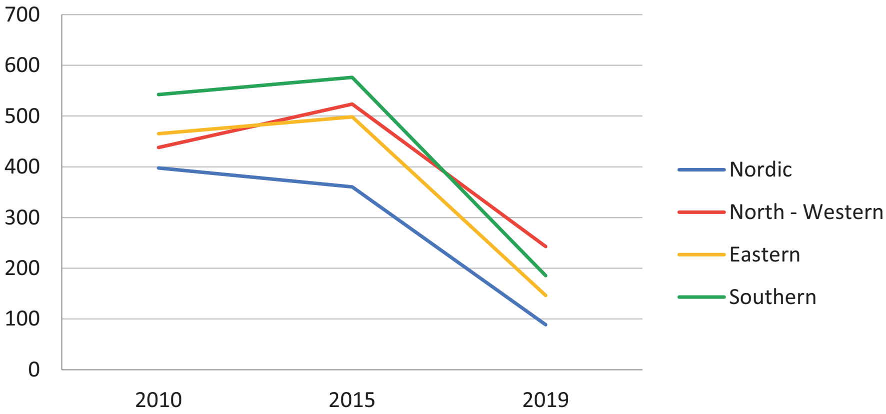

Fig. 7 The development of thematic channels in Europe by region (2010–2020). Sources: EAO (2011), vol. 2 / EAO Yearbook 2015 / EAO Yearbook 2019.*For Nordic and Eastern Region for 2010 data are from 2013. Compilation: Eumeplat Project

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 2019, 40% of thematic channels in Cyprus and Malta are related to sports in 2019 (in Cyprus 22 channels out of 52 and in Malta 10 out of 26 channels). Nevertheless, apart from Greece and Turkey, the number of sports channels is decreasing, too. Film and fiction channels are in most cases almost one in ten of the available channels.

In Eastern region there was a stable increase in the number of thematic channels in many countries under examination until 2015, followed by a sharp decline in 2019. Film and fiction channels seem to prevail the thematic TV industry of the Eastern region, being stable during the years. Generalists and sports channels present variations across countries, but still have a place in the thematic TV market.

In Nordic countries there has been a decline in the number of thematic TV channels from 2010 to 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. *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.

In terms of consumption, TV still occupies an important part of the daily lives of Southern Europeans. More importantly this trend seemed to be on the rise until 2010, where upon a reverse trend followed. For 2010 alone, the global average of TV viewing dropped slightly to 190 min per day. During the same year, the countries grouped into the Southern European model remained well above the global average. Moreover, in the next 10 years, TV viewing time continues to grow in all Southern European countries. TV viewing time is remarkably lower in the Northwestern region with its peak between 2005 and 2010 from 195 min per day in the Netherlands (2005) to 242 min in the UK (2010). The increase in time spent on watching TV that occurred in the Nordic region from 2005 to 2010 appeared in most age groups across each of the Nordic countries (only young adults in Finland and Sweden went against the trend). In the years since then, however, average viewing time has declined quite markedly. Romanians topped the Eastern European region with 329 min per day or 5 h and 29 min watching TV in 2019. On the other end of the spectrum are the citizens of Latvia, who spend only 2 h and 57 min in front of a TV set. If we compare the daily viewing time from 2015 to the one in 2019, we will see that nearly all countries have an increase in minutes; only Hungary (1.77%) and Poland (2.66%) have a slight decrease. The Internet didn't change our habit to watch TV. But for sure the Internet had changed and will continue to change our preferences on what to watch and on which channel (Fig. 8).

On the other hand, one could say that even in the digital age, TV is still a very resistant medium in Southern and most of Eastern Europe. Nevertheless, there *is a major disconnection in Southern and Eastern Europe when it comes to the hours spent in front of the TV and the reported trust in it.* Trust in TV has decreased in 14 EU countries, 2 of them from Eastern Europe—Poland and Slovakia. Still, 22 out of 28 EU member-states report high trust in TV with the highest reported in the Nordic countries (EBU, 2020a).

4.2 *Public Broadcasters: Defending Their Position in the New Television Universe*

Despite the differences in funding models, as we will see in some detail in the next section, most public channels have tried to develop strategies, to find their position in the new television order. However, these strategies vary significantly across

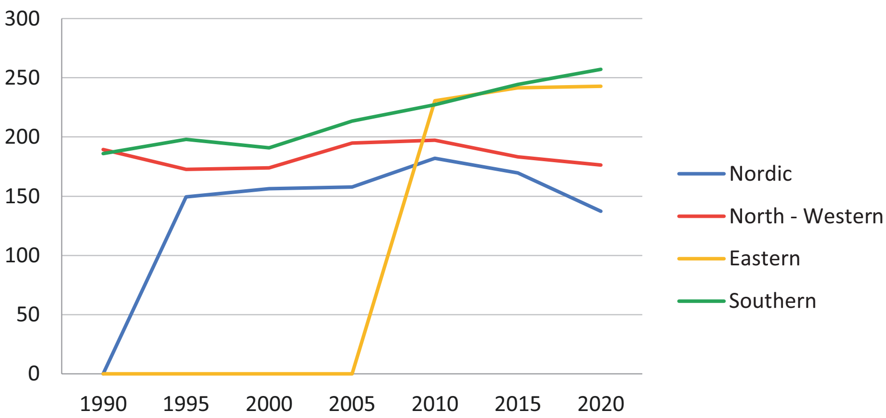

Fig. 8 TV daily viewing time by EU region (in minutes). Sources: EAO—Trends in European Television 2006, vol. 2, EAO (2011) vol. 2, EAO—Yearbook (2020)*;* EBU, TV Audiences, (2021). Compilation: Eumeplat Project

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 online 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 Northwestern 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 throughout 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 period 2010–2019. On the other hand, tighter government control on public broadcasters is becoming a trend, notably in Eastern Europe. In Poland, the conservative government has forced 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,[2] echoing the case of the Hungarian public electronic 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 Chapter "Nordic Media Systems"). From 2010 to 2015, there has been a significant increase in the number of public service terrestrial TV

[2] "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.

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 organizations (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 programs, whose success has been internationally recognized 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 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) (Fig. 9).

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 Chapter "Nordic Media Systems"). 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).

4.2.1 PSB and Public Funding

It is argued that the justification of regulatory intervention in a free media market on the premise of public interest is a thorny issue (Iosifidis, 2012, p. 6). Public funding of public broadcasters supports the production and distribution of content that

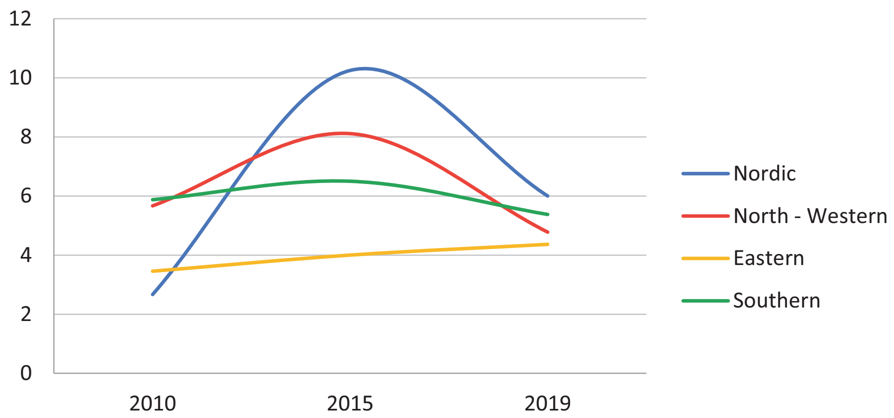

Fig. 9 The number of public TV channels in European regions. Sources: European Communities, 2003, EAO—Trends in European Television (2006), vol. 2, EAO—Trends in European Television (2011), vol. 2, EAO—Yearbook, (2010) (vol. 2, p. 120), (2016), (2019), (2020). Compilation: Eumeplat Project

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 program strategy. In effect, even nowadays m*ost of public service broadcasters rely on a mixed model of revenues from license fees, advertising, and in some cases direct funding from the state's budget.*

From 1990 to 2019 in the Northwestern 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 Euro in Ireland to 300 Euro in Austria. Comparing the funding that public audiovisual media get from government is not practical if we overlook the specific differences in each country. However, comparing what percentage of the funding came from the government will provide a clearer picture of the situation. Public broadcasters 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 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 favor 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 (Fig. 10).

According to the EBU-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* (EBU-Media Intelligence Service, 2022, p. 11).

With the notable exceptions of Spain and Cyprus, all Southern European countries rely on license fees. However, the cost of a fee is relatively low. The most expensive license is found in France (139 Euro) and the lowest in Portugal and Greece (36 Euro). 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 license fee, there is a special tax on income. Perhaps the most interesting correlation is the one between the cost of the TV license 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 license fees receive higher shares of public television ratings.

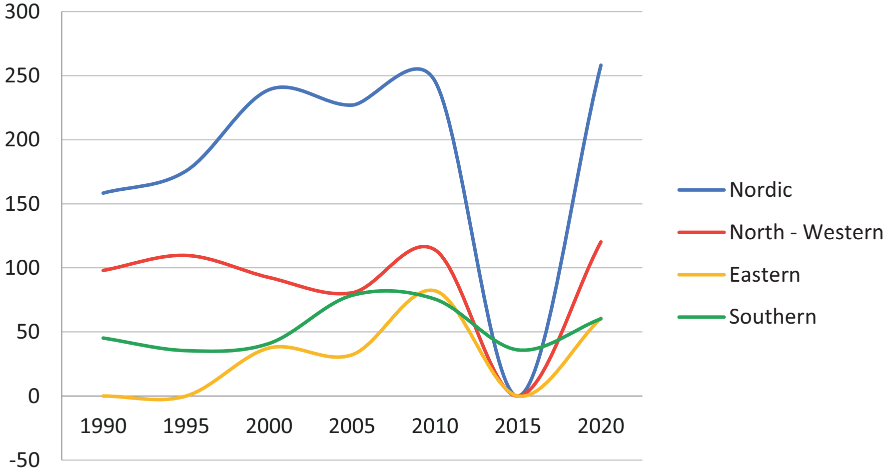

Fig. 10 TV license fee (in EUR) by EU region. Sources: North-Western Region-1990–2000: European Communities (2003), 2010: EAO Yearbook (2011) vol. 2, p. 32, 2019: EBU-MIS, Licence Fee 2020. Southern Region:1990–1995: European Commission (2003). Cinema, tv and radio in the EU. Statistics on audiovisual services. Data 1980–2002, 2000–2010: EAO—Trends in European Television 2006, vol. 2, 2019: EAO (2011) & EBU Media Intelligence Service, 2022. Eastern Europe: EAO—Trends in European Television (2006), vol. 2, EAO—Trends in European Television (2011), vol. 2, EAO—Yearbook (2016, 2019). *Data for 2009. Compilation: Eumeplat Project

During the last decade, all Nordic countries have chosen to replace the license fee with a tax model, 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 license 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. At the time of writing these lines, France was ready to scrap its TV license fee after the Senate's approval. French President Emmanuel Macron has promised during the election campaign to abolish the license fee to boost households' spending power. 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 provide a valuable contribution to the television ecosystem, since they offer a greater variety of choices to viewers, program 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 et al., 2021, p. 16).

5 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 smaller 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 Chapter "The Media in Southern Europe: Continuities, Changes and Challenges").

In the Northwestern region, most commercial TV providers distributed their programs 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 (see Chapter "The Media in Northwestern Europe in the Last Three Decades").

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 onward. 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 (see Chapter "Nordic Media Systems").

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. Although the corresponding numbers in the previous periods are missing, the particularity of Central Eastern European countries lies in that television programming was subject to a process of internationalization 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) (Fig. 11). To this trend was exposed many of these countries' markets, albeit to different extents during the various time periods (Štětka, 2012) (see Fig. 7).

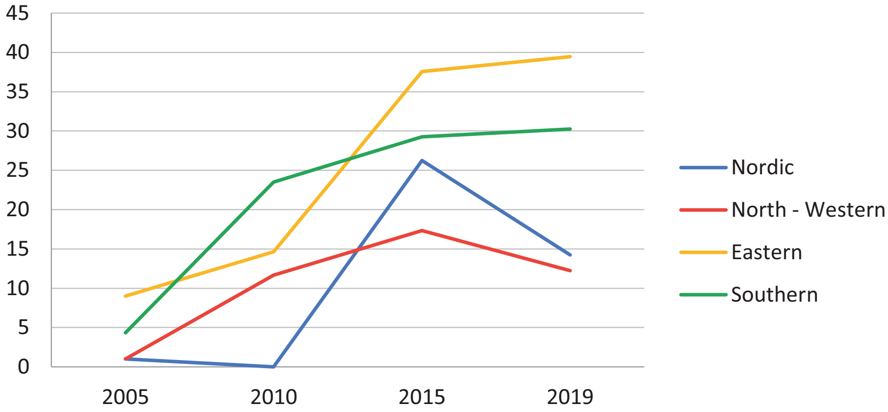

Fig. 11 Commercial terrestrial TV channels by EU region. Sources: European Communities (2003), EAO—Trends in European Television (2006), vol. 2, EAO—Trends in European Television (2011), vol. 2, EAO—Yearbook, (2000, 2010) (vol. 2.pdf, p. 120), (2016, 2019). Compilation: Eumeplat Project

5.1 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 et al., 2021). It is not a coincidence that 1990s constitutes a period of growth for cable subscription-based television both in Northwestern region and in Southern region of Europe. In the former case, the media markets that stand out in terms of subscriptions numbers are Germany, the Netherlands, and Belgium, while in the latter case, distinctive markets of increasing trends are mainly that of France and Spain (Fig. 12).

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 Chapter “Nordic Media Systems”). 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, apart from Finland, present a slight drop in the number of cable TV subscriptions, while IPTV from 2010 and onward seems to follow a steady growth (with the exception of Norway).

From 1995 to 2000, there was an increase in Pay TV operators around Europe. In effect, Pay TV is mostly connected to linear transmission, while non-linear to VoD services. However, subscription 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 has been

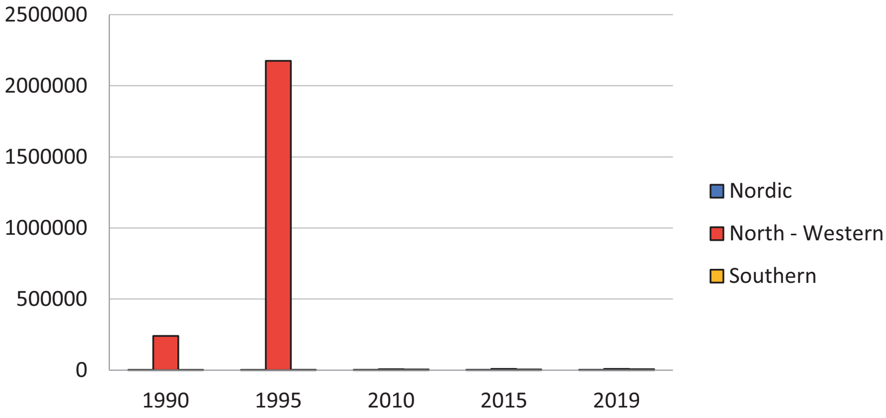

Fig. 12 Total Pay TV subscribers by EU region (in thousands). Sources: Ampere Analysis in EAO Yearbook (2020). Compilation: Eumeplat Project

supported by IPTV service providers offering their services as part of multiplay, for now mostly triple play, service bundles with flexible subscriptions and packages.

In effect, IPTV has demonstrated a fast-growing trend in most European countries, with a significant increase between 2010 and 2015 (Fig. 13).

5.2 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 30 years throughout the entire Northwestern 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

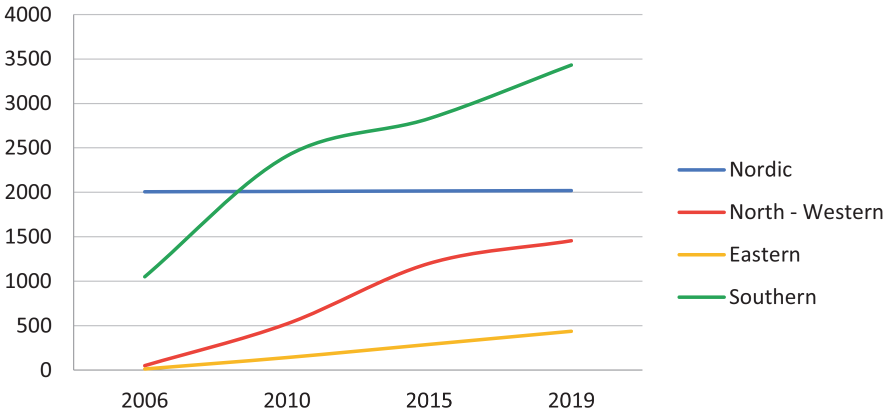

Fig. 13 OTT/IPTV by EU region (HH in thousand). Sources: Ampere Analysis, OBS in EAO (2020) Yearbook. Compilation: Eumeplat Project

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 (Fig. 14).

In Nordic countries, in contrast to the newspaper and magazine market where advertising expenditure has 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 program 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 et al. (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, thus safeguarding their viability in the future.

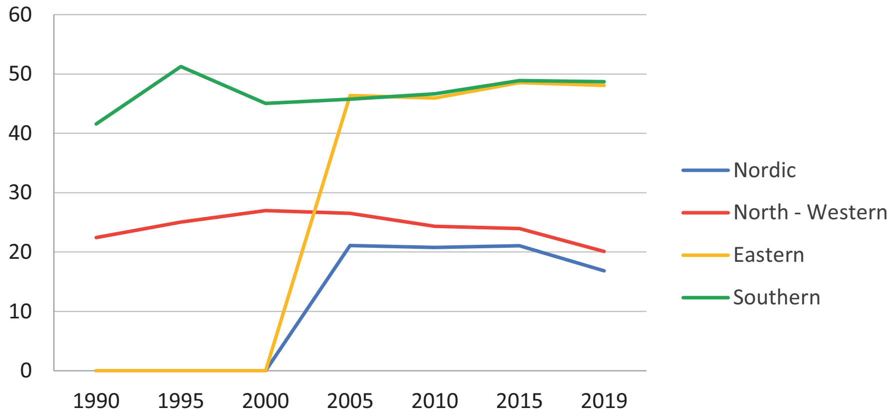

Fig. 14 TV advertising expenditure by EU region (%). Sources: For Northwestern Region data for 1990–2000: European Communities (2003). For Southern Region data for years 1990 & 1995 come from WAN, 1991 & WAN, 1996, respectively. 2001–2019: Warc © European Audiovisual Observatory, Yearbook 2020 / Annuaire 2020 / Jahrbuch 2020. Compilation: Eumeplat Project

6 Media Ownership Concentration

The liberalization of the rules governing the media systems in general and television sector 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. 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 digitalization 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), globalization and digitalization 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.*

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

European Audiovisual Observatory (EAO) 62% of the market was controlled by 15 companies in 2006, while it was further increased, up to 67% in 2010 (EAO, 2011). But things have changed dramatically since then. As the European Audiovisual Observatory observes 5 out of the world's 12 largest audiovisual groups in 2016 which 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 (UK), and Mediaset (Italy), and the public broadcasters of big European countries, ARD (Germany), the BBC (UK), France Télévisions (France), and RAI (Italy), grew by 4.6% annually between 2014 and 2019 (EAO, 2021, 54).

The COVID-19 pandemic and the subsequent lockdowns (stay safe-stay home) seem also to have facilitated the increasing importance of 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/platform 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.

7 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 (2020), as part of its Digital Decade program, 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 toward 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 Northwestern region. Nevertheless, one has to admit that 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 online (2020; OECD, 2016, 2019). 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 (see Chapter "Nordic Media Systems"). In effect, the Nordic countries seem to lead the way to the digital society (Fig. 15).

In the Northwestern European region, there is strong evidence of digitization as well, with high scores of broadband Internet penetration among the regions' households (97% of households in Netherlands in 2020 and 94% in Luxembourg in 2020 according to data from Eurostat). Austria has the best performance on mobile broadband subscription 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 Spain presenting the highest development (in 2020, 95% of Spanish households have broadband Internet connection—well above the EU average). Overall, it comes as a surprise that smaller countries and weaker economies like Cyprus and Malta have an exceptional performance in this indicator (92% and 90% 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 based on data from ITU, clearly manifests that the mobile broadband Internet has taken the lead in the national markets under

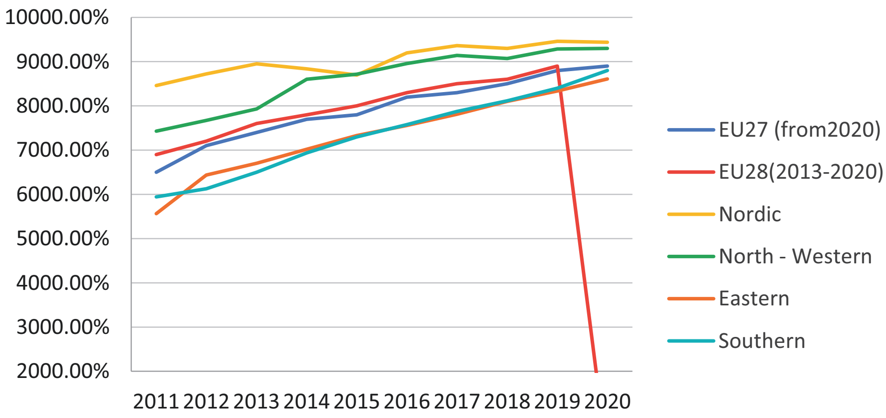

Fig. 15 Percentage of households with broadband Internet by EU region (%). Source: Eurostat, Compilation: Eumeplat Project

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 (ITU, 2019).

One interesting finding is that in countries like Greece, Cyprus, and Portugal, which have been affected disproportionally from the financial 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 Chapter "The Media in Southern Europe: Continuities, Changes and Challenges"). Additionally, countries in ex Eastern Europe seem 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 sets 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 is comprised of Slovakia, Romania, Lithuania, Croatia, and Czechia, with an average performance close to 85%.

This pattern is also discernible, if someone looks at countries' performance in the mobile broadband subscription index. For the year 2019, Estonia with 157.7 mobile broadband subscriptions per 100 inhabitants, 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 (ITU, 2019). 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) (Fig. 16).

Social media played a significant part in altering consumption habits across European societies. Even if in the beginning of their inception social media were aspired to connect individuals with shared affinity, nowadays, social media platforms like Facebook fulfill functions that were originally served by legacy media, by standing out as important *micro agenda setters* (Wohn & Bowe, 2016).

Social media use among the Europeans in the countries under examination is steadily growing, although not with the same pace in all the countries. For example, some small countries like Malta and Cyprus stand out as leaders of social media use, not only among their counterparts in the Southern region, but even when compared to countries from other regions, as well. In their research, Mourao et al. (2015) have found that those receiving their news on interactive social network sites "are more likely to assess EU performance positively and support further EU enlargements" (p. 3214). If this is the case, then the ever-growing penetration of social media use in European people's lives might open new prospects on the consolidation of Europeanization (Fig. 17).

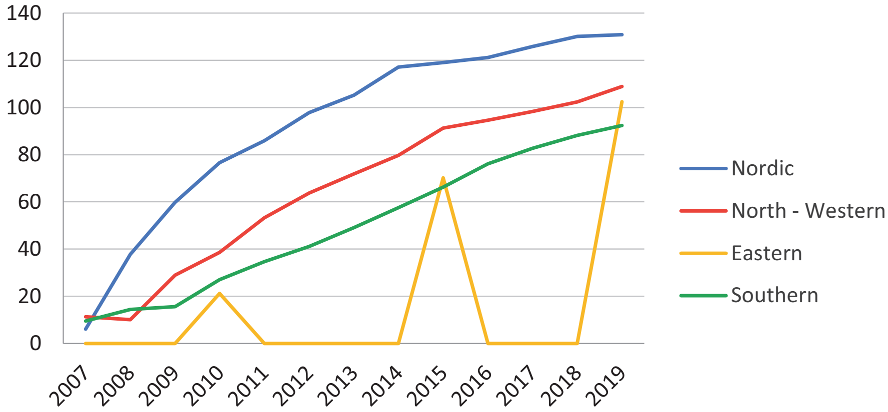

Fig. 16 Mobile broadband subscriptions per 100 inhabitants. Source: ITU. Compilation: Eumeplat Project

8 Concluding Remarks

Media systems in Europe regardless their differences, particularities, and contradictions even within their regions present some undeniable common trends. In effect, 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 seem 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.

However, as we have seen, globally, paying audiences for news continues to grow, an increase that is mainly guided by digital circulation. 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 major differences among EU member-states, regarding the number of radio stations and employees in the industry, but even though 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. From a European perspective, it has proved that the broadcasting sector during the 1980s and 1990s was characterized by growing advertising spend, instigated by the proliferation of commercial television channels, the increasing trends in local production, and the development of digital television. These developments amount to aggravating factors for the press market, whose circulation dynamics decreases

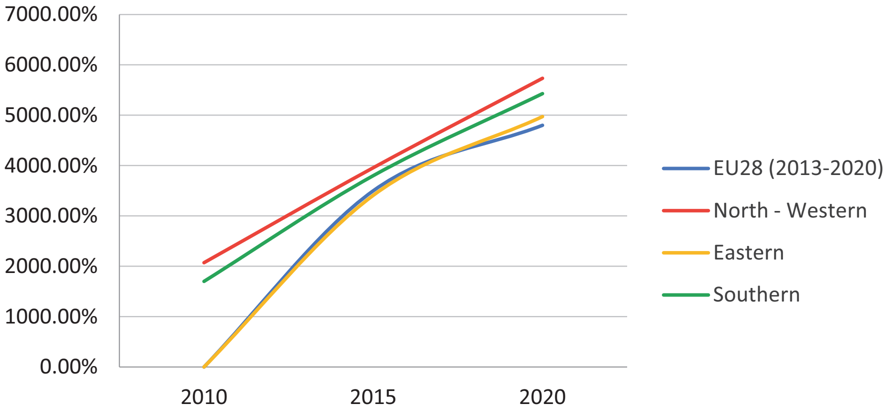

Fig. 17 Percentage of daily social media users by EU region. Source: Eurobarometer, 2015; 2019. Compilation: Eumeplat Project

even in the Nordic regions that have traditionally proved more resilient, compared to other regions, to the inevitable repercussions of television deregulation.

Public service broadcasters seem to face the most serious challenges in their history mainly in those media industries where the stable revenues have been shaken. With most public policies reinforcing the private sector and with the funding model being under revision in several media markets, public broadcasters with the lowest revenues are not allowed to prepare themselves for the platformized era of communication.

Trust in media is another important parameter examined. Throughout the period, trust in radio and TV seems to be increasing, and retain high trust over a long period of time across most EU countries (EBU, 2020a). Among the most trusting are the Nordic countries, Germany, Belgium, and the Netherlands. The least trusting ones are Greece, Spain, France, the UK, and Czechia. Overall, trust in media seems to go hand in hand with the unequal development of certain countries, combined with an un-free political culture. Greece (least trusting in national news and toward TV), Turkey, Bulgaria, and most of the Balkan states (least trust in Press) have all found different ways of placing more trust in social media to gain access to non-established information.

Overall, two important observations hold of significance. 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. 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, and economic development, resulting in differences in their respective media systems.

Especially, if we look at these countries' performance on several indexes that reflect the transition to the digital era, 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.

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The Media in Northwestern Europe in the Last Three Decades

Volker Grassmuck and Barbara Thomass

Abstract On the basis of the model of Hallin and Mancini (*Comparing media systems. Three models of media and politics*. University Press, Cambridge, 2004), the chapter describes the media systems in Northwestern Europe with respect to their main characteristics and the developments of the markets and points to the development of trust in the media that we observe in the countries of Ireland, the United Kingdom (UK), Belgium, the Netherlands, Luxembourg, Germany and Austria. The degree and nature of the links between the media and political parties are considered as well as the development of journalistic professionalism and the role of the state in the function of the media. We conclude that the media systems of the Northwestern European region are still in accordance with the democratic corporatist model of Hallin and Mancini.

Keywords Press markets · Broadcasting markets · Deregulation · Journalistic professionalism · Trust · Internet · Platformisation

1 Introduction

In this chapter, we give an overview of the main characteristics of the media systems in Northwestern Europe with respect to the model of Hallin and Mancini (2004) and how they developed during the last 30 years. We will first briefly sketch the main characteristics of the Northwestern European region, then describe the developments of the markets and point to the development of trust in the media that we find in the respective countries. According to Hallin and Mancini, the development of media systems is dependent on the markets and on three more variables, i.e. (1) the degree and nature of the links between the media and political parties; (2) the

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development of journalistic professionalism and journalistic autonomy; and (3) the role of the state in the function of the media. We will explore these dimensions and conclude whether the media systems of the Northwestern European region are still in accordance with the democratic corporatist model of Hallin and Mancini.

Looking West to East, the region encompasses Ireland, the UK, Belgium, the Netherlands, Luxembourg, Germany and Austria. It groups together seven countries where strong cultural and economic interactions are to be expected. Although the UK and Ireland belong to Hallin and Mancini's Liberal Model, we consider them together with the five countries on the continent belonging to the Democratic Corporatist Model, because, as we will see, the UK and Ireland have much in common with the Western European countries. This is due to the press, where "the political orientations of British newspapers today are as distinct as anywhere in Europe" (ibid. 210), and to broadcasting with the BBC as the foremost example of the professional model that should largely insulate broadcasting from political control. When Büchel et al. (2016) reviewed Hallin and Mancini's models using the method of qualitative comparative analysis, they included the UK in the Corporatist Model. The four Nordic countries sharing the characteristics of the other seven countries also form a region of their own (see Chapter "Nordic Media Systems").

2 Main Characteristics of the Northwestern European Region

The region consists of countries that share the Democratic Corporatist Model, which 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 & Mancini, 2004, p. 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 (ibid. p. 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-twentieth 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 persist, and there are no indications of its fading away towards a liberal, neutral media landscape. At the same time, the Northwestern 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 (the Netherlands, Belgium, Luxembourg and Austria), and the other is less clearly segmented (Germany and the UK). Or in the terms of Lijphart (1968), one is a consensus democracy, and 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 and Labour in the UK, CDU and SPD in Germany, ÖVP and SPÖ in Austria) 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.

There is an increased segmentation of parties and parallel media which goes along with a growing percentage of the population expressing distrust in traditional parties, government institutions and 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 and Memoli (2015) use Eurobarometer survey data from 27 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.

Looking at the countries in the Northwestern European region, we find that in summer 2022 trust in the press is above EU27 average (38%) with the Netherlands (56%) and Belgium (46%) taking the lead. The pattern repeats with trust in political parties, where all countries in the region were above EU average (21%) with Luxembourg (37%) in the lead followed by the Netherlands (35%) and Austria (32%). And the same goes for trust in government with EU average 34%, of which frontrunners are Luxemburg (70%) and Germany (49%) and at the rear is the Netherlands (38%) (European Commission, 2022).

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" (Rosen, 2012) 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 Development of the Markets

3.1 The Press Market

Protestantism, literacy and industrial revolution in northern Europe provided the ground for the development of mass circulation newspapers. Size certainly matters (Lowe & Nissen, 2011; Trappel et al., 2015). 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 & Mancini, 2004, p. 25 f.). Newspaper markets also vary in the balance of local, regional and national newspapers. Some (the UK, 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.

Hallin and Mancini 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 was 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 & Mancini, 2004, p. 25). The most important trends in the last two decades have 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.

European newspapers had been "firmly rooted in history, culture, and politics", as de Bens (2007, p.141) described in an overview of developments in the press industry. But this stable situation was uprooted in the recent three decades due to several challenging changes. Societal developments, shifts in audience and advertising preferences, the appearance of new media competitors and above all the spread of digital media and the convergence process turned the traditional business models upside down (Lund et al., 2011, p. 45). During the 30-year period from 1990 to 2020, the press market in the Northwestern European region has been in decline. While the number of daily, weekly and Sunday newspaper titles remained fairly constant, sales and circulation of dailies dropped constantly, rising dramatically to losses of more than 20 percentage points between 2005 and 2010 in the Benelux countries.

The share of advertising expenditure going to press as compared to other media shows a strong decline after 2010, most dramatic in the UK. Exceptions where ad expenditure in press remained fairly constant throughout are Austria, likely because of indirect subsidies through government ads, as well as 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 (World Association of Newspapers, 2021; EAO, 2021).

These changes in newspaper circulation and consumption urged the publishers towards several adaptations. First, they moved from print to the Internet. While by 2000 nearly all newspapers had online editions, from 2005 there were more online than offline newspapers, in Germany more than twice as many in 2017. In the UK in 2010, the data show 99 offline titles compared to a staggering 1410 online (World Association of Newspapers, 2021). Second, they tried by either corporate expansion or the launch of new products in the print markets to open new windows of opportunity. Powerful publishers as the German Axel Springer Group develop into large integrated media conglomerates by shifting from journalistic press to varied online businesses. Expansion also took the form of acquiring dwindling publishers in

Eastern Europe. Examples are the Austrian Styria Group in Croatia and Slovenia and the German WAZ group in Croatia and Serbia. Third, they expanded into non-journalistic lines of activities (travel, books, exclusive consumer products) to compensate weakening ad sales.

3.2 Broadcasting

3.2.1 Public Service Broadcasting

Before we look into the market trends of radio and television, we sketch the development of public service broadcasting with a focus on the breakup of its monopoly status, as this has a strong impact on how the market changed. After WW II the monopoly of public service broadcasting (PSB) was established in most countries of our sample. In the countries of the Northwestern European region, the organisational form of PSB had initially become firmly established in the post-war period before commercial stations were introduced from the 1980s onwards. 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. All countries in the Northwestern European give broadcasting professionals fairly high levels of autonomy. In this sense, Hallin and Mancini (2004) 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. p. 170).

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 a young audience, sport and parliamentary reporting and reporting of national holidays and commemorations. As manager of the PSB system, NOS's other main task is to provide for the current 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 programme guides. The Dutch PSB system currently consists of the two statutory stations NOS and NTR and the pillarised stations founded in the 1920s (VPRO, NCRV, KRO etc.).

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. In 2013 an idea from the 1960s was discussed again of installing two Director-Generals, one of whom was supposed to be black and the other red (*Profil*, 26.10.2013). The changes in government made obvious 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 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. 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).

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. 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. After a scandal of political interference, the Federal Constitutional Court which plays an important role in Germany in setting central broadcasting policy and in protecting the independence of PSB ruled in 2014 that no more than a third of the members of a Broadcast Council should be politicians in public office or leading party members.

The European Audiovisual Observatory (EAO) reported for 2017 that 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 (EAO, 2019: 31). PSB audience share in Northwestern region was highest in the UK and Germany at about 46%, followed by Flemish Belgium (37%), Austria (33%), the Netherlands (32%), Ireland (27%) and French Belgium (23%) (ibid. 33). At the same time, PSB revenues decreased by 0.4% in real terms, and the weight of PSBs dropped by 3% down to 31% in 2020, with top 100 revenue growth driven solely by the private sector (+12% over the same period). The largest budgets in 2020 were those of PSBs in Germany (EUR 9.47 billion) and the UK (EUR 6.83 billion). Yet even they cannot rival international competitors. While almost half of the 100 leading European television and radio groups were PSBs, their revenue share stood at 35% in 2020. "The erosion of PSB funding is particularly apparent in a five-year comparison: the funding volume for PSBs in Europe contracted by EUR 801.0 million between 2015 to 2020" (EAO, 2022, p. 54).

While 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 to be applied to the diversified societies in all Western European countries. In Germany, Austria, Belgium and the Netherlands today, the percentage of citizens with a migrant background is about one-fourth. In the UK only 14% 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. 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" (Thomass et al., 2015, p. 190.) Among the segments of society that PSB finds harder to reach are migrants, the less educated and younger audiences. Given all these challenges, PSB remains significant throughout the EU.

By including the Internet in its services, Public Service *Broadcasters* have transformed into Public Service *Media* (PSM), yet their 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” (European Union, 1997, p. 109). 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 et al., 2015, p. 192 ff.) and of developing themselves further onto the yet uncharted territory of the digital public sphere.

The Northwestern 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 has been cut by 30% over the past 10 years with similar cuts across the region. The compulsory licence fee has been under attack for decades as perceived unfair competition for commercial media. For instance, Rupert Murdoch’s newspapers have been waging a campaign against the BBC since he entered the television business in the early 1980s. By framing it as unfair competition for newspapers and other commercial media, he has targeted the compulsory license fee. The debate to move towards 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 ongoing in 2022/2023, which will adjust its level and review BBC governance.

In most countries of the region and, in fact, the entire EU, except Luxembourg and the UK, PSB was the only service licenced 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 (the Netherlands, 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.

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 in the UK less than 13% of households had subscribed to cable in 1987 (Franquet et al., 2020, 269 f.).

The additional channels were licenced 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, 2016, p.34 f.; cf.; Franquet et al., 2020, p. 260 ff.).

The EU is also a strong driver in deregulation. It 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, remain the responsibility of its member states. It can therefore view broadcasting only as a service in a market like any other. When the EU 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.

Deregulation seized all the countries in the Northwestern region, except Luxembourg, where the privately owned precursor of RTL, the Compagnie Luxembourgeoise de Télédiffusion (CLT), was established already in 1931.

Britain ended its monopoly of the BBC in 1955 when Independent Television (ITV) started. 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 Independent Broadcasting Authority (IBA) and then transferred to a public corporation established in 1990 of what 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. Channel 5, launched in 1997, is a general entertainment channel that shows both internally commissioned programmes and imports from the USA in particular.

The UK 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. 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.

In Germany it was the Constitutional Court that paved the way to commercial broadcasting. In its 1986 ruling, the 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 court 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" 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). Commercial broadcasting commenced in January 1984, first on cable, then soon on satellite and eventually also on terrestrial transmission. 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.

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, p. 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. 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. This nexus ended with cable and satellite. Additionally, 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 licenced 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 criticised for responding to the challenges by lowering their traditional quality and becoming too commercial (d'Haenens et al., 2011, p. 190).

In the competitive arena, commercial broadcasters, once they 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 et al., 2015, p. 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 Internet changed everything and requires the institutions to change from Public Service Broadcasting to Public Service Media.

3.3 Development of Radio Markets

Radio in the Northwestern European countries developed mostly, like TV, as a public service. The only exception is Luxembourg, where a commercial-only model was established.

The liberalisation of broadcasting led to an increase of the number particularly of commercial radio enterprises, reaching its peak in most countries of the region around the turn of the century. By 2010, the number of stations had started to drop in most countries, with a delay in Austria which was late in liberalisation. 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 (ibid.).

Data on listening time and radio audience are too patchy to draw any robust conclusions but seem to indicate that both remain stable over the 30-year period and across the region (European Communities, 2003, p. 128; EBU, 2015, p. 5 f.; EBU, 2020a, p. 9). While listenership seems to have peaked in 2014 followed by a severe drop, the numbers in 2019 are everywhere similar to or higher than those in 2000. This is also what the EBU (2007, p. 21 ff.) noticed, as it found a great diversity in terms of audience shares and overall radio listening.

The stability of radio consumption seems to be confirmed by the share of advertising expenditure it receives. This shows only minor fluctuations, with peaks between 2000 and 2015 in all countries except Austria where ad money in radio peaked in 1990 and dropped continually by more than 50 percent until 2019 (EAO, 2021; European Communities, 2003).

As the figures in Fig. 1 show, radio is still a relevant mass medium in the Northwestern European countries or—as Kleinsteuber puts it—a “resilient medium” (Kleinsteuber, 2011, p. 61). He claims that due to low access costs and the ability of

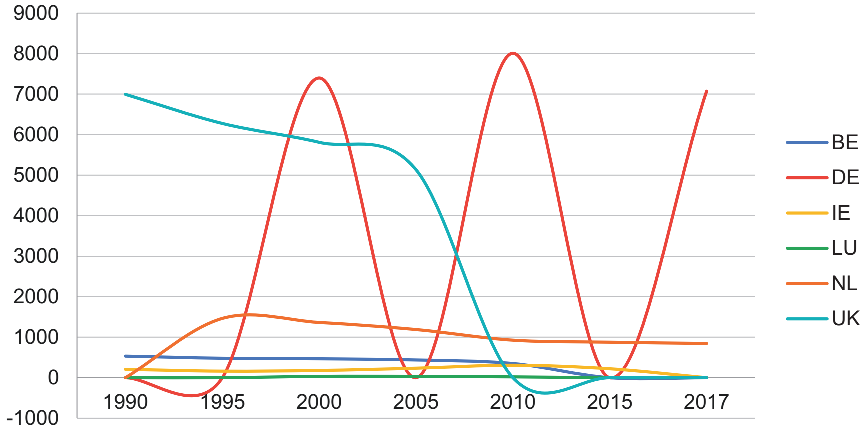

Fig. 1 The evolution of annual newspaper sales (in mln). Source: World Association of Newspapers, World Press Trends Database 1990–2017. Compilation: Eumeplat Project

radio to reflect the high diversity in Europe, it is defending its place in the media market. The competition between the public model (which is a genuine European invention) and the commercial model (which can be seen as a US import) is quite balanced (ibid. 68). In contrast to the notion of the dual system, Kleinsteuber refers to a three-pillar system, as he includes community radios. Because the landscape of those is even more diverse and oscillating and regulation for many years was absent, it is extremely difficult to get reliable data in this field. Nevertheless, community radios play a relevant role in the market as they—due to low market entry costs and many enthusiasts working for them—cater for a diversity of interests and genres.

3.4 Development of Television Markets

From the mid-1990s onwards, TV, like radio, was based on the three pillars of public service, commercial and community stations. The exception is again Luxembourg where no PSB developed.

Overall TV viewing time in the region peaked around 2005 and 2010 at values from 195 minutes per day in the Netherlands to 242 minutes in the UK. Exceptions are Austria and Flemish Belgium where viewing time continued to increase throughout the 30-year period, in 2019 reaching 183 and 170 minutes, respectively (Fig. 2).

Since the start of the pandemic in 2020, television viewing time experienced a revival after years of decline, growing by 5% on European average, 23% in Ireland and 22% in the Netherlands. The average audience market share of European PSBs in 2020 grew by 4% over the previous year.

Given the number of commercial competitors, of audiovisual offerings on the Internet and other forms of audiovisual entertainment, particularly gaming, the appreciation of PSB television remains astonishingly high across the region. The most dramatic developments are seen in Austria and Ireland where in 2019 the PSB TV viewership share had dropped to half of its value in 2000, which at 31 and 27% is still high compared to the Mediterranean countries. PSB TV share remained essentially unchanged in the other countries of the region in the 2000 to 2019 period. At between 45 and 50%, it is the highest in Germany and the UK (EAO, 2006; EAO, 2020). The number of PSB TV channels was essentially unchanged throughout the region, with a slight peak in 2015. The broadcast fee from 1990 to 2019 across the region 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 (European Communities, 2003; EAO, 2011 p. 32; EBU, 2020c).

3.5 The Rise of Thematic Channels

The new distribution technologies of satellite and cable and the ensuing deregulation led to a glut of new contenders for the potentially lucrative segments of the TV market. To provide the full range of programming in the sense of the Reithian remit of the BBC, i.e. to inform, educate and entertain, is quite costly. Therefore, most new entrants cater to special interests and thematic niches that are popular enough to attract audiences that in turn attract advertisers or paying subscribers. The number of thematic TV channels throughout the region peaked in 2015 followed by a

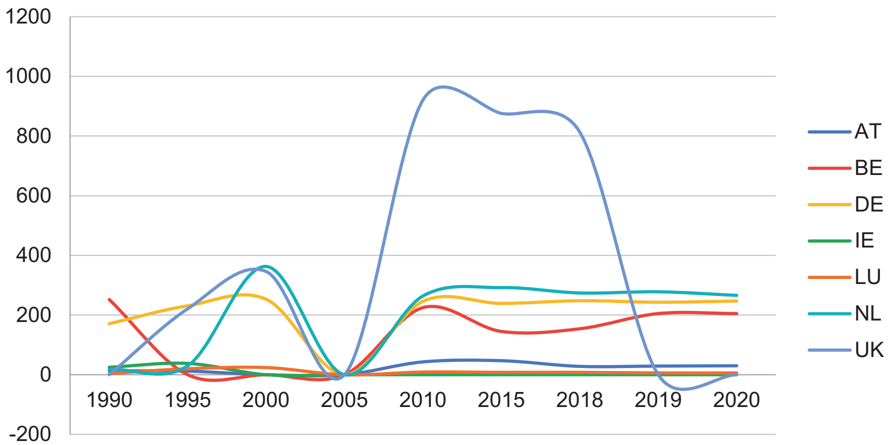

Fig. 2 Number of radio broadcasting enterprises (both public and commercial). Sources: EAO (2006, 2011, 2020). Compilation: Eumeplat Project from various EAO sources

dramatic drop until 2019, ranging from 27% in the UK to more than 94% in Luxembourg (Fig. 3).

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. The genre DNA looks similar to that of neighbouring Ireland, only that in that Catholic country there were no adult channels at all and only one religious channel compared to 17 in the UK. Larger clusters of generalist channels were seen in Austria, Germany and the Netherlands. Their numbers rose after the 2015 market consolidation, just as in the UK, while it fell in all other countries in the region (EAO, 2011, 2015 and 2019). Sports channels remained relatively strong in Belgium, Ireland and Luxembourg after consolidation (ibid.). Film and fiction channels had a 10 to 15 percent share in all markets, with only the Netherlands having less. In Germany, their number continued to rise slightly after 2015 (ibid.). News and business channels were quite strong at the height 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 (ibid.).

Overall, the deregulation of the TV market was hailed by some for creating growth, jobs and most of all freedom of choice, while sceptics feared that commercialisation would lead to a dumbing-down of the public sphere. 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.

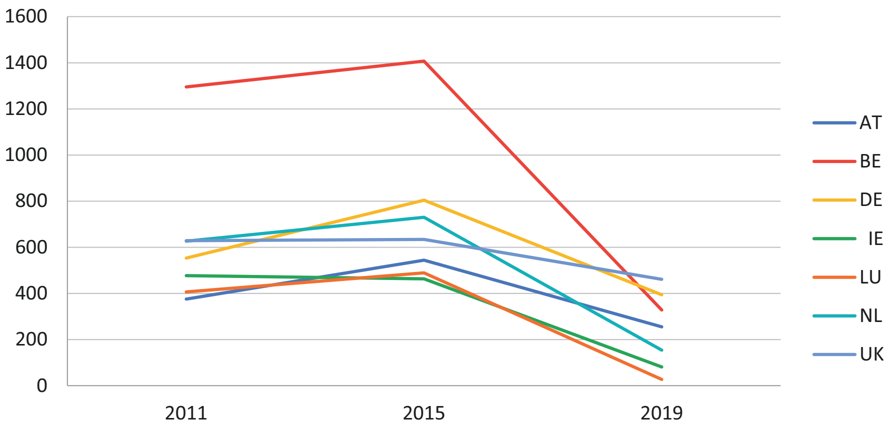

Fig. 3 Number of thematic TV channels by country. Sources: EAO Yearbooks 2011, 2015 and 2019. Compilation: Eumeplat Project

4 Media Concentration

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. However, media concentration is a threat to the plurality of news sources, and it never had been combated in the Northwestern European region in a substantial manner, while on a European level, it is rather lenient (Artero et al., 2020, p. 302).

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 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, for Germany and 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 (EMRG, 2021).

In Austria, newspaper and news magazine markets are controlled by very few companies, resulting in spectacularly high media concentration ratios which derive from several waves of concentration up until the mid-1990s (Grünangerl & Trappel, 2011, p. 78). Ten years later, the situation is similar, as the same authors report for the Media for Democracy Monitor 2021 (Trappel & Tomaz, 2021, p. 31 ff.). The number of publishing companies in Germany had halved from the 1950s to 2011, and the number of published units (*publizistische Einheiten*), which is the number of newspapers whose content is composed by separate newsrooms, decreased from 225 in 1954 to 135 in 2008 (Marcinkowski & Donk, 2011, p. 143). The five biggest publishing companies shared 41.3% of the daily newspaper circulation in 2008 (Röper, 2008, p. 421) which was reduced to 38.6% 10 years later (Röper, 2018). In the Netherlands, the overall market of national, regional, free and specialist newspapers has been dominated for many years by three large groups (d'Haenens & Kik, 2011, p. 216), a situation which even deteriorated, as today only two large players dominate both the national and regional newspaper markets (Vandenberghe & d'Haenens, 2021, p. 277). The findings are similar in the UK, where the Murdoch family alone with its News International (renamed into News UK in 2013) held more than a third of the newspaper market, followed by Daily Mail and General Trust and the Trinity Mirror Group (Humphreys, 2021, p. 327). The UK regional press is even more concentrated. Here, newspaper monopolies are the norm. The 2018 figures reveal that three companies—News Corp UK and Ireland, Reach PLC and DMG Media Ltd—accounted for 72% of all revenue of national newspaper publishers (Moore & Ramsay, 2021, p. 474).

Looking at media ownership concentration in the press, we have to keep in mind that media concentration is measured in terms of single media sectors (print, television, radio and online media). However, changes due to the convergence of media markets, media offerings and end devices and therefore media cross ownership are neither considered by the current media concentration definition nor by media concentration law. 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.

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%) and Ireland (38%) and less so in the UK (25%), Flemish Belgium (18%) and Germany (7%) (European Audiovisual Observatory (EAO, 2019, p. 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 (EAO, 2019, p. 39).

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 (Artero et al., 2020, p. 302).

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 liberalisation of financial markets and fuelled by the dot.com bubble in the late 1990s with its high investments in expectation of even higher returns (Winseck, 2010, p. 366 f.) 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 (IfM, 2021). Of the other EU countries, only France and Sweden also have players in this league. Thus, the Northwestern European region emerges in Europe as a centre of European media power.

5 Political Parallelism

"Political parallelism" refers to the ties between media and political actors. Hallin and Mancini (2004, p. 37) extended it to imply an instrumentalisation of media by political and economic interests seeking to wield political influence; and they include media parallel no longer to specific parties but to more general political orientations. Parallelism is now seen as driven by market segmentation and by the political involvement of owners and journalists (ibid. p. 214 ff.), and in the Democratic Corporatist region today appears as newspapers with recognisable 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" (Hallin & Mancini, 2004, p. 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" (Hallin & Mancini, 2004, p. 211). Hallin and Mancini's remark on the UK press landscape at the turn of the century reads like forebodings of the Brexit disaster: "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 …" (Hallin & Mancini, 2004, p. 215).

The pillars in the Netherlands began to dissolve in the 1960s. Most national dailies gradually redeveloped distinct profiles with recognisable ideological positions and a partisan audience. 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, p. 492).

Additionally, in Luxembourg the pillars began to fade. The pillar system in Austria with respect to public offices is called *Proporz*. Links between newspapers and traditional political pillar organisations remain, but the papers 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 the Netherlands, Belgium, Luxembourg and Austria, but also here there were papers parallel to political parties and other social organisations. The local press used to constitute a counterweight to the national papers, thus balancing pillarisation even more, 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 audience segments. 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.

6 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. The question stands to which degree this autonomy of mass media is challenged by other powers in society.

While the media logic, which has been established with the institutionalisation of journalism, 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. And indeed, journalists perceive internal press freedom and editorial independence as jeopardised by commercial pressures. A survey of 2500 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, according to 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.

The 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 whistleblowers 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 and 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.

In the Northwestern 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 (RwB, 2022; 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 has fused with nationalist, racist, anti-semitic, anti-Muslim, 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.

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 freelancers 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. Bobkov & Herrmann, 2020; EMRG, 2020; Morini et al., 2014).

The most consequential dynamics of the last 30 years for both press and broadcasting arguably is digitalisation. Computers 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" (Rosen, 2012) 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 professional journalists. Furthermore, the integration of TV, radio and online, first in the newsroom and 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.

7 The Media and the State

The role of the state and the nature of its intervention in the media system is the last of the four dimensions for comparison of media systems in the model of Hallin and Mancini that we want to illustrate. They differentiate between state ownership of media, press subsidies and the function of the three powers Legislature, Executive and Judiciary to make, apply and interpret laws and the state as censor and source of propaganda.

Although the normative goal is that the state should not own media which are regarded as fourth (independent) power, in many countries the state at times has owned news agencies, newspapers or other media-related enterprises, either directly or through state-owned enterprises. Hallin and Mancini single out the state-ownership of PSB as the "the most important form of state intervention" (Hallin & Mancini, 2004, p.41). PSB in the region was in the technical sense state-owned but carefully constructed to prevent any control over programming by the state (for a detailed discussion of PSB and its deregulation, see above "broadcasting").

Press subsidies are sometimes criticised as an undue state influence on the media, but as Hallin and Mancini point out, "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 & 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) analysed press subsidies in seven European countries and Canada and found a reason for it in market failure and therefore need for public support—most dramatic in local media. In all of the media systems examined, specific requirements for eligible organisations are formulated (ibid., p. 45). Their country analysis shows a general transformation in subsidy systems from circulation-oriented towards direct production support. In addition, there are production project funds specific, e.g. for the support of investigative journalism. The Stimuleringsfonds voor de Journalistik in the Netherlands, for example, 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 (ibid., p. 32). Many countries studied have set up innovation support programmes, albeit mostly with smaller budgets.

The making, application and interpretation of laws are the most fundamental forms of state intervention in the media. 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. 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 & Mancini, 2004, p. 43 f.).

All these laws ultimately derive from the fundamental right of the freedom of the press which is opposed to any form of state censorship. The struggle for press freedom was arguably the single decisive element in the professionalisation of journalism (see above). 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 2022 World Press Freedom Index ranks the countries in the Northwestern European region high. Ireland takes the lead in place 6 of 180 countries. Austria is the rearguard at place 31 (RwB, 2022).

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. Unlike the state as a censor, it “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 & Mancini, 2004, p. 44). The state being the means of society for dealing with issues of national and public interest, this cannot be otherwise. 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.

8 The Internet Shifts the Paradigm

The era of traditional twentieth century media is coming to an end. The numbers so far indicate that TV viewing time reached its climax around 2010, while the number of commercial stations, in a kind of optimistic delay, peaked around 2015 (see above). Meanwhile radio use remained fairly resilient and was complemented rather than replaced by podcasts. The press market had started its decline already in 1990, and the drop in circulation accelerated significantly from around 2005. The decisive factor in these developments is, no doubt, the Internet or, more specifically, not the Internet as such but a phase in its development that started at the beginning of the twenty-first century and is characterised by mega-platforms like Google, Facebook, Amazon and Netflix.

Broadband Internet, as a prerequisite for using these streaming platforms, has only started to spread from 2000 and is now pervasive across the region. It was available at 90% of households in Belgium and up to 97% in the Netherlands in 2020 according to data from EAO (Fig. 4).

Even more astonishing is the proliferation of mobile broadband connections. The first digital mobile telephony network in Germany launched in 1992. In that time, the first tranches of the “digital dividend” of spectrum no longer needed for broadcasting were auctioned to mobile carriers. In 2000, the ITU selected UMTS as standard for the third generation, allowing for transmission rates of up to 384 kbit/s. Internet-connectable smartphones appeared in the late 1990s but only saw their breakthrough in the mass market with Apple’s first iPhone in 2007. Take-up of mobile connectivity started from essentially zero in 2007 and exploded in only 10 years to the point where, with the exceptions of Belgium and Germany, each citizen in the region now has more than one connected mobile device (ITU, n.d.).

As for the next generation of wired transmission technology, the incumbents lag behind the new entrants to the EU market. When after 1990 telcos started to roll out connectivity in the new member states in Eastern Europe, they laid glass fibre from the start, while in their former state monopoly markets in the region, they try to make the most of their legacy copper networks and shy away from investments. This inertia of the telcos in the Northwestern European countries leads to most of them

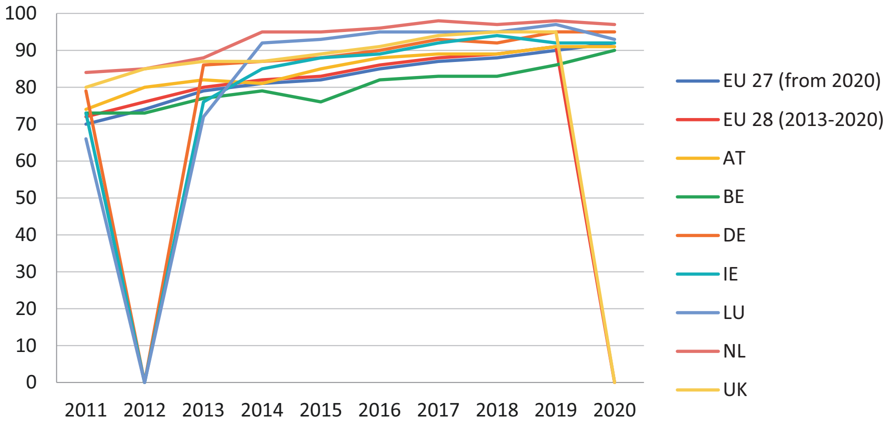

Fig. 4 Percentage of households with broadband Internet (%). Source: European Audiovisual Observatory, 2011–2020. Compilation: Eumeplat Project

being at the end of the line in fibre among 39 OECD countries (OECD Broadband statistics).

8.1 Platformisation of the Internet

With the centralised server-client platforms which came to dominate much of the Internet's activity in the early 2000s, social dialogue became centralised on global intermediaries like Facebook (2004), YouTube (2005, acquired by Google in 2006), Twitter (2006), Tumblr (2007), WhatsApp (2009, acquired by Facebook in 2014) and Instagram (2010, acquired by Facebook in 2012).

Social platforms do not provide content themselves but create feedback loops among their users, which is as well the case for search engines, as they provide an algorithm that grades a website by the number of pages and the importance of those pages that link to it. What became Google (1998) is therefore not based on artificial intelligence but on data analysis of the sum of dispersed human decisions. This approach proved so successful that Google search became a central gateway for navigating the Web for most of its global users, an infrastructural service much like a public utility.

A study by Dachwitz and Fanta recounts how Google has distributed more than half a billion euros to major European news companies since 2013. Their conclusion is "Google is the world's biggest patron of journalism" (Dachwitz & Fanta, 2020, p. 11). Since this battle over the new publishers' right was lost, Google's funding now serves to tie media organisations more closely to the company's product ecosystem of analytics and advertising. Google is out to become the dominant "operating system" for digital journalism (ibid. 91).

As Google, like all so-called social platforms, is free to users, its business model is built on advertising. An entire ecosystem of platforms and ad tech companies emerged that is quite different from the world of offline media advertising but has a strong impact on the business models of the legacy ad financed media. Data profiles are compiled of individual users' preferences, choices and behaviour and auctioned to advertisers in real time whose intended target group they match (Ryan, 2018). The legacy media cannot compete with these new forms of targeted advertising and increasingly lose their ad revenues.

The use of the Internet has been growing since 2000. Watching TV and on-demand video has also continuously gained in popularity across the region, even more so than using social media (European Commission, Eurostat, n.d.).

The 1990s superhighway vision promised to bring "500 TV channels" to the homes (Dennis et al., 1994). And in a sense, this came true. Video did not kill the radio star (The Buggles, 1979), but online video seems set to replace ever more time spent on linear broadcast TV. Two services can be singled out: One is the social video-sharing platform YouTube, launched in 2005 and acquired by Google in 2006. The other is Netflix, founded in 1997, initially to provide DVD rental by mail. In 2007, Netflix started its video on demand (SVoD) service. 2012 it expanded to Europe, first in the UK, Ireland and Scandinavia. The Netherlands followed in 2013, and Germany, Austria, Belgium and Luxembourg in 2014. Amazon launched its OTT SVoD service Prime Video in 2006. Apple started movie rentals in the iTunes Store in 2008. YouTube Premium followed in 2014.

The video streaming market in 2020, according to Statista data, in Germany was divided between Amazon Prime and Netflix (with 40% each and Maxdome, Sky Ticket and YouTube Premium 5% each) (Statista, 2021: 61). In the UK, Netflix (35%) is ahead of Amazon Prime (25%), followed by NowTV (10%) and Youtube Premium, Sky Ticket, Hulu, HBO and DisneyLife 5% each (ibid. 62). Based on company information, Statista reports that in 2021, Netflix had 158 million paying subscribers in over 190 countries.

9 Trust in the Media

"Trust" has become an important metric in public discourse. Even if this is a fluid concept, the comparison of trust surveys over time gives an indication of trends. The EBU in its Trust in Media 2020 report (based on Standard Eurobarometer 92) finds that radio has a positive trust index of 21, while the written press stands at −1 and the Internet at −23 followed by national parliaments and governments, whereas political parties (−57) are trusted even less than social networks (−45) (EBU, 2020b, p.13).

The composite trust in media index of 2019 shows that Luxembourg, Germany and the Netherlands were close to the EU28 trust average. Ireland was mid-field. Belgium and Austria were at the high end of high trust and low in distrust. The UK was at the end of the line not only in the region but in the entire EU with the lowest level of high trust (7%) and highest distrust (60%) (EBU, 2020b). Trust in the press was high throughout the region, with medium trust in Ireland and again no trust in the UK (EBU, 2020b: 38 f.). Trust in radio was high throughout, except in the UK where it was only medium high and had decreased by more than 10 points between 2014 and 2019 (ibid. 32). Trust in PSM, particularly PSM news, was highest in the Nordics, the Benelux states, Central Europe, Ireland and the UK (ibid. 17). With the exception of the BBC, the UK trusts neither its national news nor its newspapers or TV.

The reason for eroding trust in the media is a topic of broad research. There is some evidence that this is not driven entirely by delusions of conspiracies but also by reports of actual threats against journalists, interference with their work and political pressure on PSM. The World Press Freedom Index strongly correlates with the level of trust in a country's broadcast media. "The strong correlation suggests that in the European context, citizens' trust in radio and TV is intertwined with a free and independent news media landscape" (EBU, 2020b, p. 14).

Reporting on the results of the Reuters Institute Digital News Report survey 2020, which showed that trust in the news has fallen in most countries since 2015, Richard Fletcher concludes that "within our community there's no real consensus on why this has happened or what can be done about it". A closer look at the data provides a more differentiated picture: In 10 of the 18 countries, trust in news has indeed declined, in Germany from 60% in 2015 to 47% in 2019 and in the UK from 51% to 40%. But in the other eight countries, it has either increased or stayed the same. In search for explanations, Fletcher points to recent comparative research that finds that media trust cannot be analysed in isolation but is connected to political trust, polarisation or even a more general disenchantment with social institutions (e.g. Hanitzsch et al., 2017; Newman & Fletcher, 2017).

The crisis which came with the COVID-19 pandemic and the lockdowns amplified right-wing, populist movements that had grown since the 2010s. Their spokespeople now claim that the virus is harmless but used by an "elite" as a pretext to foment fear, abolish fundamental rights and establish a dictatorship. By now, up to a third of the population tends to believe in dark powers that control world affairs. They no longer trust the government, science and media and get their information from alternative media that spread "alternative facts".

Social media platforms like YouTube, Facebook, Twitter and Telegram are crucial for publishing and sharing of alternative media. But they have also come to dominate online information, news consumption, debate and advertising in general. In fact, platforms have become a focus of EU concern in various ways since the beginning of the century. These have led to regulations against hate crimes, terror propaganda, disinformation and child abuse material. The EU, although still acting within the frame of competition regulation, tries increasingly to address these harmful developments. The 2019 Copyright in the Digital Single Market Directive strengthened copyright enforcement on user-upload platforms by mandating upload filters and introduced a new ancillary press publishers' right in Europe. The 2018 Audiovisual Media Services Directive (AVMSD) expressly covers video-sharing platforms with rules for the protection of minors and against criminal offences, terror and hate.

10 The Northwestern European Media Model in Comparison

The aggregated data from our study confirm the existence of a cluster of countries with similar characteristics that Hallin and Mancini (2004) termed the Democratic-Corporatist model of media systems. Particularly PSM and the role of the state in ensuring the freedom of the press and the diversity of media remain strong throughout the seven countries of the Northwestern European region.

In this chapter, we have argued that the UK and Ireland with their strong PSM and polarised press belong to the Democratic-Corporatist rather than the Liberal Model. This has been confirmed as well. The UK remains somewhat different, though, in that it was at the forefront of the neoliberal shift. It had the highest number of commercial radio and TV stations in the region, peaking in 2010, and in the same year also the highest daily TV viewing time (242 minutes). The UK also shows by far the highest number of online-only news sources and the most dramatic drop in ad revenues of newspapers, while it has the highest share of ad spending on the Internet (65% in 2019). While citizens in the region trust their national media most of the time, the UK has the lowest trust in media in all of Europe. Brexit and the pile of lies it was based on suggest itself as explanation. The only exception still trusted in the UK is the BBC.

Austria's classification in the Democratic-Corporatist model has been called into question, favouring to place it in the Polarised-Pluralist Model of the Mediterranean countries instead. In our Region Report, we have argued that characteristics like high journalistic professionalism, decreasing political parallelism and an inclusive, regulated press market convinced us to keep Austria in the Democratic-Corporatist group. The data review confirms this decision while also showing some peculiarities. Together with Flemish Belgium, Austria is the only country in the region where TV viewing time continued to increase over the 30-year period. Together with Ireland, it is the only country that saw a significant drop in PSB TV viewership share. And finally, together with Belgium, Austria shows the highest levels of trust in media.

11 Conclusions

The seven countries of the Northwestern European region have a common past and share many of their traits and challenges. The press is in dire straits, still searching for sustainable business models in the digital environment. PSM are under increasing pressure, their legitimacy called into question by neoliberal forces, while right-wingers attack the trust in traditional media all together in order to market their own. Media concentration, influence by non-media capital and financialisation increase.

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 (Loosen et al., 2020, p. 7). 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 role of the state. 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 and 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 & Mancini, 2017). It continues to inspire research and enrich our understanding of the systems of media and politics.

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Nordic Media Systems

Thomas Andersson

Abstract The present chapter reviews the structures and developments that characterise the Nordic media landscape. The Nordic countries are marked by various commonalities, in support of consensus-making and managing conflict, which have become associated with "corporatism". Partly drawing on that context, they have commonly been depicted as belonging to a special "Nordic" media model. After taking note of the stylised key dimensions of such a model, we examine the actual features of the Nordic media systems and how they have evolved over time. In this, additionally, we compare the media systems of the Nordic countries with those of each other while also making international comparisons. Through the recent phase, associated with digitalisation, commercialisation, and populism, the Nordic countries have continued to display a special media model, although with a shift away from defensive and rigid sentiments towards becoming more conducive to adaptation and renewal. As the media landscape has become more complex and multifaceted, however, tensions building at the intersection of changed conditions for journalism, unruly media content, and polarising politics, pose serious questions for the road ahead.

Keywords Nordic · Corporatism · Newspaper market · Public broadcasting · Social media · Commercialisation · Digitalisation · Fake news

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1 Introduction [1]

The Nordic countries, consisting of Denmark, Finland, Iceland, Norway and Sweden, are typically viewed as located in the periphery of Europe, enduring a harsh climate and with a relatively sparse population (cf. Fig. 1). While violence and autocracy marked their earlier history, cross-border relations have been largely peaceful since World War II. From the late 1800s 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 is marked by specific features.

A common label for the way that institutions work in the Nordic countries is that of corporatism (Heckscher, 1957). [2] Norway and Sweden are generally ranked as the

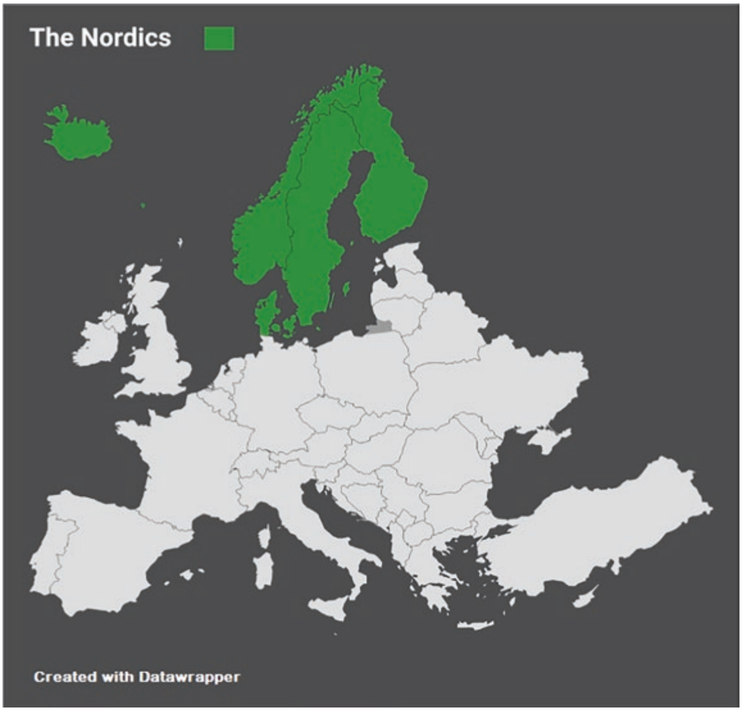

Fig. 1 Study scope in the Nordics

[1] The author is grateful for the contributions of Laura Ohler, Ingrid Andersson and Emma Björner to underlying background reports and to Qammar Abbas for extensive support in preparing the statistical data.

[2] The term corporatism originally arose in Central Europe in the nineteenth century, depicting a "political economy" that aspired to shape a middle-way between a classical liberal economy and radical socialist transformation.

most corporatist societies worldwide, with Denmark also in the top five and Finland slightly behind (Armingeon, 2002; Christiansen et al., 2010; Lijphart, 1999; Lijphart & Crepaz, 1991; Rokkan, 1966; Siaroff, 1999). In the realm of media, Hallin and Mancini (2004) argued that the application of corporatism translated into a particular Nordic media model marked by high circulation of written press tightly linked to political parties, journalistic professionalism and self-regulation, and high financial dependency on the state along with influential public broadcasting.

This chapter examines structures and developments that characterise the Nordic media landscape as distinguished from media elsewhere. While taking note of corporatism and the dimensions covered by Hallin and Mancini (2004), the purpose is not to determine the validity of any particular alleged model for the Nordic countries. We observe, however, that their media sector reflects broader societal features shared by the Nordic countries, while also continuing to be strongly influenced by common undercurrents such as those propelled by the information society, commercialism, and populism.

Considerable emphasis is placed on examining variations within the region and to what degree those cast doubt on the notion of a single Nordic model. While studying national features in-depth, most attention is devoted to Sweden, being the largest of the Nordic countries. Conversely, least attention is paid to Iceland, partly due to less availability of comparable statistics and partly as it is the smallest country in the group. Comparisons with media in other regions take note particularly of the liberal model and, to a lesser extent, that of Southern Europe.

2 An Evolving Institutional Model in the Nordics

Historically, the Nordic countries' governance model was autocratic with national authorities wielding strong centralist powers. Dominance by the monarchy, the upper classes and the church, was paralleled by the absence of an urban middle class, a predominantly rural population and the constant pressures of external conflict. The traditional fabric was gradually contested, however, along with its rigid separation of the social classes (Østerud, 1978). In its place, an independent agricultural class arose, income differences diminished (Ringen & Hannu, 1992), and "constructive" social relations took shape, linked to participatory governance (Kuhlne, 2016).

Drawing on educational reforms, infrastructure investment and the rise of entrepreneurship, between the mid-nineteenth century and 1970s, the Nordic countries combined high economic growth with a tilt towards social cohesion, known as the "Nordic" or "welfare regime" model (Alestalo et al., 2009). With "big government" at the helm, social innovation transitioned beyond traditional charity, complementing gaps in existing policy to diminish poverty by engaging underprivileged classes in support of general well-being.

To regulate procedures for industrial conflict, following the early lead of Denmark, representatives of employers and trade unions across Norway, Sweden and Finland initiated central agreements in the 1930s. Collective bargaining, indirectly coached by government, arose as a vehicle for achieving compromise and maintaining stability. The term corporatist model was invoked, 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.

Along these lines, Nordic governments generally have come to lean on discrete links with relevant organisations for exerting influence. Laws tend to encourage self-regulation, not just in workplace co-determination. Systematic webs comprising interest groups, civil servants and other powerful insiders and influencers have been found to operate broadly across key sectors and organisations.

The corporatist approach appeared challenged when Denmark let go of centralised wage-setting in the 1980s, along with other reforms in the subsequent years to induce more flexible labour markets. Although the Swedish Employers' Confederation withdrew from centralised wage-setting a few years later, the Swedish government, along with the industrial parties, continued to embrace coordinated agreements. The strategies and practices pursued by the Nordic countries had started to display some sharpening contrasts.

Pronounced Nordic similarities nevertheless remain. A common Nordic labour market has been in place since 1954. [3] A belief in the virtues of research, new technologies and innovation as a source of increased productivity and prosperity has co-existed with high union density, extensive worker representation in corporate strategy, high protection for social and family life and common belief in the virtues of managing a work-life balance. Parallel multilevel combinations of centralised coordination and decentralised negotiations favour a holistic approach to restructuring, training and productivity (Dølvik, 2008).

Social mobility is generally high; competence development combines with restructuring and transition to new employment—so-called flexicurity. In Sweden, major unions are considering ways to accommodate the rise of a so-called gig or "platform" economy (Andersson, 2017). In recent years, the Finnish government and industrial parties collaborated in experimenting with basic salary for citizens.

Although the mechanisms have evolved, influences of state and stakeholders remain intertwined. Official consultation processes maintain a kind of consensus-building before formal decisions are made. The scope of informal contacts has in fact broadened in some respects, inviting the engagement of "new" actors such as representatives of civil society (Schelin et al., 2017). Key institutional bodies and individuals thus continue hammering out joint strategies and agreements behind the scenes. Corporatism, or neo-corporatism, initially associated within industrial relations, stays relevant in numerous sectors. Other labels (e.g., "negotiating economy", "mixed economy" or "mixed administration") are sometimes used to depict the basic practices of Sweden and the Nordics (Christiansen et al., 2010; Öberg et al., 2013).

[3] Citizens of any Scandinavian country can move and work freely within the region. Today, all the Nordics participate in the common labour market of the EU and European Economic Area, although Norway and Iceland have opted not to be part of the European Union.

In terms of political structure, the trend has led towards establishing competing power circles, in each of the Nordic countries. For long, the structure was stable with opposing centres of gravity along the lines of bi-partite corporatism, linked with leading trade unions vs. employer organisations, respectively (Allern et al., 2007). Gradually, the political landscape has become volatile, however, involving green and populist movements, the breaking up of old alliances and formation of new ones.

3 The Media Landscape of the Nordics

The media sector naturally forms part of the broader institutional landscape, although it is also marked by its own features and developments. Sweden and the Nordic countries have long been associated with a well-established and stable newspaper sector (press), influential public broadcasting, a high degree of professionalisation in journalism, close links between newspapers and political parties and strong influence by the state (Hallin & Mancini, 2004). Below we review each of these main dimensions of the Nordic media landscape.

3.1 The Newspaper Market

In Sweden, diffusing information to the public gained attention in the 1700s, reflecting a weakening of royal autocracy, the spreading idea of human or citizens' rights and the rise of political parties. The first proper daily paper, *Aftonbladet*, was launched in the 1830s. It drew on an explicit ambition to present proper "news", in contrast to the previous dominance of "campaigning" (Weibull & Wadbring, 2014).

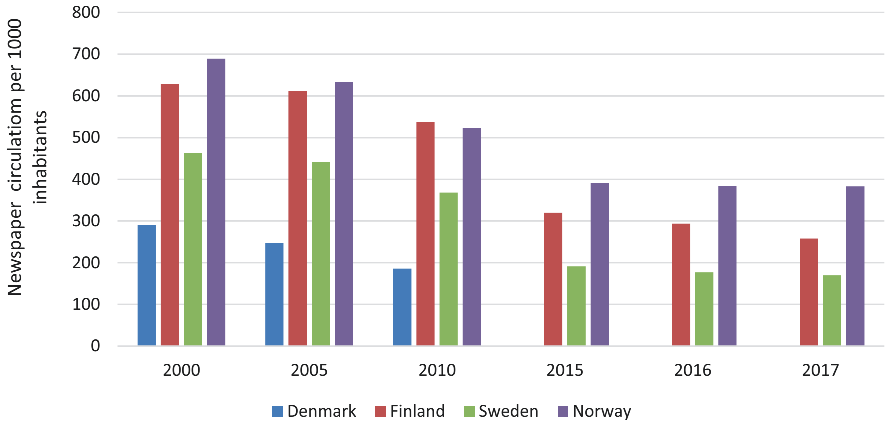

Fig. 2 Nordic press circulation per thousand inhabitants 2000–2017. Source: Harrie (2017)

A high level of subscription to local morning papers, marked by close and highly transparent links to political parties, took shape in the 1800s. As indicated by Fig. 2, the newspaper circulation has been decreasing regularly since 2000. While consistently at the lowest level in Denmark, all the Nordic countries actually retain a relatively high level of press circulation, compared to most other parts of the world. Norway displays a level hardly seen anywhere else (Hatcher & Haavik, 2014). Demand in Norway, moreover, supports a high number of newspapers per capita. The embeddedness of locally rooted press reflects high autonomy for regions and a highly active regional policy, especially compared to Denmark or Finland.

The leading tabloids in Sweden, *Aftonbladet* and *Expressen*, perform well in online advertising, key to their ability to keep expanding their audiences. Similarly, the leading quality-oriented morning newspapers, *Dagens Nyheter* and *Svenska Dagbladet*, dominate online newspaper subscriptions. The leading Danish newspapers, *Berlingske*, *Politiken*, *Weekendavisen* and *Ekstrabladet*, also perform well, as do the top-selling Norwegian newspapers, *Aftenposten*, *Adresseavisen*, *Agderposten*, *Bondebladet*, *Dagbladet* and *Firda*. Local press, by contrast, is generally weakening and more stagnant in approach. This plays a part in shaping new social gaps, which bear on discrepancy in access to news, including between urban and rural areas. This is similar to the situation in the USA, the UK and many other countries.

A major disruption of the established "rules of the game" occurred in 1995 with the launch of *Metro*. A daily paper that was circulated free of charge for users, *Metro* was funded by advertising and an agreement with local transport companies. Behind it was a Swedish entrepreneur, Jan Stenbeck, founder of MTG (Modern Times Group). *Metro* went on to become not only the newspaper with the largest circulation in Sweden, but the success spread to 18 other countries. By 2011, *Metro* was the leading circulated free daily newspaper in the USA, for instance. [4] Neither *Metro* nor other free newspapers were ever introduced in Norway, however. In the end, the "free-of-charge" newspaper industry ran out of steam. *Metro* itself closed in 2019, after 24 years, and other free newspapers struggle, if existing at all. Yet, their impact has lingered and probably more in Sweden than anywhere else. Attaining first-move advantages by radical innovation had proven itself capable of bringing public monopoly to an end, and enforcing changes in regulation as well as in other respects, as will be returned to.

3.2 Broadcasting

The decrease in the number of subscribers to printed media has been paralleled by the rise of broadcasting services. Strong new service developments surround audio listening, making it accessible via both radio and TV. While public television stagnated following the emergence of the Internet, broadcasting has taken on new dimensions and reached an unprecedented audience.

[4] https://www.businesswire.com/news/home/20110613006428/en/Metro-Newspaper-is-the-1-Free-Daily-Newspaper-in-Boston

As shown by Fig. 3, the daily reach of public television has been on the decline across the Nordic countries since around 2010. This applies especially to Sweden, where the downturn started already in the preceding decade. Denmark and Norway followed suite, while Finland has seen a smaller decline. That Norway pursue considerably higher investment than the other Nordic countries in its public service provision of news (via NRK1) and, along with Iceland (broadcasting via RÚV) has the most dominating individual such provider (Ohlsson, 2015), does not seem to made any major difference. Compared with other regions, the share of viewers using public TV still remains fairly high in the Nordics.

Figure 4 compares TV viewing time, in terms of average minutes per day spent across different age groups in the Nordic countries. Between 2005 and 2010, time spent watching TV increased in most age groups across each of the Nordic countries (only young adults in Finland and Sweden went against the trend). In the years since then, however, average viewing time has declined markedly. The age group (4–9) peaked in 2010 throughout, after which its viewing time fell sharply, staying relatively unchanged only in the case of Finland. The age pattern in Finland differs somewhat from the others in the way that young adults diminished their viewing time more dramatically after 2010, even for the eldest age group, where the tendency to watch TV has kept increasing more than in the other Nordics. Across all the Nordic countries, however, the viewing time of young adults declined by 2020 to only some 25–40 min, while the 60+ group watched TV more than 250 minutes on average, and even above 300 in Finland. All countries display a lower average viewing time in 2020 compared to either 2015 or 2005, although the elderly viewers have gone the other way.

As for radio, the population listening daily is at a high level in the Nordic countries, at up to eight in ten on average, although with Finland at a lower level. Three

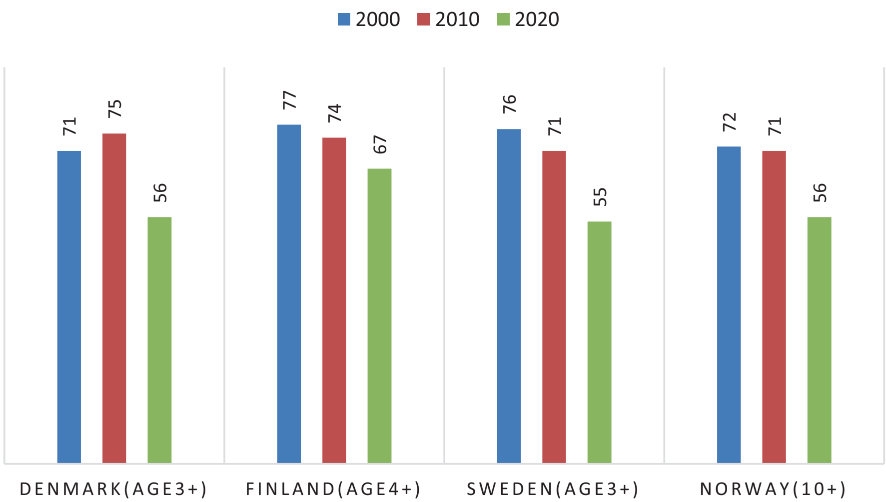

Fig. 3 Daily reach of public television, in % of population. Source: Nordicom (2021)

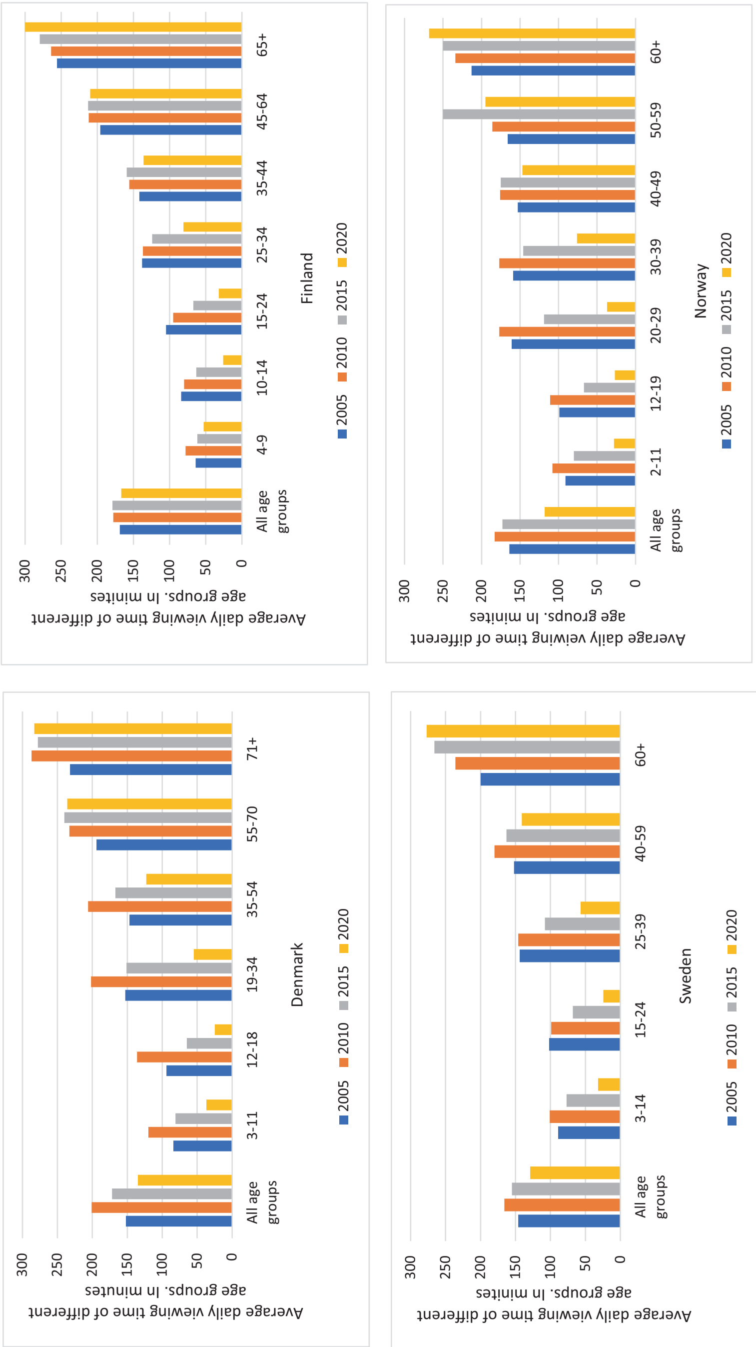

Fig. 4 Average TV viewing time across age groups. Source: Nordicom (2021)

quarters of radio listeners tune to public radio, which starkly contrasts with most other countries, including in southern Europe where public providers are in a weak position (and the share of the population listening to radio tends to hover around only two out of ten) (Harrie, 2013). Radio listening time has nevertheless decreased consistently in the Nordic countries since 2000, especially in Denmark. Meanwhile, the number of public as well as commercial radio broadcasters declined in Norway and Denmark while holding up better in Finland and Sweden. Finland, where listening time fell the least, was marked by fewer private broadcasters but higher market concentration (Eurostat, 2021). Public radio maintained a dominating position over the past two decades in all the Nordic countries except Finland, where public radio held an equally strong position at the turn of the millennium but has since been matched by private radio (Nordicom, 2021).

3.3 Journalistic Professionalism

Another hallmark of the alleged Nordic model is a high degree of journalistic professionalism and self-regulation across the media landscape, associated with ethical norms stressing journalistic objectivity. A high degree of autonomy and a strong public service orientation are related, traditionally recognised features (Petersson et al., 2006). The function of journalists is broadly viewed as a critical voice and third estate in society (Ohlsson, 2016).

Similar to many other parts of the world, journalists in the Nordic countries operated from the start without special training or education. Since the late 1950s, however, the educational systems expanded across the Nordic countries while also reorienting towards mass education, a development that partly encompassed journalism education (Gardeström, 2011). In Sweden, a specialised tertiary education in journalism arose, moving swiftly 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. Across all of them, media education evolved more or less through the following stages:

1. Apprentice system plus short courses arranged by press organisations or other interests (the initial situation in all the Nordic countries)
2. Apprentice system, combined with 3- to 10-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, 2- to 4-year journalism programmes (all Nordic countries)
4. Integration into universities (Finland 1960, Sweden 1977, Iceland 1987, Norway 1994)

With the recent advance of digitalisation and social media, technological innovation has been accompanied by a tilt towards commercialisation and rapidly changing skills requirements in journalism. As another aspect, editorial professionals have become exposed to new kinds of raw material, emanating from non-conventional sources. A surge in user-generated material has led to a blended, so-called popular, journalism (Hujanen, 2004). Vastly expanded service offerings have caused a push-back of conventional news, while journalists have had to cope with less patient and more volatile audiences. Interestingly, women are more strongly represented in the reporting of news online, compared to traditional media. On average, the share of stories on news websites reported by women in 2015 was about five percentage points higher than the share of traditional news reported by women (Nordic Council of Ministers, 2017). Separately, as will be returned to, an increasing tendency has appeared for political action to be expressed by way of opinions and understood as provoked by emotions rather than based on factual observations (Nord, 2008; Kassab, 2016). In this context, journalistic norms of objectivity, impartiality and accuracy, hallmarks of the Nordic model, meet with new challenges, as do traditional mechanisms of quality control. The issues are particularly pronounced in social media channels such as Twitter and Facebook. An increased scope for manipulation by vested interests has gone hand-in-hand with waning trust and more polarised politics.

3.4 Links Between the Media and Political Parties

Political parties and the press used to have a close relationship, another presumed pillar of the Nordic model. From early on, liberal and conservative newspapers dominated. Social democratic and Agricultural Centre Party newspapers profiled themselves already at the end of the nineteenth century, however. In all the Nordics, the socialist press related closely to the party organisation, with this practice 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 where *Socialdemocraten,* a Labour Party newspaper, achieved the highest circulation of any daily paper in the early twentieth century (Høyer, 1998).

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). By then change had started to set in, 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 fewer 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 & Blach-Ørsten, 2011). The rise of television coupled with changing ethics in journalism were contributing factors (Høyer et al., 1975).

Additionally, the loosening association between newspapers and political parties is due to the party system itself. While the standing of the political parties used to be relatively static, and was reflected in the stability of voter sentiments, a stage of fluidity has taken hold. Not only can more voters be seen to shift 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 & Hellström, 2018). Rather than ideologically determined, the success of political parties has become more dependent on building viable coalitions and compromise. 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 & Holmberg, 2016).

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 & 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.

The above factors all contributed to lessening the reliance of media outlets on stable long-term relations. In the past, the affiliation of newspapers in Sweden to political parties used to be mirrored in circles of readership, the political disposition of journalists and the content of news articles. Some of this continues to play out. In particular, some local newspapers are owned by self-governing foundations indirectly linked to politics (Ohlsson, 2016). Also, although the presence of institutional links has weakened, parallelism remains to some degree by way of content (Allern & Blach-Ørsten, 2011). Some owners retain mission statements that reflect ideological and political roots.

3.5 The Role of the State: Government Influence

State subsidies have been offered since the early 1970s to enable the survival of economically weak newspapers, many of them dependent on limited local audiences (Ohlsson, 2015). Gradually, these 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.

In recent years, the subject of media subsidies has become highly politicised. While the overall support levels declined (Ots et al., 2016), 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. Overall, public support structures have served 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. [5]

In contrast to the market for newspapers, radio was dominated from the start, in each Nordic country, by a single public provider and network, handling both national and regional coverage. While multiple competing providers were gradually allowed, private entries naturally focused on entertainment. No competition arose in regard to news or in terms of national commercial radio either. The development of digital radio, initially attempted, was halted in 2006, in the face of weak 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.

Both radio and TV are widely viewed in the Nordics as closely associated with communication services as a public good, a cultural policy extended to media. Unlimited reach of commercialisation has been resisted energetically, and editorial freedom is taken seriously. Along with the UK's BBC, Denmark's DR1, Yle in Finland, RÚV in Iceland, NRK in Norway and SVT/SR in Sweden keep evolving with a universal orientation.

As for broadcasting, all Nordic countries pursued single public channels starting 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.

Commercial television and radio were banned for relatively long in the Nordic countries, however. Southern Europe deregulated in the 1970s already, when satellite technology arrived. In the Nordics, the public broadcasting monopolies tried to maintain the old order, backed by determined national policymakers (Nord, 2011). The decisive game changer came with the launch of TV3, the first commercial channel broadcasted in Sweden, Denmark and Norway, by Kinnevik and its CEO Jan Stenbeck. In order to circumvent legislation prohibiting advertising in Swedish television, its launch of TV3 was broadcast out of London.

Competition remained restrained until satellite and cable TV became widely accessible, in effect making the public stance untenable. Around the turn of the millennium, Swedish fast-tracked digital terrestrial television (DTT), from 2007 nationwide on a government-owned network.

The offerings of Nordic public service channels have nationwide penetration, with domestic programmes accounting for more than half of their transmission time (Harrie, 2013). 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 abstain from language dubbing, except in children's

[5] For more information on state subsidies in the Nordics, see https://quod.lib.umich.edu/n/nmw/12367206.0001.001/1:4/%2D%2Dmedia-welfare-state-nordic-media-in-the-digital-era?g=dculture;rgn=div1;view=fulltext;xc=1.

programmes, which is widely judged to help underpin foreign language skills. In line with European legislation, broadcasters are similarly obliged to ensure that most transmission time is devoted to programmes produced in Europe. [6] In reality, the European share of Nordic public service companies is fairly stable at around 80%.

The requirement of Europen dominance in broadcasting has implications for content production. 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. [7] 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 first transmissions. Less than a third is acquired programming.

Public service providers display relatively diverse offerings compared to their commercial competitors, applying to both information and entertainment. [8] SVT's main channels, SVT1 and SVT2, lead in both respects. Yet, the difference is much greater in information than entertainment. Several of the commercial channels are almost as diverse as the public providers when it comes to entertainment, while way behind in information. Meanwhile, 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 diversity in entertainment coupled with narrow coverage of information (Harrie, 2013).

4 Nordic Media Transformation

The above sections demonstrate the presence of major changes in all the areas which in the past were associated with a special Nordic media model, in turn commonly linked to corporatism. That may come as no surprise, since the presence of corporatism itself has become less pronounced in the Nordic countries, at any rate changed face (Rommetvedt et al., 2013). Nevertheless, a host of special Nordic

[6] This is in line with the EU's Audiovisual Media Services (AVMS) Directive—incorporated into Member States' legislation, embraced also by the EEA, thus including Norway and Iceland although not members of the EU.

[7] Most public service channels display less than 40% dependence on acquisition to build their schedules. In-house production comprises the lion's share, while acquired programming is mostly picked up from foreign markets (Harrie, 2013).

[8] Based on an annual survey by the Swedish Radio and TV authority, which indexes Swedish television channels with a view to information-oriented versus entertainment-oriented content (Harrie, 2013)

traits persists. In this chapter we take a closer look at key aspect of the recent transformation of the Nordic media landscape.

4.1 Changing Consumer Behaviours

Under way is a major shift in news consumption, away from public media and the press to the Internet and social media. Further, changing preferences show up as a shift in the time devoted to consuming news towards locating desired information through other means and entertainment. The global penetration of social media reached some 54% in 2020. [9] In parallel, the attention span of customers/citizens has famously declined, so that humans have been found now to have a more limited attention span, down from some 20 seconds on average a few decades ago to only 8, which has been found to be less than that of a goldfish (9 seconds). [10]

While it has become possible to connect and interact with readers anywhere, anytime, priority would in many cases be placed on packaging that is fitting for such circulation, short messages, photos, attention to events and individuals suitable for immediate recognition. In this context, many observers have pointed to a recurrent crisis for journalism. The number and size of news organisations around the world have been subjected to massive rationalisation (spanning printed press as well as broadcasting), accompanied by a loss as well as a transformation of jobs and downward pressure on salaries. While many professional journalists have been laid off in areas that used to be dedicated to news in the traditional sense, other lines of business have proven capable of offering lucrative career paths. A case in point is the media landscape of the USA, where a combination of technological, economic and political upheavals is at play (Kamarck & Gabriele, 2015; Siles & Boczkowski, 2012). The consequences for the journalistic profession have arguably been dramatic. Williams (2017) found that the salary of journalists relative to PR specialists was virtually collapsing in the USA between 2004 and 2013.

Various developments have brought about significant adjustments to the mechanisms underpinning fundamental institutional structures as well as social relations. In the Nordic countries, this includes a revamping of industrial relations and their links to social cohesion as well as the plurality of civil society associations. Meanwhile, compared to other regions, unions in the Nordic countries have a greater say in the management of companies. While partly backed by law, they tend to be relatively accepting of labour market flexibility. Today, some champion new avenues for advancing employee interests and protect the security of employees. The largest union in Sweden, *Unionen*, has rethought some of its previously entrenched positions with regard to the "gig economy".

[9] https://www.statista.com/markets/424/topic/540/social-media-user-generated-content/#overview

[10] https://time.com/3858309/attention-spans-goldfish/

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. Generally emanating from initiatives by individuals, or a group of individuals, social innovations may fill the gaps of public policy in realizing locally rooted solutions to outstanding problems and issues (Andersson et al., 2015).

4.2 A Corporatist Model and the Role of Citizens

The Nordic countries took pride from early on in combining public infrastructure and institutions with an emphasis on research and innovation in support of private sector development and increased productivity in relatively small societies that were open to globalisation and cross-border exchanges (Andersson, 2014). Another tenet of modern knowledge-based societies centres on the scope for citizen engagement and initiative in driving demand for new solutions, forming part of "smart" solutions at city and local level, and also for societal progress. While the Nordics have generally been viewed as well placed in this respect too, other observations indicate the presence of a more mixed bag, with especially Sweden at times depicted as systematically controlling of citizens (Huntford, 1972) and also increasingly associated with challenges in education (Kools, 2015). On the other hand, all the Nordic countries mostly keep shining in mainstream indices and benchmarking measuring the standard of living, happiness, innovativeness, experience-industry, etc.

During the onset of the financial crisis in 2008, Iceland shocked mainstream political pundits around the world by refusing to shift the debts accumulated by reckless bankers onto the shoulders of taxpayers. In effect, this outcome was enabled by the normally powerless president refusing to sign the deal worked out by politicians, thereby by default passing the judgement to a series of pools engaging the public. The latter, in turn, resoundingly refuted bailing out the financial sector debt. [11] As a consequence, mainstream policymakers, international organisations, economists and journalists, even in the other Nordic countries, treated Iceland as a "pariah" state, until the country won out in international courts.

Likewise, Sweden shocked the frenetic crowds of mainstream media and multilateral organisations by refusing to dictate to its citizens what protective measures to adopt in response to COVID-19, but rather insisted on letting citizens assume responsibility themselves. Subjected to significant pressure to relent and impose restrictions and lock-downs similar to other countries, the social democratic

[11] Iceland's President Ólafur Ragnar Grímsson twice refused to sign the deal negotiated between politicians and bankers, thus referring the decision to *Iceland's citizens whether to resume responsibility for the private debts accumulated by the mismanaged banking system. The resulting referendums, in March 2010 and April 2012, respectively, both* lead to resounding rejections by the public. Later, a third referendum had the same result; international pressures on Iceland to renege and go against the referendums were finally rejected by the EFTA court on 28 January 2013, which cleared Iceland of all claims.

government in effect assumed a strategy of claiming that it had neither the expertise nor the mandate to tell citizens what to do. Meanwhile, they deferred the responsibility to an expert authority, Folkhälsomyndigheten, and Sweden's state epidemiologist, Tegnell, who kept insisting on advisory rather than coercive measures.

Thus, whatever downsides corporatism may have had, at the time of severe crisis, individual Nordic counties have proved remarkably capable of going against the *flow*, placing far greater credence on the judgement of their citizens than so-called liberal democracies such as the USA or the UK, or Continental Europe for that matter.

4.3 Digitalisation

The arrival of digitalisation exerted a fundamental impact on the media landscape over the past two decades. The boundaries between different media channels have become blurred. Many media outlets operate on several platforms. The vastly increased media flow has led to sharply increased competition for the attention of users, whose use of time has come under pressure and become more volatile. Commercialisation including advertising has evolved and become more differentiated and also targeted. The development of social media has brought additional dimensions, opening for more diverse and non-conventional channels for the creation, diffusion and exchange of information (Weibull & Wadbring, 2014).

In Nordic television, the impact of digitalisation expanded the portfolio of niche channels around the turn of the millennium. That development was mostly coordinated and controlled for the purpose of enabling a gradual transformation of the main public service broadcasters (Nord, 2011). The journey from analogue to digital media publishing took some special routes in the Nordics. Under the influence of bureaucratic hurdles, for instance, the TV channels opted to exploit a window in the regulatory shield to change by making news-feed available on Text-TV.

Basically, all the main players introduced similar new services online and adopted far-reaching changes to both 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).

Selected patterns and trends in the use of media outlets across Denmark, Finland, Sweden and the EU28 countries combined are outlined in Fig. 5. Most Nordic citizens, some 80% in Finland and above 90% in Sweden, access media content each day using the Internet. Across EU28, almost 80% watch TV on a TV set, which is considerably higher than for the Nordic countries. On the other hand, there is a lower tendency across EU28 to watch TV via the Internet, use the Internet for information and entertainment purposes, or use online social networks. Interestingly, some 59% of the population in Sweden and Finland still read written press daily, which is more than twice the average share in EU28.

Figure 6 illustrates the pervasive, consistent shift in news consumption, away from reading physical newspapers towards accessing information online that took place in just a single year (from 2019 to 2020).

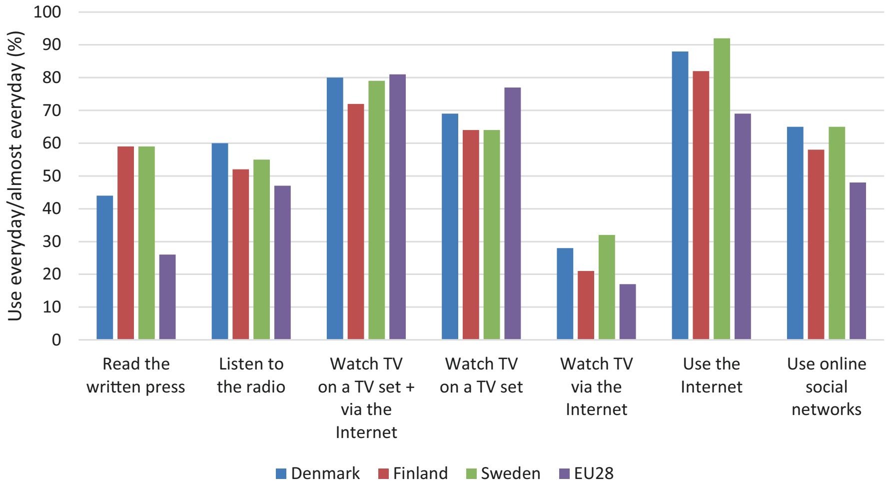

Fig. 5 Share of the population aged 15+ who uses different media every day/almost every day. Source: Eurobarometer (2021)

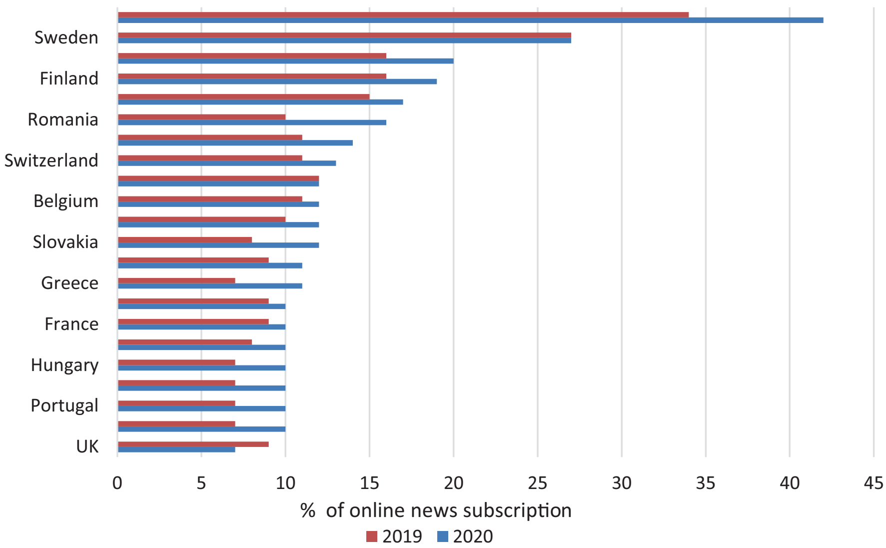

Fig. 6 The share of online news that is paid across countries. Source: Nordicom (2021)

In the media industry, digitalisation has brought new practices mainly along two trajectories: i) in regard to the redistribution of programmes and ii) the production of a diverse range of original online content ranging from digital games to weather forecasts. Through both channels, digitalisation exerts major impetus towards far-reaching re-organisation as well as an alternation of outputs, including content. These include what is published, how it is portrayed, how it is sourced, etc. The impact is interlinked with changing dynamics in the case of funding, competition, and commercialisation, as well as political and social movements.

In taking on digitalisation, the Nordic countries share features of developments mainly in the liberal media model, where the lead came from across the Atlantic. As we have already seen, the main newspapers acted decisively on digitalisation to build their own successful strategies for improving reach and service to customers online. The process involved polarisation with the local and regional press, which has lost ground, although much of it remains in business, as far as the Nordic countries go, in part due to public support.

4.4 Changing Content

The mentioned emergence of daily newspapers available for free, set off with the launch of *Metro* in the mid-1990s, played its part in driving a shift in news publishing content with shorter articles focusing on reaching as many readers as possible, motivated by increasing advertising revenue rather than bothering about numbers of subscribers.

The readership became used to an abundance of news for free, easy to access and digest. This paved the way for the online news model, which in its infancy obtained content by recycling editorial material from printed newspapers. Gradually, journalism and content generation adopted special features of online news production. The following elements are at play: i) *unlimited space* and continuous publication, in many cases referred to as a specific form of online journalism (Syvertsen et al., 2014); ii) *continuous publication*, with content going live at any time; iii) *interactivity*, not only did immediate feedback from readers become possible, but readers would let their views be known and further add to the material, which may continue to evolve; iv) *limits to duplication and repetition evaporated*, material already published could reappear, and appear again, replacing the production of new content; and v) *social media opened up for an endless flow of new expressions* creating and sharing observations, feelings, ideas and opinions shared among the likeminded with virtual communities.

As for related concrete impacts, various observations point to digitalisation reducing the depth in coverage of politics and public affairs (Petersson et al., 2006). Comparing coverage of politics over time by media in Sweden, Strömbäck and Nord (2016) observed a shift towards more emotional and personal journalism while refuting a notion of any significant change in coverage. Negative messages consistently dominate positive by approximately 6:1. In the case of news specifically prepared for publication online, some observations regarding source are worth highlighting. As already indicated, the traditional male dominance in Nordic news reporting, (compare as well in Chapter "On Western and Eastern Media Systems: Continuities and Discontinuities"), is less present. While hard data is not available, in news prepared for digital publishing, the share of women appears to approach 50%. On a separate note, the available evidence suggests that digital news is more impacted by political partisanship. In material prepared specifically for digital publishing, both the ways in which an issue is framed and the way a publisher interprets or approaches it appear more affected by a news organisation's political history and traditions (Allern & Blach-Ørsten, 2011). A possible interpretation is that news organisations leave more scope for variation in what goes online. More research is required in this regard, however, including differences between platforms. There is also the question to what extent such patterns and trends apply to the Nordic countries specifically or are also more generally valid.

A related factor is the role played by the ongoing shift towards increased commercialisation, which links to more streamlined content. As publishing actors become more financially dependent upon advertising, and the means to attract advertising revenue are strongly connected to the number of readers as well as numbers of targeted reader groups, there is a tendency for news content to be shaped to suit the mainstream. Hence, language will be more informal, sentences shorter, and vocabulary less varied. Meanwhile, international observers have concluded on this combination leading to increased participation in media publishing and content development (Carpentier et al., 2013). Regulation—or the absence of it—is a factor, especially since the production of digital news content is subjected to other (less stringent) rules than applied to analogue publishing. The greater reliance on self-regulation for the former has clearly been less limiting (Hulin & Stone, 2013).

As the established actors in the traditional news media understood that online news channels had come to stay, they adapted their strategies and service offerings accordingly. At the same time, their mandates and policies partly tied them to making the same content available on their various platforms, in ways that enable as many people as possible to access and benefit from their programmes and services. The public services offered online are generally fully on par with what can be found on their radio and TV platforms, including news. Content is offered as both streamed real-time radio or TV and on the spectrum of on-demand web and social media services. A corresponding overriding trend towards convergence of content can be observed across various media platforms.

The associated changes in media organisation observed in the Nordic countries have, however, influenced journalism and its linkages to professionalism in various ways. In the case of "arts journalism", which used to cover "high" arts in contrast to "popular" arts, a paradigm shift had been documented, with arts journalism shifting from an aesthetic to a journalistic paradigm, leading to less scope for specialisation and autonomy (Sarrimo, 2016). The combination of digitalisation and enhanced concern with commercialisation is at play. Meanwhile, the focus on a narrow already pre-defined elite has given way to the effort of expanding the readership and a broadening of the concept of culture (Jaakkola, 2014).

Interesting media content research in the Nordic countries has weighed impacts of digital transformation vs. other explanations, such as urbanisation, demographic development, changes in education or other socio-economic factors. Political news, while intensifying in each of the capital regions, has thinned in other regions where it has also become less substantive and instead more personal and emotional (Allern & Pollack, 2012). Politics is still the content type which takes up most space in media publishing. The media coverage of criminal acts, meanwhile, has been given less space and particularly in urban areas (Karlsson et al., 2016; Weibull et al., 2018).

Media coverage of incidents with a short time span such as accidents and abrupt conflicts has a given place in tabloid press but less so in daily newspaper and public broadcasting. The same pattern prevails for sports and entertainment news. Radio remains the key media channel for sports news and coverage of sports events. Weather reporting has come to attain not just more space but also more in-depth analysis and links to politics, which may reflect increased interest in climate change and governance. Coverage of sports has gained in prominence for commercial channels. Attention to crime has diminished across all media channels. Broadly speaking, the magnitude of changes in content has been greater and faster online compared to traditional media (Karlsson et al., 2016).

The number of articles in mainstream Swedish newspapers that display visual images more than doubled between 1990 and 2010 (Andersson, 2013). In their web material, instantly produced videos increased sharply, a change which has been demonstrated in other countries as well. Freely available press, such as *Metro*, picked up use of images online to a particularly high degree. In radio, it hardly existed before 2007 but was found in two-thirds of their online (social medias and websites) material by 2014 (Nilsson et al., 2016).

4.5 Commercialisation and Advertising

With the ICT revolution, the rise of new media channels and news outlets brought about a vastly enhanced scope for interactivity, with diffusion not just of information but also of new services and goods as well, as has gradually become associated with electronic commerce. The cross-border nature of online communication and exchanges means that national regulation becomes less relevant. The scope for mass distribution becomes particularly dramatic for services and intangible assets, whose distribution has come to require scanty transport and traditional logistics costs.

Although the Nordic countries were late in opening for digitalisation of the media, they unleashed a wave of disruptive innovation and entrepreneurial talent highly focused on realising the new opportunities at hand, by creating scalable immaterial services and niche markets in the realms of communication, music, entertainment and so forth. The legacy of some of these continues to evolve and prosper to this day, whether popularly associated with Sweden or not, as exemplified by Skype and Spotify. Some of the traditional media conglomerates embraced this innovative wave, developing powerful outlets for news online, while a range of new players arose and expanded swiftly in the realm of social media.

Printed newspapers as such have lost ground to broadcasting, however, and notably to communication online. Revenue for the newspaper industry has similarly declined alongside a trend towards enhanced market concentration. This development mirrors changes in the composition of advertising/marketing expenditures across media channels. Figure 7 depicts the level of expenses in relation to the population across main media channels and, totally, for four Nordic countries and compared with selected other European countries, from 2005 to 2019.

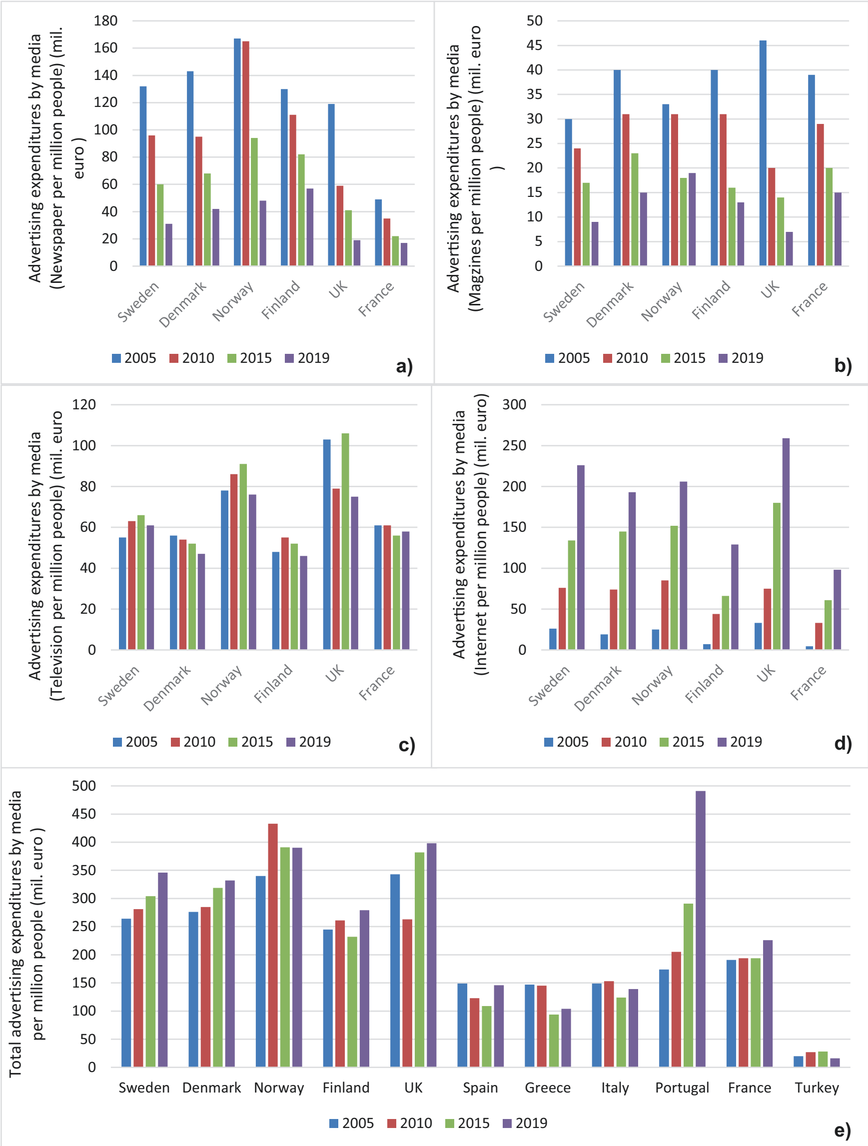

Fig. 7 Advertising expenditures in a) newspaper sector; b) magazines; c) TV; d) Internet; e) total advertising expenditures in the media sector. Source: Ascential Events (2021)

Expenditures on advertising in the newspaper sector (Fig. 7a) fell markedly between 2005 and 2019. The level in the Nordic countries was relatively high to start with. Moreover, it held up more here than elsewhere, especially in Finland. The pattern was similar for magazines (5.7b), although the decline in the Nordic countries was comparable to that in the UK and France (most other European countries experienced a greater contraction). By contrast, expenditures allocated to advertising in television (7c) have been relatively stable, with Norway at the highest level in the Nordics, comparable to the UK. Financially strong companies, in any market, continue to see value in reaching selected consumer segments by advertising through commercial TV programme breaks. Marketing expenditures online (7d), is a different story, with steep increases across the board. The Nordics, together with the UK, are ahead of other European countries in this case, experiencing significantly larger investment in digital advertising per capita.

Adding up expenditures across the various media channels, the total (7e) can be seen to have been consistently high in the Nordics and also on an upward trend. The picture is similar in the UK, while expenditures are significantly lower in most other European countries. An exception is Portugal, which displayed an exceptional surge in advertising expenses on TV specifically. Overall, advertising online has overtaken that spent on traditional media channels. The onset of COVID-19 with associated lockdowns further exacerbated this shift.

The resulting financial pressures have been accompanied by intense debate on the need of public subsidies, to compensate for the decline in commercial revenue across traditional media. In all the Nordic countries, however, the government stepped up support during COVID-19, resulting in a new wave of disparities. At the peak of "pandemic" media funding, private news media received about ten times more public support per capita in Sweden and Denmark than was the case in Finland. As that phase came to a close in 2022, basically all the Nordic countries initiated plans for modernising media support ahead. With the exception of Iceland, which previously had not applied subsidies but merely introduced temporary support during the pandemic, the Nordic countries are planning to redistribute support in favour of local media amd journalism, as well as shift support from text-based to audio-and video-based media. The modernisation of subsidies under way further aims to define quality-enhancing functional and transparency criteria as a basis for public subsidies.

5 Trust in the Media

To what extent content, or a message, can be conveyed from a source to a recipient hinges on a range of factors such as language, format, syntax and also the nature of the relationship between sender and recipient. Such factors influence to what extent a message is understood and how it is interpreted. Cultural factors play a role as well.

5.1 Varying Levels of Trust

The Nordic countries have been relatively homogeneous through history and are widely known to represent "high-trust" societies, in comparison with many others. Generally, trust is defined as a personal perception regarding the reliability that can be placed in other people or in organisations. For trust-building, regulatory conditions and actual behaviour matter, as does perception.

Which institutions enjoy trust varies between societies. In many, the highest trust levels are enjoyed by police and military and possibly the courts. Radio and TV belong to those that tend to follow next, whereas social media usually rank lower, with political power near or at the bottom (EBU, 2020).

In the context of this report, prime consideration in regard to trust centres on the extent to which citizens "trust" various forms of media, how they compare with others in this regard and what changes are under way. A relatively high reliance on public television for news, and on newspapers for public information, implies that political actors meet with high requirements to handle direct exposure to, and communication with, the electorate. Since paid political advertising is banned in the mainstream media, political actors have few other means to reach out than attaining relevant news management skills.

With the rise of modern media in western societies, trust stood out as a key differentiator from the propaganda machines of the past or of contemporary autocratic regimes. As already noted, this applied strongly to the Nordic countries, where the creation of independent newspapers was interwoven with a weakening stance of the monarchies as well as the church, the decline of traditional class society and the quest for educational reform. A kind of ethical code arose, making it essential for news to be transmitted with a sense of impartiality, credibility, and authenticity.

Gradually, regulations were nailed down, pertaining to the so-called legacy media (print, radio and TV), under the broad terms stipulated by international law. Registration as "media" was mandatory for recognition under the supervision of a governmental agency devised for the purpose. Media companies were required to hire only licensed journalists to handle "journalistic" activity. The objective was civil and penal responsibility for the media. In some EU countries, the material scope was limited to audio-visual media services defined by the AVMS Directive, while for others specific media laws established particular administrative obligations, e.g. to enter a public register or subject to specific content regulation.

The Nordic countries are regularly rated high in benchmarking viewed as key for a knowledge society, e.g. in the areas of innovation, happiness and governance. At the same time, trust in radio and TV is at a high level. The OECD, the EU, the World Economic Forum, EBU's Media Intelligence Service (MIS) and the Global Media Monitoring Project (GMMP) rank the Nordic countries as consistent top performers. The Netherlands generally presents the closest profile, with Germany, Switzerland and Estonia similar in specific respects.

The following are some of the main trends in regard to trust in media channels that apply for the Nordics as well as, to a varying extent, more generally/for other regions:

- Trust in written press, particularly the mainstream daily papers, maintains a strong position
- Trust in public service television is also relatively high, although less than for printed papers (more so in the Nordic countries than elsewhere)

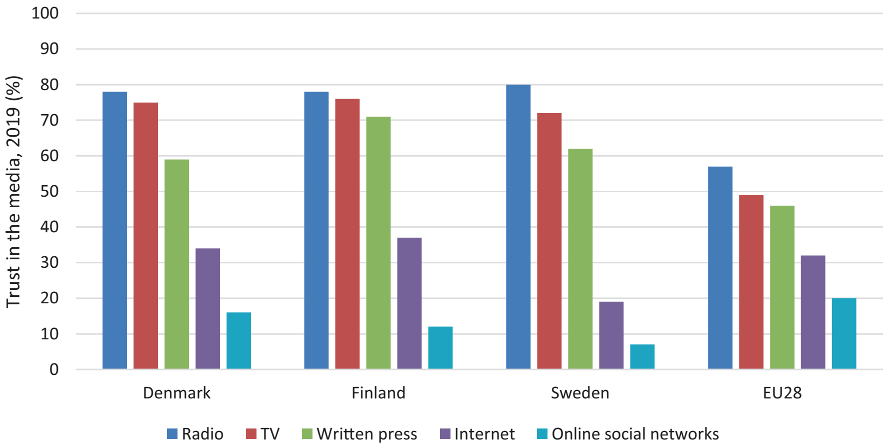

Fig. 8 The share of the population that express trust in the Media. Source: EBU (2020)

- Trust in the Internet is weak, including social networks (particularly in the Nordic countries)

Further, most Swedes consider the state-owned SR—"Sweden Radio"—as the most impartial and credible news channel, followed by other publicly owned ones. The other Nordic countries, and the EU as a whole, largely display the same order of things, although mostly with the highest trust placed in public media institutions followed by written press. Finns have the highest trust levels and Danes the lowest among the Nordics. Basically, all express the least trust in the news broadcast on the Internet and social media, but the Nordics make a bigger distinction in this respect, compared to the European average. Figure 8 compares the trust profiles of the three Nordic countries referred to and the average for EU28.

Trust in social media (SoMe) platforms is on the decline across Europe. A recent survey found radio to be the most trusted medium, scoring highest in 24 out of 33 countries (Reuters Institute, 2021). The Nordic countries demonstrate relatively high trust in national media, with more than 50% of citizens agreeing with the statement that their national media provides trustworthy information. [12] This stands in sharp contrast to three of the biggest markets in Europe—Spain, the UK and France—where a low level of trust was found.

5.2 *Fake News and the Media*

A common technique of distorting reality is the usage of propaganda methods (Soules, 2015), such as media manipulation and the spreading of "Fake News", i.e. distorted truths or lies. Fake news has been constantly invented and propagated as long as humans have walked the planet (Harari, 2011). The term itself is "new",

[12] https://medienorge.uib.no/files/Eksterne_pub/EBU-MIS-Trust_in_Media_2020.pdf

however, coined by Hillary Clinton in a 2016 speech with reference to false propaganda flooding social media and then turned on its head by Donald Trump on the campaign trail when he used it against CNN a month later (Wendling, 2018).

From there on, not just populists and extremists but also bonafide politicians have taken advantage in the pursuit of delegitimizing opposing opinions (Dausend et al., 2017; Ginsburgh et al., 2020). In the Nordic countries, its active use has been documented both in attacks on media itself and on political opponents (Kalsnes et al., 2021). In the age of Internet and social media, with chatbots and AI integrating data sources while utilising channels of mass communication coupled with personal targeting, manipulation of "news" attains an industrial scale. Proving legitimacy and demonstrating validity of facts meet with formidable challenges at one end, while "anything goes" at the other (UNESCO, 2020).

The following conditions are viewed as underpinning the ability of the Nordics to counter the challenges of fake news, in support of trust in societal institutions and public media:

- Limited size combined with communication channels with high reach, relating to relatively homogenous societies which, at the same time, have an inclination to social cohesion as well as openness
- Strong traditions of reading coupled with public services related to education, libraries, etc.

Further, the Nordics rank consistently high or near the top of indices such as press freedom, transparency, gender equality, innovation and education. When opposition parties have insinuated that fake news is spread by government-controlled media platforms, most citizens have kept regarding them as the offspring of populist parties aiming to sow division and distrust (Wodak, 2015).

Those advancing fake news, however, some typical features of the Nordic model, open borders and cultural aspects, e.g. a certain naiveté, have been exploited. Disinformation further advanced "under cover", targeting particular regions, groups and individuals for the purpose of undermining confidence in established institutions within specific communities. This, in effect, has contributed to creating a more volatile political landscape. Playing on and intensifying tensions around the greatly expanded flow of refugees has served as a particularly effective vehicle for the populist parties of the Nordic countries to promote their own legitimacy and ideas (EUMEPLAT, 2023).

In Denmark and to some extent Finland, anti-immigration policies moved into the political mainstream already years ago (Damon & Hume, 2016). In Norway and Iceland, there have been less of an issue due to their more remote geographical location. In Sweden, a generally international outlook held up for long. The lead-up to the latest national poll, however, saw a massive increase in social media traffic, particularly on Twitter, clearly manipulative and politically driven (EUMEPLAT, 2023; Sandberg et al., 2022). The party on the extreme right, *Sverigedemokraterna*, turned out the second largest and with direct, substantive influence on the new centre-right government formed after the 2022 parliamentary elections.

In the wake of the magnification and diffusion of fake news happening internationally, a countervailing industry has evolved, checking and publishing data on the number of "facts violation", overseen by an external institution in support of validity. For many users, the numbers of "likes" on social media platforms count as indicators of their truthfulness (Dausend et al., 2017). Despite the presence of various countermeasures, the regulatory response has been largely ineffective, and the situation remains dire (Alemanno, 2018). Wodak (2015) complains about the hopelessness of having a constructive discussion about the validity of facts if every shared argument is accused of being false. The effort and challenge of finding the "real" truth may thus sometimes in itself prove of little meaning.

How then muster backing of quality journalism and cultivate healthy sources of criticism? A number of fact-checking initiatives have appeared in the Nordic countries. The resulting efforts have cast light on established media as well, which at times serve as an amplification and reverberation channel for fake news narratives. Swedish public television, for instance, faced severe criticism over its coverage of the 2020 US presidential election. In some sort of effort to appear "neutral", in effect it came out whitewashing Donald Trump's attack on democracy and with that domestic populist anti-immigrant parties in Sweden.

What kind of corrections work best and why remains to be seen. Calls have been framed based on evaluation of the ongoing development in the three Scandinavian countries (Norway, Sweden and Denmark), for new methods to screen, verify and counter online news and to enhance media literacy, partly to disclose information manipulation appearing in various shapes, spanning text, icons, images and video. Given the shift in the power balance that has already occurred, however, crafting and implementing any roll-back has not become any easier.

6 Nordic Media Patterns in Perspective

This chapter has reviewed various aspects of Nordic societies with particular focus on the media landscape. Some of the observed developments reflect external factors such as technological change and international trends. In other respects, the Nordic model has evolved along trajectories shaped by internal conditions. So, to what extent does it make sense to keep associating the Nordic countries with corporatism or a particular Nordic media model?

Relating to past positions in the literature, Hallin and Mancini (2004) predicted that the Nordic model would gravitate towards the Liberal one. Ohlsson (2015) argued such convergence has happened. Others, such as Nord (2008) and Sapiezynska (2018), speak of a hybrid model taking shape, a liberalised version of the corporatist model. Hallin and Mancini (2017) refer to the rise of various novel sub-systems.

Synthesising conclusions from the present report, below we characterise key similarities vs. dissimilarities of the Nordic media model compared with other regions:

- Nordic consumption patterns are similar to continental (north-western) Europe when it comes to ranking of press freedom.
- In many ways, the Nordic structures of public service broadcasting are similar to those of the UK and Japan.
- The Nordic countries have much in common with similarly wealthy Western societies but have more in common with each other (Andersen et al., 2007).
- In international comparison, Nordic countries cluster on indicators related to social outcomes—such as happiness, social trust, freedom of speech, leverage of information and communication technologies and patterns of media use. This stands out as a distinct pattern when the Nordics are compared with other regions.
- Newspaper readership is marked by relatively small gender differences in the Nordic countries. Southern Europe has the opposite. While gender gaps range from a 35% difference between male and female readership in Portugal, they may not exceed a few percent in Sweden. Historically rooted explanations include differences in literacy rates and a greater separation between men and women in social life (Hallin & Mancini, 2004). In this domain, other regions are most likely gravitating to a situation more similar to that of the Nordics.
- Radio and TV exhibit relatively high viewer numbers, with radio predominantly public in nature, while commercialisation and alternative news are weakly present. Television similarly displays continuously high numbers of viewers as do the public media parts, although private channels advance their standing in this case. Viewer numbers are relatively high for children and, in particular, the elderly in all the Nordic countries, while adolescents and young adults show a marked decline in time devoted to watching television.
- External relations and influences lead in various directions. With Sweden the most centrally located and largest of the Nordic countries, the surrounding Nordics have strong links to Sweden, although Iceland less so. At the same time, the largest Nordic countries are looking west rather than east. While Finland has been particularly oriented toward Sweden in the past, all the Nordics have been influenced by Anglo-Saxon media systems. French and German influences have been tangible too and somewhat further reinvigorated in recent years. The impact of liberal systems has conversely waned to some degree, in favour of continental Europe. Iceland's media system, finally, used to be strongly US-oriented, but, in recent years, a noteworthy diversification appears to have made Iceland more similar to the other Nordic countries, as well as "more European".
- Broadcasting has declined significantly in all Nordic countries, although to a varying degree. As public policy favoured public broadcasting, commercial television evolved fairly late. Today, the Nordics are amongst the front-runners when it comes to fast Internet access and digitalisation, while traditional newspapers and public media are still going strong.
- Trust in written press remains high in the Nordics and even gained in importance with the rise of fake news. Although the daily watching time of public television has declined, trust levels have stayed relatively high.

Table 1 Stylized comparison between Nordic and Liberal media models

Dimensions of comparison	Nordic model	Liberal model
Newspaper industry (and public service broadcasting)	Circulation declined modestly but remains relatively high. Consumers stay relatively loyal to public media (remains)	Moderate circulation, users having emigrated much more to commercial alternatives
Political parallelism	From party press and external pluralism to more neutral and commercial press; regulations of broadcast media (gone/altered)	Market-orientation of printed and broadcast media
Professionalism	Journalism keeps up its ethics, although under pressure. High degree of institutional self-regulation (partly remains)	High degree; non-institutional self-regulation
State intervention	Frequent press subsidies and regulations (partly remains), other aspect has to do with public defence of public broadcasting (has become less defensive, but remains)	Less frequent, market orientation, less support of public broadcasting
Digital media and trust	Written press and public television remain strongly present (despite a decrease in relative terms). Traditional media actors have actively and successfully adopted digital strategies. Strong demand for Internet use although qualified with low trust in content found on the Internet and on social media (has arisen as distinct feature of the Nordic model)	Trust in media is low for written as well as online news, in line with less public regulation of media content. Commercial platforms meet with few hurdles to exploit user information for business purposes.

Table 1 further sums up how the developments of the Nordic model compared with the Liberal model, referring to the stylised traditional interpretation of differences. On balance, the Nordic model maintains strong features of its own (observations made in parentheses, second column). That is not to say that it remains the same as in the past. The influence of political association is mostly gone, public media retain government support but has adapted to navigating new technologies along with more open and competitive markets. As for the direction of change in individual countries, the transformation of the Icelandic media and political system, while not extensively covered in this report, may serve as illustration of the particularities at play. In various ways, Iceland's media system has long differed from those in the other Nordic countries. In brief, corporatism is less prevalent in Iceland, as is journalistic professionalism, and remnants of political parallelism have carried over to what has become a highly commercial media system. This has long operated without the public service requirements or support for private media that characterise the other Nordic countries. Along the way, however, Iceland was particularly impacted by the 2008 financial crisis, and the ensuing years have brought quite systemic change to media and politics. After a temporary cooling of relations, Nordic cooperation involving Iceland has intensified. On regulatory matters as well as structural change, the Icelandic media system now seems in a stage of transformation that makes it more similar to the other Nordic countries, not less, and more different from the liberal model than it used to be (Harrie, 2017).

The rise of the information society has been accompanied by greater fluidity and diversity, as well as with issues such as misuse of personal data and cybercrime. Social media but also established media have been strongly affected by the fabrication of news and targeted misinformation sowing discord among particularly vulnerable groups. Although bestowed with features and capacity of use for countering the threat of fake news, it appears that the Nordic model, with strive for consensus while smoothing over conflict, has been ill-equipped to respond. The migrant issues arising from the start of the refugee crisis in 2015 soon became contentious and a prime target of misinformation and populisma, applying to the wider European context as well as the Nordic countries (Duxbury, 2018; Kelly, 2018).

Compared to other regions, thus far the Nordics demonstrate a greater scope for combining taking advantage of new technologies and media markets with continued demand for robust public media offerings, while less faith is placed in social media. As in so many other places, however, substantive variations appear on the ground, between centre and periphery, urban and rural and those that are better educated versus those that are not (Brake, 2013).

To conclude, the Nordic media systems hardly comply any more with the conventional assumptions of a corporatist model. Yet, thus far they kept evolving under the influence of a special Nordic media model. A privileged standing for public media was upheld for many years on terms that accounted for rigidity and risk of stagnation. Innovators and entrepreneurs taking advantage of technical progress made change inevitable. The public media sector has come a long way since then, contributing to new solutions as well as enjoying relatively strong public support and trust. In the more complex media landscape taking shape, however, changed conditions for journalism along with the proliferation of unruly content development are interwoven with more volatile and polarised politics. How to cope with these dynamics pose serious questions for the road ahead.

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The Media in Southern Europe: Continuities, Changes and Challenges

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Abstract The media systems of Portugal, Spain, France, Italy, Malta, Greece, Cyprus and Turkey represent what Daniel Hallin and Paolo Mancini have proposed as the Southern European or polarised pluralistic model. Regardless of their differences, the media in Southern Europe are characterised by low levels of newspaper circulation, a tradition of advocacy reporting, instrumentalisation of privately owned media, politicisation of public broadcasting and broadcast regulation and limited development of journalism as an autonomous profession. In the digital era, the media in Southern Europe have to adjust themselves to the new conditions, as citizens have turned rapidly to the digital and social media, regardless the uneven development of the Internet in most countries. It seems that digitisation of the media landscape has led the Southern European media to follow a path not very dissimilar to other European countries as in the past. The advent of digital and social media, as well as the emergence of citizen journalism, has made the news media landscape even more uncertain for the legacy media and the professional journalist, but less controlled by the state, which used to be the norm in the analogue past.

Keywords Media systems · Polarised pluralistic model · Newspaper circulation · TV viewership · Listenership · Social media · Internet penetration · OTT · Clientelism · Parallelism · Instrumentalisation

1 Introduction

The media systems in Portugal, Spain, France, Italy, Malta, Greece, Cyprus and Turkey represent what Daniel Hallin and Paolo Mancini proposed as Southern European or *Mediterranean* or *polarised pluralistic* model. Despite this group not

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being completely homogenous, the media systems in Southern Europe tend to share several characteristics which distinguish them from the rest of the Central, Western and Northern Europe.[1] 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.

The media systems of the Southern European countries fit well and present similar features with the Mediterranean/polarised model identified by Hallin and Mancini (2004) and Hallin and Papathanassopoulos (2000). These are low levels of newspaper circulation, high levels of TV consumption, a tradition of advocacy reporting, instrumentalisation of privately owned media, tight governmental control of the public broadcaster, savage deregulation and limited development of journalism as an autonomous profession. The recent fiscal crisis in relation to the advent of the digital media has caused additional problems to the Southern European media systems. With a few exemptions, however, the media in Southern Europe have managed to survive since the fiscal crisis has not eventually weakened their close relationship with the political system. On the contrary, it seems that the media landscape has entered a new era of 'interplay' between media owners and politicians. This chapter aims to focus on the continuities and discontinuities of the Southern media model by focusing firstly to the developments in the market and then to its main characteristics.

2 The Media Market

2.1 Low Levels of Newspaper Circulation

In most Southern European countries, the press was traditionally regarded as a means of negotiation among the politically active classes rather than as a part of mass popular culture (Hallin & Mancini, 2004, 2012). As a result, when electronic media started to approach the public with a familiar language and modes of communication, they managed to become the true mass media (Casero-Ripollés & Izquierdo-Castillo, 2013).

In the last decade, publishers had to confront the financial crisis of 2008 and the decrease both in sales and in advertising expenditure. 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, 2020). 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. In Greece *Eleftherotypia* and *Eleftheros Typos* ceased publication; others continued

[1] 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).

with only their online editions like *La Tribune* and *France Soir* in France; many free dailies ceased operation like *Metro* in Spain and *Meia Hora* and *Global Notícias* in Portugal; mergers and changes of ownership took place; local offices were closed 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.

To better understand the relationship between citizens and the press, we have to take a look at the trust in the press indicator. Contrary to other European regions, the newspaper in Southern Europe is not considered a trustworthy medium. According to the EBU's figures on media trust (2020), apart from Portugal, where 58% of the citizens say they trust the written press, Southern Europeans appeared to be more sceptical about, if not avoiders of, the press than their northern counterparts. Press trust in France and Italy scores medium. Cyprus reports low trust (40%), while only one in three citizens in Spain, Greece, Malta, Cyprus and Turkey tends to trust the press (EBU, 2020).

In most Southern European countries, low circulation and the continuous failures of newspapers to reinvent themselves in appealing ways traditionally led to over-dependence on state aid, along with the governmental involvement with the publishers (Antheaume, 2010). Italy and France developed such complicated media subsidy mechanisms since the 1960s (Antheaume, 2010; Palmer & Sorbets, 1997). Often the amount of the subsidies has to do with the newspaper's political stance and affiliations. A characteristic example was the lack of transparency in the way the Greek government allocated funds at media outlets during COVID crisis (The Manifold, 2020).

However, these low circulation volumes and the downward trend in sales and readership from 1990 to 2019 did not appear at the same time nor to the same degree across Southern European countries (Fig. 1).

Overall, the biggest effect is a change of reading habits. Levels of readership increased in the early 2000s due to the appearance of free press in Southern Europe. *Direct Matin*, *Metro* and *20 minutes* in France (Kuhn, 2013), *Metro* and *Leggo* in Italy (Mancini & Gerli, 2017), and *20 Minutos*, *Que!*, ADN and *Metro Directo* in Spain (OECD, 2010) soon found their audience. In Italy daily readership has been steadily growing since 2000, and free dailies have strongly contributed to this increase adding about six million readers from 2005 to 2009. Research has shown that 'free newspapers' were the most popular type of print press (Nossek et al., 2015), while focusing mostly on soft news and 'apolitical' content (Kuhn, 2013). These newsreaders, however, were not converted into traditional newspaper readers and dropped reading newspapers altogether as soon as free press was hit by the 2008 economic crisis. More precisely, when we observe the readership trends, as reported in data surveys throughout the 30-year period, it is apparent that while daily readership drops, weekly readership is rising in most cases until 2015 and then dropping a little from 2015 to 2019.

It might be argued that the penetration of Web 2.0 and faster Internet connections, as well as the financial crisis, were the principal factors that led to lower newspaper consumption. On the other hand, newspapers in the Southern European countries were merely addressed to the respective elites and not the wider public.

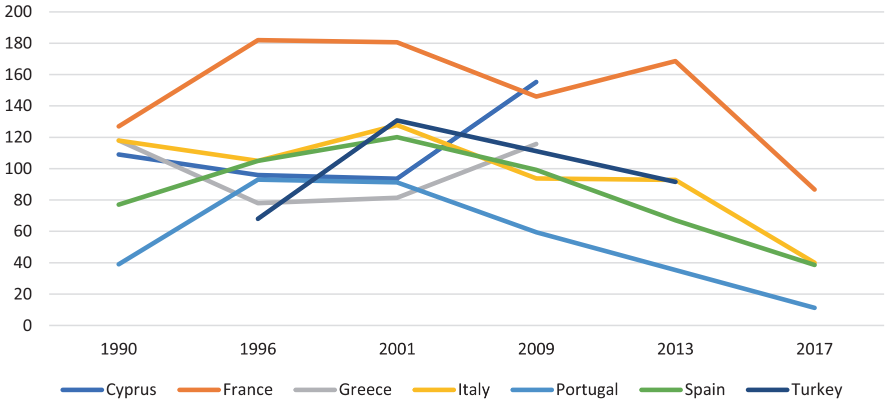

Fig. 1 Dailies average circulation/adult population (copies per thousand). Sources: World Association of newspapers–World Trends Report 1991, 1997, 2002, 2010, 2014, 2017. Compilation: Eumeplat Project

Nonetheless, the people that used to read newspapers continue to do so, but on a weekly basis. It can therefore be argued that while web-based news portals are more efficient in providing breaking news and 24 hour information, newspapers continue to function as a point of reference in decoding this ocean of constant information.

It doesn't come as a surprise that the advertising industry is responsive to sales fluctuations. 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, we notice that in France—most probably due to French presidential elections—the advertising expenditure for newspapers increased significantly (from 16.5% in 2005 to 37.3 in 2010). During the same period in Italy, Spain and Portugal, there were slight decreases. Newspapers in Italy were resilient most of the time; however, the advertising expenditure was cut 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 has the biggest share of advertising expenditure for the press in 2019 reaching 12.4%.

In the early 2000s, newspapers started experimenting with their online presence. 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 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 cannibalisation process

(Casero-Ripollés & Izquierdo-Castillo, 2013; Simon & Kadiyali, 2007; Kaiser, 2006; Filistrucchi, 2005; Chyi & Lasorsa, 2002).

In Greece new native online media have become the most popular sources of news, whereas French, Spanish and Italian online public spheres are still dominated by legacy media (Antheaume, 2010). *La Repubblica*, *Il Corriere dellaSera* and *Il Fatto Quotidiano* 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. However, advertising revenues appeared to be insufficient for sustaining traditional press outlets. New business models combining pay wall 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. Nevertheless, 90% of publishers' revenue continues to come from print revenues (World Association of Newspapers, 2022).

2.2 Radio Small but Trustful

With the exception of Cyprus and Greece, all the countries in Southern Europe are below the EU28 median regarding the share of respondents who listen to the radio every day or almost every day (Statista, 2020). Although they listen less, they operate more radio stations. 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. However, the side effects of the financial crisis are visible in 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 (−22.8%). 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%).

Similarly, the years following the 2008 financial crisis had a detrimental effect for the people employed in this media sector. 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.

As far as it concerns the advertising share for radio, the relevant data reveal that it has remained stable throughout the years—with the exemption of Greece, ranging from 5 to 10% of the total advertising expenditure. It is worth mentioning that even during the financial crisis the radio ad spent was not severely affected. Moreover, the shifts in listening habits caused by the technological developments (e-radio, streaming platforms, podcasts, etc.) don't seem to have an effect on the traditional radio regarding the share of advertising expenditure (Fig. 2).

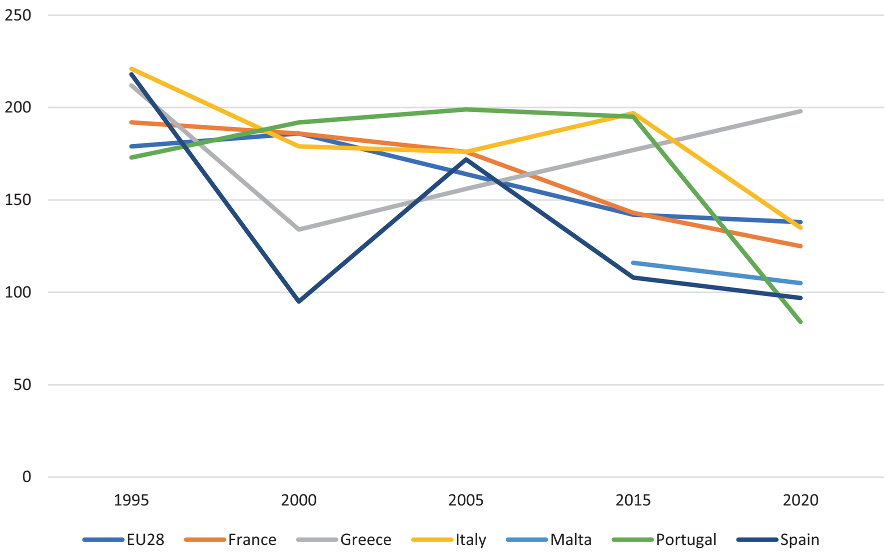

Fig. 2 Radio daily listenership (in minutes). Sources: *EBU, Audience Trends*. Compilation: Eumeplat Project

In the last years, traditional radio in Southern Europe is losing its appeal. This can be explained with the rise of streaming services and platforms; and even though terrestrial radio broadcasting is still the most important distribution platform, figures show that online radio is no longer just a complement to FM but replacing it, especially when it comes to younger listeners (Cordeiro, 2012).Concerning news consumption, podcasts seem more appealing to the youth (18–34 yrs.), while older age groups (35–55 +) still prefer listening to the radio (Newman et al., 2020). An interesting exception to the rule is Italy, where young people still appear to be avid radio listeners (EBU, 2020).

On the other hand, radio continues to be the most trusted medium. Respondents in Portugal said they trusted radio as well as TV (both 68%). Trust in radio in Spain fell sharply from 2018, with 48% of citizens expressing distrust in 2020. Another notable exception is Greece, where citizens distrust all traditional media (62% distrust radio) and instead turn to the Internet to get the news. Distrust in radio in Turkey is as high as in Greece (61%) with Turkish citizens turning to TV and the Internet as more reliable sources of information (EBU, 2020).

2.3 *Television Is Still Dominant*

As already noted, the Southern European media market, even though it presents common characteristics, mostly regarding consumption patterns, varies greatly in size and dynamic on the supply side. Namely, the model consists of larger markets of France, Italy, Spain and Turkey, followed by the medium markets of Portugal and Greece and smaller markets of Cyprus and Malta that mostly import their content. However, following deregulation all these markets saw a boom in the number of free commercial TV channels up to 2010. However, this trend differs greatly from one country to another. In Greece, there were a moderate number of commercial channels that apart from changes in the media field remained stable through time, whereas in Portugal both public and commercial channels remained stable. Italy is on top. It is striking that in 2019 there were 128 commercial channels in Italy, while in Turkey that ranked in the second place, there were only 41 channels at the time. As a result of the economic downturn of 2008, markets in Cyprus, Spain and Turkey experienced the closure of commercial TV channels, while public channels were also closed or merged by 2010. France and Italy saw a boom in the number of commercial channels from 2010 and on, while Portugal kept a stable number in TV channels, as in the case of Greece.

The arrival of digital platforms in the mid-1990s 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. By 2015, the thematic TV market had reached its saturation in most countries of the Southern European cluster. The only exception is Turkey, partly because of its late market development. As in other European countries, IPTV and VOD started establishing in the field, driving revenues in the TV industry.

When it comes to TV consumption, market share and overall impact, research has shown that TV occupies an important part of the daily lives of Southern Europeans (Hallin & Mancini, 2004). More importantly this trend seemed to be on the rise until 2010, where upon a reverse trend followed. 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. Moreover, in the next 10 years, TV viewing time continue to grow in all Southern European countries (Fig. 3).

Although Southern Europeans seem to be heavy TV users, citizens in six out of the eight countries of the Southern Europe report low to no trust at all in TV: Cyprus (48%), Turkey and Malta (45%), France (32%), Spain (29%) and lastly Greece (22%). Two notable exceptions are Portugal which reports high trust in TV (69%) and Italy just limping above the European average with 51%. In other words, it seems that the viewing habits of Southern European citizens have little to do with TV news content and more with the consumption of entertainment programs. This disassociation might be explained by an increasing news avoidance, or it could imply that Southern Europeans trust less news that disseminated by mainstream media.

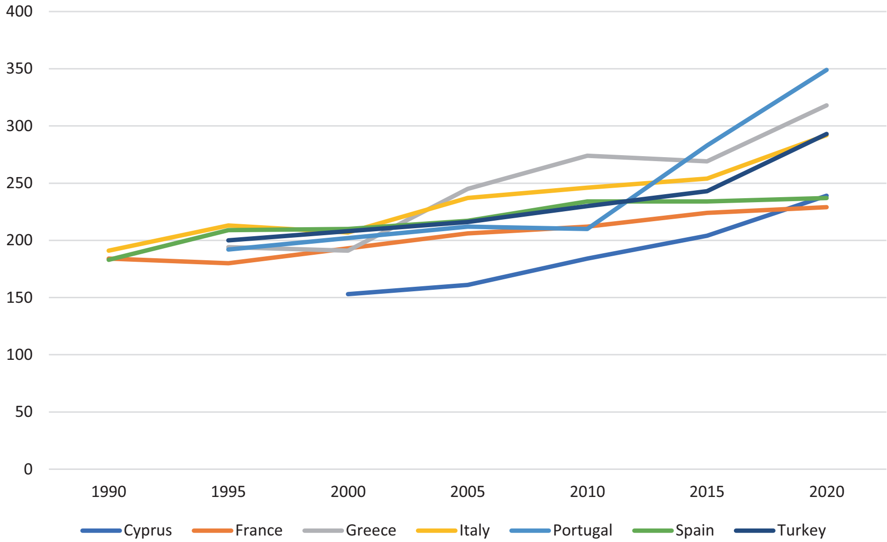

Fig. 3 TV daily viewing time (in minutes). Sources: *EAO –Trends in European Television 2006, vol.2,* EAO, 2011*, vol.2, EAO – Yearbook 2020 EBU, TV Audiences, 2021.* Compilation: Eumeplat Project

2.4 Going Broadband, Even Unevenly

Broadband Internet penetration has followed a considerable growth in the last decade, with Greece presenting the highest development, according to the latest data from Eurostat (2021). More precisely, in 2020, 95% of Spanish households have broadband Internet connection (well above the EU average). Cyprus seems to have an outstanding performance in this indicator as well, with 92% and 93% of the island's households having broadband Internet access, in 2020 and 2021, respectively, followed by Malta (90% in 2020). It comes as a surprise that countries with advanced economy as Italy and France seem to follow broadband Internet penetration with a slower pace than countries with weaker economy. More precisely, according to Eurostat, in Italy 87% of households have broadband Internet access in 2020, whereas in France 88% in 2021. Greece has one of the lowest Internet penetration rates, compared to other countries of this cluster, since in 2021 85% of the country's households had access to broadband Internet connection. Portugal stands at the bottom of this ranking (84% in 2021). In Turkey, the broadband Internet penetration has been growing steadily, where according to Turkstat (2015, 2019) in 2015, 67.8% of households had broadband Internet connection and in 2019 the relevant percentage has risen up to 87.9%. Mobile broadband subscriptions have encountered a tremendous growth during the last decade (2009–2019) in the majority of the countries under examination, although at a different pace.

In effect, Internet use has been steadily growing throughout the last decades in all the countries under examination. What is worth noting though is that smaller

Southern countries—with the exemption of Spain—seem to be the leaders of this trend. More precisely, according to ITU in 2019, 90.72% of Spanish people use the Internet, followed by 86% of Cypriots and 85.78% of Maltese people. Italians, Greeks and Portuguese people use to a lesser extent the Internet, compared to their Mediterranean counterparts. The percentage of individuals using the internet in Italy was 74.39 in 2018, whereas for the year 2019, 75.67% of Greeks accessed the Internet and 75.35% of Portuguese people (Fig. 4).

Social media use among Southern Europeans seems to be steadily growing, although not with the same pace in all the countries. The issue of trust in legacy media might provide an explanation for the increased use of social media in Southern European countries. Nevertheless, France and Italy have the lowest percentage of daily social media use. Regarding the low percentage of social media use in France, one possible explanation could be found in the French government's determination for stronger social media regulation over privacy matters, which has resulted in clashes with Silicon Valley CEOs and consequently has affected the social media usage in the country, compared to other European countries.

3 Political Parallelism

According to Albuquerque, the concept of political parallelism is a 'product of history' that reflects a peculiar pattern of relationship between media and political institutions, 'common enough to define the political communication system as a

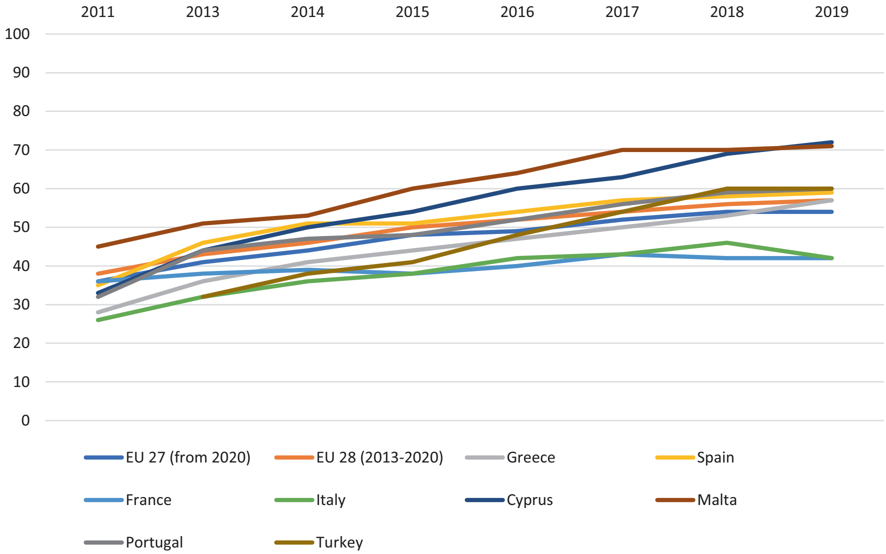

Fig. 4 Percentage of individuals participating in social networks 3 months prior the year of survey. Source: Eurostat. Compilation: Eumeplat Project

whole' (2018, p. 2). As a result, Albuquerque (2013) points out that in order to be applied, the concept of political parallelism demands the satisfaction of two preconditions: the existence of a competitive political system with clear political cleavages and a stable relationship between media and political actors that fosters recurrent patterns of interaction between them.

As Hallin and Mancini point out, the media in the Southern European countries are relatively strongly politicised, 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, mobilising readers to support political causes. Public broadcasting tends to be party-politicised. 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 emphasise commentary from a distinct political perspective. However, there is some variation in this trend as well. 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 Southern European countries tends to emphasise 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 ritualised 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 Sierra et al. (2010, p. 380) 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 it seems that from the very start these 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, and it seems to continue 'to be part of this order as facilitators and ideological communicators' (Sümer & Taş, 2020, p. 43).

Even after the commercialisation 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 commercialisation period the French media followed the trend of autonomising from political power, most of the news media can still be identified along the far left-far right axis. In other words, as Kuhn (2017, 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 (Graña et al., 2020). In France, the local press is characterised by a high degree of concentration, which is quite geofigurically localised, 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. On 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 organisations (transparency in public life, freedom of communication).

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 & Gómez-Baceiredo, 2017). Fuentes Aragones (cited in de la Sierra et al., 2010, p. 380) 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, 2001; Mancini, 1993). This reality has caused the public to perceive the media as guided by political and business interests as well as clientelism.

The political independence of journalism in Italy is also disconcerting, especially related to the lack of independence of the public broadcasters. 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 et al., 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 et al., 2020).

The issue of media's 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, so 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' (Christoforou, 2010, p. 243).

In Portugal, media political bias lost relevance once the normalisation of the democratic regime has taken place, and the partisan press has virtually disappeared ever since the commercialisation'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 (Correiam & Martins, 2017).

In Malta, political parties and the government have to right 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 a generally acknowledged fact that political influence in Maltese news organisations is 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 instrumentalisation (Çarkoğlu & 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,[2] 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).

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 associations filed 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 et al., 2020). More diverse and vibrant views appear consistently at the local and regional outlets, but these have limited distribution (Yesil, 2016, p. 8).

4 Instrumentalisation 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 and the 2008 financial 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 and even government involvement (Noam, 2016), shaped a hardly sustainable business environment

[2] 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).

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 instrumentalisation 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 standardised legal procedures (Mancini, 2012). Direct ownership and/or political pressures are the main means of media instrumentalisation, while lack of transparency in terms of media ownership is a thorn in media's side regarding audience trust and credibility (Mancini, 2012).

According to CMPF (2022), 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), based on the 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 instrumentalise 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 it 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, and 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 characterised 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 holds that 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 and 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 characterised 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).

Greek media have been dominated by large media organisations 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 fiscal 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. 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.

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 PrensaIbérica, 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 PrensaIbérica and a radio station for Unidad Editorial (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 privatised 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 2-year period of revolutionary upheaval during which the media were, for the most part, taken over by radicalised journalists who conceived them as instruments of class struggle. Ownership of much of the media passed to the state when the banks were nationalised, 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 privatised, while in 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. Even though instrumentalisation 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' (Sammut, 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).

Instrumentalisation 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 seem to use their media outlets to protect their interest in other sectors of the economy. As Somer 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).

5 Politicisation of Public Broadcasting

Most countries in Western Europe have succeeded in developing institutions which separate public broadcasting from the direct control of the political majority. In France, 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 aimed to ensure the independence of the public broadcast and offered transparency in the manner TV and radio licences 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 broadcaster RAI was essentially under the control of the ruling Christian Democratic Party in the 1950s and 1960s, but in the 1970s, 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 (Mazzoleni, 2000, p. 162). For decades, Italian governments seem to have been either incapable or reluctant 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). 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 depoliticisation 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 criticised of biased reporting in favour of the government (Sanders & Canel, 2004, p. 202). This widespread 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 4-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). In Greece, news and editorial judgements 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 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). Similarly, 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). The public broadcaster, TRT, has been always under tight state control, and its audience fell dramatically after the advent of private channels (Yesil, 2016, p. 39).

In other words, in most countries politicisation 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. This brief historical frame could shed a light in the less homogenous picture found in the Southern European countries regarding public broadcasters. For example, in Italy and France, PSB receive more than a third of TV viewership. Smaller markets of Portugal, Greece and Cyprus follow close to 10% or even higher. Even though a slight downward trend—with a notable exemption of Spain—was recorded in public broadcasters' popularity for most countries up to 2019, this was reversed during 2020. During the COVID-19 health crisis, citizens in most countries turned to public channels for reliable information. In effect, public service media (including radio) was the most trusted news source in Portugal and among the top five sources in Spain, Italy and France. Nevertheless, citizens in Greece and Turkey don't trust the public television. It is worth mentioning that in these countries the PSB head is still directly appointed by the government. Politicians in power continue to treat public television as the 'long arm of the state' resulting in low credibility and high levels of citizens' distrust.

6 Limited Professionalisation

As we have already noted, the high instrumentalisation of the news media by oligarchs, industrialists, parties or the state, characterising the Southern European media model, implies that journalistic autonomy will be limited. Journalists will at times have to defer to their political masters (see Hallin & Mancini, 2004, p. 111). The process of journalists' professionalisation 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 professionalisation 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.

In Greece, the professional activity of Greek journalists in practice was and still is defined by a framework of alignment to the particular interests of the media owners (Papathanassopoulos, 2001, p. 519). In Cyprus the presence of various regulatory bodies has not actually led to a transparent media system (Millioni et al., 2018; Christophorou & Spyridou, 2017). In Spain, journalism has also resulted in a low degree of professional autonomy for journalists themselves, which favours the control on behalf of political actors (Casero-Ripollés et al., 2015, p. 98). In Italy, journalists do not hold a high level of autonomy (Splendore, 2016), while Italian journalism is characterised by a high degree of political parallelism (Hamada et al., 2019, p. 143).

The strong role of political parties and the Church in Malta's media system has hindered the development of journalism as an autonomous profession (Vassallo, 2020; Simunjak, 2016). On the other hand, in France, 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 professionalisation of journalism, which took place in the first third of the twentieth century (Weaver & Willnat, 2012). In Turkey, the guidelines of the formal accountability system and ethical standards in the exercise of journalism laid down by the Journalist's Association and media groups have never been implemented into practice mainly, because of the political and economic pressures upon the media sector (GencelBek, 2011).

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 characterised 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 scrutinise political and economic power centres. 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 (Correiam & Martins, 2017). This development has created blurry journalistic practices with the sharp increase of paid content and the domination of infotainment media logic (Cádima et al., 2020).

It is reported 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 professionalization of journalism and the professionalism of journalists' (Alonso, 2015). Hence, the profession precariousness and the fiscal 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., 2020). In the last 2 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 et al., 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 3000–5000 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 labour support has given birth to a suffocating working environment for the Turkish journalists (Christensen, 2007, pp. 192–193; Yesil, 2016, p. 111). 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 categorised as one of the worst jailers of journalists in the world again (Brogi et al., 2020).

7 "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. In effect, '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' (Papathanassopoulos, 1997, p. 351).

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).

The deregulation of the TV media market in Spain was marked by a dual transformation: decentralisation and liberalisation. 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' (Bonet & Guimerài Orts, 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 emphasising 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 (Sümer & Taş, 2020, p. 36). The de facto privatisation by satellite channels was a major challenge for the Turkish public broadcaster. 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'.

8 Concluding Remarks: Continuities and Discontinuities

Although the developments in the Southern European media sector may not entirely respond to the needs of their industry, 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 media systems of Southern Europe have worked under Western democratic rule for less than 50 years now, and they had suddenly to face all the upheavals that other Western media systems have taken years to deal with. On the other hand, some important continuities go on such as the significant role of the state and the politicisation and polarisation of the media sector. More precisely:

First, the continuous *interplay* between politics and the media. Media and politics continually interact and influence each other in various ways, as we have seen, in most Southern European media systems.

Secondly, the state (aka leading political parties) 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 and, of course, in news agencies.[3]

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. 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, state subsidies (date back to 1944) in 2005 amounted to 249.2 million euro, while the non-direct subsidies were far higher. In Spain, the state is the largest spender in the media annually. Among the forms of funding are state subsidies given to the national and regional public media companies, while indirect state contributions are disguised as taxes, as well as advertising in the media bought with public money

[3] See the French Agence France Presse, the Italian Agency AGI, EFE in Spain, ANA-MPA in Greece, Anadolu Ajansi in Turkey, AgênciaLusa in Portugal.

(Campos-Freire et al., 2020, p. 4). Governmental choices here are critical for the economic sustainability of some of the small- and medium-sized media companies (Artero & Sánchez-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. In Turkey, public funding is also a source of tension in the country's public scene. According to Nielsen's relative data, six newspapers belonging to 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, which cannot be justified by their circulation figures (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) absorbed 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 (Nenadic, 2017, p. 7). Italy, during the last 5 years, is encountering major transformations regarding the system of public funding in the media.[4] Indirect public support has already been abandoned in 2020 (Trevisan, 2020, p. 5).

However, *the logic of media markets* may under certain circumstances undermine these relationships. It can make media organisations 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 do 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 polarisation 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. Mattoni and Ceccobelli (2018) have made a crucial point when they state that digitisation has led to a radical transformation of politics organised 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-institutionalisation (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).

[4] 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.

In addition, the new financial pressures brought to legacy media by *the digital technology have paved the way for a kind of de-professionalisation 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 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 online 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, 'globalisation' 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 Europeanisation processes rather than globalisation*, since the EU provides with a common legal framework and all its member states, either northern, western, or southern, have to follow.

The 'Europeanisation' 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 organisational logic of domestic politics and policymaking (Harcourt, 2002; Radaelli, 1997). The EU 'Europeanisation' process will certainly affect their media systems, as well. As the rest of media systems around the world, the media in Southern Europe have been affected by the globalisation processes, the Europeanization process of the EU membership and the developments of technology. In effect, the media in Southern Europe, as elsewhere, have been affected by the globalisation, technology, economy and the developments of the European Union.

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The Media in Eastern Europe

Dessislava Boshnakova and Desislava Dankova

Abstract Media systems are always in the process of change. Countries in Eastern Europe have similarities, but at the same time present major differences. Analysis indicates that press freedom, foreign ownership, political parallelism, and the strength of public service broadcasting have a strong correlation. Analysis indicates that press freedom, foreign ownership, political parallelism, and the strength of public service broadcasting have a strong correlation, even though significant differences exist among countries. Thus, it is difficult to argue for a unique type of Eastern European media system.

Overall, the historical background of political parallelism and advocacy journalism in Eastern Europe is rooted in the legacy of the communist era, where the media was used as a tool of the state to control the flow of information and promote the government's agenda. Despite the fall of communism and the transition to democracy in many countries in the region, these practices have persisted in some cases.

Media systems in Central and Eastern Europe cannot be classified as a single model but can instead be divided into three different types. Romania, Hungary, and Bulgaria have high levels of political parallelism and low levels of press freedom. Central media systems (Czech Republic, Croatia, Poland, and Slovenia) have strong public service broadcasting and low levels of foreign ownership. Northern systems (Estonia, Latvia, Lithuania, and Slovakia) have the highest levels of press freedom, the highest levels of foreign ownership, and the lowest levels of political parallelism.

Keywords Central and Eastern Europe · CEE · Transformation · Civil society · Media systems · Parallelism · Clientelism · Instrumentalization · Mass media · Politics · Newspaper circulation · Public broadcasting · TV viewership · Listenership · Social media · Internet · Digitalization

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1 Introduction

Taken together the media systems of EU country members Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia, as well as those of Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Northern Macedonia, Serbia, and Ukraine, form what we usually consider the Eastern European media region. The group is large and not at all homogenous; however the media systems of these Eastern European countries share characteristics which set them apart from the rest of Europe, which is largely due to similarities in their paths of political and social development in the last century. For the purposes of this chapter, we examine the EU country members only.

Media are an integral part of democracy. The state of the media environment is strongly connected to the state of democracy in each country. The process of transition from communism to democracy includes deep changes in media market and policy. Along the process of democratization and accession to the European Union, free press is one of the prerequisites. The transition of the ex-communist Eastern European countries followed a largely similar pattern and timeline, and their admission to the EU, known as the "Eastern Enlargement," happened in three phases between 2004 and 2013.

The transition period is important as political changes affected dramatically the media markets in the post-communist countries. The regime changes after 1989 put an end to the monopolistic political control of the media. Freedom of press was proclaimed and most of the media were privatized. A gradual and accelerating evolution towards more democratic and freer media was anticipated to take place across the region, and to a great extent that is what has happened. Nevertheless, those who expected rapid development of free media were often disappointed. The new political elites and their business clientele have continuously tried to limit the autonomy of the media. Most significantly, in the past decade, press freedom in many Eastern European countries has increasingly come under threat.

Unfortunately, the COVID-19 crisis has worsened the status of the free press worse over the world, and Eastern Europe was no exception. Introducing "emergency legislation," an alarming number of governments in Central and Eastern Europe have used the ongoing health crisis as a pretext to restrict the free flow of information and clamp down on independent media (International Press Institute, 2020). The chapter has the goal to lay out facts, point out roots, and outline patterns of development of the Eastern media model.

2 The Media Market

2.1 Ever-Decreasing Levels of Newspaper Readership

Despite being one of the oldest and widespread forms of media, the printed press market has shrunk globally during the past decades. Digitalization and the subsequent changes in the media environment have left the press media struggling to find a viable business model. Although data about newspaper sales in Central and Eastern Europe (CEE) in recent years are incomplete, the trend is shown on Fig. 1. The biggest decrease in sales and ergo in readership took place between 1995 and 2000.

The most impressive, 72% decrease in newspaper sales is observed in Estonia between 1990 and 1995. In the Czech Republic, which has some of the highest levels of newspaper circulation per capita, newspaper sales dropped by 60% in the decade 1990–2000. In Poland and in Slovakia, 53% and 58% decreases, respectively, resulted in just 5 years between 1995 and 2000. It can be argued that the main reason for this dramatic shift has been the readiness with which readers embraced the emergence of the digital sources of information—online news portals on the one hand and social media networks on the other hand. This has proved to be the biggest challenge print media faced—the pressing need to reinvent themselves and find efficient ways to transit to digital and still play the important role they had as the fourth pillar of democracy. At the beginning of the new millennium, with readers moving to digital sources, news publishers in CEE were forced to start building their online presence. In contrast to the new "native digital" news outlets, traditional publishers were desperate to avoid as much as possible cannibalization of their core sources of revenue, i.e., sales of print products and advertising income, while trying

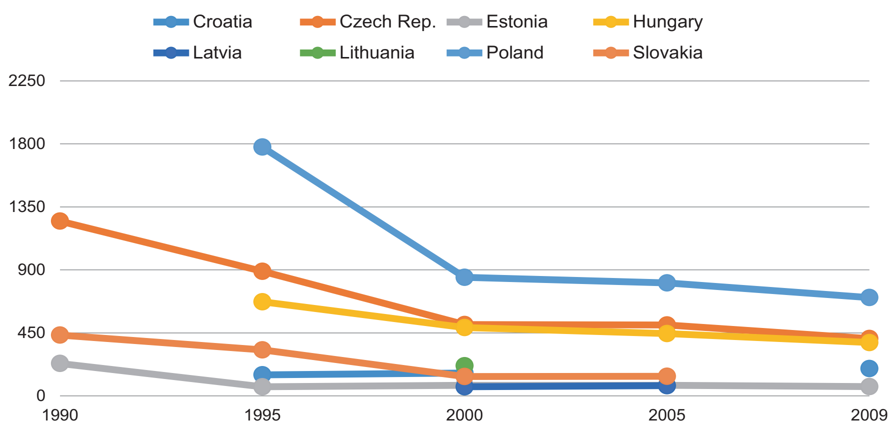

Fig. 1 Number of annual newspaper sales (in millions of copies) (data not available for Bulgaria, Romania, Slovenia). Source: World Association of newspapers—World Trends Reports 1991, 1994, 1996, 1997, 2002, 2007, 2011. Compilation: Eumeplat Project

to "migrate" their readers to and keep them on their own online platforms. It is worth noting that currently it is still the legacy media companies, who are behind the most preferred online news. Nevertheless, written press readership is in steady decline across Europe with the number of people reading at least once a week, standing at 51% in 2021, a decrease by 22% since 2010 (Eurobarometer, 2020/2021). In line with this trend, the daily average circulation in most of the CEE countries is dropping, and that is a clear mark of the situation of print media: people are reading news, but ever less on paper (Fig. 2).

Weekly newspapers have presented a broader readership than dailies, and that is a fact for all countries in the region, except for Estonia until recently. Weeklies do not compete with digital media on the grounds of speed in delivering the news, as they offer readers a deeper analysis and more details. Slovenia and Estonia, the two maintaining the highest standard of living countries in Eastern Europe, display similar levels of daily and weekly readership. At the other extreme, the poorest country, Bulgaria, maintains four to six times difference in favor of weekly readership for the whole examined period. Overall data for the entire region show 30 + % readers of weekly written press, within a clear downward trend.

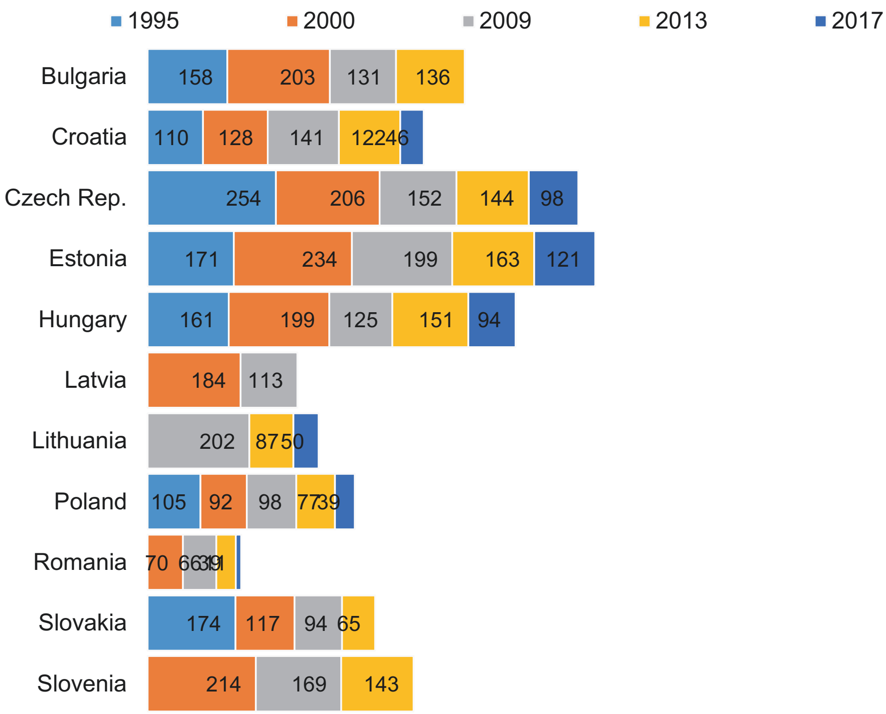

Fig. 2 Dailies' average circulation/adult population (copies per thousand). Sources: World Association of newspapers—World Trends Reports 1991, 1996, 1998, 2002, 2010; *Total paid-for and free dailies, total average circulation (000)—World Press Trends 2014, WAN-IFRA, 2014. Compilation: Eumeplat Project

In the CEE region, it is arguably the countries with poor records of freedom of press that display the highest percentage of people who claim to never read written press—Romania (44%), Hungary (38%), and Bulgaria (33%). The countries with the smallest proportion of non-readers are Slovenia (15%), Lithuania (11%), and Estonia (9%). And even though countries like Estonia and Lithuania in the last years actually show a decrease in non-readers, the overall clear-cut trend for the region (as for the whole of Europe) is one of steady increase of the percentage of people who do not read written press at all (Eurobarometer 2020/2021).

On the face of dropping circulation and readership, the numbers of newspaper titles seem to be following a much less steep path of decrease with Czech Republic and Estonia actually seeing a threefold growth (World Association of Newspapers, 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011) (Fig. 3).

As readership and sales decrease, so do advertising revenues. Ad expenditure in written press has been dropping more than half in most of the countries in the region. For instance, 51.5% of all ad spend in Latvia in 1995 was in press. By 2005 that percentage has dropped to 29%. The advertising market is very dynamic, and newspapers and magazines are in direct competition for expenditures with global social platforms like Facebook, Instagram, Twitter, etc.

The COVID-19 crisis made the situation even more complicated, since despite people consuming more news, advertising spend dropped. Some scholars called the situation a paradox, as media had larger audiences but less advertising. According to a 2020 forecast by Dentsu International, a marketing communications company, "overall, 2021 global ad spend is forecast to remain below the pre-pandemic level of US$ 600 billion recorded in 2019" (Dentsu International, 2020). According to the same forecast, the share of press in global ad spend will continue to drop in 2022 and beyond. With that tendency publishers are scrambling to find working business

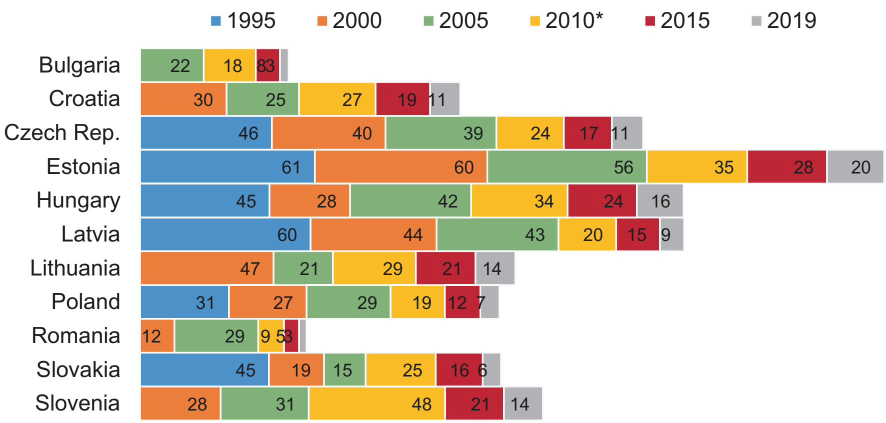

Fig. 3 Press advertising expenditure (newspapers and magazines) (%). Sources: World Association of newspapers—World Trends Reports 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2015, 2017; 2019/*Newspaper advertising expenditure (US$, million, current prices)—World Press Trends 2014, WAN-IFRA, 2014. Compilation: Eumeplat Project

models to successfully sell their content to readers and advertisers—this time online and more precisely—on mobile devices.

Trust regarding the media is another important question. About half of Europeans now trust the written press. Over the longer term, and in the CEE region as well, the trend is of increasing trust in the written press (+9% over the decade to 2021) (Eurobarometer, 2020/2021). Legacy press publishers tend to transfer the trust in their print content to their online content. "Many publishers across the world have reported record traffic to their digital platforms during the pandemic, as people actively sought accurate and reliable information" (World Association of News Publishers, 2020). It can be argued that the major crisis situations of late (especially the war in Ukraine) have further affected this pattern in CEE. We can assume that no media in the region today can survive on the market without online presence, but that is especially crucial for legacy press.

2.2 Radio: The Most Trusted Medium

In Europe overall radio listening time is in steady decline in the last two decades across all age groups, but particularly among young people, where the average daily listening time is less than 1 1/2 hours. The radio weekly reach is solid with app. 84% of Europeans reached through this medium (EBU, 2022).

Radio continues to be the most trusted medium. 58% of European respondents to a Eurobarometer survey (2020) say they "tend to trust" radio, compared with 35% of respondents who "tend not to trust" it (Eurobarometer, 2020/2021). Within the CEE region, trust in radio is growing in Estonia (77%, +15 percentage points), Czech Republic (72%, +10), Latvia (70%, +5), Lithuania (66%, +4), and Slovenia (58%, +6) and decreasing in Slovakia (60%, −4), Poland (52%, −2), Croatia (48%, −2), Romania (48%, −13), Bulgaria (43%, −8), and Hungary (41%, −5) (Eurobarometer, 2020/2021).

There is a tendency of decrease in the numbers of enterprises operating as radio broadcasters across the European Union, and that is visible in the CEE region as well (Eurostat, 2020). Among the EU member countries with highest numbers of radio enterprises in 2017, Hungary boasted 310, which is still impressive compared to Estonia (10), Slovakia (16), or Lithuania (23). Compared to population size, the number of radio broadcasters per million inhabitants also varies greatly between the countries. The highest ratios were recorded in Slovenia (76), Croatia (38), and Hungary (32), while the lowest ones were observed in Poland and Slovakia (3) (Eurostat, 2020). Slovakia and Slovenia are the only two countries with positive change rate in the period 2010–2018.

In 2017, in the EU, radio broadcasting enterprises employed 14% less people than in 2013 (Eurostat, 2020). The tendency is visible in Eastern Europe too, where Poland is the only country in the region with a positive change rate in the period 2010–2018. In Slovakia, for example, just 63 persons were employed in the radio broadcasting sector in 2017. The number of persons employed as a percentage of

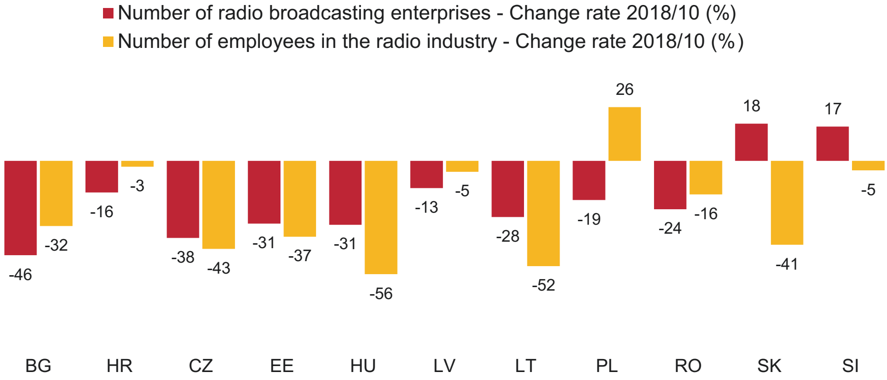

Fig. 4 Change rate of number of radio broadcasters and employees (%). Sources: Eurostat (2020). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: https://appsso.eurostat.ec.europa.eu. Compilation: Eumeplat Project

total employment is low in all EU member states and close to zero in the Czech Republic and Slovakia (Eurostat, 2020). It is in Slovakia, Lithuania, Hungary, and Czech Republic that the decrease in the numbers of people employed in the radio industry outpaces the rate of decrease of the number of radio broadcasting enterprises (Fig. 4).

According to Dentsu International's 2021 report and forecast, the global ad spend in radio as a percentage is not declining at present and a similar performance is going to be presented in the near future (−0.8 in 2019, −10.1 in 2020, +4.7 in 2021, and + 1.6 in 2022). The share of global ad spending remains nearly stable—6.0% in 2019 to 5.5% in 2022 (Dentsu International, 2020). In all CEE countries the radio advertising market remains stable and with no big changes. Despite listening time steadily declining, radio remains a trusted medium, and that is reflected in the advertising spend (Fig. 5).

2.3 *Television Is the Dominant Medium*

The CEE region's television landscape is very diverse and has undergone some major changes in the last three decades. Television has its firm roots in the communist period as the main socially and politically valued medium. For East Europeans it is the mass medium that has come into existence in exactly that period. Hence continuities from that period are important. During the transition from state-controlled broadcasting to a free market media environment, privately owned television channels have appeared, which, together with proliferating cable and satellite television originating from the West, have become an important part of the media universe and thus have pushed public service broadcasting into an evolution of its own.

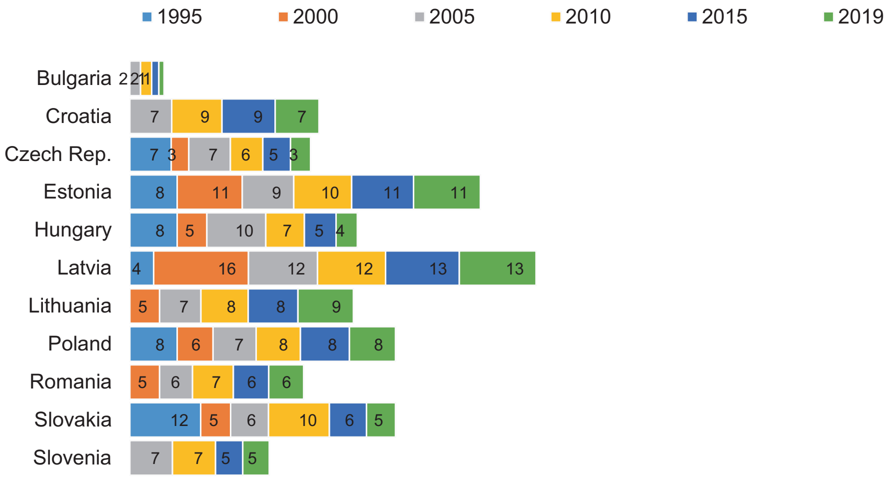

Fig. 5 Radio advertising expenditure (%). Sources: (**a**) European Media Handbook (1997), (**b**) European Media Handbook (2004), (**c**) European Audiovisual Observatory, (**d**) Data for 2019 retrieved from Statista (2022a, 2022b) MAR-AD Advertising expenditures by media (2001–2019)/ Source: Warc / © European Audiovisual Observatory/Yearbook 2020. Compilation: Eumeplat Project

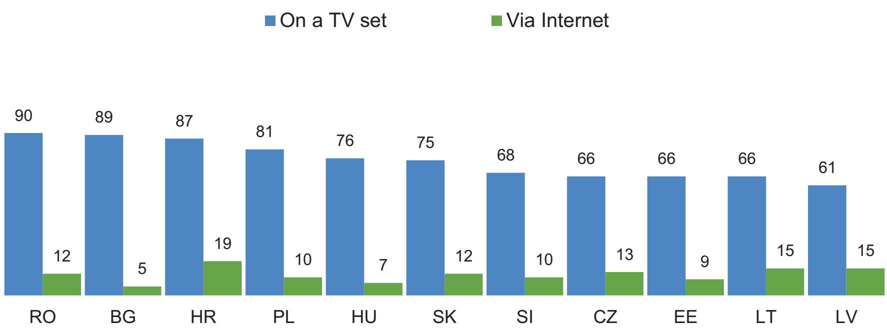

Fig. 6 Share of population watching television every day or almost every day in 2020 (%). Source: Standard Eurobarometer 94 Winter 2020–2021, Media use in the EU. Compilation: Eumeplat Project

TV viewership continues to be at high levels, with more than eight in ten respondents watching every day or almost every day (Eurobarometer, 2020/2021). Although generally declining, the rate is very slow (app.- 3%, over 10 years), with a growing share of viewers transitioning to digital platforms, but nonetheless remaining TV viewers. Viewing rates and habits vary across the region. The highest scores are in the Balkans, with Romania leading the pack. At the other end are the Baltic countries, with much more moderate viewing rates. It is worth pointing out that in Hungary, TV has lost significant audiences. It can be argued that this is the result of the government's heavy-handed meddling in media over the last decade, resulting in lower levels of trust among a large portion of the population (Fig. 6).

Private TV channels claim the bigger share of TV viewers with over 50% audience reach. Romania is leading with 71.8% daily audience, while the biggest decrease is in Hungary, where in the period 2005–2019, private TV channels have lost audience and fell by 23.4%. At the same time, Hungary had the biggest daily audience of foreign channels: 27.4%, a 19.5% growth, which again is arguably the result of dropping levels of trust in domestic media sources.

During the period 2005–2015, most of the Eastern European countries joined the EU broadcasting market, and new players appeared on stage. There had been a remarkable growth of commercial channels. The number was stable in most countries during the period 2015–2019. There has been a small decline in Croatia. In Slovakia, Slovenia, Hungary, and Bulgaria, there has been practically no change, whereas in all other countries, we see a slight increase in the number of channels. The biggest increase was in Romania with eight new channels in 2019. Poland has the biggest portfolio, comprising 93 commercial channels. Per capita it is Slovenia leading, with 83 channels entertaining a population of 2.1 million (EAO, 2006, 2011, 2015, 2019).

The CEE region historically has been dominated by local players and linear TV. As Digital TV Research mentions, major US players have entered the Eastern European market, especially in regard to SVOD platforms (Easton, 2021). It's worth noting that HBO, the famous cable TV network, first set up a European operation in Hungary in 1991. From there, in the following years, it was rolled out across the CEE region and later to other parts of Europe. Currently cable TV is still the most viewed form of TV in the region. The trend is one of decreasing or stagnating numbers of subscribers of cable TV, apart from Romania, where a significant increase has been observed. But in some countries, particularly in Bulgaria and Slovakia, the number of subscriptions has dropped by half (EAO, 2016, 2020/2021). Currently, the number of digital subscribers is growing but is still below that of analogue, which continues to shrink. The forecast is for the total number of pay TV households to reach 74 million by 2027 compared to over 80 million in 2018. But while the number of digital subscribers will grow, analogue cable will probably completely disappear from the market (Statista, 2022a, 2022b).

Government-funded public TV is highly popular throughout Europe, and CEE makes no exception. During the past decade, audience shares for public service TV have generally ranged between 30 and 40%, depending on the country. All countries in the region have at least 2 public channels, between 4 and 6 in most countries, with Poland being the absolute leader with 12 public channels in 2019 (EAO, 2021).

Public TV stations are largely government-funded. On average the state support for the public audiovisual media sector in the region has grown from 70% to 81% between 2008 and 2014. Public media in most countries receive over 90% of their funding from their governments. This percentage is the lowest in Poland, but it has been growing in the past years (EAO, 2016). However, comparing the proportions of government funding gives us just an indication of the real value of state support for PSB in the different countries. It takes a more complex comparison model, taking into account the specific differences in each country, the levels of advertising revenues, the existence of license fee system, etc., to establish a clearer view of the situation.

Five countries in CEE currently apply a license fee system for public TV (Croatia, Czech Republic, Poland, Slovakia, and Slovenia). Data shows that, with the exception of Croatia, the fees are under the EUR 121 average for EBU countries (EBU, 2020).

There is scarce coherent data regarding the advertising revenues of public broadcasters in the different countries. But it has been noticed that, for example, the economic crisis of 2008–2010 and the resulting drop in advertising expenditure affected much more severely PSB, than the commercial channels.

Relevant data show that in more than half of the countries of the region, the level of TV digitalization is over 50%, whereas in Slovenia it is 90.3%. It should be noted that digitalization is one of the processes that has started at the same time in nearly all EU countries, regardless of the market size. Without any doubt the COVID-19 crisis had an accelerating effect on all on-demand content services, and now TV landscape is gradually being transformed by the advance of video streaming solutions. "The Eastern European OTT market is set to triple by 2025," claims a new report (Easton, 2020). The market is changing, and thanks to the ongoing adoption of connected TV, development in digital video delivery, and growing demand for customized content, viewers in many countries now opt for non-linear streaming options. While there are definite regional differences in the availability and usage of digital video content, there is a visible trend towards VOD content in Eastern Europe, too. The growth in revenue is remarkable in all countries, and the highest is observed in Poland—the increase is almost 15-fold (Statista, 2022a, 2022b).

Bulgaria is the only country in the region where TV advertising expenditure is above 70%. In 2019 it's share increased to 86%. The data about Bulgaria indicates 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 to TV is around 50% of the market. Estonia and Hungary are the two countries with the lowest portion of TV advertising, below the average for the region. TV advertising volume 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 the new streaming platforms, which attract ever more the attention of advertisers. According to Dentsu International, the share of Digital in global ad spend will grow from 42.8% in 2019 to 51.2% in 2022 (Dentsu International, 2021). From experience, we know that global trends in media advertising will affect all countries sooner or later (Table 1).

Television is generally a trusted medium in 7 out of the 11 CEE countries, where more than 53% of respondents "tend to trust" TV according to Eurobarometer (2020/2021), compared to less than 47% who do "not tend to trust" the medium. The situation is reversed in Poland, Hungary, Croatia, and Slovenia.

The television landscape in the CEE region is diverse and dynamic. Revenues of the TV market have remained relatively stable, and even though TV advertising has experienced a visible decline due to the COVID-19 crisis, television remains one of the leading sources of news and entertainment. The number of viewers has grown,

Table 1 TV advertising expenditure (in million EUR & %)

GEO/TIME	2010		2011		2015		2019		% Change 2019/2011
	M	%	M	%	M	%	M	%	%
Bulgaria	240,5	**74**	260,7	**74**	371,7	**81**	690,5	**86**	12
Croatia	107,6	47	105,9	50	97,3	51	103,5	44	-6
Czech Rep.	358,9	39	376,3	41	352,4	36	584,1	32	-9
Estonia	21,1	32	22,9	**32**	25,4	**30**	26,3	**27**	-5
Hungary	198	33	214,1	35	185,1	**30**	241,7	28	-7
Latvia	-	36	31	45	33,3	43	34,9	41	-4
Lithuania	-	42.6	47	48	46,1	46	52,3	44	-4
Poland	-	51.5	920,8	46	984,6	41	1037,8	37	-9
Romania	-	65.2	213,6	53	216,2	67	308	64	11
Slovakia	-	68	229,5	47	315,3	49	805,4	68	21
Slovenia	-	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. Compilation: Eumeplat Project

and despite the emerging competition from online streaming services, viewership is high. However, while TV penetration rates keep rising, traditional TV consumption is slowly declining as viewing habits and preferences continuously evolve.

2.4 *Catching up with the Rest of Europe on Broadband*

The digitalization of the ex-communist countries has presented a considerable growth in the last decade but is still trailing the process on the rest of the continent. The number of UHD ready broadband subscriptions in Eastern European markets has risen by 286% over just 3 years from 3.7 million in 2013 to 14.2 million in 2016, and now more than 25% of CEE households have subscribed to fixed broadband services with average connection speeds faster than 15 Mbps (Gaber, 2017). Moreover, the connection speeds have been rising constantly over the recent years, with Romania, Czech Republic, Latvia, and Bulgaria displaying the biggest growth.

Those four countries have an overall average speed exceeding 15 Mbps. 2020 data from Statista shows the share of households with broadband Internet is below 85% only in Romania, Lithuania, and Bulgaria. Mobile broadband subscriptions have encountered a tremendous growth during the period (2010–2020) in all the countries. Six countries have reached a result over 100 in 2020, and Estonia is the leader in that indicator with 164.8%. Latvia follows with 140.2% and Poland with 124.6%. Hungary has the lowest percentage: 75.4% (OECD Data, 2021). In the following years, those numbers will continue to grow as mobile access to Internet is the preferred way for young people and more people will use 5G. And this is the technical side of the story.

Usage of Internet paints a slightly different picture. 2020 Eurobarometer data shows daily use of Internet varies substantially among different EU member states and in particular among the CEE countries. Estonia is an overall leader in Europe with 98% usage, while Romania is at the bottom with 58%. The Czech Republic and Latvia are also in the top echelon with 96% each, as are Slovenia and Lithuania with 94–93%, respectively. Slovakia is just above the EU27 average with 76%. Poland, Bulgaria, and Hungary accompany Romania at the bottom with usage rates between 64 and 66% (Eurobarometer, 2020/2021). The share of individuals participating in social media networks has nearly doubled in all countries for the period 2011–2020. In 2020 Lithuania had the highest share (74%) in the EU of individuals using social media daily, while Hungary (51%) and Poland (47%) the lowest (compared to EU27 average of 52%) (Eurobarometer, 2020/2021) (Fig. 7).

With more than half of the population using social media, those platforms are becoming ever more important in shaping public opinion. The key competence for responsible use of social media is media literacy, which is in the focus of many EU

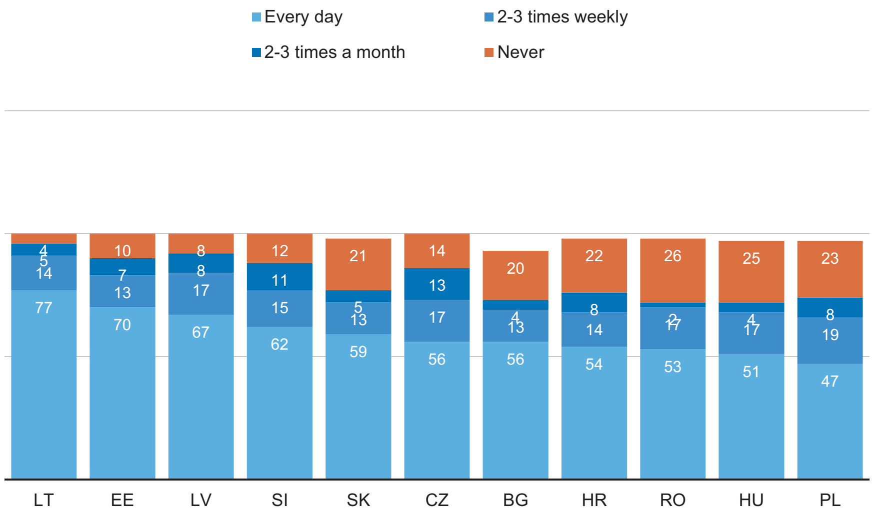

Fig. 7 Share of population using social media in 2020 (%). Source: Standard Eurobarometer 94 Winter 2020–2021, Media use in the EU

surveys. Regarding Eastern Europe, only Estonia (third) is with a top ranking in the Media Literacy Index 2021. The biggest decrease in ranking is registered in Slovenia (−5), Poland (−2), Czech Republic (−2), and Latvia (−2). Romania and Bulgaria are at the bottom of the index in 2021 (Open Society Institute Sofia, 2021).

In the cluster of CEE countries, Estonia occupies a special place. New Yorker magazine has labeled it "The Digital Republic" and has praised its e-Estonia project as "the most ambitious project in technological statecraft today" (Heller, 2017).

3 Is There a Comprehensive Eastern European Media Model? Similarities and Differences

The ten post-communist Eastern European countries we examine here, all made a, more or less, successful transition towards democracy after the collapse of their communist regimes in 1989–1991 and joined the European Union between 2004 and 2013. Freedom of the press was declared, and the vast majority of printed newspapers and electronic media became privately owned. Together, these countries form a presumptive block, featuring a common media system. Nonetheless both similarities and differences are visible between them in terms of their political development and media environment. The group, to which we refer as Central and Eastern Europe (CEE), is not a homogenous one in respect to democratic consolidation, political standards, and levels of economic development. Their media systems operate under varying levels of political pressure, leading to politicization, and economic pressure, resulting in commercialization. In general, the quality of the media in these countries can be considered relatively low. On the one hand, this can be explained with the relatively recent transition from centrally controlled to free democratic media. On the other hand, that is the result of these two negative tendencies (Dobek-Ostrowska, 2016).

The 1990s saw significant changes in the media landscape of Central and Eastern Europe. The transformation of state-controlled media into public service media began, ending the monopoly of state broadcasters and allowing for the emergence of private commercial radio and television stations. Commercial media became the most popular in all countries of the region. Western European investors, who entered the market, introduced many new titles, leading to an increase in the number of political and entertainment publications. The beginning of the new millennium saw a significant rise in the use of cable television, mobile phones, and the Internet. These technological, economic, and other changes in the media and its socio-economic environment led to blurred boundaries between genres and mediums. Many quality newspapers became tabloids, and some public television stations became commercialized. With the opening of geographical and political borders, global contents merged with the local (Jakubowicz, 2007). With the appearance and expansion of new genres, such as talk shows and reality formats, reality and fiction mixed to an extent never seen before,-"entertainment" became keyword. New genres and media redefined the traditional concepts of “politics” and “political communication” (Bajomi-Lázár & Sükösd, 2008). All these changes shaped a profound shift. As Daniel Hallin and Paolo Mancin note:

> It is certainly normal to expect that it will take quite a while after a change like that for media systems to be established. It is certain that media institutions will need time to evolve to the point where their relations with other institutions, their place in social structure as a whole are relatively stable. (Hallin and Mancini interview, 2011)

Has a comprehensive Eastern European media model emerged? What is the extent to which CEE media systems should be treated as a homogeneous entity? Before answering this question, it is worth marking briefly what the *differences and similarities* between the different CEE countries are and what they stem from.

The strong historical legacies of the Habsburg and Ottoman empires, as well as the Scandinavian influences over the Baltic region and Poland, suggest base-level cultural gaps between the countries in the CEE region. The Central European countries have historically enjoyed stronger ties with Western Europe, while the three Baltic republics have been exposed for a longer time to the centrally controlled totalitarian Soviet modus operandi. The Czech Republic, Slovakia, Slovenia, Croatia, and the Baltic countries have just recently emerged as new sovereign states; out of former larger formations, Romania is a state of 163 years, while Hungary and Bulgaria, despite being “old” nation states, look back to merely 104 and 144 years of independence in their most recent history. Poland and Romania are relatively big countries, while four countries, Slovenia and the Baltic states are tiny, with population around two million each. Some of the countries (Romania, Bulgaria, Latvia, Slovakia) host large ethnic minorities, which are not necessarily loyal to the country they are citizens of. And that is reflected in the media scene. Romania and Croatia have started their transitions in violence, Czechs and Slovaks have enjoyed a “velvet revolution,” while in most of the countries, the transition from communism to democracy and the free market were negotiated between the old and new elites. The speed and scope of the market and constitutional reforms and the subsequent economic performance varied across the region. Poland and Slovenia managed to grow through the 2008–2010 economic melt-down, while the rest were hit, some of them severely. Slovenia has the highest GDP per capita and approximately three times higher than Bulgaria. Foreign investment in the print media sector is high in Hungary and Estonia, but relatively low in Slovenia or Lithuania. Newspapers in Poland are more prosperous than all other newspapers throughout the region. Again, in Poland, public service broadcasters have a much higher average viewership than in the other countries. Internet use is well above the European average in the Baltic countries, but below average in Bulgaria and Romania. Political and business parallelism seems to be less pronounced in Poland and Slovenia, than in the other CEE states.

The media independence of different countries varies according to the various indexes, with some, such as the Baltic countries and Slovakia, enjoying prestigious rankings while others, such as Bulgaria, Romania, and Hungary, ranking low (Mancini and Zielonka, 2012). It can be argued that a geographically vertical North-South divide is observed, rather than a traditional West-East, with the Baltic and

Balkan countries at the extremes (Castro Herrero et al., 2017). As we can see, these differences stem not only from deep historical background but also from reforms, developments, and influences in the last three decades.

There is a score of distinctive similarities, which we would prefer to review through the prism of Hallin and Mancini's categories and criteria for comparing media systems. These similarities include, without being limited to, politicization of the state; politicization of the media; political and business parallelism; weakness of state structures; weakness of civil society; small and weak media markets; commercialization; clientelism; blurry media ownership; ownership concentration; inconsistent media legislation and regulation; superficial adoption of external models; and disoriented journalistic profession and blurred professional identity (Mancini & Zielonka, 2012). These similarities and differences prompt us to contemplate whether there is unique media system that represents the media landscapes in the region and that we could label as Eastern European.

4 Political Parallelism

We believe the concept of political parallelism (Hallin & Mancini, 2004), which refers to the alignment of the media system with the political system, where media outlets align with specific political parties or ideologies, and the media landscape is divided along these lines and is helpful for understanding the media systems of Eastern European countries. This is because, in the region, media is often heavily politicized, and political and business parallelisms are prominent features. It must be remembered though that the concept, as it has been developed in recent decades of mainstream academic literature, should be applied with caution to the new democracies in CEE, where political parties are neither strong nor stable, leaving room for a variety of interests and individual political figures to influence news media (Mancini & Zielonka, 2012).

Political parallelism and advocacy journalism have deep roots in the history of Eastern Europe. During the communist era, all countries in the region had a state-controlled media system, where the media was used as a tool of the government to promote its ideology and to control the flow of information to the public. This led to a lack of diversity in the media landscape and a lack of independent voices. After the fall of communism in Eastern Europe in the late 1980s and early 1990s, the countries in the region underwent a process of democratization and media liberalization. However, in many cases, the media sector remained heavily politicized, with state-controlled media institutions advancing the agenda of the government and private media supporting particular political parties.

A good example is Hungary, where the media landscape is heavily influenced by politics. State-controlled media outlets such as Magyar Televízió (MTV) and Magyar Rádió (MR) are known to promote the government's narrative and align with the ruling party Fidesz. Private media outlets such as Origo, Magyar Nemzet, and Magyar Hírlap are also known to align with Fidesz. This has led to concerns about a lack of diversity in the media environment and a lack of independent voices (Polyák, 2019). In Poland and Romania, a similar situation is observed although not to such a drastic extent. In Poland the public Telewizja Polska (TVP) and Polskie Radio (PR), as well as the private publications Gazeta Polska, Nasz Dziennik, and Fakt, are known to support the ruling party Law and Justice (PiS). In Romania it is again public broadcasters Romanian Television (TVR) and Romanian Radio (SRR), as well as private media channels Antena 3, Romania TV, and B1 TV, who follow the government narrative. And there are relevant examples from Slovakia, Bulgaria, and Slovenia. In the Baltic republics, state-controlled media, such as Estonian Public Broadcasting (ERR), Latvijas Televīzija (LTV), and Lietuvos Nacionalinis Radijas ir Televizija (LRT), are considered to be relatively independent, with less government interference. However, there have been concerns about media ownership concentration and political influence in the media. For example, in Estonia, a few big companies own the majority of media outlets, and this has led to concerns about the concentration of media ownership. Additionally, there have been concerns about political influence in the media, with allegations of pressure on journalists and owners to adhere to a pro-government editorial line.

In Eastern Europe, a tradition of advocacy in journalism has been present for many years, particularly during the communist era. Under communism, the state controlled the media, and journalists were expected to promote the ideologies and policies of the state. With the fall of communism, many journalists in Eastern Europe have embraced the advocacy tradition, using their platform to voice their opinions on important issues and hold those in power accountable. Commentary style of journalism, similar to advocacy tradition, is characterized by expressing opinions, analysis, and criticism on various topics, events, and people, rather than impartial reporting of facts. This style of journalism is common in Eastern Europe, where there is a long tradition of political commentary in the press. Some commentators have a strong following and are known for their influential analysis and criticism. However, it should be noted that the situation across the region is diverse and complex, and the different countries have different levels of press freedom, different economic situations, different political regimes, and so on. Therefore, it would be wrong to generalize regarding the situation of advocacy and commentary style of journalism in Eastern Europe.

For example, in Romania, the media landscape is diverse and pluralistic, with many different voices and opinions represented. However, the media sector has been heavily influenced by political and economic interests, leading to a lack of critical reporting on sensitive issues such as corruption. The newspaper *Romania Libera* is known for its investigative reporting and critical commentary on political and economic issues.

In Poland, the advocacy tradition in journalism is strong, with many newspapers and television stations taking a clear stance on political and social issues. For instance, the newspaper *Gazeta Wyborcza* is known for its liberal and pro-democracy stance, while the newspaper Rzeczpospolita has a more conservative and nationalistic approach.

In Hungary, as mentioned, the government has been criticized for exerting political influence over the media, which has resulted in a dramatic decrease in diversity of voices and opinions.

In Bulgaria, the media landscape is heavily influenced by business interests, leading to a lack of critical reporting on corruption and other sensitive issues. Still, there are journalists and media outlets that continue to practice impartial journalism and commentary, such as the Economedia newsgroup, which is known for its investigative reporting and critical commentary on political and economic issues.

Some media outlets in Czech Republic have been chastised for their advocacy journalism. The newspaper *Lidové Noviny*, for example, is owned by the billionaire-turned politician Andrej Babiš and has been criticized for its editorial policy that promotes the owner's business interests and political agenda. Similar cases can be found in Croatia with businessman and politician Miroslav Kutle and the newspaper *Večernji List* and in Estonia with Toomas Hendrik Ilves and the newspaper *Eesti Päevaleht*.

5 Instrumentalization of Media

The instrumentalization of media refers to the use of the media as a tool or instrument to achieve specific political, social, or economic goals. This can take various forms, such as using state-controlled media to promote the government's agenda, using private media to promote specific political parties or ideologies, or using media to promote specific business interests. Political instrumentalization of media can occur through censorship, propaganda, disinformation, or manipulation of the news. It can also take place through ownership concentration, where a small number of individuals or companies control a large share of the media market, leading to a lack of diversity in the media landscape and a lack of independent voices. It can also include the use of media ownership and advertising to exert control over the content of media outlets. This practice has been a concern in Eastern Europe, where many countries have a history of authoritarian or semi-authoritarian government and weak democratic institutions. This has led to concerns about media freedom, censorship, and the ability of citizens to access diverse and reliable sources of information. Business instrumentalization of media refers to the use of media as a tool to achieve business objectives, such as increasing revenue, promoting products or services, or shaping public opinion. In scholarly literature, the concept of business parallelism highlights the influence of business interests on the media and the overlap between the media, politics, and business. Media owners are typically businesses or wealthy individuals with connections to political institutions who attempt to influence political decision-making. This fluid and ongoing overlap of various functions and interests is present in Central and Eastern Europe. Colin Sparks (1998) has noted the existence of close ties between politicians, business leaders, and the media in post-communist countries, referring to this phenomenon as the "overlapping between economics, politics, and the media" or "political capital."

In Central and Eastern Europe, instrumentalization of media happens in different forms and in different degrees. The following are a few examples, illustrating the situation in several CEE countries:

Poland's media landscape features examples of ownership concentration, with the media group Polska Press controlled by the business interests of Jarosław Kaczyński, leader of the ruling party Law and Justice, owning over 200 regional newspapers and several national newspapers and magazines. Another major player in the media market is the ITI Group, which owns several popular television channels and has been accused of having close ties to the government and promoting government-friendly content. Additionally, the radio market is dominated by a few large companies such as Eurozet, RMF FM, and ZPR Media.

In Hungary, a small group of companies and individuals control a significant portion of the media market, with many also having business interests in other industries. The concentration of media ownership is particularly high in the television market, with Mediaworks Hungary, controlled by the businessman Lőrinc Mészáros, a close ally of Prime Minister Viktor Orbán, owning several popular television channels and radio stations. The Central European Press and Media Foundation (KESMA), formed in 2018 and controlled by individuals and companies closely tied to the ruling party, controls over 500 media outlets in Hungary. The newspaper *Magyar Nemzet*, which was one of the most important opposition newspapers in Hungary, was owned by the businessman Lajos Simicska, a former ally of the Prime Minister, but was shut down in 2016, seen as a move to silence a critical voice in the media.

In Romania, the media group Intact Media Group, controlled by the politician and businessman Dan Voiculescu, controls several television channels (most notably Antena 1 and Antena 3), radio stations, and newspapers and is often criticized for providing biased coverage and for being used as a tool to influence public opinion. The newspaper Romania Libera, which was one of the oldest and most respected newspapers in Romania, was sold in 2014 to the businessman Adrian Sarbu, linked to the then ruling party and has since been criticized for providing biased coverage. The newspaper Evenimentul Zilei was sold in 2015 to the businessman Sebastian Ghita, and its editorial line changed after the sale.

Even in the Baltic countries of Latvia, Lithuania, and Estonia, where the regulatory and legal frameworks for the media are generally considered strong, there are concerns about the influence of business and political interests on the media landscape, with several major media companies being owned by individuals with ties to politics and business. For example, the media group Latvijas Mediji, which is one of the largest media companies in Latvia and controls several television channels, radio stations, and newspapers, is owned by the businessman Aivars Lembergs, who is also the mayor of Ventspils and has been linked to political scandals. Another example is the newspaper *Neatkarīgā Rīta Avīze*, which was one of the oldest and most respected newspapers in Latvia and which in 2018 was sold to Andris Šķēle, a business oligarch and former politician who served two terms as Prime Minister of Latvia from 1995 to 1997 and again from 1999 to 2000.

Croatia's media ownership is complex and often characterized by a lack of transparency. The country's media market is dominated by a few large companies, and many media outlets are owned by business conglomerates. For example, the powerful Agrokor group, one of the largest companies in Croatia, owns several newspapers and magazines, including *Večernji list* and *Gloria*. Other major media owners include the Todorić family, who own the newspaper *Novi list*.

In Bulgaria, media ownership is often concentrated in the hands of a few powerful individuals or companies. In 2017, Freedom House reported that media ownership in Bulgaria is highly concentrated, with a small number of companies controlling the majority of the country's print and broadcast media. According to the Centre for the Study of Democracy, in 2018, the three largest media groups in the country controlled over 60% of the newspaper market and over 80% of the television market. These media groups have been known to have close ties to political parties and have been accused of promoting their political agenda. One example of this is the New Bulgarian Media Group, which is owned by businessman and politician Delyan Peevski. The group controls several major newspapers, television channels, and radio stations. Similarly, the MTG Media Group, which is owned by businesswoman Irena Krasteva (Peevski's mother), has been accused of having close ties to major political parties DPS and GERB and promoting their views, through its media outlets.

6 State Intervention and Curbing the Freedom of Media

Following the collapse of communism, democracy-building and state reconstruction (or even state-building in some cases) went hand in hand. Newly formed states such as Croatia, Slovenia, and the Baltic republics had to undertake the complex task of state construction, while established states like Hungary, Poland, Romania, or Bulgaria needed to depoliticize the communist state as a key objective. Political parties, business corporations, organized interest groups, and even individual politicians and businessmen sought to "capture" various state institutions for their own benefit, resulting in these states becoming (re)politicized (Zielonka & Mancini, 2011).

The role of the state in the media sector can vary greatly between the different countries. In countries such as Poland, Hungary, Czech Republic, and Slovakia, the state has a notable presence in the media sector. In Hungary, Poland, or Romania, governments have been criticized for exerting too much control over the media, with allegations of censorship and bias in state-controlled outlets. They have used their control over advertising revenue, ownership of media outlets and regulatory bodies to influence the media, and the news narrative in their favor. This has raised worries about media freedom and the weakening of democratic structures in these countries. In certain cases, media organizations that are critical of the government have been shut down or taken over by government-friendly owners, while in others, government-controlled outlets have become dominant.

In Hungary, the government of Prime Minister Viktor Orbán has faced criticism for limiting media freedom in the country. The government has been accused of using its influence over public media to restrict the diversity of news coverage, using regulatory and financial pressure to force the sale of independent media outlets to government-friendly businessmen, restricting the ability of foreign media companies to operate in the country, thereby limiting the options for news sources available to the public. Furthermore, the government has been accused of using state-controlled media to spread false information and propaganda. "Since 2010, the Hungarian government has systematically dismantled media independence, freedom and pluralism distorting the media market" (European Federation of Journalists, 2019).

The Polish government has been criticized for appointing loyalists to key positions in public broadcasters and for using the justice system to target critical journalists and media outlets. The situation in Poland, for example, pushed the EU to "slam new legislation in Poland that could limit media freedom" (Euronews, 2021).

In Romania, corruption and lack of transparency in state-funded media and state-funded advertising have been reported as problematic (Mungiu-Pippidi, 2003).

In other countries, such as the Baltic states, Czech Republic, and Slovakia, the media sector is considered to be more independent, with less government interference. Media in Croatia and Slovenia are considered to be generally free, but there have been concerns about media ownership concentration and political influence in the media.

In this respect the state of media in Bulgaria is the worst, although it has been showing signs of improvement in the last years. *Bulgarian media are still considered the least free in the EU and in Southeastern Europe "as the few outspoken journalists are victims of smear campaigns, harassment by the state, intimidation and violence"* (Ralev, 2021).

In effect, in Poland, Hungary and Bulgaria, which (together with Greece) continuously occupy the bottom positions of EU countries in the Reporters Without Borders Index for several years now, the media environment is seriously threatened. The most recent (2022) index by RSF has concluded that it is largely in Eastern European EU member countries that "governments have intensified draconian laws against journalists" (RSF, Reporters Without Borders, 2022a, 2022b).

Governments in Eastern Europe have been criticized for limiting press freedom during the COVID-19 pandemic. In Poland, a law was passed allowing dismissal of journalists and editors from public media outlets, and there were reports of government pressure on private media to promote a pro-government narrative and censorship of critical pandemic coverage. In Hungary, emergency powers were allegedly used to limit journalists' ability to report on the pandemic, plus pressure on private media to follow the government line and censorship of critical reporting (Simon, 2020). Romania was criticized for its handling of pandemic info, including lack of accurate and timely information about COVID-19 spread. Bulgaria also faced criticism for its handling of pandemic info and allegations that state-controlled media was used to control the narrative. In contrast, the press freedom in Estonia, Latvia, and Lithuania has been relatively unaffected by the pandemic.

The countries with the poorest records of freedom of media, such as Hungary, Romania, and Bulgaria, have been most affected; however, similar restrictions have also been reported in the Czech Republic and Slovenia.

7 Limited Professionalization

Journalism in Central and Eastern Europe has undergone significant changes since the fall of communism in the region. While the end of state control has led to an expansion of media freedom and the emergence of new, independent outlets, the sector continues to be characterized by a number of challenges. One of the main issues is the concentration of media ownership in the hands of a small number of individuals or companies, which can lead to a lack of diversity and a bias in news coverage. Furthermore, many journalists in the region continue to face pressure from governments, as well as from advertisers and other powerful interests. These challenges can be traced back to the legacy of communism, where state control and censorship were pervasive and where the media was used as a tool for propaganda and control, rather than as an independent watchdog (Jakubowicz, 2007; Bajomi-Lázár & Sükösd, 2008).

Economic changes have had mixed effects on the profession, as they have reduced job security for journalists without necessarily promoting experience and knowledge. Schools of journalism have improved their teaching standards, but largely have failed to provide sufficient career opportunities for their graduates.

It is generally acknowledged that professional associations for journalists in Central and Eastern Europe have fewer members, limited organizational structures, and limited financial resources compared to their western counterparts. This can be attributed to several factors, including a lack of tradition of independent journalism, as well as economic and political challenges that have made it difficult for journalists to form and sustain professional organizations. In some countries, such as Hungary, the organizational framework for journalism is particularly fragmented, with multiple associations that may be divided along ideological lines. This can make it difficult for journalists to come together and advocate for their rights and interests and can also contribute to a lack of cohesion and coherence in the profession (Metyková & Císarová, 2009).

Journalists in Central and Eastern Europe face a number of challenges, including low pay compared to their Western European counterparts, a less stable and coherent regulatory framework, and more direct pressures from politicians and media owners. These factors have led to a lack of adherence to ethical and professional standards in the profession. Additionally, the constantly changing political, economic, and social environment of the post-communist region has made it difficult for journalists to establish a clear and strong professional identity, leading to a blurred professional identity (Hume, 2011). The roles of journalists are often diffuse and overlapping, creating confusion and a lack of coherence. Legal and regulatory reforms have also contributed to uncertainty and a lack of security for the profession. Furthermore, the professional status of journalists is poorly defined in the region, and journalists' rights such as source confidentiality and access to information are unclear (Metyková & Císarová, 2009). Employers in the region are not able to guarantee legal defense for journalists when cases go to trial, and journalistic salaries are relatively low and often variable. And they vary across the region: on average, journalists earn around EUR 1500 a month in Slovenia, but only EUR 500 in Romania. The overlap between journalism and other professional activities such as public relations is widespread, which results in many student journalists ending up in PR.

This is in close relation to yet another general feature of the journalism in Eastern Europe, namely, political and business clientelism. Daniel Hallin and Stylianos Papathanassopoulos (2002) developed the idea of political clientelism in journalism as a way to explain how media systems work in many Southern European and Latin American countries. They identify five key features of this phenomenon: low levels of newspaper circulation, 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 (Hallin & Papathanassopoulos, 2002). It is evident that these characteristics are prevalent in CEE media, so it is vital to take this into account.

In the 1990s, established Western publishing and TV companies entered the CEE markets in the 1990s, following the opening of these markets to foreign investment. These companies established subsidiaries and partnerships in the region to expand their reach and capitalize on the new opportunities. Some examples include News Corp, which acquired several newspapers and TV stations in Poland, Hungary, and Romania through its subsidiary News International; Bertelsmann, which established a presence in the region through its subsidiary RTL Group and acquired several TV and radio stations in countries like Poland, Czech Republic, and Hungary; Swiss publisher Ringier AG; German media company Axel Springer; and other companies such as WAZ and Handelsblatt. These companies brought with them practices of professional journalism such as accuracy, fairness, and objectivity, as well as a commitment to journalistic ethics and the protection of journalistic sources. Though this improved the quality of journalism in the CEE region and promoted a more open and democratic society, not all companies had the same level of commitment to journalistic standards, and some practices may have been adapted to the local context. Recently, several foreign investors have retreated from some of the media markets in Central and Eastern Europe, including established publishing companies such as WAZ, Handelsblatt, or Bonnier, which might be primarily for economic reasons. But some fear that without the backing of a foreign-based investor, the now locally owned media might be even more prone to political instrumentalization (Mancini and Zielonka, 2012).

Journalists in some Eastern European countries who report on corruption, organized crime, and government abuses of power are at risk of harassment, intimidation, and even violence. As a result, many journalists in these countries practice self-censorship to avoid putting themselves in harm's way. Some recent examples include the murder of Viktoria Marinova in Bulgaria in 2018, while investigating

EU funds misuse, the killing of Pawel Adamowicz in Poland in 2019, and the harassment and death threats faced by Cătălin Tolontan in Romania while investigating corruption. The murder of Jan Kuciak in Slovakia in 2018, which was widely believed to be a result of his investigative reporting, was a reminder of the dangers that journalists can face when reporting on corruption and organized crime. His death led to widespread public outrage and protests and the resignation of the Prime Minister Robert Fico. However, it's important to note that not all countries in Eastern Europe have the same level of risk for journalists. Some countries have relatively strong press freedom and protections for journalists. It's also worth noting that even in countries where the profession of journalists is considered safe, there are still cases of journalists being targeted for their reporting.

The region has its examples of media outlets that prioritize high-quality journalism, such as the Polish newspaper *Gazeta Wyborcza.* An original and independent newspaper, according to Paolo Mancini, is introducing many innovations with respect to Polish journalism (Hallin & Mancini interview, 2011). Other notable examples include the Bulgarian weekly *Capital*, the Polish project Spięcie (a joint project between five independent newsrooms), the Hungarian outlet Direkt36, the Romanian news portal Republica.ro, the trilingual Baltic investigative website Re:Baltica, and the Bulgarian investigative outlet Bivol (Simon, 2021).

8 Concluding Remarks

Media systems are always in the process of change. Countries in Eastern Europe have similarities, but at the same time present major differences. Analysis indicates that press freedom, foreign ownership, political parallelism, and the strength of public service broadcasting have a strong correlation even though significant differences exist among countries. It is difficult to speak of a unique type of Eastern European media system.

In all post-communist CEE countries, the transition period after the regime changes in 1989–1990 was significant due to the major impact political changes had on media markets. The end of monopolistic political control over media resulted in the declaration of press freedom and privatization of most media. A gradual evolution towards more democratic and free media was largely achieved, though with a disappointingly slow pace of progress in places. Additionally, Central and Eastern Europe media market grew from $47.43 billion in 2010 to $64.26 billion in 2019 at a compound growth rate of 3.40%. The market is expected to further grow and to reach $179.65 billion in 2030 at a CAGR of 10.40%.

Overall, the historical background of political parallelism and advocacy journalism in Eastern Europe is rooted in the legacy of the communist era, where the media was used as a tool of the state to control the flow of information and promote the government's agenda. Despite the fall of communism and the transition to democracy in many countries in the region, these practices have persisted in some cases.

Media systems in Central and Eastern Europe cannot be classified as a single model but can instead be divided into three different types. Romania, Hungary, and Bulgaria have high levels of political parallelism and low levels of press freedom. Central media systems (Czech Republic, Croatia, Poland, and Slovenia) have strong public service broadcasting and low levels of foreign ownership. Northern systems (Estonia, Latvia, Lithuania, and Slovakia) have the highest levels of press freedom, the highest levels of foreign ownership, and the lowest levels of political parallelism. Notably, Estonia stands out within this third category, particularly in terms of high rates of online news use, inclusiveness of the press market, and press subsidies, which are similar to those of Scandinavian countries.

In Eastern Europe, there is a correlation between countries with poor records of press freedom and a higher percentage of individuals who do not read written press. On the other hand, countries with strong press freedom have a lower percentage of non-readers. Although some countries in the region have shown a decrease in non-readers, the general trend in Eastern Europe, as well as in Europe as a whole, is a steady rise in the number of people who do not read written press.

Radio listening time has steadily decreased over the past two decades, particularly among young people, who listen for less than 1.5 hours a day. The number of radio broadcasting companies is declining across the EU, including in the Eastern European region. Despite differences in the number of radio companies per million inhabitants, the trend of decreasing employment in the radio industry is visible in Eastern Europe, with Poland as the only exception in the region. The percentage of total employment in radio broadcasting is low across CEE and close to zero in the Czech Republic and Slovakia. In some countries, the decrease in the number of people employed in radio outpaces the decline in radio broadcasting enterprises.

TV viewing remains high, with most people watching every day or almost every day, though the rate has declined slowly. There's a shift to digital platforms but viewers remain with TV. Viewing rates and habits vary across the region, with the Balkans having the highest and Baltic countries having moderate rates. Private TV channels have the majority of viewers, with Romania having the largest daily audience. Public TV is government-funded and highly popular, with the state support for public media growing constantly to levels of above 85%. TV remains a leading source of news and entertainment despite the competition from online streaming services, but traditional TV consumption is slowly declining as viewing habits evolve.

The CEE region has seen substantial growth in digitalization and Internet usage over the past decade, although it still lags behind other parts of the continent. Mobile broadband subscriptions have seen explosive growth in all countries in the region during 2010–2020. There is a large variation in daily Internet usage across the CEE countries, with Estonia leading Europe at 98% and Romania trailing with 58%. Social media usage has nearly doubled for all countries in the region from 2011 to 2020. Lithuania had the highest daily usage in the EU at 74%. The Baltic countries and Estonia in particular showcase an impressive example of successful digitalization of media and society, leading not only within the CEE region but in the whole EU.

In recent years, trust in the written press has increased (about half of East Europeans now trust the written press), with legacy press publishers transferring the trust they've built in their print content to their online platforms. Radio continues to be the most trusted medium, with a majority of East Europeans expressing trust in the medium. The level of trust in radio is on the rise in various CEE countries. Television is generally considered a trusted medium in most of the 11 Eastern European countries studied, with more respondents expressing trust in the medium than not. However, the situation is reversed in a few countries like Poland, Hungary, Croatia, and Slovenia.

Attempts by new political elites and their business interests to limit media autonomy have become a major threat to press freedom in many Central and Eastern European countries. The COVID-19 pandemic has further stepped the challenges faced by free press globally, and Eastern Europe is no exception. Under the guise of "emergency legislation," a concerning number of governments in Central and Eastern Europe have used the crisis as an excuse to restrict the free flow of information and stifle independent media. In this respect media literacy is an important factor. In a 2021 pan-European Media Literacy Index, Estonia was one of the top three ranked countries, while Romania and Bulgaria ranked lowest.

The distinctive changes in the media systems in Central and Eastern Europe have been driven by two major factors—on the one hand, the political changes in the region over the last 30+ years and, on the other hand, the technological advances that have impacted media changes the world over. While the influence of the first factor is gradually subsiding over time and will continue to decrease in the future, the importance of technological developments is growing.

For the countries under study here, the political changes have not been limited to solely the transition from communism to free democracy but include the developments that have stemmed from their admission into the European Union.

Technological development, being pan-global and taking place nearly simultaneously across the world, impacts rather evenly the countries in the region. It can be argued that this would lead to a more levelled field and reduce discrepancies between the media systems of the countries in the CEE region. This will probably be augmented by them all being subjected to a quasi-uniform EU media regulations and general direction of development. From another aspect we can also speculate that the three different groups within the CEE region will also move towards their respective "centres of gravity." The "Southern" group, Romania and Bulgaria in particular, will tend to develop characteristics aligning them with countries from the Mediterranean, Polarized Pluralist media system model. The "Central" group (Czech Republic, Croatia, Poland, and Slovenia) can be expected to develop along lines converging in the long term with the direction of development of the North/Central Europe's Democratic Corporatist Model. Hungary is an interesting example here. The present problematic country of Eastern Europe is currently in an unnatural grouping with Bulgaria and Romania. It can be argued that, following a regime change, over time the country and its media system would migrate in the direction of its Central European peers, with whom Hungary shares a historical background and the leader of which it has been for a long period. The countries of the "Northern" cluster—Estonia, Latvia, Lithuania, and Slovakia—display a natural gravitation towards the North European/Scandinavian Liberal Model. In any case it is difficult to expect that a distinctive "Eastern European" media system model would materialize.

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Conclusions

Stylianos Papathanassopoulos and Andrea Miconi

Abstract The media systems in Europe have followed the developments in technology and globalization processes, resulting in the fading of concrete borderlines between and across them, paving the way for the establishment of the 'platform society'. The latter grants dominant status to business and technological change, and it pulls together divergent systems of the communications sector. It operates alongside, and gains from, the advent of globalization, which takes place on both international and local levels. Finally, it changes the social role of media, as in the foreseeable future citizens-viewers will be classified according to their purchasing power.

Keywords Convergence · Digitalization · Globalization · Media systems · Platformization

Media systems, as described by Hallin and Mancini (2004), have now been modified significantly due to the advent of digital media technologies. Nevertheless, the dimensions that have been employed for comparing media ecosystems over the last three decades—political parallelism, state's role, journalistic professionalism and reach of the media market—are still of value. However, in the age of platformization of the communication universe, when investigating media ecosystems and forming typologies, the emphasis should be given to the evolution of communication technologies, since the latter have changed how media content is produced, disseminated and consumed. Additionally, in all media systems, competition has been intensified due to the rise of diverse digital players against an ever-changing

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platformized background on which traditional media organizations and digital intermediaries coexist.

The patterns of media use and trust between the clusters of countries, emerged by the available data analysis, can disclose important issues regarding the resilience of media over time and help us mapping the shifts in media markets, as the media field transitions from the analogue to the digital age.

Throughout the pages of this volume, it has become evident that national and subsequently regional media systems have followed the developments in technology and globalization processes, resulting in the fading of concrete borderlines between and across different media systems. This seems to be the reason that explains why recent research on media systems traces either 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).

As we have seen throughout this book's chapters, the developments in communications technology, such as digitalization, platformization and convergence, have commenced altering the media landscape, and many analysts have attempted to predict what these changes are going to be. In effect, as Esser and Vilegenthart's remark, 'countries are exposed to similar trends and developments' and even though, 'those developments play out differently in different contexts' (2017, p. 23), we are still able to identify some common patterns at least in principle.

First, the new developments in the European media field, such as digital television, OTT, SVOD, and streaming, have become a reality for the simple reason that they are heavily influenced by the needs of the European industry and financial concerns, intense marketing and promotion.

Second, while European media has moved towards the digital and platform age, the conventional sources of revenue (advertising and license fee) still play an important role, even though new ways of funding in the age of platformization, mainly by the subscribers, will increase their importance too.

Third, in an environment in which the deregulation of European media sector has been associated with the dominance of neo-liberal ideologies advocating the restructuring and modernization of the economy and, in effect, the marketization of the public communication sector, consumer demand has been taken for granted.

Fourth, the new developments in the media field have led to the creation of larger and fewer dominant groups in the last decades. The economic dynamics of the information industries have encouraged private enterprises in the sector to become vertically integrated and to expand horizontally, thereby increasing the levels of concentration. The information industries are becoming more concentrated and populated by large multimedia groups. European countries have unleashed powers for mega firms, but in the era of platformization, these have been replaced in practice by the so-called Tech Giants.

Fifth, the *consumer-choice* argument still plays a dominant role in new media developments. In the 1980s cable TV was considered as the ideal technology to end centralized television systems and as something that would encourage interpersonal communication and democracy. In the last decade the same arguments have come back replacing the terms of 'cable TV' and 'wired society' to 'digital TV' and currently platformization of the media. Again, this digital/platform rhetoric has paid little attention to the citizen-viewer, although they argue for him/her. In effect, new media developments clearly indicate that in the foreseeable future, citizens-viewers will be classified according to their purchasing power. These trends, however, mirror the developments of the last decades in Europe, where poverty and inequality have been more severe. In effect, one can observe how the evolution of media platforms is intertwined with broader dynamics and, namely, with the increasing polarization of our societies. In this respect, last years have brought to completion the twofold process, by which globalization is reducing the differences *between* countries, while at the same time fostering new economic inequalities *within* those countries (see Harvey, 2014, p. 171; Piketty, 2013, p. 80).

The digitalization and convergence of European media systems communications seem to be part and parcel of a developing process leading to the 'platform society'. It grants dominant status to business and technological change, and it pulls together divergent systems of the communications sector. It operates alongside, and gains from, the advent of globalization, which takes place on both international and local levels. Finally, it changes the social role of media. For example, television used to be considered as a public good, and it seems to be transformed in a highly class divided medium.

In this new era, the European Union could be a decisive factor in ending this new societal cleavage, but it is uncertain whether will be successful since public policies in most countries favour this new 'brave society'. Furthermore, as long as critical interplays among media organizations, technologies and practices of media's content production and consumption are unfolding in state-bounded media systems, the role of the state in shaping and controlling key aspects of media policies is far from being considered as a remnant of the past (Flew & Waisbord, 2015). It remains to be seen whether either the European Union or the individual member states can really control concentration and consolidation in the field, especially the Tech Giants. In fact, the race to a new transformation of European media systems has started in late 1980s, and it seems it keeps going on.

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