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MEDIA MARKETS IN CONTEMPORARY EUROPE

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INTRODUCTION

The impulse to write this publication stemmed from the rapidly evolving Western European as well as Polish media markets in recent times. The acceleration of these changes has been particularly noticeable since the end of the last century and the beginning of the present one; their unprecedented dynamics and temporality, however, make any attempt to describe the role of the media in the contemporary human environment a difficult task. Looking from this perspective, it therefore seems imperative to capture and consolidate a certain image of the media market, at a specific moment of its transformation.

Our intention was to gather comprehensive information on the current shape of media markets in selected European countries, as well as Poland, and to leave the reader with a sense of complete knowledge in this regard. As the primary objective, we considered the need to show the evolution of the media (in historical terms), necessary to outline the current shape of the media markets in question. This makes it possible to identify in which areas the greatest change has taken place, what it involves, and how the processes of change have shaped contemporary media systems. From this perspective, an image of today's media emerges, subject primarily to technological pressures, but also influenced by ever-deepening consolidation processes. The latter depend on business circumstances, political decisions and changes in how the public uses the media. However, in outlining images of contemporary markets in this way, we have not attempted to define the fields of challenges and prospects for individual media segments, wishing instead to encapsulate the most important information in this publication about the functioning of media at the start of the third decade of the 21st century.

We are aware of the huge dynamics of change, and of the fact that when discussing the structure of today's media or their market position (circulation, press readership, radio listening, TV viewing, Internet use), the data referred to may become outdated increasingly quickly. Hence, we were keen to capture the most relevant phenomena and growth indicators, including where markets are more resistant to fluctuations. What remains unchanged, however, is the fact that it is the new

technology market that is determining the transformation of traditional mass media, influencing, for example, ownership policies that have resulted in corporations focusing their activities on multimedia activity. This often disrupts the fully democratic functioning of the market, its competitiveness (see the analysis of Reporters Without Borders' annual media freedom index), and introduces a kind of communication and information hegemony. Nevertheless, the transformation of the media is not taking place in parallel, which was also the subject of our deliberations, since (in addition to the elements already mentioned) one has to take into account the increasing overall time spent with the media, the issue of trust in information sources, (in many cases) the work of the journalists themselves, but also changes within the legislation and the directions of state policy towards the public media (e.g. Poland, France, Italy) as well as commercial media (examples of Greece or Austria).

In order to better understand the specificity and importance of the modern media, it is necessary to look at the history of their development. This is the purpose of the first part of the publication that chronologically presents the milestones in the development of the means of mass communication, press, radio and television, and the inventions that have dramatically changed media markets since the second half of the 20th century, forcing a new approach in their management. The approach adopted in this study did not, however, require a detailed discussion of all media technologies, as there are also studies in the Polish literature devoted to the history of media development. This section therefore covers the stages of the media development from the first reasonably regular print publications of the 17th century, the gradual popularisation of the press – the 'gold rush' of the 19th and early 20th centuries – to an approximation of the history of radio broadcasting, the development of television broadcasting, and then entering the 20th century with the digital media age (not just the Internet!).

Part two of the publication focuses more closely at the media markets of sixteen selected European countries, categorised according to similar rules of operation. The first chapter analyses the media markets of Northern Europe, namely the Nordic countries: Denmark, Norway, Sweden and Finland, as well as the United Kingdom. The second chapter will discuss the countries of Western Europe: Germany, Austria, multilingual Switzerland, France, and two of the Benelux countries, the Netherlands and Belgium. The third chapter looks at the media markets of the Southern European countries – Spain, Portugal and Greece – that embarked on the road to democracy at around the same time, i.e. the second half of the 1970s. The last country in this part of the discussion is Italy. Each time, the media in the countries analysed will be discussed with a breakdown into the press, radio, television, new media and cinema markets.

The third part of this volume is devoted to a discussion of the history of the Polish media, divided into two detailed chapters. The first chapter covers the beginnings

of Polish periodicals, through the inter-war period and the Second World War, to the organisation of the media system in the communist era, up to the changes of 1989 and the new, market-oriented shift. The second part focuses on contemporary Polish media and the current situation in the press segment, the radio and television market, as well as media ownership and management (publishers and broadcasters).

The information presented in our publication is of a systematic nature and, in addition to the current status (data for 2021), it also includes a brief historical overview, without which it would be impossible to grasp the trends and growth-related tendencies. An important factor in the characteristics of the markets, which we must point out at the outset, is the ongoing pandemic caused by the COVID-19 virus in 2020–2021 (in practice also in the current year, 2022), which resulted in a social and cultural lockdown. It has somewhat changed the perspective of media perception and steered the public towards more reliable sources, and these often turned out to be traditional media. It also played a significant role in the case of the film industry, as one of the elements of the 'freeze' on all cultural activity was the closure of cinemas for several months or limited access. Generally speaking, however, we highlighted any data and indicators that had or could have had an impact on how media were used.

We hope that the multifaceted nature of the changes that have taken place in the media markets we have discussed in recent decades will be a valuable addition, not only for media studies analyses of the situation of media as the 21st century begins. We believe that the effort we have undertaken will contribute to the literature related to the current functioning of European media systems.

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Part 1. OVERVIEW OF MEDIA HISTORY

Press

The key technical invention that made the development of the press possible was the construction of a printing press by Johannes Gutenberg around the middle of the 15th century, which made it much easier to reproduce books that had previously been transcribed by hand by monks. Over time, in addition to books, irregularly published news materials began to be printed, containing important political information, accounts of various celebrations, practical information and entertaining trivia. Such prints, although resembling the press in appearance and content, was not yet the actual press, as it lacked its fundamental characteristic, namely periodicity, as it did not appear regularly at fixed stretches of time: monthly, weekly or daily.

The 17th century is considered to mark the birth of the press as we know it today, i.e. regular and in an established structure. It was at that time that the first publications, which were the prototypes of today's newspapers, began to appear fairly regularly in many European cities. Most frequently, these were elitist weeklies in which representatives of the intellectual echelons wrote for a similar audience. These magazines were expensive, with low circulation and their social impact was minor. The development of the press was limited by several factors, firstly the small number of readers. Not only were few people literate, but newspapers were expensive, further limiting the number of people willing to buy them. Secondly, the secular and clerical authorities of the time sought to maintain control over all publishing, fearing the effects of unrestricted access to information and knowledge and the spread of heretical and subversive ideas[1].

The authorities exercised control over publishing in two dimensions: control of the market and control of content. The former consisted of limiting printing and publishing, for which special permits were required, which was supposed to make publishers loyal to the authorities and print only correct – government-approved –

[1] Compare D. McQuail, *Teoria komunikowania masowego*, Warszawa 2007, pp. 47–50.

content. The latter involved censorship and was handled by institutions set up specifically for this purpose.

The most famous and longest-lasting institution of censorship was established by the Catholic Church. This was the Congregation of the Index, which from the mid-16th century until 1948 compiled and updated the famous Index librorum prohibitorum, a list of banned works and authors whose printing and reading was forbidden by the Church. State authorities entrusted the exercise of such censorship first to universities and then to specially established institutions. Both authorities, clerical and secular, were united in their belief that they needed to exercise such control, as they feared the spread of information and content harmful to the minds of their subjects and to the authority of government. These concerns were not unfounded, as it soon became apparent that the most popular content was that which the authorities considered harmful[2].

The end of the 17th century as well as the 18th century were a period of enlightenment, the development of science and the struggle for democratic freedoms, including the right to express one's own views, also through press and to free it from the control of the authorities. The adoption of the so-called First Amendment to the Constitution of the United States of America in 1791, became a pivotal moment in this struggle, which is considered the first constitutional guarantee of freedom of the press. Indeed, free press – one that is independent of political power – was considered a prerequisite for a democratic system, and over time it came to be referred to as the 'fourth power'. The term has become a keyword for the role of the press (today by press we mean all mass media) in a democratic system. Since the basis of this system is the division of power into three areas – legislative, executive and judiciary – calling the media the 'fourth power' underlines their important role in such a system. Their 'power' lies in their right to control the first three authorities, i.e. to keep them in check. This involves observing the authorities, commenting on their actions, detecting and publicising abuse and corruption. The media are supposed to be the 'watchdog of democracy'. However, in order for the media to perform this function, they must be guaranteed freedom, i.e. independence from the authority they are supposed to monitor on behalf of the citizens[3].

The 19th century is referred to as the 'golden age of the press' in press history textbooks around the world, as this is when the press developed quantitatively and qualitatively, the press markets took shape, the technological revolution changed its shape and content, and its circulation and readership significantly increased. In the further decades of this century, the readership of that time, meaning regulars

[2] K. Pokorna-Ignatowicz, *Kościół w świecie mediów. Historia – dokumenty – dylematy,* Kraków 2002, pp. 15–17.

[3] M. Mrozowski, *Media masowe. Władza, rozrywka i biznes,* Warszawa 2001, pp. 87–91.

of aristocratic salons and the intellectual elite, was joined by a growing middle class (the bourgeoisie) with political aspirations, and later also by numerous representatives of the lower classes. The press markets that were shaped during that period diverged; alongside the 'press of the aristocratic salons' and the bourgeois press, aimed at the emerging middle class, titles aimed at the mass reader – with at least a basic education as an employee of the developing industrial plants, a resident of a big city, interested in his/her immediate surroundings and entertainment – became more popular. The press created for such people was colourful, with lots of illustrations and then photographs, the titles were large and flashy and the texts written in simple language to rouse emotions. Much space was devoted to sensational news, criticism of the authorities, rumours and scandals. Such press was called popular, mass and eventually tabloid press. Great importance in the development of the press during this period was placed in the emerging market for commercial advertising, the inclusion of which on newspapers became a source of additional profit for its publishers, which made it possible to reduce its price for readers and print more copies[4].

History of radio

The term 'radio' has a double meaning, denoting a receiver used to listen to a radio programme as well as a station that broadcasts its programme. All radio stations form a system called radio broadcasting. In the early days of radio broadcasting, two systems developed: wired radio, in which receivers were connected by wires to a broadcasting station, and wireless radio using radio waves, or specific frequency bands. Due to the limited territorial coverage of the former, wireless radio became dominant over time.

The technical inventions that made the development of radio broadcasting possible came at the end of the 19th century, and the first experiments with the transmission of sound over a distance took place at the beginning of the 20th century. The period of growth and popularisation of radio broadcasting was between the wars – the 1920s and 1930s. In the 1930s, all European countries had their own radio stations, and there were already a large number of them in operation in the USA. The popularity of radio as a new medium and its rapid growth were caused by several factors. Firstly, it allowed distances to be covered, and the message to reach distant towns. Secondly, by using the spoken word, it allowed information to reach people who were excluded from the ability to use the written word. Thirdly, relying solely on one sense, hearing the radio message strongly influenced the imagination and emotions of listeners, making it an effective tool for persuasive influence, including political propaganda or religious messages[5]. The power of radio's influence is evidenced

[4] *Ibidem*.

[5] S. Jędrzejewski, *Radio w komunikacji społecznej. Rola i tendencje rozwojowe,* Warszawa 2003, pp. 47–50.

by an event in 1938, when the US radio station CBS broadcast a radio play based on Herbert George Wells' novel 'War of the Worlds' about an attack by Martians on Earth, after listening to which many listeners of the radio play believed in an attack by Martians and panicked.

Because radio uses radio frequencies to transmit its signal, the need arose to legally regulate the ways in which broadcasters allocate and control their use. This is why countries have begun to regulate these issues in relevant legislation and to create supervisory institutions. It was widely acknowledged that a licence was necessary for broadcasting. In contrast, the status and functions of radio broadcasting were regulated differently. In the US, where there were even several radio stations in large cities, radio broadcasting took on a commercial character from the start, as private radio stations competed for the attention of listeners, whose numbers translated into advertising profits. European countries, on the other hand, have recognised radio broadcasting as an institution with important information, educational and cultural functions in relation to society, and have built a monopolistic model whereby only one broadcaster operated in the state to fulfil these important tasks for society, with the source of income for the broadcaster being the subscription fees paid by radio owners. This model would also be applied to television in the future[6].

The Second World War period halted the growth of radio broadcasting in European countries for several years. An intensive expansion was undertaken after its completion. The popularisation of radio among consumers has been fundamentally influenced not only by the development of the broadcasting infrastructure itself, but above all by the availability of successive generations of receiving equipment. Initially, a major barrier was the price of radio devices, which over time started to become cheaper and thus more and more people could afford to buy them. An important step in this popularisation of radio in the second half of the 20th century was the invention of transistor and car receivers, which made radio a mass-listening medium.

Development of television

The term television, as with radio, refers to both the technology for transmitting sound and images and the broadcasting station that transmits such a message. The development of television was made possible by inventions at the end of the 19th century, thanks to which, by the end of the 1920s it was possible to develop broadcasting technologies, while in the 1930s the first television stations were launched in the UK, USA or Germany. Receivers for television – TV sets – began to be manufactured in the same decade. Due to the outbreak of the Second World War, production growth was halted in Europe, while it developed without any interruptions in the US, resulting in its popularization in the US in the 1950s and in Europe a decade later. The same legal

[6] *Ibidem*, pp. 50–64.

solutions were adopted for television as for radio broadcasting, i.e. the requirement for a broadcasting licence and supervision by a market regulator, as well as the same operating models. In the US, numerous, mainly private stations were established and cable television developed, while in Europe there were public television broadcasters with exclusive rights (monopoly) to broadcasting. In most European countries, such a monopolistic broadcasting model survived until the 1980s. In the 1990s, this began to switch to a dual model, with commercial broadcasters emerging alongside the existing public service broadcasters[7].

In the middle of the 20th century, in the 1950s, the era of colour television began. In Europe, two systems were developed: SECAM, which was introduced in Eastern European countries and France, and PAL, used by TV stations in Western European countries. In the 1960s, television broadcasts via artificial satellites orbiting the Earth became possible. Thanks to this technique, the moon landing in July 1969 was seen by millions of viewers on both sides of the Atlantic, including in Poland as the only communist country.

In the following decades of the 20th century, television in European countries became as popular as in the USA. Almost every living room was dominated by a television set, first black and white, then colour, with the occasional remote control, connected to a cable set-top box and, in the late 20th century, satellite TV. More viewing options became available via VHS recorders and videotapes, the mass production of which began in the 1980s.

The final two decades of the twentieth century brought further changes to the way television worked and was received: traditional televisions were more often replaced by their new generations – plasma TV and HDTV. Digital platforms emerged and television broadcasting would cross national and continental borders and become global[8].

History of the Internet and new media

The last two decades of the 20th century brought a number of technological developments that remodelled the previous analogue world of the media, and the communication processes themselves. The 1980s marked the era of personal computers, the video industry, satellite broadcasting and digital music; in the 1990s, on the other hand, global Internet dominated, although it should be kept in mind that this was also a period of popularization and evolution of mobile telephones using the GSM standard or paid satellite platforms (including TV thematic channels). The beginning of the 21st century brought the acceleration of internet broadcasting, digitization of television and radio signals, remodelling of the media content delivery system

7 K. Williams, *Media w Europie*, Warszawa 2008, pp. 64–73.

8 A. Jaskiernia, *Od telewizji masowej do Netfliksa. Telewizja w Stanach Zjednoczonych w epoce cyfrowej*, Warszawa 2016, pp. 155–214.

and, further down the line, development of social media or streaming services. The changes affected the position of the traditional media, especially when it came to press, whose role would most visibly diminish.

Each time new media emerged in the 20th century, it affected the overall media landscape. This happened when radio 'took over' the propaganda function from the press. Television took away the informational and entertainment primacy of both these media, while satellite and cable broadcasting took audiences away from terrestrial stations, and the video industry snatched audiences away from cinemas. It was no different with the popularisation of the Internet starting in mid-1990s, which soon combined all the features of previous media, and expanded them over time.

New media of the 1980s

A technological and cultural revolution was sparked by Sony's presentation of a portable music listening device, the Walkman, in 1979. It used solutions familiar from existing recording equipment (dictaphones) available to journalists. Patented and introduced in June 1980 in the UK and US, the Walkman (the first model being the TPS-L2) proved to be one of the most groundbreaking devices of mass culture, not just the music industry. The portable player was the first mobile, personal device that made listening to music intimate and exclusive, because you could listen to music with the use of headphones, anywhere outside the home, without interference from the environment. Advertised with the slogan 'A new way to enjoy music in high quality anywhere at any time', it redefined leisure activities, but also became a symbol of a new generation.

The same thing happened with the video industry, which flourished from the mid-1970s and rapidly evolved into home cinemas, with video cassette rental chains or one's own audiovisual material recorded users with VCRs. The applicable standard for video reception at the time was VHS (video home system), which was introduced by the JVC corporation. It was a competitor of Sony, which promoted the better quality Betamax format, but less attractive to consumers due to its greater openness to the needs and challenges of the market. The VCR became a permanent private household media accessory for more than two decades, replacing or complementing cinema and television. For both, it represented a kind of threat, as it made it possible to watch recorded shows or films repeatedly, any day, any time, as well as to create film collections on private video tapes[9].

The changes in the television and film market of the time were also linked to the rapid development of satellite broadcasting, the introduction of premium channels (Canal+, Sky, FilmNet, etc.) and cable networks, developed in the US as early as the 1970s. The first 24-hour news station CNN (Cable News Network, 1980) and music

[9] J. Mikułowski Pomorski, *Zmieniający się świat mediów*, Kraków 2008, pp. 128–140.

television MTV (1981) also began broadcasting in the US. Thanks to satellite transmissions, many new channels were launched in Europe in the 1980s, including in places where terrestrial transmission, due to regulations and the protection of public broadcasters, could not offer anything other than public stations (e.g. Scandinavia). The golden decade of cable networks started in the 1990s in Europe, supported by further deregulation of state broadcasting monopolies and the opening of markets to trans-European operators. As a result, average households gained access to dozens of domestic and foreign channels with a diverse profile.

New media of the late 20th century

In the 1990s, technology was accelerating and traditional media began to lose mass reach and audience, opening up a place in the daily ritual (agenda) for new, digital media. Digitalization entailed changes in the way they are used, and the ongoing computer revolution has forced people to assimilate them and use them widely, both in the professional sphere and in the communication system. Although digital media were still in the process of implementation the 1970s (e.g. laser disc or compact disc after 1982), it was the 'small revolutions' that occurred after 1990 that proved to be the breakthroughs with the most profound implications.

These changes began back in 1989, when society symbolically entered the Web 1.0 era. This period featured a network of unidirectional information links for 'read only' purposes. It was then that a British physicist and programmer, Tim Berners-Lee, put forward the idea of a universally accessible network of hypertext document connections, the World Wide Web (WWW) application/service. This network was initially intended to enable the creation of a database with information that was then to be shared between the computers of the staff of the Swiss CERN (Organisation Européenne pour la Recherche Nucléaire – European Organisation for Nuclear Research). The system was shared on the CERN network in October 1990, external web servers were enabled in the following year, which initiated the globalisation of the service, and the first website was launched. In 1993, CERN allowed the free use of network protocols and code, which led to the creation of websites, and a year later telecommunications companies began to open up access to the Internet on a wider scale. Thanks to the fact that it was possible to use 2G internet technology on mobile phones, it also became possible to send short text messages (SMS) at the end of 1992.

The first period of World Wide Web development did not yet have the characteristics attributed to strictly new media, such as interactivity – a two-way flow of information and interacting with creators, changing the roles of senders and receivers. The relationship between the two changed at the beginning of the new millennium, when the 20th century read only culture – that had previously only allowed passive audiences to consume content produced elsewhere and by someone else – entered

the era of read/write[10]. At that time the former audience simultaneously became the broadcaster, and a permission for feedback was contained in the logic of the new media. The transition from the 'flawed' (conventionally, communication-wise) era of Web 1.0 to Web 2.0 is most often dated to 1999, although some researchers lean towards 2004, when YouTube was founded. Although Web 1.0 allowed information to be shared anytime and anywhere, these were static connections and they functioned similarly to a library.

In this aspect, the transition from modem, dial-up internet to broadband was an important development. The first one involved connecting a computer to a computer network using a telephone modem, which it used to connect to the network's access server. It could have been analogue (the computer's serial communication port connected via a modem to the telephone network, at 56 kbps) or digital (using ISDN services or digital mobile networks). In the years to come, increasing transmission speeds would determine the direction of the Internet, which became the primary sphere of private-public communication.

Search engines became the most important tool to help obtain information and influence communication processes. With time, they replaced the media gatekeepers. Some of the first global search engines included Yahoo! which was launched in 1994 and Altavista, which debuted a year later. Polish tools included NEToskop and Sieciowid, founded in 1996, and Infoseek, launched in 1997[11]. The breakthrough in the world of search engines, however, came in 1998 with the debut of Google, which in barely a few years became the most widely used search engine in the world, and the very concept of 'googling' became synonymous with searching for information.

With the development of online services, the traditional media (press, radio, television) had to prepare for a forced revolution, as the web not only took over their existing functions, but also introduced and popularized a number of new ones. Thus, the internet has been defined as a contemporary, social metamedium.

The second half of the 1990s marked the beginning of the era of widely available digital media, which changed the media in terms of quality. At the end of 1996, the first commercial optical DVD carrier appeared on the market, quickly displacing the VHS format in the film industry. In 1995, mp3 became the primary format for the compression (decoding and encoding) of music files, which had been under development at the Fraunhofer Institute for Digital Media Technology since as early as the late 1980s and was officially presented in 1992. A portable device for playing mp3 files was developed in 1997 and went on sale the following year, but it was the iPod,

[10] L. Lessig, *Free Culture: How Big Media Uses Technology and the Law to Lock Down Culture and Control Creativity*, New York 2004, pp. 37–38.

[11] D. Baran, *Polish Internet at the end of the 20th Century*, [in:] *The Polish Media System 1989–2011*, ed. K. Pokorna-Ignatowicz, Kraków 2013, pp. 44–45.

unveiled by Apple in October 2001, that has been dubbed the 'Walkman of the 21st century'.

At the end of the 20th century, the world of new media faced an unprecedented wave of 'piracy', involving the free and unlawful sharing of copyrighted content between internet users. This was made possible by the release of file-sharing software, Napster (1999). The tool, initially intended for a narrow audience, quickly became a global utility. As a result of protests from record labels and artists, and lawsuits brought by the Recording Industry of America, its owner declared bankruptcy in 2001 and the service itself became paid. Napster, however, proved to be a precursor to P2P (peer to peer) tools such as the Israeli Soulseek or the Estonian-Danish Kazaa, which in subsequent years influenced the redefinition of the concept of online freedom[12]. This has raised a number of questions for broadcasters and audiences about the extent of freedom to use Internet resources, with particular reference to the approach to intellectual property.

Social media

Although social media with a global reach may not have become widespread until after 2000, in practice it was already in operation during the early stages of the Internet's development. One example is Classmates, the first social networking site created in 1995, which made it easy to find friends from your school years. The global growth of social networking sites has developed in very different ways, but before that, in 2001, Wikipedia was launched, which was the first multilingual encyclopaedia where entries could be made or modified by any web user.

Going back to the revolution of social media platforms, in 2002 last.fm was launched, a site whose core function was music recommendations. The next was LinkedIn, in 2003, connecting people on a professional and business basis, and MySpace, bringing young performers to a wider music audience. Bought in 2005 for $580 million by the Rupert Murdoch – owned News Corporation, the site was at the top of the major social networks. However, it soon began to lose popularity and in 2011 News Corp. sold it for barely $35 million. This showed how unpredictable online media can be, although undoubtedly the decline in popularity had to do with the launch of Facebook in 2004. Within fifteen years, it had attracted almost 3 billion users.

Significantly, alongside global tools, the massive growth of 'local' portals could be observed, with sites such as QZone (China, 2005), nasza-klasa (Poland, 2006–2021), and VKontakte (Russia, 2007). It was not uncommon for them to become a national phenomenon, on a mass scale. Simultaneously, global microblogging sites or applications such as the informative Twitter (2006, bought in April 2022 by Elon Musk), the

[12] Compare S. Nożyński, *Dostępność muzyki a dziennikarstwo muzyczne*, [in:] *Media jako przestrzenie muzyki*, eds. M. Parus, A. Trudzik, Gdańsk 2016, pp. 86–91.

photo-based Instagram (2010, from 2012 owned by Facebook/Meta Platforms), the short video-based Snapchat (2011) or TikTok (2016) were still developing.

Unsurprisingly, it is the functionality of social media that has had the greatest impact on the habits and behaviour of media audiences, both in terms of information (becoming the first source of information) and communication itself (replacing telephone calls or face-to-face contact). While converting the role and importance of traditional media, they also transposed their existing qualities. Convergence, as a force for determining change in media industries, became a reality as we entered the digital age[13]. Since 2004, there has been a slow but steady growth in the popularity of podcasts, a technology that allows audio and video content to be played or downloaded, depending on the user's needs, and played at any time and on any device.

Music and film streaming VoD

With the development of Web 2.0, the mechanism of 'on-demand production and delivery' has become widespread, which in television would in time take the form of VOD (video on demand) programmes and in music – shopping services. Back in 2001, in response to the illegal sources of music file distribution, the major media companies launched paid services for the purchase of music: Vivendi Universal – mp3.com, BMG with Warner Music – MusicNet, and Sony together with Universal – Pressplay. They did not gain wider popularity, as the first music streaming service, Rhapsody, was launched in the same year. The novelty here was access to music resources for a single subscription fee, which changed the way users thought about how to access audio and video content. In 2007, the French launched Deezer; a year later, Spotify, today's most popular service, was founded in Sweden. It was only in 2015 that the tech giants Apple and Google decided to launch their own music platforms, respectively: Apple Music and YouTube Music (formerly: Google Play Music).

VOD platforms have developed simultaneously with music streaming. Although some of these, such as the UK's Kingston Communications, were already being developed in the 1990s, the internet technology of the time did not allow for such easy dissemination and popularisation. On-demand TV became synonymous with American Netflix, which evolved from an online video rental company established in 1998, to a streaming service launched in 2007. After that, its own VOD platforms were made available, among others, by HBO (HBO GO, 2010) or Amazon Prime (in the USA since 2005, in Europe since 2014). Streaming platforms used an inherent feature of new media: independence from time and space. This meant abandoning the set known from traditional television or radio, imposing the time and place of receiving favourite/desired shows on the viewer. This is why traditional broadcasters (commercial

[13] H. Jenkins, *Kultura konwergencji. Zderzenie starych i nowych mediów*, Warszawa 2007, pp. 15–25.

and public) joined the creation of their own VOD platforms, for whom such a service allowed them to combine modernity with tradition and, in the long term, simply retain audiences leaving for the internet or dedicated platforms/services.

The broadly defined 'new media' (often wrongly identified solely with the internet), not only radically changed the role and rules of the so-called 'old' media, but above all increased the time spent with the media in general. In addition to informational or entertainment functions, other activities have been added, linked to new communication habits. Attributes such as interactivity or accessibility have become the natural paradigm of new media. They have modified habits, media rituals and widened the choice of sources and tools. They have become a catalyst for broadcast quality (4K image), and the sheer richness of modern media has made it possible, among other things, to engage all the senses (5D cinema, VR).

Finally, in the general sphere, they have given their users a sense of personal contact (social presence), but have also allowed for highly personalised forms of communication, perceived as adapting the media to the user's preferences, while ensuring the ability to maintain autonomy of choice. At the same time, previously unknown challenges have emerged, relating to the right to privacy, security of use and accountability for all activity. Thus, today we are dealing with all modes of communication, appropriate to all stages of infrastructure and technology development.

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Part 2. EUROPEAN MEDIA MARKETS

Chapter 1. THE MEDIA IN NORTHERN EUROPEAN COUNTRIES

1.1. Nordic countries

The Scandinavian social media landscape is one of the most interesting not only in Europe, but also globally. On the one hand, Denmark, Norway, Sweden and Finland have conservative societies, with high rates of cultural participation, still strongly oriented towards traditional media, with still high rates of purchase and reading of newspapers or books. These are societies deeply rooted in their own culture and seek to nurture it, but are also open to minorities. High living standards have been accompanied by a dynamic development of technology, availability and use of new media, specifically in the second decade of the 21st century.

In the case of the Nordic countries, the following, inter alia, should be noted:

- social centralisation, which encourages the creation of smaller media outlets beyond large urban centres such as Oslo, Bergen, Copenhagen, Helsinki or Stockholm;
- long-standing restrictions on commercial television stations, which, with exceptions, started to emerge very late, often only in the 1990s; on the other hand, even the emerging non-public media were very often subject to regulations similar to public stations, e.g. in terms of a certain number of hours for programmes in a particular language, mother tongue requirements or mandatory cultural content;
- a system of press subsidies and reading promotion, as well as widespread use of libraries – these elements add up to a picture of careful media education and provision of access to diverse information;
- the functioning of journalists' trade unions, to which almost all active journalists belong; this is due to the broad scope of protection for journalists, their social status (a highly respected profession), their privileges (access to public information) and, above all, the support of journalists' organisations themselves;

- a high degree of emancipation and one of the highest rates of economically active women in Europe, including in the media industry; also associated with this is the increasing proportion of people with higher education – after 2000, Scandinavia has an increasing proportion of more and better educated women;
- greater social mobility; a change of residence within a district or, at most, a move to a neighbouring one, quite often results in staying within the signal distribution range of the local and regional medium, which affects its reception.

Linguistic diversity is also an important media and cultural factor. In Finland, Finnish and Swedish have official language status, in addition to media broadcasting in Sámi. Similarly, in Norway, where in addition to their own dialects – officially Norwegians speak varieties of Bokmål and Nynorsk – the Sámi language is nurtured, and in some regions Finnish[14]. Also the officially linguistically homogeneous Denmark is a country of diverse nationalities (e.g. Inuit or Faroese), with minor dialects (e.g. Faroese or Greenlandic). In Sweden, only Swedish is the official language, but transmissions are also created for the Finnish minority.

It was Sweden that in 1766 introduced provisions for freedom of speech, the principles of advertising as well as freedom of the press and access to official documents into the constitution. In the same year in Finland, King Adolf Fredrik issued a decree on freedom of writing and printing. In Norway, these freedoms were legally guaranteed in 1814 and in Denmark in 1848. This was directly related to the early development of literacy and reading skills in these areas, becoming widespread as early as the late 18th century, and to a degree similar for both rural and urban areas. There is a reason why the Nordic countries are referred to as Media Welfare States, thus emphasising the developed welfare system.

The so-called local patriotism, expressed in the desire to publish a newspaper even in the smallest of towns, is cited as one of the features of the Nordic media market. This desire stems from the need to be informed even in the area of the local community; hence, a high-circulation press has never developed in these countries, and the dominant type consists of numerous local, sub-local and regional titles. Another feature related to the establishment of newspapers there was their connection with social mobilisation and periods of political conflicts. This was the case with the Swedish press (press during the Thirty Years' War of the early 17th century) or the Finnish press (second half of the 19th century, Finnish national movement)[15].

[14] D. Baran, *Rynek medialny Norwegii – analiza stanu na rok 2012*, „Media i Medioznawstwo" 2012, no. 3, p. 17.

[15] M. Chacińska, *Finlandia*, [in:] *Systemy medialne państw Unii Europejskiej. Kraje pierwszej piętnastki,* eds. A. Matykiewicz-Włodarska, M. Ślufińska, Toruń 2016, p. 66.

It was also the social movements promoting home literacy, self-education circles and women's emancipation and equality at the turn of the 20th century. Building social habits at this level paid off in subsequently decades, and so it is not surprising that in the 21st century approximately 75% of Finns still read at least one book a year.

Another determinant is the rooting of political sympathies in class and ideological divisions (parties, trade unions) and the absence of religious or ethnic divisions. This is despite changes in the ethnic structure of countries such as Sweden, where the proportion of foreigners, in relation to the mid-1980s, has almost doubled and is now close to 9%. Other factors related to the reach of the press, which, for example, in Denmark at the beginning of the 20th century reached 100% of the population, which meant that there was no more space to expand coverage. The model developed this way today results in information being the primary purpose of media use in general.

The Nordic media market has developed in multiple ways: from a period of press dominance (primarily regional, according to the local model), to the years of public radio development, the increasing importance of (public) television, to the strengthening of media organisations and the creation of domestic conglomerates. In fact, since the beginning of the 21st century, the greatest emphasis has been on making the most of the opportunities of the digital age: the digitalisation of the media and the expansion of traditional media.

The use of traditional mass media here is still a result of the state's strong guardianship of culture and its monopolisation processes, until the beginning of this century made them somewhat backward. The above acceleration, mainly in terms of capital concentration and the creation of multimedia holdings, but also the earlier depoliticisation of content and marketisation, was related to the strong welfare state, modifying market mechanisms mainly through the media's emphasis on public service rather than entertainment content. The efficient functioning of media supervisory and self-regulatory bodies, which enjoy independence and high esteem throughout the community should be added to the above.

Hence, transformations in the media are subject to fragmentation in the north of Europe, in relation to the rest, and even meet this process halfway. This is evidenced, among other things, by the number of radio stations and the ever-increasing popularity of digital radio, which in turn has still not caught on in continental Europe. In the case of television, on the other hand, there is a different trend, linked to departing from its traditional form. However, it is worth noting here that, compared to the rest of Europe, daily TV coverage in the Nordic countries has never been high, ranging between 70–80%. Scandinavians' exposure to linear TV is similarly diverse, with daily viewing ranging from 118 (Norway) to 167 minutes (Finland) in 2020. And even though it was a year marked by the COVID-19 pandemic, and therefore severely reduced social activity, it was another year with a decline in overall traditional TV viewing.

A final factor that needs to be emphasised is the level of digitalisation, the quality and availability of online services, and the percentage of active internet users. In these respects, the Nordic countries also stand out from the rest of the continent[16]. The final element of the media environment is the cinema, which – however recognisable and appreciated in the world – is limited to films produced carefully and perhaps without box office popularity (no co-productions). The small number of domestic premieres, the lack of blockbusters, is compensated by very high quality television products or outstanding series, which are mostly co-produced by all of Scandinavia's public broadcasters. Some of them are later produced as remakes by American TV stations and transferred to streaming platforms or TV stations – an example is 'Forbrydelsen' (American version: 'The Killing'), and Riget (American version: 'Kingdom Hospital').

DENMARK

Denmark is the smallest country in terms of area (territorially, however, the areas of Greenland and the Faroe Islands should be added here) in Northern European, with a population of 5.7 million. When compared to the other Nordic countries, the population is not so heavily concentrated around the metropolis, and is relatively diverse. It is mainly made up of Scandinavians, but also Inuit, Faroese or smaller ethnic groups from Germany, Turkey and migrants from the Middle East (Iranians). The country's official language is Danish and the most widely spoken, 'second' language is English. In addition to these, Faroese, Greenlandic (an Inuit dialect) and German are also spoken.

Denmark maintains cultural and economic proximity with the other Nordic countries due to historical circumstances[17]. Two social aspects are also significant: the orientation towards a far-reaching culture of equality and the so-called politics of modesty persisting in the culture[18]. On top of this, we should emphasise the economic and technological progress that determines the mixed attitude of Danes towards media in general. For barely 20%, the traditional press is still the first source of information (although it is trusted by nearly half of Danes), while radio (76%) and online media (81%) are the most reliable[19]. Television is now trusted by less than 70% of the

[16] E. Harrie, *Denmark, Finland and Sweden are the EU's most digital countries*, https://www.nordicom.gu.se/en/latest/news/denmark-finland-and-sweden-are-eus-most-digital-countries (accessed 31.05.2022).

[17] M. Banaś, *Dania*, [in:] *Systemy medialne państw…*, pp. 42–43.

[18] For example, a law was passed in 2012 giving homosexual partners the right to marry in the Church.

[19] Reuters Institute for the Study of Journalism. Digital News Report 2021. Authors: Nic Newman, Richard Fletcher, Anne Schulz, Simge Andı, Craig T. Robertson, Rasmus Kleis Nielsen. Report available: https://reutersinstitute.politics.ox.ac.uk/sites/default/files/2021-06/Digital_News_Report_2021_FINAL.pdf (accessed 31.05.2022).

public, and nearly half fear the impact of fake news – for the latter reason, less than 20 percent trust social media, despite high levels of participation[20].

The 1948 Danish Constitution only refers to the media to a limited extent. Article 77 in fact refers to freedom of expression. In 1992, Medieansvarsloven was introduced, a document on the social responsibility of the media. Radio and television activities are regulated by the 2003 Law on Radio and Television Activities; media governance is in turn overseen by the Media Council which is subordinate to the Ministry of Justice[21]. In the Reporters Without Borders Media Freedom Index (RSF) for 2022, Denmark ranked second.

Press

The first Danish-language press publication was 'Ny Affvjser' (1657), although many sources cite the rhyming monthly 'Den Danske Mercurius', published by poet and journalist Anders Bording, as the first. This paper was published from 1666 to 1691. The oldest Danish paper still published today is Copenhagen's 'Berlingske', until 2011 published as 'Berlingske Tidende'. The most important papers to this day were established at the end of the 19th century: 'Jyllands-Posten' (est. 1871) and 'Politiken' (1884).

For years, Denmark was among the top Nordic countries with the highest reading rates, but today, with a rate of approximately 40 percent (compared to nearly 60 percent in 2010), it lags behind. The biggest losses among audiences are in the paid local press, which competes with both online news and the free press – mostly weeklies. Readership of national dailies fell from 3.8 million in 2000 to 1.2 million in 2014. The Sunday press also suffered large losses, with its readership falling from 2.75 million to 1.1 million over the period. Back in the early 1990s nearly 40 dailies were published in the country; a decade later, the number had dropped to 31, and remains so today[22]. The structure of the market in 2021 included 10 papers published 6 days a week (plus 6 Sunday editions), of which 8 are considered national; 21 dailies published 5 times a week and 5 Sunday papers[23]. In practice, it is recognised that barely 4 of these are

[20] Report: Media development in Denmark. Summary and Discourse 2021, https://mediernesudvikling.kum.dk/fileadmin/user_upload/dokumenter/medier/Mediernes_udvikling/2021/Overblik_og_perspektivering/Summary_and_discourse_2021.pdf (accessed 31.05.2022).

[21] M. Banaś, *op. cit.*, p. 46.

[22] L. Nord, *Comparing Nordic media systems: North between West and East?*, „Central European Journal of Communication" 2008, vol. 1, no. 1, p. 101. Available: https://cejc.ptks.pl/attachments/Comparing-Nordic-media-systems-North-between-West-and-East_2018-06-07_15-02-55.pdf (accessed 31.05.2022).

[23] M. Blach-Ørsten, R. Burkal, E. Mayerhöffer, I. Willig, *High media independence and informal democratic traditions in the newsroom*, [in:] *The Media for Democracy Monitor 2021: How Leading News Media Survive Digital Transformation, vol. 2*, eds. J. Trappel, T. Tomaz, Nordicom, Gothenburg 2021, p. 150.

typically regional newspapers, the rest being local. These newspapers are, moreover, defined as 'provincial'.

No daily newspaper has a circulation of more than 100,000. The largest, 'Politiken', still had a circulation of 138,000 in 2000, but dropped below 90,000 at the beginning of the second decade of this century. Similarly, the 'Jyllands-Posten' (from ca. 180,000 to just over 50,000) and 'Berlingske' (from 154,000 to 55,000)[24]. The largest weekly readership, combined in digital and paper versions, is now recorded by 'Politiken' (486,000 in 2021), ahead of the 'B.T.' tabloid (366,000), which has lost more than half of its readers in the last two years alone[25]. The readership of 'Berlingske' is 312,000, and has increased, while the smallest of the country's dailies, 'Licitationen', which is aimed at the construction industry, reaches 20,000. When it comes to Danish press readership, it is difficult to point to unidirectional trends; however, as in other northern European countries, tabloids are also losing the most in Denmark. The largest readerships among local dailies are recorded by 'Jydske Vestkysten' (185,000), 'Nordjyske Stiftstidende' (150,000) and 'Fyens Stifstidende' (121,000).

The number of free non-journals, which still exceeds 200, is impressive. National free newspapers also dominated at one time, the first being 'MetroXpress', which appeared in 2001. In the same year, the daily 'Urban' entered the market, and in 2006 there were as many as 11 free dailies published in Denmark. They were originally referred to as the 'first generation of free newspapers', but later the term traffic papers remains. Free 'MetroXpress' and tabloid 'BT' were partly merged in April 2018. The first newspaper was closed the following year, in 2022 it was announced that the second would become a 100 percent digital media, funded by advertising, in the following year[26].

The national and local press is still partly subsidised by government money, which was distributed by the Danish Press Fund until 2012, primarily to maintain information balance in the coverage. In 2012, this amounted to a substantial EUR 47 million. However, the topic of the withdrawal of direct funding returns at every general election. Interestingly, until a decade or so ago, such aid was also earmarked for the foreign press, distributed within Denmark. Grants are awarded to news media in proportion to the number of journalists they employ, assuming a socially diverse readership and the same socially relevant content. Annual subsidies are significant, reaching the amount of EUR 3 million – here the example of the national 'Kristeligt Dagblad' or 'Information' can be pointed out. What may be more puzzling, however,

[24] Data for: https://www.statbank.dk (accessed 25.04.2022).

[25] https://webtest.kantargallup.dk/storage/reports/March2022/Ssk8hQuIZEbDBHA5C0Zg.pdf (accessed 25.04.2022).

[26] J. Paolino, *BT to be 100 percent digital from 2023*, https://cphpost.dk/2022-06-22/news/bt-to-be-100-percent-digital-from-2023 (accessed 30.06.2022). The 'Metro' website was also closed.

is that tabloids, which fall halfway within the grant criteria, and online media (up to EUR 500,000) are also subsidised. On the other hand, this is in line with the state's market protection policy, as evidenced by a document prepared in 2017 by the Danish Agency for Culture and Palaces, entitled[27]. The Impact of International Actors on the Danish Media Market, in which concern was expressed about the undue influence of foreign actors in shaping the domestic media environment. This report was prompted, among other things, by the takeover in 2016 by Belgian giant Persgroep of the oldest media group, Berlingske Media, which had previously purchased 'MetroXpress'.

In addition to the above, the second most significant player is the Jysk Fynske Medier group, which operates in regional markets and has a portfolio of 15 dailies, 63 weeklies and five radio stations. The corporation was established in 2016 following the merger – a year earlier – of three newspaper groups: Fynske Medier, Syddanske Medier and Jyske Medier, and the addition of Mydtyjyske Medier[28]. The third largest press group is JP/Politikens Hus, whose media is read by every other Dane, and which publishes 'Jyllands-Posten' or 'Ekstra Bladet'.

The situation in the Danish press is difficult; the main papers here sell the fewest copies of all the Nordic countries. Danes have also not quite convinced themselves to pay for online content, hence the intense efforts of publishers who are struggling to increase the 15% subscription purchase rate. Most editorial offices are recording financial losses and, in practice, it is the above state subsidies that allow them to manage their companies efficiently, and stay in business. In 2018, only two press groups achieved a profit: JP/Politikens Hus and Børsen.

Among magazine and book publishers, the largest Danish groups are Egmont and Aller. The former is operationally active in more than a dozen countries around the world, in addition to magazines in the film, television, book, games and education markets. Aller focuses on publishing in all Nordic countries. Both are among the fifteen largest media corporations of the Nordic countries[29].

It is worth noting that, despite the clear decline in traditional press readership, publishers' revenue from digital sales is still less than 20% of their overall revenue. The most popular papers have lost more paper readers than they have gained online, although 70% of Danes confirm that the read online news. Interestingly, the situation of the press is not even improved by the fact that it is exempt from VAT, but only pays a fee on revenues from actual sales. Newspaper revenues are estimated to have

[27] An agenda of the Ministry of Culture, responsible for the cultural policy of the country, mainly in the fields of visual and performing arts, music, literature, museums, historical and cultural heritage, libraries and print and electronic media.

[28] M. Banaś, *op. cit.*, pp. 52–53.

[29] J. Ohlsson, *Top 25 Nordic media companies by revenue*, https://www.nordicom.gu.se/sites/default/files/bilder/Mediefakta/Faktablad/factsheet-2021-1-top-25-nordic-media-companies-by-revenue.pdf (accessed 25.04.2022).

fallen by 40% since the beginning of the 21st century, and in the second decade the daily reach of newspapers fell by 20%. The least popular type is magazines, which are mostly published as quarterly or monthly magazines. Within this group, a distinction is made between general magazines, opinion magazines, TV and radio periodicals, as well as professional and scientific publications.

TV

The television market is characterised by a lack of typical commercial channels, offered through terrestrial broadcasting. The strong position of the two public stations – DR and TV2 – remains unshaken. The DR Public Media Group (originally as Statsradiofonien, renamed Danmarks Radio), which acts as a public benefit organisation, was founded in 1925; it reports to the Ministry of Culture and operates on the basis of a four-year media agreement (a form of public service contract) with the government. The agreement is the result of a settlement between the government and the parties sitting in Parliament on the direction of state media policy with regard to funding or forms of cooperation between the public and private sectors, etc.[30]. The main channel is DR channel one, and the second, also dependent on government subsidies, although supported by advertising, is TV2. The channel, broadcasting from Odense (Funen), was established in 1988 as a reaction to the expansion of satellite channels. Indeed, it is worth recalling that the monopoly of the public broadcaster was only broken in 1983, with the admission of local broadcasters to the market at that time, while foreign television expanded in the second half of the 1980s.

Public television consists of only 3 channels: DR1, DR2 and one for the youngest children DR RamaSjang (established in 2009). Another children's channel, DR Ultra, broadcast terrestrially between 2013 and 2020 before moving to the network, as did another, DR3.

Danish satellite channel TV3 launched in 1990 (broadcasting from London); the first commercial one was local network TV Danmark, launched in 1997. As it broadcast a partially unified programme, it was declared the 'third terrestrial channel' in Denmark[31]. In 2000, TV2 made its debut, and in 2006 another public channel, the cultural channel DR2, was launched, presenting documentaries, satirical films and art cinema. The TV2 Group includes thematic channels, the most popular of which are TV2 Zulu (the first thematic channel, launched in 2000, focusing on a young

[30] It is effective, among other things. Liability Act to which members of the DR Board are subject. In addition, there is, for example, the position of audience spokesperson, i.e. the internal editor of listeners and viewers.

[31] K. Williams, *Demise or renewal? The dilemma of public service television in western Europe*, [in:] *No News is Bad News. Radio, Television and the Public,* ed. M. Bromley, Routledge 2001, chapter 1, pp. 16–17

audience), TV2 Charlie (since 2004, for middle-aged viewers), the entertainment TV2 Fri (since 2013), Sport (2015), and the streaming service TV2 Play[32].

Public media outlets do not broadcast advertisements and, until recently, subsisted solely on a licence fee (in 2018 this was the equivalent of EUR 339 per year per household), but this form of licence fee was considered socially unfair and was replaced by full funding from the state budget[33]. As a result, this meant a reduction in the overall DR budget of nearly 20%. From the beginning of 2022, the media fee has been included in income tax. Part of the licence fee also goes to the TV2 channel. In addition, a source of funding for the public media is a fund directed to commercial entities that would like to contribute to the production costs of radio or television programmes, such as documentaries.

September 2018 was an important date in the modern history of Danish television, when the Ministry of Culture announced the closure of three of the six television stations and three of the eight radio stations. Such a far-reaching reform of the public broadcaster was intended to address the trend of audiences moving away from television. As it is difficult to attract young audiences, some of the content in news services has been formatted with them in mind through innovation grants, either by targeting children and young people's issues or by presenting age-appropriate films, such as on TV2[34].

According to Kantar TNS Gallup data, nearly 94% of Danes use public media (radio and television) during the week, devoting nearly 45,000 hours of this to television alone. Between 2010 and 2015, however, total TV audiences fell by more than 500,000 viewers, to 3.48 million; it was public television that lost the most viewers. Interestingly, in 2020, only 56% watched TV every day in Denmark, another year marking a decline in this regard. The time spent on traditional TV has fallen over the three years from 150 to 135 minutes, except for viewers in the 55+ age group[35]. When the combined audience of linear TV and streaming is taken into account, however, the time exceeds 180 minutes.

The market share of the public media is the highest in Scandinavia (75% for television and 65% for radio respectively), although in practice – and this should be emphasised – there are no purely commercial, terrestrial broadcast media in the country. In 2006, digital terrestrial television was launched in Denmark. The two most popular

[32] Publisher details: https://omtv2.tv2.dk/tv-2s-medier/kanaler (accessed 15.03.2022)

[33] *Denmark plans to cut 20% of funding for public service media*, 19.03.2018, https://www.ifj.org/media-centre/news/detail/category/europe/article/denmark-plans-to-cut-20-of-funding-for-public-service-media.html (accessed 20.06.2022). The new public service tax is financed by a reduced basic tax credit for Danes over the age of 18.

[34] 'Format' (JP / Politiken); 'Concentrate', 'Ultra Nyt' (3 DR, online and on TV).

[35] E. Harrie, *TV viewing in the Nordic countries in 2020*, https://www.nordicom.gu.se/sites/default/files/bilder/Mediefakta/Faktablad/factsheet-2021-4-tvviewing-in-the-nordics-2020.pdf (accessed 25.04.2022).

channels in the country today are the aforementioned TV2 – watched by 1.98 million (in 2010 it was 2.71 million, 34% in reach), and DR1, with an audience of two million (then close to 2.5 million, the same share as TV2). This is followed by TV2's thematic stations News and Charlie, and DR2, whose viewership fluctuates around 11–12%. Interestingly, DR2 lost nearly 200,000 viewers in 10 years and today relies on an audience of 690,000, which should be combined with the increase in thematic channel offerings. And those, from the TV2 group, are watched by a total of approximately 1.4 million viewers, similarly to the TV3 group (1.37 million).

The third Danish company is Discovery Networks Danmark ApS (formerly SBS Discovery Media), owner of stations such as Kanal 5, Kanal 4 and 6'eren, responsible for the Discovery+ and Eurosport Player streaming services. Also channels of the Allente company, formed from the 2020 merger of the Canal Digital and Viasat groups are available in the country. It allows Danes to have access to dozens of thematic channels via satellite or streaming. In 2012, Netflix entered the local market, expanding access to streaming platforms and SVoD (Subscription Video on Demand) alongside HBO and Viaplay.

Radio

The DR public radio began broadcasting in 1925, launching a second channel only in 1963, as a result of the development of pirate stations. The first radio station to broadcast outside the law was Radio Mercur, transmitting a programme from a ship moored in international waters between 1958 and 1962. The first commercial channels did not appear until 2003, although gradual deregulation of the market had already taken place in the 1980s.

The current public broadcasting system is made up of channels belonging to Danmarks Radio, which includes 3 FM channels: P1, P2, P3, split regional P4 (10 stations) and aimed at the 60+ audience, digitally broadcasting 8 regional stations under the common name P5. In addition, the DR broadcasts a station dedicated to jazz music (P8) or dance music (P6). 43% of radio airtime is music. An interesting entity was Radio24syv, a hybrid type station, combining public and private interest[36]. It broadcast from 2011 to 2019, and closed down due to political decisions and problems with the licence, among other things[37]. After a tender, Radio Loud, also operated by Berlingske Media, took its place. The radio has been broadcasting from Copenhagen since 2020. At the beginning of 2021, it was renamed 24syv.

The commercial market is formed by approximately 100 local and regional channels. The most important ones are local stations located in Jutland, while none are

[36] It was a publicly funded talk radio station, but owned by Berlingske Media and PeopleGroup. Through public funding, it had to meet the requirements for certain types of programmes.

[37] https://en.wikipedia.org/wiki/Radio24syv#2019_closure (accessed 20.03.2022)

from the two largest cities, Copenhagen and Aarhus. The largest non-public corporation operating in the country is the German Bauer Media Group, which owns five leading radio stations, including one of the oldest, The Voice, established in 1984, as well as Nova FM, Radio 100 or Pop FM. Their audience is over 2 million per week, with a market share of up to 52%[38]. DAB radio is growing rapidly in the country, with 33% coverage already in 2010. Despite this, daily radio listening time is falling – in 2020 it was only 102 minutes, down from 104 the year before. Instead, most young people are increasingly listening to podcasts.

New media

The number of regular web users increased from 73 to 93% in Denmark between 2005 and 2015. At the other extreme are, of course, the so-called non-users, whose number fell from 14 to 3% in the same period. In comparison: in Finland, the increase achieved from 62 to 91% (non-users fell from as much as 23 to barely 5%), in Sweden from 76 to 89% (12% to 5%) and in Norway from 74 to 96% (non-users from 15% to…1%). Today, all Danes are within reception of the internet, and 99% are internet users[39]. 80% of Danes use the web every day, while barely 2% have never used it. The diversity of forms of access and the stability of user behaviour is characteristic, as well as the use of websites to contact state institutions (used by nearly 90%).

More than 83% of the Danish population are active users of social media – spending nearly 100 minutes a day on it. Social media use is undisputedly dominated by Facebook, which is used by almost 86% of internet users. The second most popular is YouTube, while the third is Instagram. The most popular newspaper websites are Ekstrabladet.dk, BT and Politiken. The weaker interest in traditional online media may be puzzling, especially with regard to the use of ICT in the public sector. A high number of unique users, however, is recorded by TV station websites – dr.dk, with more than 1.7 million, and tv2.dk with almost 1.3 million. In 2020, 68% of Danes used social media on a daily basis and 49% used the web to search for information (almost as many read articles on social media).

According to Nordicom, three corporations, Google, Facebook (Meta) and LinkedIn (Microsoft), obtain the most revenue from online advertising, with a combined share of up to 42%.

[38] Publisher details: www.bauermedia.com/business-areas/audio (accessed 20.04.2022).

[39] Eurostat data: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Digital_economy_and_society_statistics_-_households_and_individuals (accessed 20.04.2022). These figures are based on declarations of having used the web at least once in the three months preceding the survey. According to analysis from Digital News Report, internet usage is 98%.

Cinema

When writing about cinematography in all the Nordic countries, it is important to start by mentioning the most important institution – Nordisk Film, which operates in the area of cinema, television, video, and VOD services. It operates a network of 23 cinemas: Nordisk Film Biografer, which also manages twenty cinemas in Norway. The total audience in these countries reaches 10 million per year. The second largest cinema chain in Denmark is CinemaxX, with three cinemas in Aarhus, Copenhagen and Odense. There are also smaller arthouse cinemas in the country, and in small towns, and screenings also take place in voluntary cinemas. In 2020, there were 167 cinemas in the country, offering 476 cinema screens. The number of both has fallen slightly year-on-year, most likely due to the pandemic lockdown in 2019.

Nordisk Film Production produces films and TV series, and it is approximately 15 film and television productions per year (covering Norway, Denmark and Sweden). Since 2015, it has been providing support for talent, through the Nordisk Film / SPRING programme, mainly aimed at filmmakers from the Danish Nordisk Film organisation, as well as giving support to Danish film education through the Super16 programme. Danish cinema gets very strong support not only from Nordisk Film, but also from DR and TV3 funding. In 1997, the Danish Film Institute was established by the Ministry of Culture, which supports and coordinates a number of activities, such as promotional activities. All production and distribution is based on four film contracts per year, signed by all political parties. In the latest one, signed for 2019–2023, the Danish Parliament has emphasised greater flexibility and ambitious productions. The level of funding has been maintained, approximately at the level of EUR 75 million per year[40].

2008 was the best year in 30 years, in terms of revenue for Danish cinema (the 'golden years' have been since the late 1970s). That year also saw 106 American films, 56 European films and 16 films from outside both countries. In subsequent years, there has been a gradual increase in the number of domestic productions: for example, in 2017, 22% were Danish films (15 motion pictures) and in subsequent years their share increased to more than 30%, with a production of more than 25 films per year. 2018 was a record-breaking year in terms of popularity and distribution revenue for just domestic feature films, among which productions based on a series of detective/crime novels dominated, once again. Among the five most popular films of the year at the time, as many as 3 were local productions: 'The Purity Of Vengeance', 'A Fortunate Man' and 'The Way To Mandalay'.

[40] A. Pham, *New Danish Film Agreement for 2019–2023 in place*, https://nordiskfilmogtvfond.com/news/stories/new-danish-film-agreement-for-2019-2023-in-place (accessed 20.06.2022).

NORWAY

In this country with a population of more than 5.4 million, 94% are Norwegians and 586,000 are foreigners residing in the country, including the largest Polish minority of more than 112,000[41]. A significant group is the approximately forty-thousand-strong indigenous Sami people who live in northern Norway. Most of the Sami settlements are located in the northern part of the country, mainly in Finnmark County, with some also living in southern Trøndelag[42].

Social access to information and public administration documents is regarded as one of the pillars of Norwegian democracy, and there is a ban on the presentation of advertisements contrary to the fundamental principle of gender equality. The role of the Constitution of 1814[43], in which two points relating to the functioning of the media are recorded, remains invariably important: Article 100, guaranteeing freedom of expression, and Article 110a, which relates to the protection of minorities of Sami, who are guaranteed the protection of language or culture in it. The first article is primarily intended to thwart censorship, the second to guarantee the cultural development of minorities.

The basic premises for the conduct of state media policy include: maintaining freedom of expression, cultural diversity and heritage, broadcasting in the mother tongue, protecting children from harmful content, maintaining social identity, education and upbringing. The state has supported the press by granting subsidies to small circulation local and regional dailies since 1969[44]. It also ensures that ethical rules are respected in the media, and various culture-related institutions such are behind this, such as the Norwegian Arts Commission, Press Complaints Commission, the Ministry of Culture and Church Affairs as well as the Media Council (Medietilsynet) appointed by the above, which is responsible for broadcast legislation, copyright,

41 Data behind Statistics Norway: www.ssb.no (accessed 25.05.2022).

42 The total number of Sami today is estimated at approximately 80,000. In addition to Norway, they also live in Finland, Sweden and Russia.

43 I. Biernacka-Ligęza, *Norwegia*, [in:] *Rynki medialne wybranych państw Europy Zachodniej*, ed. K. Konarska, Kraków 2018, p. 141.

44 The way subsidies are distributed has changed significantly over the years. Between 2007 and 2015, subsidies to newspapers were provided and supervised by the Norwegian Arts Council, and mainly granted to minority newspapers. Since 2008, mainly distribution costs have been compensated. As of 2016, the subsidies have returned to the Office of the Public Accounts. Media. In addition to forms of direct subsidies to the press, Norwegian titles – both print and online – receive indirect subsidies, such as exemption from VAT on sales. It is worth mentioning that, in general, cultural services are exempt from VAT in this country (this includes cinema, theatre or ballet tickets as well as admission to galleries, concerts and sporting events). Some of the largest grants go to publications for the Samoan minority.

press subsidies and film, whose mission is to 'promote media diversity and enhance media literacy'[45].

The complexity of media law in Norway can be illustrated by the example of Eierskapstilsynet – the Media Ownership Council, which was established in 1999 under the Media Ownership Act to prevent excessive concentration in the market. The office has become a part of Medietilsynet. In 2016, the Media Ownership Act (Medieeierskapsloven) was abolished and media concentration issues became the domain of Konkurransetilsynet – the Competition Office. In addition, the provisions of the Code of Criminal Procedure or the Broadcasting Act (1992), among others, also apply to the regulation.

Norway has a highly developed IT infrastructure, also supported by the public administration, promoting its use in the area of culture and arts. Already between 1998 and 2000, the Norwegian Arts Council has experimentally supported art projects using new technologies. The technological progress today places the country among the world's most computerised societies. The time devoted to traditional media (especially radio) and the amount of free time devoted to cultural activities continue to be impressive[46]. Around 2010, when the percentage of people with a university degree exceeded 33% in Norway, the knowledge economy became a priority.

In the RSF's Press Freedom Index 2022, Norway has continuously been rated the highest of all democratic countries since 2017.

Press

The first newspaper title was published in 1763, and it was the weekly 'Norske Intelligenz Seddeler'. For a long time, the development of the press was closely linked to socio-political and class events, including the conflict with Sweden from the second half of the 19th century onwards. Back in the 1930s A Press Complaints Commission was established and the biggest transformation of the press took place in the 1970s, when the subsidy system was introduced and the process of departisanisation of newspapers began[47]. This is one of the last periods of development of the Norwegian press in the 20th century, known as the golden period of the Norwegian press, which lasted until the end of the 1980s and was characterised by the 'modernisation of newspapers' and a general increase in circulation. The political press, which had dominated the market a decade earlier, virtually disappeared from the market

[45] Source: The Norwegian Media Authority, https://www.medietilsynet.no/english (accessed 11.04.2022).

[46] D. Baran, *Korzystanie z mediów i wolny czas – porównanie Polski i Norwegii*, „Zeszyty Prasoznawcze" 2008, no. 3–4 (195–196), pp. 163–173.

[47] More: D. Baran, *Rynek medialny Norwegii – analiza stanu na rok 2012*, „Media i Medioznawstwo" 2012, no. 3 (7/II), pp. 18–19; also: I. Biernacka-Ligęza, *op. cit.*, pp. 156, 159–160.

in the mid-1990s; during this period the market was fairly stable, although declining circulation was observed[48].

Norway is indicated as a country where convergence processes work well. This form of extending reach is particularly developed by media houses and media owners. The ownership model itself has also undergone tremendous changes in Norway: until recently, it could be separated by the extent of media ownership – the newspaper market was based almost entirely on Norwegian capital, while domestically published magazines were dominated by Swedish and Danish corporations – Egmont, Aller or Bonnier. Today, the structure has changed mainly due to an expanded, forward-looking approach to the market and media business development strategy. This is important, as in recent years there has been a marked decline in readership and print circulation mainly due to the migration of readers to the web[49].

The average circulation of the newspaper fluctuates between 2,000 and 5,000 copies. Regional and local papers still have an advantage in terms of reach and dominance in the regions, and the circulation of the Sunday press also remains relatively high.[50] In a country where there has never been a national free daily newspaper, which is a rarity in Europe, there is a wide variety of free papers at the local and regional level, including those focusing on politics.

In 1990 there were 189 dailies published in Norway; in 2010, there were 226. In 2020, there are still 215 papers published in the press market, including four metropolitan newspapers:[51]

- Published since 1960, the conservative 'Aftenposten' today has a combined circulation (digital and paper) of 254,200 (figures for 2021; in 2000 the circulation was 239,000);[52]
- regional 'Bergens Tidende' – 89,000 circulation (20 years ago – nearly 92,000).;
- regional 'Stavanger Aftenblad' (Rogaland) – 63,900 copies (73,000);
- the oldest, 'Adresseavisen', which has been published in Trondheim since 1767, with more than 76,800 copies (88,000).

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48 I. Biernacka-Ligęza, *Norweska prasa lokalna – zarys problematyki*, [in:] *Współczesne media. Wolne media?*, vol. 3, eds. I. Hofman, D. Kępa-Figura, Lublin 2010, p. 10–11.

49 The first breakdown in 1992, with the admission of commercials on nonpublic television.

50 Sunday newspapers in Norway were published until 1919, then their publication was suspended and resumed in 1990. The circulation of all Sunday dailies at the time was 670,000 copies, of which almost 440,000 were for the editions of the two largest 'VG' and 'Aftenposten'. Read. D. Baran, *Rynek medialny*…, pp. 23–24. Also: I. Biernacka-Ligęza, *Norweska prasa*…, pp. 17–19.

51 All data for: www.medienorge.uib.no and www.ssb.no.

52 Its afternoon edition, 'Aftenposten Aften', almost 100 percent circulation by subscription, was closed in 2012, although back in 2000 it had a circulation of over 175,000. An interesting feature is 'Aftenposten Junior', launched on a pilot basis in 2012 with a circulation of up to 14,000, today distributed in 27,000 copies.

The largest total paid circulation is achieved by the tabloids: 311,600 copies of 'Verdens Gang', which exceeded 390,000 copies in 2002 (record year), and 109,400 copies of the daily 'Dagbladet' (with a circulation of 192,500 in the same period)[53]. Remarkably, both titles have the most homogeneous readership socially, geographically and by genre, and are referred to as 'schizophrenic newspapers', balancing serious and lighter texts. It is also important to note the huge popularity of e-publications, which significantly increase circulation – in the case of 'Bergens Tidende', digital distribution accounts for more than 50%. The total circulation of Norwegian dailies today is 2.5 million and has been growing steadily since 2016.

In the case of Norway, however, the most relevant indicator of a newspaper's popularity is its readership. Many papers, following the launch of online services and e-publications, have managed to compensate for the loss of print edition readers, and this was achieved with a clear margin. In 2021, the largest readerships were recorded by: 'Aftenposten' (Saturday edition as many as 304,000 readers, Sunday 220,000, weekday 271,000), 'VG' (Saturday 253,000, weekday 135,000) and 'Dagbladet' (163,000 Saturday edition, 83,000 weekday). The most popular online title is 'VG', which is read by nearly 2 million Norwegians, twice as many 'Dagbladet'. 'Aftenposten' are read online by almost 820,000 Norwegian internet users[54].

Norway's most important papers are concentrated in the hands of and managed by domestic publishers and entrepreneurs. Norway's largest media group is the relatively young Schibsted, established in 1995. It owns nine titles, including 'Aftenposten', 'VG', and the group also holds shares in 'Bergens Tidende' and 'Stavanger Aftenblad'. Until recently, Schibsted also had a presence in other parts of Europe, where it published, inter alia, the free daily newspaper '20 Minutes', but it has withdrawn from non-Norwegian markets, focusing on the development of media and new technologies at home. The second largest Norwegian company is Amedia (formerly A-Pressen), operating mainly in the regional market. After absorbing the Edda Media group (until 2006 Orkla Media, later part of Mecom), which published dozens of local and regional titles, in 2012, its portfolio now comprises 80 papers, including seven available only online. The share of the total circulation of the Norwegian press of both groups reaches almost 60%. The market is complemented by Polaris Media, a company established in 2008, which owns 44 newspapers and where 29% of shares are owned by…[55] Schibsted.

[53] 'VG', which took the form of a tabloid in 1963, was read by almost 1.4 million Norwegians in the mid-1990s, and its readership at the time surpassed the most read Swedish and Finnish newspapers. Today, only 38,700 print runs remain.

[54] https://www.medienorge.uib.no/english/?cat=statistikk&page=avis&queryID=395 (accessed 20.04.2022).

[55] https://www.medienorge.uib.no/english/?cat=statistikk&page=avis&queryID=188 (accessed 20.04.2022).

Since the beginning of the 21st century, there have been significant changes in attitudes towards the daily press, whose readership reached 81% as recently as 1999 and 64% in 2010; after that time, there has only been decline, with the result that the readership of the traditional press has fallen below 30%. However, when online newspaper readership is taken into account, it turns out that this figure is still impressive, with up to 77% people regularly reading newspapers in Norway[56]. By mid-2021, this had even increased to 82%[57]. It should be emphasised that the readership levels of online and paper newspapers had already equalised in Norway in 2013. Still nearly half of households have a subscription to a newspaper of some kind, as many as 59% use online versions of newspapers, plus 45% of Norwegians pay to access online content[58].

Weeklies and magazines are the biggest losers today, with an average of 4–5 % of Norwegians reading them in 2021. Dominant among these are sales and promotional papers (such as 'Coop Medlem', which reaches 700,000 Norwegians), or additions, such as those added to 'Aftenposten', 'A-magasinet'. Circulation of the weeklies barely exceeds 1 million copies in total, compared to almost 3 million at the beginning of the second decade of this century.

The time spent interacting with the traditional press has shrunk from 40 minutes in 1995, to just 10 in 2021, although it was still stabilising at nearly 30% in the middle of the first decade of the 21st century.

TV market

Relative to other European countries, Norwegian television has been exceptionally late, and has only partially freed itself from most state restrictions. A regulatory media system with a public service nature protecting the whole system, even through a system of privileges, was supposed to respond to the need to preserve pluralism and independence, to protect against corporate monopolies. This created inequalities among broadcasters, especially as it was supported by restrictions on content diversity, such as an obligation to allocate a certain amount of time to broadcast in Norwegian, an obligation to broadcast programmes or programme genres related to national culture and education. This results in private stations having tasks and constraints imposed on them similar to those of public broadcasters, and thus their nature does not differ significantly from the public offer.

The electronic media monopoly, held until the early 1980s, was essentially only broken with the appearance of the satellite TV era. In 1988, the law was

[56] Norsk mediebarometer 2020. Statistisk sentralbyrå report, April 2021. Available: https://www.ssb.no/en/kultur-og-fritid/artikler-og-publikasjoner/_attachment/452390?_ts=17ddc9dbda8 (accessed 20.06.2022).

[57] Data from the Consumer & Media report for: New survey: More Norwegians read newspapers during the pandemic, https://norwaytoday.info/news/new-survey-more-norwegians-read-newspapers-during-the-pandemic (accessed 20.06.2022).

[58] Reuters Institute for the Study of Journalism. Digital News Report 2021, Norway, p. 93.

liberalised (the Local Broadcasting Act), which made satellite programmes available via cable networks and by satellite. Commercial TV Norge (owned by SBS at the time) and TV3 (owned by Sweden's Modern Times Group) began broadcasting via satellite, and it was only in these channels that advertising widely appeared while being banned for the public station. Three years later, advertising was allowed on local television. Until 2019, the issue of public media subscriptions was resolved in a permanent way: everyone who owns a TV has to pay. Subscription in Norway was the only source of income for the public media, and was among the highest in Europe (apart from Denmark and Austria). As of 2020, these rules have been changed, while budget and income tax funding has been introduced for all people over the age of 17. On public television, advertising is still banned and only sponsored programmes are allowed, although the legitimacy of this form is also widely debated[59].

In 1982, commercial local stations, distributed mainly on cable networks, began broadcasting. It was only a decade later that the first commercial TV2 station broadcasting from outside the capital (Bergen) appeared, which de facto broke the TV monopoly. It should be mentioned here that for a very long time Norwegians only had access to one public channel, NRK, which was established in 1960; in 1985, 10 regional NRK channels were created, while NRK2 was only established in 1996, with airtime dedicated to young viewers (until midday) and culture (in the evening). In 1996, the NRK became a public limited company with the state as its sole shareholder.

In the first half of the 1980s, foreign satellite stations appeared on cable networks – Sky Channel was the first. Of the Nordic channels, in 1988 Norwegians had access to Sweden's TV3 and the newly-established, domestic TVNorge. In 1998, the analogue satellite platform Viasat began broadcasting throughout the A year later, the process of switching to digital broadcasting began. The second digital satellite platform was Canal Digital, owned by telecoms operator Telenor. The digital terrestrial TV platform RiksTV started broadcasting in 2005 and the first channels were available on 1 September 2007 in the Rogaland region.

The analogue signal was switched off in March 2008. The platform's owner, Norges Televisjon, which is managed by the public NRK, Telenor and TV2, led to all areas of the country already broadcasting digitally at the end of 2009. Digitisation of broadcasting was taking place towards the north of the country, while the last counties broadcasting in analogue were Troms and Finmark[60].

[59] *Ny finansiering av NRK*, 2.07.2019, www.nrk.no/lisens/ny-finansiering-av-nrk-1.14612032 (accessed 20.06.2022),

[60] D. Baran, *Rynek medialny*…, p. 30.

Digital terrestrial television has increased the number of channels available and a total of 30 nationwide stations are now broadcasting in Norway, including 16 purely commercial stations, three public channels, seven with a paid subscription, and four others owned by non-profit or sales organisations[61]. On top of this, it broadcasts 10 regional public channels, eight local channels in digital transmission, plus around sixty local stations (only the Counties of Sogn Og Fjordane and Hedmark do not have their own TV channel). The commercial market was divided between the Danish Egmont Group (owner of the TV2 Group channels), Discovery Communications (e.g. TVNorge, Fem or Max) and Nordic Entertainment Group (NENT, owner of Viasat4, TV3, TV6, etc.). The most watched channels today are the public NRK1 (35.9%), TV2 (17.8%) and TVNorge (5.7%). NRK's three channels gather nearly 43% of the audience. Traditional television is watched for an average of 108 minutes per day, 39 of which are on the first public channel and 19 on TV2.

Although Norway has never been a 'TV country', TV viewing has further decelerated in recent years. This is, in fact, the case throughout Scandinavia. Even in the 1990s, after the expansion of the commercial TV market, viewing figures rose steadily – from 108 minutes a day in 1992, 163 in 2000, to a record 183 minutes in 2010.

It is pointed out that regulation, thus in practice support of the state monopoly, has been treated almost as a necessity in Norway for a long period, as it administratively regulated the limited goods of frequency allocation. Moreover, it also touched on the cultural spheres of Norwegian life. Current regulations need to be related to the realities of the digital age and, even more so, need to be seen through the lens of cultural policy. It is possible that the cultural aspect here is the last argument for any state interference.

Radio

The origins of radio broadcasting date back to 1925, but it was not until 1933, upon the initiative of four private radio company owners, that the public channel NRK (Norsk rikskringkasting) was established. The 'golden years of radio' were in the 1950s and 1960s, while the second NRK P2 programme was only launched in 1984, and this happened 'on the occasion' of the liberalisation of the local radio market. In 1981, local radio stations were allowed to be set up, although almost until the early 1990s they were not allowed to broadcast advertisements, making them rely on financial support from institutions and private organisations. Public broadcaster NRK P3 started broadcasting in 1993, the same year that the first private national broadcaster, P4, received its broadcasting licence. The second national private station, Kanal24, only entered the market in 2004. Today it operates as Radio Norge and is part of the Bauer Group.

[61] Data: www.medienorge.uib.no/english/?cat=statistikk&page=tv&queryID=290 (accessed 20.04.2022).

From the beginning, public radio subsisted on subscription fees, supported by advertising until 1940. Today, NRK radio broadcasts 15 stations, including such important ones as NRK Sápmi – for the Sami minority, NRK Super – a 24-hour children's channel, or NRK Folkemusikk – which presents traditional local music. There are also 15 regional channels within the public broadcaster's structures.

In addition to the public stations, there are 17 national radio stations broadcasting in Norway. This part of the radio market is split between eight channels owned by the Nordic Entertainment Group – including NRJ, which the corporation shares with France's NRJ, and nine owned by Bauer Media. Apart from the aforementioned P4, all private radio stations started broadcasting after 2010. In addition to these, Norwegians have access to 57 local DAB radio stations and 78 still broadcast on FM. The most popular station today is NRK P1, with a radio market share of 38.1%. P4 chooses 13% of listeners and 9.2% of NRK P1+; NRK channel two's audience is 6.9%. Other commercial stations include Radio Norge (3.5%). The NRK family channels, with a share of 66%, are the most popular group of radio stations in the country.

The first digitally broadcast channel, NRK Klassisk, was launched in 1995. The digitalization process of radio was completed at the end of 2017, at the same time as the FM band was completely switched off. Since then, Norwegians have only had access to the DAB+ standard, although FM has been left for dozens of local radio stations. Above all, however, care was taken to ensure that the digital signal was fully available – 99.7% of the country's population was already within DAB+ coverage. Furthermore, all new cars had already been fitted with digital receivers. The switchover to digital radio for only two years has slightly reduced listening levels, which by the end of 2019 were back to pre-exclusion levels of daily coverage of 64% and weekly coverage of up to 88%.

Nordicom's data shows that in the early 1990s In the 1990s, 71% of Norwegians spent close to 140 minutes a day listening to the radio, of which more than 60% were on public radio station NRK, while approximately 30% were listeners of P4, belonging to MTG Group. In 1990, the market was divided between two national stations, 18 regional stations and 442 local stations. In subsequent years, listenership declined, hitting a low in 1996 (59%), after which the situation stabilised at no more than 60%. After the weakest year in 2007, radio began to rebuild its position, which must be attributed to the growing popularity of the just-entered DAB+, whose listenership in 2012 already reached 13%[62]. Today, radio in Norway is listened to by 47% of the population and they spend an average of 127 minutes a day listening to it[63]. More than 70% of Norwegians aged 10+ have a DAB radio in their home (Nielsen Audio data).

[62] The first DAB radio stations started broadcasting in 1995.

[63] https://medienorge.uib.no/english/?cat=statistikk&page=radio&queryID=177 (accessed 20.04.2022).

The time spent listening to the radio in Norway varies according to the results of surveys: according to data based on PPM in 2004, listening time reached as much as 152 minutes a day, while today it is 137 minutes[64]. However, regardless of the differences in measurement, the very factor causing the high rate remains the same and that is the time the average Norwegian spends in the car (commuting to and from work). As a result of the social centralisation brought about by migratory processes, traffic within urban settlements increased during this time, which has translated into more contact with the radio. Norwegians listen to the radio mainly for information (60%), placing the highest value on local news.

New media

The fastest acceleration in Internet use in Norway occurred in the first decade of the 21st century: from 27% of users in 2000, this grew to 77% in 2010. Only 4% of Norwegians did not have access to the global web at the time, and this was in the 64+ age group. It is interesting to note that the percentage of people using a Smart TV to connect to the web grew rapidly in the following years (29% in 2016), while at the same time there has been a dynamic jump in the use of the internet outside one's home. This has not been unaffected by the time devoted to media, although what has become noticeable is not the replacement of old media with new media, but the spreading of time across multiple media (books, radio, web, streaming), and the inclination towards entertainment content[65]. On the other hand, traditional media clearly lost out, with the readership of the traditional press falling by half during this period. In 2021, the Internet usage rate in Norway was as high as 98%.

Eurostat data shows that more than 80% of internet users in Norway use the web to contact government institutions, while in the entertainment sphere, streaming is very popular, with 61% using video content. Among social networks, Facebook is the predominant choice with 66%, followed by Instagram and Snapchat (almost 50% each). As in other Nordic countries, Twitter is also used quite widely. Already at the beginning of the second decade of this century, the level of social media use in Scandinavia made it possible to conclude that this is the world's most connected region.

On the World Wide Web, Norwegians primarily search for information or use online services. In 1996, as many as eight newspapers had online editions, and after ten years their daily coverage was almost 62%. The clearly growing online readership translates into the overall attractiveness and wider reach of the electronic form of newspapers. One such example is the newspaper 'News from Tysnes', which covers a group of islands south of Bergen.

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64 H. Østbye, *Media landscapes: Norway*, https://medialandscapes.org/country/norway (accessed 20.04.2022).

65 D. Baran, *op. cit.,* p. 169.

Cinema

Norwegian film production is largely subsidised by Nordiskfilm. In the private sector, the Swedish Film Institute is instead an important operator, and no less important is the role of local governments, which licence productions and support distribution. Annually, 20 to 25 films are produced in the country; around 200 of the films distributed are foreign productions, with other European films constituting approximately 15%, while films from the USA make up almost 60% of the repertoire. The cinema is subject to strict regulations, mainly with regard to censorship and age restrictions, introduced as early as 1912 by the Cinematography Act.

The largest contribution to Norwegian cinema is made by the intergovernmental Nordic Council of Ministers, whose task is to promote cooperation between the Nordic countries. Since 2005, it has awarded annual film prizes (The Nordic Council Film Prize) to the best productions from Norway, Denmark, Iceland, Sweden and Finland, in addition to prizes in music or literature[66].

In 2020, there were 209 cinemas in the country, with 655 screens. Ticket sales amounted to 4.8 million, giving a relatively low cinema attendance rate. However, limitations caused by the periodic closure of cinemas, due to the COVID-19 pandemic, must be taken into account. When looking back, the correct average for the last decade can be seen: more than 12 million tickets sold annually, which means that on average Norwegians go to the cinema more than twice a year[67]. Towards the end of the second decade of the 21st century, cinema in Norway began to lose both audiences and market share (from 22 to 16%), although it had barely recovered two decades earlier. In the 1950s, cinema halls were filled by 35 million Norwegians a year, and after the lowest ever attendance in 1992 (just 9.5 million viewers in a year), its cultural role began to grow again.

Looking at the list of cinema premieres, it is important to note the steady increase in the number of new films screened in cinemas over the last decade: from 207 in 2010, to 257 in 2019[68]. The number of domestic productions varies, over the same period: 26 domestic films in 2010, 36 in 2014, but only 25 in 2019. However, if we look at the share of Norwegian films in total releases, we can observe a stabile rate ranging between 12 and 14%; the highest, 18%, was recorded in the aforementioned 2014.

SWEDEN

It is one of the averagely populated countries in the European Union, although the most populous of all the Nordic countries. Inhabited by 10.4 million citizens (as of

[66] The Film Prize was first awarded in 2002, then as a one-off award to celebrate the 50th anniversary of the Nordic Council.

[67] Data for: www.nordicstatistics.org (accessed 25.06.2022).

[68] In pandemic, 2020, it was barely 160 premiers.

2021), of which 880,800 (8.4%) are foreigners[69]. It is characterised by a very high degree of social self-organisation (grassroots social movements, circles, associations), and by the promotion of social and cultural equality, with its basis in 20th century egalitarianism and the good social position of women[70]. It is stands out due to its high levels of reading and cultural activity, which is cause partially by the following factors: early dissemination of reading instruction by the Church (mid-17th century); the relatively early abolition of censorship – the adoption of the Freedom of the Press Act in 1766); open access to public information; and a commitment to media education for children and young people. The latter is associated with the establishment of the Press Ombudsman and the Press Council in 1969. The Media Advisory Committee focuses on educating children and young people and protecting them from harmful media content.

The Freedom of Expression Act, adopted in 1991, is one of the four pieces of legislation that make up the Swedish Constitution. Another constitutional act relating to the media is the Freedom of Printing Act 1949. In addition to these, the Act on Access to Public Information and the State Secrets Act should be mentioned here, setting out, among other things, the rules for the protection of journalistic sources[71]. Electronic media activities are governed by the Radio and Television Act of 2010. The regulatory authority for the media market, operating as part of the Ministry of Culture, is the Press, Radio and Television Council (Myndigheten för radio och tv).

In the last decade, there has been a very clear increase in the concentration of media ownership in Sweden. This is mainly seen on a regional scale, although it is emphasised that the market is still competitive, both towards other commercial companies as well as state-owned entities.

In 2020, Swedes used various types of media for as much as 418 minutes a day, with audial media predominating (35% of the time)[72]. The country ranks 3rd in the Reporters Without Borders' media freedom ranking.

Press

The first regularly published paper in Sweden was the official journal 'Ordinari Post Tijdender', also published as 'Post-och Inrikes Tidningar' from 1645. Until 2007, it had been the longest-running newspaper in the country, having switched to an online-only version at the beginning of that year. Over the years, an educational press

[69] www.scb.se/en/finding-statistics/statistics-by-subject-area/population/population-composition/population-statistics/pong/tables-and-graphs/yearly-statistics--the-whole-country/summary-of-population-statistics (accessed 25.06.2022).

[70] M. Chacińska, *Sweden,* [in:] *State media systems*…, pp. 280–281.

[71] Chacińska, *op. cit.,* p. 282.

[72] The data includes parallel use of several media. Data for: The Swedish Media Barometer 2020: Summary, https://norden.diva-portal.org/smash/get/diva2:1557211/SUMMARY01.pdf (accessed 11.06.2022).

developed in Sweden, and it is only the 'Dagligt Allehanda', published since 1763, that is considered the first commercial title. The 18th century is characterised by the development of the local press, linked to social movements. The most important daily newspapers appeared in the 19th century: the daily Aftonbladet launched in 1830, Dagens Nyheter in 1864 and Svenska Dagbladet in 1884. They are all still in print today and continue to be among the most widely read newspapers in the country.

What also affects the press market (and even the media market more broadly) is the fact that young Swedes move quickly and willingly from rural to urban areas, leaving older residents in the former. As a result, the educational gap between urban and rural areas is growing and this, alongside global mobility, is polarising rural areas, increasing local segregation. For this reason, for many years newspapers proliferated precisely in the cities, and, for example Stockholm even had 10 of them; the so-called omnibus paper also appeared, as a new type of newspaper for everyone.

The situation of the contemporary printed press in Sweden resembles that of the late 20th century in terms of one aspect: it significantly influences the Swedish public opinion. And this is in spite of changes in the ways in which the media are used, the dynamic development of new technologies (the move away from a politically oriented press, which was not partisan though, came earlier). Within twenty years, the number of dailies has decreased from 90 (2000) to 77 (2020), and likewise with non-journals – from 73 to 61. One of the factors for change consisted in introducing free, national daily press; this trend began when the daily newspaper 'Metro' (1995) appeared. And even though today in Europe the national free press is in a clearly defensive position, it is precisely the expansion of the Swedish 'Metro' that constituted a determinant of periodic change and has influenced the manner in which many markets operate. The habits of the readers constitute another determinant of this process – at the end of the 1990s, nearly 75% of Swedes subscribed to at least one title; by 2020 this had dropped to 46%. The case is similar when it comes to the reading rate, which in 2021 stood at 68%[73], even though back at the beginning of the 21st century it had been 81%[74]. More than half of the readers choose the morning press, as many as 56% using digital editions (in 2018 this was barely 29%), while 27% opt for paper versions (back in 2014 this was more than 50%). Magazines are read by one-third of Swedes (of which 25% paper versions and 13% digital versions), with weeklies and monthlies being the most common.

[73] Data: The Media Barometer 2021, www.nordicom.gu.se/en/media-barometer (accessed 1.06.2022). Also: M. Garz, M. Zhuang, *Media coverage and pandemic behaviour: Evidence from Sweden*, www.marcelgarz.com/wp-content/uploads/C19-Mobility-Jul-2022.pdf (accessed 25.07.2022).

[74] www.nordicom.gu.se/en/statistics-facts/media-statistics (accessed 5.06.2022).

Ingela Wadbring emphasises that reading in Sweden is not a question of geography, but of a structure related to the place of residence[75]; therefore, it is derived from migratory transfers. Furthermore, an element of changing the habits is the form of using traditional media – in this case it is possible to point to 2004, a threshold year for the print media, during which five Swedish dailies changed to a tabloid format, adapting the layout to current (at the time) trends.

Newspaper readership is declining especially in Sweden's largest cities, such as Goteborg, which reported a short-lived growth after introducing free newspapers, and mainly in the city's poorer neighbourhoods[76]. In August 2019, the symbol of change in the Swedish press, the daily newspaper Metro, was closed. Today, the local and even provincial press remains the driver of readership.

After the fall of the national free newspaper segment, the market is divided into:

1. Metropolitan morning publications, i.e. dailies published in three major cities: Stockholm ('Dagens Nyheter'), Gothenburg ('Göteborgs-Posten', founded 1813/1850[77]), and Malmö ('Sydsvenskan'/'Helsingborgs Dagblad', since 1870).
2. Tabloids published in Stockholm: 'Aftonbladet' and 'Expressen' (since 1944), including its local editions in Gothenburg ('GT'), and Malmö ('Kvällsposten').
3. Regional and local newspapers, published at least three times a week, until recently accounting for nearly 40% of the market turnover;
4. Titles published 1–2 times a week, accounting for approximately 5% of the press circulation.

The aforementioned 'Metro' was initially published in six cities, but over time it expanded its reach to seventeen cities, expanding mostly by including student centres, for example Uppsala or Linköping. Its circulation then increased to 600,000 copies. In 2000, more free newspapers – 'Stockholm News' and 'Everyday' – appeared on the market, in 2007 there were already five free titles coming out, and by 2009, up to eight were being published.

Among the other newspapers, it is worth mentioning the business-oriented 'Dagens Industri' (est. 1976, circulation 95,000, readership 303,000), the Christian 'Dagen'[78] (est. 1945), as well as a weekly advice and family magazine, 'Allers', estimated

[75] I. Wadbring, *The Role of Free Dailies in a Segregated Society*, NORDICOM Review. Dec2007, vol. 28, p. 135.

[76] *Ibidem*, p. 141.

[77] The title was originally published between 1813 and 1822, and returned to the market in 1850. Information behind the website of the daily newspaper 'Göteborgs-Posten': https://info.gp.se (accessed 12.04.2022).

[78] From April 2021, one issue of the magazine is published in a digital version only. This was due to rising publishing and distribution costs, and the pandemic period (decline in advertising revenue) also contributed. It is also not insignificant that the number of subscribers to the online edition has increased significantly. Read more: *Dagens historia*, www.dagen.se/om-dagen/2020/05/07/ett-salt-i-foruttnelsen (accessed 12.06.2022).

to reach 290,000 Swedes[79]. In total, the market is estimated to be close to 400 periodical publications. There are few general popular magazines, and since the second decade there has also been a significant decline in the women's and family magazine segment. Specialised magazines, for example concerning food, sports, home furnishings or history and science, have not been developed since the 1980s. Instead, press published by associations, companies, or trade unions plays an important role.

In recent years, the biggest changes that have stirred up the relatively long-stable market have involved ownership movements. Notable among these are the transition of 'Dagens Nyheter'[80] to the Bonnier Group in 2013, the purchase of 'Göteborgs-Posten' by Stampen Media in 2015, and the 'Sydsvenskan/Helsingborgs Dagblad' merger. In the structure of publishers, the Bonnier Group (since mid-2022 as Bonnier News[81]) has effectively gained a monopoly. Established in 1804 as a book publisher, it has undergone its greatest transformation in recent years, and on a global scale. After acquiring the press part of Time Inc. in 2007, the group formed the Bonnier Corporation in the US, and in 2013 also bought motoring magazines there from Source Interlink. In 2019, it acquired local newspaper conglomerate MittMedia (24 dailies) and followed this in 2020 with the acquisition of Hall Media (7 newspapers)[82]. Bonnier also has a stake in the Norwegian Amedia concern. Another significant media group is the Stampen Group, publisher of mainly local titles, such as 'Bohusläningen' or 'Lokaltidningen'.

Since 1971, there has been a highly developed system of support for the press in the country, and its main scope concerns assistance in terms of distribution. Here, today publishers can count on four different forms of subsidy from the government. They depend on circulation and frequency of publication (for both traditional and digital presses), and forms of distribution; media subsidies can also be provided to news media whose primary scope consists in news activity, with a particular focus on democracy and diversity of content. Local journalism is also subsidised, especially in areas where it has less coverage. Subsidies are awarded by the Media Subsidies Council, one of the bodies of the Press and Broadcasting

[79] Data from Ocast: https://ocast.com/se/toplists/print-magazines (accessed 1.06.2022).

[80] The example of this opinion-leading title perfectly illustrates the direction of the evolution of the Swedish press since the beginning of this century: with circulation dropping by more than from more than 360,000 (year 2000) to just under 250,000, digital subscriptions, offered since 2014, have risen to a level of 250,000 in 2022. Data for: *Digital record for Dagens Nyheter*, 2.07.2022, https://earthpressnews.com/digital-record-for-dagens-nyheter (accessed 21.12.2021).

[81] *Bonnier Publications to become part of Bonnier News*, 18.05.2022, www.bonnier.com/en/news/bonnier-publications-to-become-part-of-bonnier-news (accessed 11.06.2022).

[82] U. Facht, J. Ohlsson, *Medie-Sverige 2021*, http://norden.diva-portal.org/smash/get/diva2:1534443/FULLTEXT01.pdf (accessed 6.06.2022).

Authority[83]. More than 100 newspapers receive subsidies each year, defined in detail by regulations[84].

Television market

The complex public audiovisual media sector – SR, SVT, and UR – is based on the principle of complete programming, political, or advertising independence. This provides journalists with great freedom in terms of their professional endeavours and choice of content. Decentralised public media operate on the basis of several-year licences granted by the government. These licences determine, for example, the direction for development, reflecting the diversity of the society (including the necessity to broadcast in migrant and minority languages), the nurturing of Swedish culture and language, and in particular seek to safeguard children and young people.

Television officially started on 4 September 1956, even though the first test broadcasts were carried out as early as in 1954. Since the very beginning, the broadcaster's mission was to focus on stimulating public debate and promoting equality. Public service television is financed solely with service charges and individual advertisements are only allowed on the occasion of sports broadcasts. In 1969, a second channel, TV2, was launched including so-called 'regional windows'. In 1986, the government allowed the establishment of local networks, albeit without the right to broadcast advertisements until 1991. In 1992, public radio and television were split into two separate companies, and in 1994 they were 'nationalised', resulting in them becoming a limited liability company, owned by a foundation 100% owned by the State Treasury. In 2007, digital terrestrial TV was introduced in Sweden, and in 2008 digital TV saturation had already reached 93.7%[85].

Today, the public broadcaster possesses five channels with national coverage: SVT1, SVT2, the SVT24 news channel, Barnkanalen (since 2002, aimed at children), and Kunskapskanalen (since 2004, educational, produced jointly with UR[86]). Until 2017, it also broadcast SVT World[87], made available by satellite in 1997 for Swedes

[83] The Council was set up in 2010 as the Office for the Environment. The Broadcasting Authority has been operating under this name since 2016, www.mprt.se/en/subsidies-to-media/distribution-subsidies (accessed 17.06.2022).

[84] Sample press subsidy regulation: www.mprt.se/Documents/Presstödsnämnden/Regler/Press%20Subsidies%20Ordinance.pdf?epslanguage=en (accessed 25.06.2022).

[85] M. Jałoszyńska, *Przeobrażenia w szwedzkim systemie medialnym pod wpływem technologii cyfrowej i nowych mediów* [in:] *Systemy medialne w dobie cyfryzacji. Kierunki i skala przemian,* ed. Z. Oniszczuk, Katowice 2015, p. 22.

[86] Educational Broadcasting Company (*Sveriges Utbildningsradio*), which provides a public service. Its aim is to provide access to educational programmes on radio and television. It has been in operation since 1978.

[87] The channel was launched in 1988 as TV4, specifically for the Finnish population. It then operated as SVT4 and, until 2009, as SVT Europe. It was subject to additional charges.

living outside the country. Its distribution was terminated mainly due to a drastic decline in subscribers, but the channel was maintained for viewers in Finland[88].

Until 2018, the Swedish public media subsisted on a service fee – a public service charge (TV-Avgiften) – paid by each household with a TV set. The distribution of revenues was decided by the Parliament, directing approximately 60% for television. Since 1 January 2019, the fee was replaced by a public service tax of 1% on the income tax for people over the age of 18[89].

Among the Nordic countries, the Swedish TV market is one of the better developed ones, especially in terms of the share of commercial entities. The satellite channel TV3 (Kinnevik/Stenbeck), initially conceived as a general Scandinavian channel, was launched in 1987, broadcasting from London. In 1990[90], TV4 (owned by telecom operator Telia[91]) began a test run, which finally started broadcasting two years later. The remaining national stations today include the general entertainment Kanal 5 (Warner Bros. Discovery[92]) and those owned by NENT (Nordic Entertainment Group, known as Viaplay Group) – TV8[93] (established in 1997) and TV6 (2006).

In 2021, traditional TV in Sweden was watched by less than 53% of the population, and this marked yet another year with a decline in viewership, which had been higher than 70% a decade earlier. In 2021 the daily time spent watching TV was 124 minutes. In comparison to 2017 this represents a 16 minute drop[94]. The most popular channels, according to the time spent watching them – 26% each – are the public SVT and the private TV4; the market share of the former is only slightly higher (33% versus 29%). The third channel is SVT2, although public channels reported the biggest decline in viewership in recent years. Daily streaming TV coverage exceeded 55%.

88 R. Briel, *SVT World to end international distribution*, www.broadbandtvnews.com/2016/11/02/svt-world-end-international-distribution (accessed 20.06.2022).

89 *Sweden: Public TV and Radio Service Fee System Reformed, New Tax Introduced*, www.loc.gov/item/global-legal-monitor/2018-12-14/sweden-public-tv-and-radio-service-fee-system-reformed-new-tax-introduced (accessed 6.06.2022).

90 It is worth noting that in 1990 there was only one broadcasting licence to be obtained.

91 Telia is the second largest company in the Nordic region in terms of revenue, after Norway's Telenor. Read more: www.nordicom.gu.se/sites/default/files/bilder/Mediefakta/Faktablad/factsheet-2021-1-top-25-nordic-media-companies-by-revenue.pdf (accessed 31.05.2022).

92 Established in 1989 as Nordic Channel, until 2013 owned by Germany's ProSiebenSat1 Media AG.

93 Until 2015, owned by then leading media company, Modern Times Group, which focused on the gaming market after selling its media assets.

94 Nordicom data: www.nordicom.gu.se/sites/default/files/bilder/Mediefakta/Faktablad/factsheet-2021-4-tvviewing-in-the-nordics-2020.pdf (accessed 31.05.2022).

Radio

The origins of Swedish broadcasting can be traced back to 1924; at that time the concept of Swedish radio was presented[95], which took off at the beginning of 1925 as AB Radiotjänst. The radio was owned by newspaper publishers, press agencies, and the radio industry, and within a decade its hourly program (daily) stretched to 8 hours of broadcasting. In 1929 the shows on Swedish radio were announced by a woman – Margareta de Geer – which was unprecedented, not only in Europe.

In 1957, after the start of regular television broadcasts, the radio was renamed Sveriges Radio AB[96]. A second channel (P2) was launched slightly earlier, in 1955, and a third one (P3) was launched in 1961. Creating the third channel was dictated by the need to introduce an alternative to the hugely popular pirate radio station Radio Nord. In 1969, the public broadcaster launched shows in Finnish, and a separate digital channel, P7 Sisuradio, was to be launched in 1998. Since the mid 1960s, 'neighbour' radios and those aimed at other, smaller communities – both types outside the public broadcasting system – also developed. At the same time, regional and then local stations (1973) were developed as part of the SR group. The first local and national commercial radio stations started broadcasting in 1993, along with separating a group of 25 regional public radio stations. That year is considered to constitute the end of the radio monopoly in Sweden.

On a European scale, the Swedish radio market has been the most innovative: DAB broadcasting began there in 1995, and by 2000 three public channels were already broadcasting via the Internet. By 2005, all local channels were available in this version.

After years of decline, 2019 was the first year of increase the radio coverage (from 61 to 73%); it currently stands at 76% and is the highest among the Nordic countries. The amount of time spent listening to the radio also increased significantly during this period, from 62 minutes in 2018 to 83 minutes in 2021[97]. The public broadcaster's radio stations attract the largest audiences: P4 (49%) and P1 (17%), while the most popular commercial channel is Mix Megapol (8%). Stations owned by Sveriges Radio are chosen by a near-record 77% of listeners (79% of Swedes listened to public radio in 2013–14 alone), with the remaining part listening to commercial radio. Since the beginning of the second decade of this century, the development of *community radio* has ceased.

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95 L. Nord, T. von Krogh, *Continuity and change in a more fragmented media landscape*, [in:] *The Media For Democracy Monitor 2021 vol. 1: How Leading News Media Survive Digital Transformation,* eds. J. Trappel, T. Tomaz, EMRG Nordicom, p. 354.

96 *History of Swedish Radio*, https://sverigesradio.se/sida/artikel.aspx?programid=2438&artikel=733497 (accessed 31.05.2022).

97 www.nordicom.gu.se/en/media-barometer (accessed 31.05.2022).

Two large networks dominate among commercial broadcasters: Bauer Media (16% of the market) and NENT Group (11%). Until the early 2010s the main radio broadcasters included Sweden's MTG Radio (NENT was formed from the group's division) and the German-owned ProSiebenSat.1 – SBS Sweden[98]. The preferred way to listen to the radio in Sweden for many years had been in the car (50%), while the share of traditional forms of listening is declining, although it still remains above 30%. More than 22% of Swedes listen to podcasts and one-fifth listen to live online radio.

New media

In 2015, 77% of Swedes used the Internet daily or almost daily, and one of the most common activities was to take advantage of the websites of public institutions and seek information there (65%). In 2021, the percentage of internet users was 92% (93% of households can access the Internet[99]), and was lowest in the Nordic group. It should be emphasized that so-called non-users of the web are people who do not need access to the Internet, do not trust it, or find it too expensive. A very strong emphasis, also in response to public demand, is being placed on digital education and improving the range and quality of digital services.

First and foremost, Swedish Internet users are social media users, although in this case the pace has also clearly slowed down, with Facebook being the most popular. Today, 72% of Swedes aged 16–74 use social media, and this has been an almost constant (fluctuating 1–2%) for the past five years. 84% of Swedes read news online, more than 70% use streaming/live-streaming services or VOD content. YouTube (64% reach), Netflix (48%), and SVT Play (45%) are the most popular. According to data from The Media Barometer 2021, the smartphone is the most common fixture in the Swedish household (96%), ahead of TV (95%) and radio (89%). 38% of Swedes pay at least one press subscription; 23% use e-books. 30% of Swedes pay to access information on the Internet.

Compared to other Europeans, Swedes are considered to be the most active Internet users – already in 2012 they were spending more than 24 hours a week online. Today, this figure has grown. This is interesting, as for many years precisely Sweden was considered the mainstay of the traditional press, but clearly in the last twenty years the media activity of Swedes has shifted, in favour of new technologies[100]. According to data from the Swedish Media Barometer 2019[101], the total daily time spent using

[98] Both groups had more than 40 stations each in their portfolios. At that time, it was also estimated that more than 700 small, so-called urban radio stations, belonging to religious associations and NGOs, were broadcasting in the country.

[99] Data: https://ec.europa.eu/eurostat/web/digital-economy-and-society/data/database (accessed 11.06.2022). According to Eurostat, the percentage of internet users was 95%.

[100] More: M. Jałoszyńska, *Przeobrażenia w szwedzkim*…, pp. 28–29.

[101] Joint study by Nordicom and University of Gothenburg: *The digital newspaper dominates and most people watch TV/Online videos – here are the 13 most important results from the*

media in 2019 was more than 6 hours (367 minutes), and it is worth noting the simultaneous reading of, for example, books and listening to music. In 2020, this time increased to 418 minutes, which was probably related to habits formed during pandemic restrictions. Swedes devote 279 of these minutes for audio and video media consumption, just 70 minutes for reading, and nearly an hour for social media. The most preferred sources of information are still the public media: SVT (for 46%) and SR radio (39%); the commercial TV4 is third (35%). For 28% of residents, Facebook constitutes the source of news, and for the youngest, YouTube or Instagram. More than 30% of Swedes choose SVT online services as their main source of information.

Cinema

As recently as the beginning of this century, between 20 and 25 movies were produced annually in Sweden. Approximately 200 movies were foreign ones, only 15% of which were from other European countries, while movies from the USA constituted almost 60% of those on offer. In 2021, as many as 49 Swedish movies were produced; a total of 265 feature-length premieres were screened in cinemas, television, and streaming services (of which 225 in cinemas)[102]. For the past decade or so, Swedish productions have constituted just slightly more than 10% of total films at the cinema, a level maintained in 2021 (13%), although relating this to all distribution platforms, this share has reached as high as 18.5%[103]. Interestingly, almost 36% of European productions were screened in 2021, and this accounted for nearly 2% less than US premieres.

National productions regularly gather nearly 20% of the audience. On Swedish television, the share of national movies reaches ¼ of the presented productions. Considering genres, documentaries and dramas dominate Swedish productions.

In the case of films, a major role is played by local governments, which grant film licences. Apart from Nordisk Film & TV Fond, in the private sector, the most important operator, overseeing the cinema system, is the Swedish Film Institute (Svenska Filminstitutet, SFI). In 2021, SFI supported the production budgets of 33% of national movies. Film distribution is dominated by Svensk Filmindustri.

Three regional funds provide support for cinematography: Film i Skåne constitutes a part of the Swedish Film Commission for the Skåne region; Film i Väst invests in co-productions that have broad international potential but can also contribute to developing the industry or infrastructure in the Västra Götaland region; Filmpool

Swedish Media Barometer 2019, www.nordicom.gu.se/en/latest/news/digital-newspaper-dominates-and-most-people-watch-tvonline-videos-here-are-13-most (accessed 30.06.2022). Data also after: Reuters Institute Digital News Report 2021, Sweden.

[102] It should be emphasised that the trend has been upward for years, and in 2019 there were 295 films. The lower number is of course due to the limitations of the pandemic period.

[103] Data: Swedish Film Institute: Facts and Figures 2021.

Nord is a film resource centre that also actively cooperates in terms of producing shows aimed at children and young people.

FINLAND

In terms of population structure, Finland is a homogeneous country. Inhabited by 5.55 million people, 95% of whom identify themselves as ethnically Finnish, with the remainder forming a not so large but significant Swedish-speaking minority. Most Finns live in cities and this might be partially responsible for the high level of cultural participation; treating the media as important social institutions is undoubtedly also significant. The country's development has long been determined by relations with its neighbours – since Finland was a Swedish province (until the early 19th century), but also as a result of attempts to spread Russian influence during the October Revolution of 1917. In 1918, the Republic of Finland was established, and in 1919 the Constitution and the prototype of the Freedom of Expression Act were passed.

Paragraph 12 of the Finnish Constitution guarantees freedom of expression and the right to information, inalienable in Nordic countries. Par. 17 includes a provision concerning the right to one's own language and culture, and this is important as Finland has two official national languages, Finnish and Swedish, which are equalled by this provision. The language of an indigenous group – the Sámi – as well as the languages of the Romani and other ethnic people, are no less important[104]. Thus, the state meets the cultural and social needs of Finnish- and Swedish-speaking residents on an equal basis, while also catering for minority languages. Even though just over 5% of the country's population is Swedish-speaking, up to now as many as 12 newspapers are published in this language and four have bilingual editions. The public media broadcast in five languages – English, Sámi and Latin in addition to the two official languages.

The Ministry of Education and Culture oversees content in audiovisual media or adjudicates copyright issues – in this case, the Government appoints a Copyright Council for a three-year term. Finland has more than 20 different communication and media acts, but no separate legislation that covers the specifics of competition, concentration of capital, or ownership in the media. Traficom, the Finnish Transport and Communications Agency, regulates broadcasting (allocates radio frequencies or transmission licences). Interestingly, it also monitors Internet providers. It is worth emphasising that in Finland, media regulation extends to the Internet as well, although it is (usually) of a protective or cultural nature. In 2020, the government proposed legislation intended to protect the media and journalists from the effects of

[104] Text of the Constitution of Finland: https://oikeusministerio.fi/en/constitution-of-finland (accessed 11.01.2022).

online hate speech. Additionally, Finland was the first country in the world where broadband access, with a minimum speed of 1Mbps, became a right for every citizen, according to legislation passed in 2010[105].

Finland records the highest rates of technological advancement, education, economic, and democratic development in Europe. However, the country can also account for a high level of cultural participation: up to 85% of Finnish women and 70% of men report reading at least one book a year[106] (here it is noted that Finns consider reading books as a hobby). According to Statistics Finland, in 2021, the rate of lending books from libraries fell below 30% for the first time.

In RSF's media freedom summary, Finland was ranked 5th in 2022, down three places from the previous year. In 2016, the country was at the top of this ranking. It is also worth mentioning the world's highest level of trust in the news media, which, according to the Reuters Institute, is trusted by up to 65% of Finns[107]. The main sources of news are the Internet, television, and social media.

Press

The first Finnish newspaper founded in 1771 was the Swedish-language 'Tidningar utgifne af et Sällskap i Åbo' (English: 'News published by the public in Turku'), in print until 1861. The oldest Swedish-language dailies still published today are the 'Åbo Underrättelser' (est. 1824, also published in Turku; circulation 5,500, readership of printed editions approximately 15,000), 'Vasabladet' (1856, published in Vaasa, circulation. 15,500, readership 38,000), and the seven-day 'Hufvudstadsbladet' (1864, Helsinki; circulation 29,000, readership 73,000 in paper, reach nearly 150,000). Historically speaking, the Finnish-language press began to dominate from the turn of the 20th century, and the oldest Finnish-language newspaper still in circulation is 'Keskisuomalainen' (1871, circulation approximately 65,000), published in Jyväskylä[108].

In order to support the press, mainly after electronic media became common, indirect aid was introduced in the country in the form of transport subsidies that covered distribution costs. In 1971, the aid was extended to include direct (financial) subsidies, which in the 1990s even amounted to more than €10 million per year.

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[105] *1 Mbit Internet access a universal service in Finland from the beginning of July*, 29.06.2010, www.lvm.fi/en/-/1-mbit-internet-access-a-universal-service-in-finland-from-the-beginning-of-july-782612 (accessed 11.01.2022).

[106] *More people read in Finland – but fewer books per year*, 25.04.2019, https://yle.fi/news/3-10755536 (accessed 1.11.2021).

[107] Data: Reuters Institute Report, after: *Finland has highest trust in news media, global study finds*, 23.06.2021, https://yle.fi/news/3-11994928 (accessed 2.04.2022).

[108] Finland's oldest newspapers still retain their original Swedish-language titles. J. Jyrkiainen, *Media landscapes: Finland*, https://medialandscapes.org/country/finland/media/print (accessed 1.11.2021).

Since 2008, grants have been discretionary and fixed: €0.5 million[109]. Whereas, funding for cultural periodicals has been increased to more than €1 million.

The most distinctive features of the Finnish newspaper segment are the still high print circulation rates, subscriptions, the highest number of seven-day newspapers – as many as 22[110], as well as nine six-day newspapers. The final element is the so-called 'publishing chains' in which publishers have been operating since the 1990s, today called 'multimedia chains'. In Finnish media nomenclature, a chain can be referred to when a publisher owns at least two subscribed newspapers. There are currently 36 daily newspapers in the country, i.e. published 4–7 days a week, and 251 non-daily newspapers (frequency 1–3 issues). In addition to the mentioned titles, the Finnish-language 'Helsingin Sanomat' remains the most important title (est. 1889), as well as two tabloids, 'Ilta-Sanomat' (1932) and 'Iltalehti' (1980), which in practice divide the daily newspaper market between them.

Free press appeared in 1997 along with the debut of 'Uutislehti 100', published at the time in more than 100,000 copies. In 1999, 'Metro' entered the market and very quickly began to gain an advantage, also in terms of volume (150,000 circulation). The first of the titles was closed in 2008, and 'Metro' followed in 2017. This was due to a general crisis of this title's publishers[111] in Europe as well as phasing out from subsequent markets, but also the fact that Finns were more willing to transfer readership to the web. The urban free press, such as 'Tamperelainen' – published in the Tampereen district, with a readership of more than 130,000 – and Helsinki's 'Länsiväylä' (109,000) are still very much active.

Like the rest of Northern Europe, the dominant type of ownership in the Finnish press consists in national, or Nordic, capital. The largest concern, whether in terms of advertising revenue, market share, or sales volume, consists in Sanoma (Sanoma Oyj), which controls nearly 40% of the market in the country. Until recently it was one of the largest media companies in Eastern Europe, from whose markets it completed its withdrawal in 2015[112]. At the end of the second decade of this century, the concern abandoned Belgium and the Netherlands, focusing on developing media technology in the Finnish market. The second largest is the Keskisuomalainen company (approximately 20% of the market), and the third, until recently the runner-up, Alma Media (under this name since 1998, also operating as a broadcaster

[109] Statistics Finland: https://pxhopea2.stat.fi/sahkoiset_julkaisut/joukkoviestintatilasto/html/engl0000.htm (accessed 2.04.2022).

[110] As recently as 2013, there were 31.

[111] The title was published at the time by the Swedish Modern Times Group, Luxembourg-based Metro International SA and the investment fund AB Custos.

[112] Publisher information. https://www.sanoma.com/en/who-we-are/history (accessed 11.04.2022) In the country, the conglomerate bought out the regional press titles from Alma Media at the time.

until 2005), controlling approximately 8% of the market. In the book and magazine publishing segment, the Otava concern possesses the greatest influence.

Despite the depoliticisation of the press, leading party titles still appear in the country, although in reduced circulation or number of issues. The periodical of the right-wing National Coalition 'Nykypäivä' (four online editions) is available online, the weekly magazine of the Left Alliance – 'Kansan Uutiset', or 'Suomenmaa' (owned by the Centre Party) is distributed in print and online. However, the popularity and importance of so-called 'special newspapers', published often since the beginning of the 20th century, should be emphasised: the financial daily 'Kauppalehti' – published by Alma Media five times a week, with a circulation of 22,300 (print) and 102,000 (digital) and a claimed reach of nearly 600,000; 'Maaseudun Tulevaisuus' – aimed at rural residents, three times a week (Monday, Wednesday, Friday) with a circulation of over 73,000, and a readership of 322,000[113]; the equestrian sports periodical 'Hevosurheil' – 2 times a week, with a circulation of approximately 20,000 copies[114].

Among Finnish periodicals, there are segments of magazines: consumer magazines (including family, specialised, and historical), business and trade magazines, opinion magazines (politics, culture, religion), as well as consumer and corporate magazines[115]. General weeklies, family magazines, and women's magazines are the most sold and read. These include the bi-weekly 'Et-Lehti' (also published in Swedish), aimed at older readers, and one of the largest in the Nordic countries, and the lifestyle weekly 'Seiska (7 paivaa)'. Online magazine readership is approaching print levels – in 2021 48% of Finns chose print, but as many as 45% opt for online versions. Among periodicals, the advice magazine 'Yhteishyvä' (over 2 million) and the consumer and corporate periodical 'Pirkka' (1.7 million) account for the largest readerships.

According to Media Audit Finland data, approximately 96% of people in Finland still read daily press (physically or online), and this level is equal across all demographic groups[116].

[113] Data: Maaseudun Tulevaisuus. Media information 2019, https://mediamyynti.maaseuduntulevaisuus.fi/wp-content/uploads/2019/04/MT_Mediainformation_2019_A4_7p_010419.pdf (accessed 31.05.2022).

[114] Until 2009, it was also the Christian weekly Kotimaa, officially not recognised as the voice of the Church. Today, the title is available for a fee, exclusively online.

[115] In detail on the Finnish press situation in 2020: *Magazine market's difficult decade*, https://pxhopea2.stat.fi/sahkoiset_julkaisut/joukkoviestintatilasto/pdf/teksti_en_03_2020.pdf (accessed 1.06.2022).

[116] These statistics are based on a survey that covered approximately 23,000 respondents aged 15+. More: *Poll: Newspapers reach 96 percent of population daily*, 13.10.2021, www.yle.fi/news/3-12141375 (accessed 31.05.2022).

Television

Its beginning dates back to 1955, when the Television Club was initiated, which aimed to create a station independent of the Russians, who at that time were preparing to open a television channel in Finland, their former colony. This led to creating TES-TV, which began broadcasting in 1956 and was managed by the Finnish Foundation for the Promotion of Technology and the Helsinki Institute of Technology.

After several months of test broadcasting, the national broadcasting company Yleisradio (initially called Suomen Televisio, STV) launched the first public television channel, YLE, at the beginning of 1958. In 1965, a second channel was launched, which must be considered a unique event in European terms. Thematic public television channels would only be created after 2001: the cultural YLE Teema and YLE Fem, a general channel broadcast for the Swedish-speaking population (since 2012 as sFST5). The two former channels merged in April 2017: YLE Teema & Fem. Its viewership barely exceeds 3%, compared to YLE TV1's 27% and YLE TV2's 13.3%.

Since 2013, public television has been funded by income tax, paid by each resident[117]. This system replaced the hitherto inefficient manner of collecting service charge fees, which were evaded by nearly a quarter of households. Interestingly, it was since 2013 that the public broadcaster began to record its annual operating income**.** Public TV channels today hold a market share of nearly 44%, with Yle News cited as the most trusted news source.

In 1986, a satellite channel, TV Finland, was initiated and broadcast this way until 2013 – satellite transmission was abandoned due to negligible interest (barely 1,600 people subscribed). It targets the Finnish-speaking population in Sweden, and that is where it still broadcasts digitally by terrestrial means, in the Stockholm area. Its offering consists of programs from the main YLE antennas, broadcast in Swedish. The first commercial channel – MTV3[118] – was established in 1957, and compared to other European countries, it was one of the earliest non-public channels launched. Interestingly, initially of a commercial nature, after 1986 it was included within the YLE structure, only to become a 100% private station once again seven years later. The second most important channel is Nelonen, established in 1990, which was the first to start broadcasting in HD in 2009.

The non-public television market is divided between two groups in Finland. The first is the Swedish holding company TV4 Media AB, which is part of the telecommunications Telia Company. It includes, for example, MTV3 (MTV Oy, market share

[117] With exceptions including, for example, those on the lowest incomes. Details *End of the road for TV license fees*, 27.11.2012, https://yle.fi/uutiset/osasto/news/end_of_the_road_for_tv_license_fees/6392392 (accessed 1.06.2022). Also: Funding of Public Media Service, Media Intelligence Service Report, March 2022.

[118] Mainos-TV (MTV) was founded by advertisers, advertising agencies and film companies.

17.7%)[119]. In the overall TV audience in Finland, the group's channels hold 24.6% of the market. The second entity is Nelonen Media – owned by the Sanoma Group and established in 1997. The concern's station viewership reaches 13.3%, and the most popular channel is Nelonen, with a share of 7.9%[120]. TV stations owned by Discovery Networks Finland can count on a share of just over 9%.

The open TV market is now made up of three public channels, 19 commercial channels with national coverage, 38 payable channels, and up to 40 regional channels. The number of payable stations has doubled over the last decade[121]. Digital terrestrial television launched in 2001 and the analogue signal was discontinued in 2007 (in cable networks in March 2008)[122]. In 2004, Finland's Canal Digital began broadcasting. On average, the daily time spent watching TV in 2021 was 2 hours and 43 minutes, less than the previous year by 4 minutes.

Radio

The history of Finnish radio broadcasting dates back to 1926, when the private Ylesradio, was established, although the first radio tests had been carried out since 1923. In 1934, radio was nationalised and became more agrarian in character, although with an emphasis on education. Today, it broadcasts in three languages: Finnish, Swedish (Radio Vega and Yle X3M) and, in the north of Lapland, the Sámi language (Yle Sámi Radio). Moreover, an interesting feature is Yle's weekly bulletin in Latin – Nuntii Latini (News in Latin). It is also available online and constitutes one of the few Latin-language news services outside the Vatican'[123]. Additionally, Helsinki is also home to Yle Mondo, a channel aimed at a foreign audience, also available by satellite in eight languages.

In 1971, regional radio began broadcasting in the Helsinki metropolitan area, even though the first licences for private radio, not yet at the national level, were not granted until 1985. In 1989, local Radio Pooki was launched, which was only extended to Helsinki, Porvoo and Turku, among others, and later also Tampere and Lapua. In 1995, France's NRJ began broadcasting in Helsinki, which has increased its coverage across the entire country since 2012. The first national commercial radio station, Radio Nova, did not launch until 1997. Owned at the time by the Bonnier Group

[119] The conglomerate was formed after the acquisition of Swedish giant Bonnier Group, the pan-Nordic premium channel operator C More Entertainment, and just Finnish MTV Oy.

[120] www.finnpanel.fi/en/tulokset/tv/vuosi/sharev/viimeisin/sharev.html (accessed 1.06.2022).

[121] Statistics Finland. https://pxhopea2.stat.fi/sahkoiset_julkaisut/joukkoviestintatilasto/html/engl0004.htm (accessed 1.06.2022).

[122] W. Van den Broeck, Jo Pierson (eds.), *Digital Television in Europe*, VUBPRESS, Brussels 2008, pp. 65–66.

[123] J. Jyrkiainen, *Media landscapes: Finland*, https://medialandscapes.org/country/finland/media/radio (accessed 15.10.2022).

and the Swedish investment fund Proventus, it was sold to the German Bauer Media Group at the end of 2015. Indeed, it is Bauer that is Finland's largest commercial radio broadcaster, with a share of 23% (in 2014 it was only 10%). The second major player is Nelonen Media, whose radio stations hold a market share of 16% (only 6% in 2011).

In 2021, the Finnish radio market consisted of: Yle's 6 public channels, 24 public regional stations, 3 special character stations (Yle Mondo, Yle Klassinen, Yle Sámi Radio); 20 private stations with national coverage, 35 with local and regional coverage. This last segment is particularly worth mentioning, as the number of these radio stations has decreased threefold compared to the previous period. Radio is also moving away from broadcast chains. Moreover, DVB radio did not become popular in Finland and in 2017 Yle stopped broadcasting the last three radio stations in this standard.

In practice, there is a market duality – the share of Yle's public radio stations is 52% and has not changed since the beginning of the century, with only small fluctuations, with the rest is distributed between non-public stations. Yle Radio Suomi is the most popular radio station in the country (34%), followed by Radio Nova and Yle Radio1 with 9%; Radio Suomipop records 6%.

After a following year of declines, the daily time spent listening to the radio is now 148 minutes, and this is the lowest since the 1980s; as recently as the early 2000s, listening exceeded 200 minutes per day.

New media

Internet penetration in Finland has reached 94%, and only 2% of the population have never used the web. Similarly as in other northern European countries, the share of Internet users in Finland is only growing among the older age groups, and the personalisation of devices and technological tools has represented a sharply upward trend for years. As many as 84% of Finns use the Internet on their mobile phones and 69% on laptops. Finns are most likely to use the public broadcaster's websites (44%).

93% of Finns under the age of 45 use the Internet daily, with a growing variety of forms of access. 85% read online media sites, 70% actively participate in social media, and 69% listen to or download music. In 2021, Facebook is the leading social media, overtaking WhatsApp and YouTube. Until recently, Suomi24, a Finnish opinion and discussion platform, was also a significant element of the news category, but it too had to recognise the primacy of the global giants.

The changes in the forms of activity enjoyed by the Finnish population may be evidenced by the fact that in the early 2000s, one of the favourite online pastimes of Finns was, among others, downloading games or photos. Today, Finns are more likely to use the web for everyday errands, communicating, searching for information, or following the media. In terms of TV and movie streaming services, YouTube dominates, ahead of Yle Areena, Netflix, and mtv.fi.

The daily newspaper 'Helsingin Sanomat', which launched a paywall as early as 2012, today holds more than 30% of all digital press subscriptions in the country. However, it is important to note that over the years, just 20% of Finns have been convinced to pay to access information online. In these terms, compared to the other Nordic countries, Finland clearly stands out.

Cinema

There are 178 cinemas in the country, equipped with 351 screens. Even though the number of cinemas has decreased by 50 since the beginning of the 21st century, the number of cinema screens increased[124]. In 2007, most cinemas in the country were modernised and multiplexes were established.

It is difficult to determine the average share of indigenous productions in the total movie market, as figures range from 18% (2011), 30% (2015), to 40% (2020). Rather unsurprisingly, American movies dominate, accounting for almost 60% of the repertoire; however, in this case there is also an exception: 2019, in which Hollywood productions accounted for 37% and Scandinavian films for 31%. The average annual number of premieres totals 200 and the number of movies screened (in total) exceeds 400. In 2020, it was even a record 489 movies. In 2021, 139 productions premiered, 30 of which were Finnish premieres.

The Finnish Film Foundation (Suomen elokuvasäätiö) supports and promotes the Finnish film industry, ensuring the accessibility of national productions and their diversity. The organisation receives funding from the Ministry of Education and Culture, which collects it from lottery income and special purpose funds to promote the art of film[125]. It is also responsible for Finnish film exports and international promotion. In 2021, 78 film grants were awarded. Nearly 78% of funding is allocated for feature films, and almost 11% for documentaries. In the country, tremendous attention is also paid to gender equality in cinema and to maintaining proportions, from the design to the production stage.

Until recently, Finns were most likely to watch romantic comedies, but in recent years this trend has reversed in favour of war-themed productions. In 2017, one of the most watched films was 'Lapland Odyssey 3', a production that was not exported outside the country.

[124] www.stat.fi/tup/suoluk/suoluk_kulttuuri_en.html#Cinemas,%20museums%20and%20theatres (accessed 1.06.2022).

[125] The Finnish Ministry of Education itself also subsidises films and the audiovisual industry with additional amounts, www.ses.fi/en/the-finnish-film-foundation (accessed 1.06.2022).

1.2. Media of the United Kingdom

GREAT BRITAIN

Great Britain is a constitutional monarchy, with a population – as of the end of 2021 – of 68.2 million, with a very large minority population of 6.1 million[126]. The United Kingdom consists of: England, Wales, Scotland, and Northern Ireland. It is considered a multi-radio and multi-television country, meaning highly saturated with electronic media. It is the second largest media market in Europe, and the fifth largest in the world, even though none of the world's media conglomerates are based there. However, influential international concerns – News Corp., Bertelsmann, or Time Warner – operate or have operated there successfully. At the same time, Great Britain is recognisable in the media world thanks to institutions such as the BBC and Reuters – one of the first and still today the most important international press agencies[127].

What distinguishes the country from others is that there are no provisions in the constitution concerning guarantees of civil liberties; nor is there a press act[128] that defines the scope of press freedom and its obligations. The provisions of law include acts that prohibit publishing content that harms children, threatens state security, or passes judgment. The law relating to the press is based on precedents, different for various parts of the UK, and for example, the Protection of Information Act of 1989 applies to journalistic activities. It is estimated that up to more than 140 different pieces of legislation may apply to the media – to varying degrees. The most important form of 'regulation' appears to be the so-called *light touch*, meaning no political interference in the activities of the media sector unless there is a higher necessity[129]. Separate regulations apply only to the BBC.

The most important journalistic entity is the National Union of Journalists, founded in 1907. The British Association of Journalists, founded in 1992, which is also more active in the online sphere, has become more important. The regulator and supervisory authority of the electronic media market is Ofcom (Office of Communications), which was established in 2003, in the place of five previously operating institutions.

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[126] Data: www.ons.gov.uk. Also: www.macrotrends.net/countries/GBR/united-kingdom/population. In 2020, the largest population group born outside the UK was Indians (896,000), while the largest nationality group was Poles (682,000). 22% of London's population is non-British.

[127] More: M. Galent, *Wielka Brytania*, [in:] *Systemy medialne państw Unii Europejskiej*…, *op. cit.*, p. 308. It should be recalled that Reuters, founded in 1851, was the first to report, among other things, on the collapse of the USSR or the demolition of the Berlin Wall.

[128] In 1953, the Press Council was established, replaced in 1991 by the Press Complaints Commission, abolished in turn in 2014, which was replaced by a new regulator, IPSO (Independent Press Standard Organisation). Read: M. Galent, pp. 313–314.

[129] K. Konarska, *Wielka Brytania*, [in:] *Rynki medialne wybranych państw*…, *op. cit.*, pp. 206–208.

It oversees content in the media, apart from the Internet, and determines the principles to which broadcasters are subject. It also grants broadcasting licences.

Great Britain has almost always been successful in implementing new technological developments – it was the first country in Europe to broadcast regular television shows, and in 1998 it launched the first digital terrestrial networks, immediately on six multiplexes. The digitalisation phase was completed in 2014, having ensured the delivery of quality media products to Islanders, and full digital coverage of the country.

In 2022, the UK was ranked 24th in RSF's World Press Freedom Index, rising from 33rd place[130].

Press

The UK market is one of the oldest in Europe, its origins date back as far as the 17th century[131] and to the debut of the government biweekly 'Oxfords Gazette'. The first English daily newspaper, 'The Daily Courant', was published between 1702 and 1735, while in 1706 the first evening paper, the 'Evening Post', began to be published. In the 18th century, the development of the press began to be hampered by state restrictions, such as the press tax (the so-called Stamp Acts, 1712 and 1725[132]), on advertising, or the 1738 ban on publishing news concerning the proceedings of Parliament, lifted in 1771.

In 1748, the first Scottish paper, the 'Aberdeen Journal', is founded, and in 1779 the first Sunday newspaper, 'Johnson's British Gazette and Sunday Monitor' was launched. In 1843, two important titles were launched: the weekly newspaper 'The Economist' and the tabloid 'News of the World'. The latter was shut down in 2011 after the outbreak of the so-called *phone hacking scandal*[133]. The most important titles still published in the UK today are the conservative 'The Times' (est. 1785), 'The

[130] Interestingly, in 2017 it was on m. 40, mainly due to the introduction of laws allowing for greater public surveillance. This is recalled by Katarzyna Konarska in the cited article (p. 219).

[131] We are talking about the press published periodically. Lucyna Słupek draws attention to 16th century ephemeral writings, among other things. More: L. Słupek, *Rynek mediów w Wielkiej Brytanii. Wybrane zagadnienia*, [in:] *Media a integracja*…, *op. cit.*, pp. 33–34.

[132] More: J. W. Adamowski, *System medialny Wielkiej Brytanii*, [in:] *Wybrane zagraniczne systemy medialne,* red. J. W. Adamowski*,* Warszawa 2008, pp. 48–49.

[133] These events are accurately described by Nick Davies in *Hack attack: the inside story of how the truth caught up with Rupert Murdoch*, Faber and Faber, Inc. an affiliate of Farrar, Straus and Giroux, New York 2014. Murdoch-owned News Int. He took over the title in 1969, along with a second tabloid, 'The Sun'. Following the scandal, in 2012 Rupert Murdoch is launching a Sunday edition of The Sun – 'The Sun On Sunday'. It is worth noting in passing that until 2014 there was a Press Complaints Committee, set up by the most important publishers, which, among other things, developed a Code of Practice. However, after the eavesdropping scandal, a request was made for its dissolution, mainly for its inadequate handling of the case and links to the scandal itself. At the time, Prime Minister James Cameron blocked its abolition.

Observer' (1791, Sunday), the prototype of the popular press, 'The Daily Telegraph' (cheap, moderately conservative, est. 1855), as well as the first mass-market title, 'The Daily Mail'[134], published since 1896.

A peculiar feature of the British market still consists in the division into three segments (sectors), which reflect the class division of the society, so that the dailies there have a well-defined audience. A distinction is made between: the prestige press (*quality papers*), which includes 'The Times', 'The Guardian' (est. 1821), 'The Daily Telegraph' or 'The Financial Times' (1888, circulation 116,700), which sells nearly half its circulation outside the UK. The middle-class press group (*middle market papers*) includes, for example, 'The Daily Mail' and 'Daily Express' (1900), while the sensationalist press (*red-top tabloids*) includes: 'The Daily Mirror' (1903), 'The Sun', and 'Daily Star' (1978). It is worth pointing out that 'The Independent' is still among the most opinion-forming British dailies. Established in 1986, the daily newspaper last appeared in print in March 2016, but its online version has remained at the top of opinion-forming media in Britain.

The British popular press relies on copy sales, the prestigious press on advertising. Another feature of the print media market is the lack of a typical political party press[135] and an emphasis on analysis and information, although it shows 'a lack of political objectivity and open support for a particular political force'[136].

As late as at the beginning of the 21st century, the country was still publishing approximately 100 daily newspapers, more than 1,300 weekly newspapers, and nearly 8,000 magazines; 70 million copies of the daily press were sold each week and newspapers were read by almost 70% of the population. Today, these numbers have significantly dropped, with the main changes noted in the ownership structure. The largest players include the Daily Mail & General Trust (DM&GT) conglomerate; at a national level, News UK (former News Corp.) has the largest market share, with 33.6%, and the press part of DM&GT, DMG Media, which includes Associated Newspapers, Northcliffe Media and Harmsworth Printing (with 24%). In the case of magazines, Bauer Media, Immedite Media Co. and Future plc play an important role. The contemporary ownership structure of the British media is interesting in that, as recently as the early 2000s, the daily newspaper market was split between eight players.

The British market is characterised by a small number of regional and local dailies – there are more than 1,200 local and regional titles published in the country –

[134] At the beginning of the 20th century, the newspaper goes out with a circulation of 1 million copies!

[135] The political 'turnaround' in the press took place during Margaret Thatcher's government, at which time the involvement of her journalists increased, prompting a 'struggle for new journalism' and demands by journalists to, among other things, diversify content or increase the aesthetics of publications.

[136] M. Galent, *op. cit.,* pp. 314–315.

daily, Sunday, and weekly newspapers, or ones appearing twice a week, payable or free. Their declared readership exceeds 80%. Examples of circulation in 2021: 'Aberdeen – Press & Journal' – 31.6k, 'Irish News' – 28k, 'Manchester Evening News' – 22.1k. A constantly important sub-segment of the press is the Sunday newspapers, which fill the gaps in the socio-political magazines. So, the opinion-forming group includes the 'Sunday Times', 'Sunday Telegraph', and 'The Observer'; *midmarket papers*: 'Mail on Sunday' and 'Sunday Express'; among the sensationalist press: 'People', 'Sunday Mirror', and 'Sun On Sunday'[137]. The British newspaper market was not immune to the downward trends, with the formerly very popular afternoon papers, read in the 1960s by up to 90% of households, losing the most.

At a local level, the top player is the National World plc concern, established in 2019, which became the owner of JPIMedia at the beginning of 2021, which itself, just in 2018, acquired, among others, one of the oldest UK concerns, Johnston Press (founded in 1769). The second largest publisher of local and regional papers is Newsquest Media Group[138] owned by the American newspaper giant Gannett, owner of more than 200 print and online titles. The following one is the Tindle Newspapers group, whose portfolio includes more than 150 local titles, covering the south and south-west of England and Wales[139]. It is mandatory to mention Reach plc[140] which, since 1999, following a series of purchases (Mirror Group, Express Newspaper), acquisitions, and mergers[141] (including with Local World[142]), became the leading regional publisher (more than 100 titles), online, and the dominant media entity in Ireland. The final major player is Immediate Media Co. (2011), so a British offshoot of the German concern Hubert Burda Media, which owns the UK's largest broadcasting, sports, or advice magazines.

In 1999, in London, the Associated Newspapers group founded the free daily 'Metro', which quickly became the world's largest free newspaper, with a circulation of up to 840,000. This was followed by the so called 'lite versions' of other titles, such as 'FTpm' (from the 'Financial Times'), 'London Lite' ('Evening Standard'), and 'City A.M.'.

[137] K. Jedrzejczyk-Kuliniak, *Prasa w Wielkiej Brytanii*, [in:] *Media masowe na świecie. Modele systemów medialnych i ich dynamika rozwojowa,* ed. B. Dobek-Ostrowska, Wrocław 2007, pp. 143–144.

[138] www.newsquest.co.uk/publishing (accessed 20.04.2022). Its portfolio also includes 29 magazines with a readership in excess of 960,000 per month.

[139] http://tindlenews.co.uk/products (accessed 20.04.2022). The company is also active in the radio and internet sectors.

[140] One of the UK's oldest newspaper companies (1904), from 1999 to 2018 as Trinity Mirror.

[141] www.reachplc.com/about-us/history (accessed 20.04.2022).

[142] The conglomerate was established in 2012, following the buyout of, among others, the Northcliffe Media. More on ownership: M. Moore, G. Ramsay, *United Kingdom: Economic challenges, market consolidation and increasing professional insecurity,* [in:] *The Media for Democracy*…, *vol. 1, op. cit*, pp. 478–482.

However, most of these, fell quite quickly, mainly due to the vagueness of the target group.

The British magazine segment consists largely in opinion-forming weeklies: 'The Economist' (1843, circulation over 800,000, with a similar number of digital subscriptions[143]), 'The Spectator' (1828, 102,000) or the left-wing 'The New Statesman' (1913), as well as satirical magazines ('Private Eye' – founded 1961, circulation 237,700), popular science magazines ('New Scientist', 1956, selling approximately 84,000 copies) or economic ones. Unlike in most European countries, women's magazines have relatively small circulations, while radio and TV weeklies such as 'Radio Times' (circulation 480,900) and 'TV Times' (109,000) are very popular.

Television market

The British audiovisual media market is not, as it might seem, dominated by the BBC, but reflects a typical dual system. It is divided between a public entity and the digital satellite platform Sky, as well as commercial channels. The five main television channels – BBC, ITV (Channel 3), Channel 4, S4C, and Channel 5 – form the so-called *Public Service Broadcasting* (PSB)[144].

The history of the British public service media dates back to 1926, when the privately-owned[145] British Broadcasting Company, the prototype of the later BBC, was founded. Following its dissolution, the British Broadcasting Corporation began broadcasting in January 1927, already as a public entity. The first television channel, the BBC Television Service, did not start regular broadcasts until 1936, even though it was tested as early as 1929. Renamed first as BBC TV (1960), it was named BBC One after the launch of a second channel in 1964.

The BBC is funded through licence service fees[146], although the issue of introducing advertising has been raised when determining operating conditions since at least the 1980s. The broadcaster's activities are regulated by two documents. The first is the *Royal Charter*, providing the privilege of broadcasting within the UK, which can be described as an 'internal' document. The second is *The Agreement*, which includes, among other things, the terms and conditions for corporate media operations outside the country but also sets out funding and regulatory obligations[147]. The RC is re-

[143] During the COVID-19 pandemic, circulation reduced to approximately 700,000. Remarkably, more than half of the print runs are sold in North America. Com Ch. Tobitt, *The Economist grows subscribers by 9% to 1.1m in 2020/21 and pays back furlough cash*, https://pressgazette.co.uk/the-economist-subscribers-annual-report-2021 (accessed 30.05.2022).

[144] The remaining channels, including thematic channels belonging to the main broadcasters, form the so-called PSB portfolio.

[145] Its shareholders also included US electronics companies operating in the UK.

[146] As recently as 2018, six thousand UK households were paying a lower licence fee for black and white TV.

[147] Adamowski, *op. cit.*, p. 66.

newed every 10 years and has to do with amendments made to the BBC's operating principles – hence the periods in the BBC's history when it has been in force for longer, with amendments. *The Agreement* is in force concurrently but may be amended with the consent of the Secretary of State for Culture, Media, and Sport, with whom the BBC signs this document.

Nine Charters have been published up to 2021, with the last one being valid for the period 2017–2027. The first was granted in 1927 and the principles and objectives included therein constitute the basis for BBC's operation up to this day[148]. It was not until the fourth Charter (1952) that the conditions for introducing commercial television were enshrined. In accordance with the Television Act of 1954, a 'competitor' to the BBC was launched, meaning the first advertising-funded public service channel, Channel 3, which began broadcasting within London the following year[149]. Known as Independent Television (ITV), it was organised as a network of regional stations, with licences granted to local broadcasters in the areas of given countries: England, Scotland, Wales, and Northern Ireland[150]. In this way, the BBC's monopoly came to an end and, in practice, a 'comfortable duopoly' of broadcasting was perpetuated[151].

In the 1970s, following a wave of criticism directed at the standards introduced into broadcasting, a Community Program Section was set up to ensure that ethnic minorities and local communities had a say in their programs. Two groundbreaking events, in terms of the BBC's global relevance, took place in the 1980s: the first was broadcasting the wedding of Princess Diana and Prince Charles, on 29 July 1981. The audience in 74 countries reached 750 million, including 28.4 million in the UK alone[152]. In 1985, the Live Aid concert was broadcast globally, which, in 60 countries, was seen by almost 400 million viewers.

The BBC is a driver of the digitalisation process, as well as of the entire technological progress in terms of electronic media[153]. Great Britain was the first country in Eu-

[148] Among the principles: The BBC is non-commercial (subsistence), universal, independent of government and interest groups and political pressure (such a position was guaranteed by the monopoly) and presents high quality content. The standard and objective is to inform and educate, and to work towards strengthening national identity.

[149] www.itvplc.com/about/history/2017 (accessed 20.04.2022).

[150] By February 2016, there were 13 regions where ITV plc was broadcasting a joint programme. In two regions in Scotland, they operate as STV and are owned by STV Group.

[151] M. Galent, *op. cit.,* p. 319.

[152] www.bbc.com/historyofthebbc/anniversaries/july/wedding-of-prince-charles-and-lady-diana-spencer (accessed 20.04.2022).

[153] In the so-called White Paper entitled 'The Future of the European Union. 'A public service for all: the BBC in the digital age' (2006), the Ministry of Culture addressed all aspects of the BBC's operations, such as programming, production, management and obligations to audiences. It also emphasised the crucial importance of building a 'digital Britain'. The 2016 Charter proposed to change the governance of the BBC and replace the existing BBC Board of Governors with a BBC Trust and BBC Executive Board. The BBC Trust would

rope to launch digital terrestrial networks, on six multiplexes, in 1998. The first digital regions of the country have been referred to since the end of 2008, and the analogue TV signal was switched off by the end of 2012. Since the end of the 20th century, the public broadcaster underwent a number of changes, mainly related to the production structure of programs[154].

The BBC consists of:

1. national reach television channels: general interest channels – BBC One and BBC Two, youth channel BBC Three, high culture channel BBC Four, thematic channels: BBC News (established in 1997 as BBC News24), Parliament, CBeebies (children up to 5 years), and CBBC (ages 6–12);
2. national radio channels: BBC Radio 1, 2, 3, 4, and Radio 5 Live; DAB only: BBC Asian Network, 1Xtra (urban radio, with black music), Radio 6 Music (rock and pop), or Radio 4 Extra (broadcasting reruns of the BBC4 channel);
3. local and regional radio and TV: broadcast for England, Scotland, Wales, and Northern Ireland;
4. interactive services, provided through the BBC Red Button platform launched in 2001[155];

The fifth group consists in the commercial company BBC Studios, which is responsible for independent, non-publicly funded (budget or subscription) payable channels. Dedicated to foreign markets, usually covered by a subscription, they are launched either independently or in cooperation with other commercial players. Today, the co-branded channels include BBC Earth, BBC First, BBC Brit, BBC CBeebies, BBC Lifestyle, BBC Knowledge, BBC Entertainment, BBC America (a collaboration with Discovery), and the channels broadcasting in Canada, BBC Canada and BBC Kids, BBC

be the 'voice, eyes and ears' of TV subscribers. In addition, the so-called Public Value Test (PVT) – henceforth, no new service or material change could take place until the regulator, the BBC Trust, had conducted a PVT. The first service to be subjected to PVT was the BBC's on-demand services, including the so-called 'on-demand' services. BBC iPlayer. It is worth mentioning, however, that alongside the public broadcaster, Rupert Murdoch is responsible for some of the biggest innovations in British television, whose concern carried out the first PPV broadcast in 1996 (the Frank Bruno vs. Mike Tyson fight), introduced the first mobile phone streams of Sky Sport and Sky News in 2005, and an HD satellite platform in 2006.

154 For example, in 1993 the Producers Choice system was introduced, meaning that external, independent producers were allowed to run programmes, which translated into reduced staff and rationalised the corporation's expenditure.

155 Until 2008 as BBCi, which in turn replaced BBC Text. These are interactive services that allow viewers to access additional TV programmes, live coverage of sports and cultural events, lottery information, weather, or national and international news. On 30.01.2020, Red Button text services were planned to be switched off, but due to protests this plan was postponed.

UKTV (Australia and New Zealand), and BBC World News[156]. It is worth noting that these channels operate under the conditions of market competition, so naturally their offer is modified by the broadcaster. Even more so when viewed from the perspective of transparency of operation and the applicable standards, the BBC is still considered to be a global model of a public service medium.

A groundbreaking year for non-public service television in the UK was 1982, when Channel 4[157] – funded by advertising sold through ITV, but maintaining a high level of education and broadcasting mission shows – began broadcasting. The same year saw the launch of the satellite channel Sky One[158], the first such channel in Europe. In 1983, its majority shareholder became News Int. belonging to Rupert Murdoch, who launched the Sky Television Network in 1989 – the first satellite platform in the UK, offering four specialised channels at the time: Sky One, Sky Movies, Sky News, and Sky Sports. As a result of a merger with British Satellite Broadcasting in 1990, the payable platform BSkyB operates since 1991. Following ownership changes in 2014, including the majority of shares in Sky Italia and Sky Deutschland, the group changed its name to Sky plc. Following the acquisition by US Comcast in 2018, the Sky Group Limited concern was formed, operating in the UK as Sky UK Limited.

Another important channel is Channel 5, established in 1997, which offers shows, for example, directed at the hearing impaired and ethnic minorities. Its nature is more complex, as it is formally owned by ViacomCBS (RTL until 2011), but benefits from government broadcasting licences (frequencies). The aforementioned ITV is owned by two entities that hold licences in terms of the station (on a franchise basis): ITV plc and STV Group. Today it broadcasts channels such as ITV2, ITV3, and ITVbe.

It is estimated that more than 90% of UK households today possess multi-channel TV and access to nearly 500 channels, including 30 broadcasting 24-hour news. In 2020, on average, British people watched TV (traditional and online video) for 340 minutes per day[159]. According to Ofcom data, viewing figures are as follows: the

[156] In 2018. BBC Worldwide merged with BBC Studios to form a new production, distribution and licensing entity, www.bbcstudios.com/about/our-channels-and-brands (accessed 30.04.2022).

[157] S4C (Sianel Pedwar Cymru), a separate Welsh language channel, was set up for Wales, funded by public subsidies, from the BBC, advertising or grants. In contrast, at the end of April 2022, ministers announced a plan to privatise Channel 4, as part of a deeper reform of UK media, which would aim to strengthen the public broadcaster in competition with streaming platforms. The case has been met with considerable opposition from media and social institutions. Read. J. Waterson, *Channel 4 privatisation to begin amid criticism from MPs and industry*, www.theguardian.com/media/2022/apr/27/channel-4-privatisation-to-begin-amid-criticism-from-mps-and-industry (accessed 30.06.2022).

[158] Initially as Satellite Television Limited, it operated under the name Sky Channel from 1984 and Sky One in 1989. The channel closed in mid-2021.

[159] www.ofcom.org.uk/research-and-data/facts. Interestingly, in 2012, the time spent in front of the TV was 'only' 241 minutes.

BBC channels – 31.8% (including BBC One approximately 20%, BBC Two 6%), ITV – 21.6% (including ITV1 approximately 16%), Channel 4 – 5%, Channel 5 – 4%. In addition to those mentioned, channels owned by the Sky network and Viacom achieve more than 9% share in the audience.

Film streaming platforms (Subscription Video on Demand) in Great Britain include the international giants – Netflix, Amazon Prime, and Disney+, as well as Sky-owned Now TV. By mid 2020, Netflix was subscribed by 43% of households, Amazon by 35%, Disney+ by 13%, Now TV by 8%, and Apple TV+ by 5%[160]. Other on-demand platforms active in Great Britain include Virgin Media.

Writing about British television, it is also worth mentioning the plans to launch the '*Kangaroo*' project, with the BBC, ITV, and Channel 4 behind it. It was supposed to be a collective streaming platform that would allow it to compete with Netflix or Amazon Prime Video. Initial talks concerning the online collaboration were held in 2007, but two years later Ofcom rejected the BBC's project. Negotiations, this time with the support of NBC Universal, were still ongoing in 2016[161].

Radio

The first half of 1922 is considered to be the birth of British radio, with the launch of two radio stations, 2MT and 2LO. Later that year, the government at that time, through the General Post Office, granted a broadcasting licence to the BBC, which would maintain a monopoly on radio broadcasting for decades to come. In practice, competition was later enforced only by the pirate Radio Caroline, broadcasting without a licence from extraterritorial waters[162]. This form of illegal broadcasting was particularly popular in countries where a monopoly of public stations (France) or commercial stations (USA) persisted.

The case was not different in the UK, where, although local radio programs were launched under the BBC in 1967 (initially in Leicester, Sheffield, and Merseyside), it was not until 1972, following the passing of the Sound Broadcasting Act, that the radio monopoly was effectively abolished. On its basis, the first licensed commercial radio station, LBC (London Broadcasting Company), began broadcasting a year later, in the talk radio format. It was not until 1990 that the Broadcasting Act introduced following significant changes to licensing, meaning that in September 1992 the first

[160] Data behind: Ofcom Media Nations 2020 UK report. Available at www.ofcom.org.uk.

[161] A. Rajan, *Can a new Kangaroo transform British TV?*, 18.08.2018, www.bbc.com/news/technology-45550155 (accessed 20.04.2022).

[162] Others include MV Olga Patricia or MV Mi Amigo. All were closed under the Marine and Broadcasting Offences Act, enacted in 1967. In 1983, the Community Radio Association was established, which was later expanded to include local television broadcasters, transforming the organisation into the Community Media Association (CMA, Community Media Association).

nationwide, commercial station Classic FM could begin broadcasting[163]. In 2004, the Community Radio Order came into force, which in turn was intended to structure the position of the community broadcaster (third sector, *community radio*)[164]. As a result, the sector grew rapidly and today a total of 140 radio stations operate in this format. In 1995, the BBC began a trial digital radio program broadcast. Today, there are 40 DAB stations, including 11 belonging to the BBC and as many as 14 belonging to Global Radio. The overall share of digital radio in the UK exceeds 64%[165]; 42% of Brits listen to DAB radio, and just 36% in the traditional standard, AM/FM.

The contemporary UK radio market is divided between 8 national stations: 5 operating within the BBC, Absolute Radio (Bauer Group), Classic FM (Global Radio), and Talksport (Wireless Group)[166]. 40% of the market is owned by two concerns, Bauer and Global Radio, and 14% by independent owners. There are 332 stations broadcasting locally today, including 43 owned by the BBC. Listeners devote 43.6% of their time to the BBC's national radio stations (combined), 6.3% to local and regional stations. The listenership of non-public national stations exceeds 23%, while all commercial stations reach 48%. Approximately 2.1% listen to *community radio* stations. It is worth noting the shift in listenership: a decade ago, BBC stations had a share of 55% and commercial radio 43%. The most listened to radio stations in the UK at the end of 2021 were BBC Radio2 (16.4%) and BBC Radio4 (11.6%, plus Radio 4 Extra, 1.4%). Classic FM's market share was just 4.3%[167].

In addition to the BBC, the national channels are predominantly owned by three media groups: Global Radio, Bauer Media and Wireless Group (formerly UTV Media). Another channel requiring mention is a special entity, the BBC World Service, which produces radio programs for other countries, launched in 1927 for overseas countries and British colonies. They are entirely funded by the budget of the Ministry of Foreign Affairs, which decides in which languages the program will be broadcast[168]. The listening rate in the UK is stable and oscillates around 90% in the 15+ age group. The average weekly radio listening rate exceeds 20 hours.

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163 www.classicfm.com/about-classic-fm/values-history (accessed 20.04.2022).

164 The Community Radio Order 2004, www.legislation.gov.uk/uksi/2004/1944/made (accessed 20.04.2022).

165 Some estimate that it is likely that even the planned 2030 FM switch-off will not happen, due to the need to protect all listeners, www.rajar.co.uk/content.php?page=news (accessed 21.06.2022).

166 M. Moore, G. Ramsay, *United Kingdom: Economic challenges…*, *op. cit*, pp. 477–478.

167 All listenership data for Rajar: www.rajar.co.uk (accessed 21.06.2022).

168 From 1938 onwards, the service broadcast in foreign languages, for audiences in non-democratic countries or countries with endangered democratic values. The BBC's Polish section broadcast from 1939 to 2005, when the station's 'mission' was finally recognised as having been exhausted.

New media

Internet use in the UK in 2021 reached 95%[169]. By the beginning of 2020, the percentage of adult Internet users had reached 92% (compared to 91% the year before). In the 16–44 age group, the percentage is 99%, while among those aged 75 and over, it is 54%. In the latter case, the percentage of Internet users has almost doubled in the last decade alone[170].

The 'Electronic Telegraph' was the first traditional medium to appear on the Internet in 1994. The 'Guardian Unlimited' created its own website and, similarly to BBC Online, it quickly became one of the most often read websites… in the world. Despite this, today only 8% of Brits are willing to pay for online content; a kind of compensation for such a poor state of digital subscriptions has been the government's abolition of VAT on digital publications, which increases the profits of online publishers.

The medium's most frequently visited websites are: BBC News (78% of users, i.e. 38.7 million users), 'The Sun' (57% of users, close to 28.4 million), followed by the 'Daily Mail' website – Mail Online (51%), and the 'Daily Mirror' (50%)[171]. The BBC News website also remains the first source of information, followed by the aforementioned website of The Guardian, with Sky News online in third place. Today already 74% of Brits go online for information, and traditional press constitutes the first source of news for only 15%. Brits have the greatest confidence in TV brands.

The most popular video service is YouTube, which effectively competes with traditional TV and streaming platforms in the sphere of TV broadcasting. Facebook dominates in terms of social media, ahead of Instagram and Twitter. The country's trend concerns a rapid shift away from traditional TV to online TV, and the increasing use of smart TV. 68% of Brits use the internet on smartphones to search for information.

Cinema

There are 843 cinemas in the UK (data for 2020) and their number has grown constantly since 2014 – at that time there were 100 fewer. During this time, the number of cinema screens has increased from 3,900 to almost 4,600; 44% are 3D screens[172]. It is estimated that the UK's *box office* is worth £850 million annually. Films of domestic production account for up to 30% of the repertoire on average, and the number of

[169] Data: Reuters Institute for the Study of Journalism: Digital News Report 2021, United Kingdom, pp. 62–63.

[170] www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/bulletins/internetusers/2020 (accessed 30.11.2022).

[171] A. Majid, *Top 50 newsbrands in the UK: Ladbible sees fastest growth in June with Metro and Independent biggest winners in top ten*, https://pressgazette.co.uk/most-popular-websites-news-uk-monthly (accessed 20.04.2022).

[172] Data: www.cinemauk.org.uk/the-industry/facts-and-figures (accessed 22.05.2022).

features produced annually does not exceed 70. More than 60% of Brits go to the cinema at least once a year, and they can choose from the largest number of digital cinemas. As it was estimated, 2017 was 'the most lucrative year in the history of cinema': ticket sales increased by 3.6% and were estimated at £1.3 billion. Fun fact: as recently as 2018, approximately 40% of the film industry's revenue still came from selling and renting DVDs as well as television. The longest-screened films in cinemas are British and American.

In 2020, independent UK films had a 14% share in the box office, and it marked another year of growth in this segment[173], although this figure would fall to 5% in the pandemic year of 2021. However, it should be noted that the production of 209 movies was initiated that year, of which 126 are described as independent cinema[174]. Film co-production in the UK has been experiencing double-digit growth for years, with 23 productions made in this form in 2019. Of the 188 movies that entered production in 2019, 94 were domestic movies, with the number of movies alone falling by almost half. However, this is rather the exception to the rule.

There are nearly 8,000 entities in the UK involved in film and video production, and more than 400 in distribution alone. The largest funding for the film comes from the National Lottery Distribution Fund, and amounts to over £60 million (over 8% of funding). A second important source consists in special purpose grants from the Ministry of Digital, Culture, Media, and Sport, which were particularly significant during the pandemic years when they rose from the previous approximately £23 million to more than £37 million[175]. Moreover, film productions are supported by commercial filmmakers – Film4/Channel 4, BBC Films/BBC4, the more regionally based non-governmental Art Council or the government of Northern Ireland. For example, BBC Films – the fiction branch of the BBC – commissions approximately 15 movies a year, thereby supporting ambitious, independent cinema.

As in other countries, there is one main stand-out institution that works to develop national cinema – the BFI (British Film Institute), founded in 1933. It is a charity organisation, listed in the Royal Charter, which curates, among others, the National Archive, seeks and supports young filmmakers, works with government and the film industry, and distributes funds from the aforementioned Lottery (since 2011). Another entity worth mentioning is the British Council, which, among other things, represents the United Kingdom of Great Britain and Northern Ireland 'in the field of cultural and educational cooperation' through targeted grants and funding. In 2020,

[173] The films produced by British studios have added blockbusters such as 'Star Wars: The Rise of Skywalker', 'Aladdin' and 'Rocketman'.

[174] T. Dams, *UK-Ireland box office rebounds in 2021 but market share of local films falls*, www.screendaily.com/news/uk-ireland-box-office-rebounds-in-2021-but-market-share-of-local-films-falls/5167254.article (accessed 22.05.2022).

[175] All data: BFI Statistical Yearbook 2021, www.bfi.org.uk/industry-data-insights/statistical-yearbook (accessed 15.06.2022).

the BFI supported the production of 68 films, while BBC – 48. 28 productions benefited from Creative Europe programme funding, with more than 20 films receiving Scottish or Irish funding.

IRELAND

The Republic of Ireland, which occupies approximately 83% of the island of Ireland, is home to 5.12 million people[176], nearly ¼ of whom live in metropolitan Dublin alone. There are two official languages in the country: English and Gaelic (Irish, a Celtic language); the latter is spoken by approximately one in five Irish residents. Ireland became independent in 1922 but the country did not gain full independence from the UK until 1948 – the Republic of Ireland Act at that time finally broke the formal ties with the UK. In 1973, Ireland became a member of the EEC.

The Irish Constitution was enacted in 1937 and it included provisions for freedom of expression – a right included in Art. 40, which stipulates: 'In view of the vital importance of the formation of public opinion for the common good, the State nevertheless strives to ensure that organs of public opinion, such as radio, the press and the cinema, while retaining their freedom of expression guaranteed by law, including criticism of Government policy, are not used to violate public order or morals or to undermine State authority'[177]. The same provision is at the same time one of the more criticised, seeing how it 'establishes (or obliges to criminalise) as many as three types of offences as a consequence of the abuse of freedom of expression'[178]. In addition, the Basic Law emphasises public education.

Ireland's legal system is based on the law of precedent and the scope of freedom of the press there is nowadays also determined by regulations under international law[179]. Moreover, the Irish media reflects social and political movements, and additionally – since the 1980s – a strong relationship between the press and politics has come into play. As Michał Kaczmarczyk notices, 'research concerning the press of the Republic (…) thus provides insights into the history of the Irish struggle for independence and, as a result, the history of statehood in its various aspects'[180]. The fastest stage of media development fell in the mid 1990s when the country experienced an economic boom and became one of the most prosperous and wealthy countries in

[176] Central Statistics Office data: www.cso.ie/en. According to the authority, in early 2021, Ireland's population exceeded 5 million for the first time since the mid-19th century.

[177] Translation for: http://libr.sejm.gov.pl/tek01/txt/konst/irlandia2011.html.

[178] M. Menkes, *System medialny Irlandii*, „Środkowoeuropejskie Studia Polityczne" 2009, no. 4, pp. 150–152.

[179] M. Kaczmarczyk, *Prawne podstawy wolności prasy w Irlandii*, „Roczniki Administracji i Prawa" 2020, XX, z 2, pp. 28–30.

[180] M. Kaczmarczyk, *Początki prasy, radia i telewizji w Republice Irlandii*, „Zeszyty Prasoznawcze" 2009, no. 1–2 (197–198), p. 126.

Europe. That is when most changes in the sphere of media regulation law took place, for example, with the emergence of Irish editions of British dailies. On the other hand, the global crisis of 2008 almost let the country to bankruptcy, with great losses in the economy, including in the media. Ireland emerged from the crisis in 2013.

Until the end of the 1960s the press was subject to a number of censorship provisions[181]. An example of their practical action was, for example, the fact that it was only in 1995 that the Censorship of Publications Board, established under the Censorship of Publications Act of 1929, allowed the 'Playboy' magazine to be marketed. In 1997, the Freedom of Information Act was passed[182], which removed the secrecy of certain government documents. The transformation of the Irish media of the early 21st century also had positive effects for the society: thanks to moving away from political control of the media, journalists were able to expose many scandalous cases involving, for example, corruption or sexual abuse in the Church.

One of the features of the newspaper market consists in low sales of Belfast titles in the south of the country and southern newspapers in the north. The custom of subscribing to the press also did not become popular. The Irish Press Council, funded by publishers, also operates within the country; the institution of the *Press Ombudsman* has been established within it[183]. The largest union of journalists is the UK-wide National Union of Journalists, which includes nearly 90% of journalists as its members. It is believed that the media in Ireland 'by default' is in opposition to the authorities, and the public can control state institutions through the media. In 2022, Ireland was ranked 6th in the World Press Freedom Index, moving up six positions from the previous year.

Press

The origins of the press in Ireland date back to 1659 and the 'An Account of the Chief Occurrences'. By the end of the 17th century, mainly in Dublin, a few more titles were published, but the first significant one was 'Faulkner's Dublin Journal', published for 100 years (1725–1825)[184]. In terms of commercial press, 'The Irish Times', which officially supported the British-Irish union, has been published since 1859. In the 20th century, the development of the press market was hampered by colonial conflicts over affiliation or independence from the British Crown, as well as the fact that the Irish press had to compete with the British press itself. Up to the 1970s Irish newspapers were described as serious, with an impact on public opinion, hence the

[181] M. Kaczmarczyk, *Prawne podstawy*…, pp. 29–30.

[182] The 2003 amendments restricted the public's access to information. Read: M. Galent, *Irlandia*, [in:] *Systemy medialne państw*…, pp. 194–195.

[183] M. Kaczmarczyk, *Prawne podstawy*…, pp. 37–40.

[184] The oldest Irish title is the 'News Letter Of Belfast', published in Northern Ireland, with the first issue published in 1737.

failed attempts to introduce lighter formats such as the 'Sunday Review' (a tabloid published between 1957 and 1963). In 1972 the 'Sunday World', the first British-style tabloid, began to be published. Today, the British editions of 'The Irish Sun' and 'The Irish Daily Mirror' are still published in this group.

In the last decade of the 20th century, following the country's rapid development and growing attractiveness, the press market developed, with an increase in specialised content and the entry of new, mainly British, publishers. By the mid 1990s they launched so-called 'Irish editions' of their flagship titles, although these were often the same newspapers in content, but with the prefix 'Irish' in the vignette and a few pages inside devoted to national issues. It is estimated that at that time nearly ¼ of Irish titles were published in London.

The biggest changes on the press market, as a result of the increasing online activity of the Irish and the effects of the crisis, took place at the end of the second decade of 21st century that century. Recently, there has been a significant decline in advertising revenue in the magazine segment (including the closure of the Irish edition of 'Glamour'), the daily newspaper market became smaller by 1/10th and there have also been changes in terms of owners.

The press in Ireland is generally divided into two categories: national (with a strong Sunday press) and regional, consisting of weekly papers. Regular readership still exceeds 70%, and together with online versions it reaches 84%. The Irish like to read about sports (football, horse racing) and the choice of title is very often dictated by… the attractiveness of the cover itself. The regional and local press segment still publishes more than 50 titles of regional prominence, with their roots stretching back as far as the 19th century. A significant part of these have been bought up in recent years by large conglomerates such as Mediahuis.

The most important national newspapers are 'The Irish Times', considered to be the first typically Irish newspaper, originally a Unionist newspaper, later shifting toward a more liberal side. Its sales (paper and digital) are now close to 80,000 and the website is one of the most visited in the country. The second one is 'The Irish Independent', founded in Dublin in 1905, which sells 87,500 copies and is read by an audience of nearly half a million. The title had a centrist character, but today it is considered more conservative. The 'Irish Examiner', founded in 1841 in Cork (23,000), for a long time the only regional daily with national coverage, also has a permanent place in the top three positions.

The national Sunday titles constitute an extremely important segment. In this category, the 'Sunday Independent', with sales of more than 168,000 copies, and the 'Sunday World', with a circulation of more than 123,000 copies (published in separate editions for the Republic and Northern Ireland) absolutely dominate the market. Besides these, one might mention the financial 'The Business Post' (circulation 25,000),

'Irish Mail on Sunday' (56,400), and 'Irish Sun on Sunday' (49,100[185]). In the group of local and regional weeklies, it is worth pointing out 'The Kerryman' magazine (est. 1904), published in Tralee, Kerry County; the twice-weekly 'Donegal Democrat', published in the Donega County since 1919; and the weekly 'The Sligo Weekender' from the Sligo County. Furthermore, there are nearly 30 press publishers in the country who issue approximately 150 consumer and trade magazines.

The last few years have seen major moves in Ireland towards a large concentration of capital, and one based on foreign capital. Currently, the most important media group is Mediahuis, owned by a Belgian-Dutch holding company. In 2019, the concern acquired Independent News and Media[186] (INM), at that time Ireland's largest press entity, established in 1973. In terms of unifying the brand, in May 2021, INM underwent a rebranding and officially became Mediahuis[187]. The corporation now publishes 3 national dailies (for example 'Irish Independent'), 3 Sunday titles (including 'Sunday World'), and 12 regional weeklies. The second major group is The Irish Times concern, which acquired Landmark Media in 2018, providing it a portfolio that includes 'Irish Examiner', 'Evening Echo' as well as several regional weekly papers. The company is focused on the Dublin market. In February 2021, the concern appealed to the *Future of Media Commission* for financial support for Irish journalism, investment in technology, and support with distribution. According to the publisher, the continued survival of the information industry is at risk[188]. At this point it is worth mentioning that there are no capital restrictions in the country and, unlike UK publishers, Irish publishers are subject to VAT. This gives British publishers a price advantage on the press market and facilitates expansion.

The British concern that is most significant in Ireland is the Reach plc group, publishing, for example, 'Irish Mirror', 'Irish Daily Star', 'Dublin Live', or 'RSVP Magazine'.

Television

The first TV channel Telefís Éireann was broadcast from Donybrook, a district of Dublin. It was launched on December 31, 1961. In 1968 the channel began broadcasting in PAL standard, while the first transmission in colour took place in 1971 (the Railway Cup final match at Croke Park Stadium). In the early years of broadcasting, Irish television presented extensive thematic programs, including religious productions, children's and youth shows, talk-shows (since 1962), journalism, and

[185] Most titles are no longer audited by the Audit Bureau of Circulations, hence circulation and sales figures are mostly from 2019 or early 2020.

[186] INM acquired another local group, The Celtic Media, in 2016, giving it control of 80% of the market.

[187] Official website of the group: www.mediahuis.ie/inm (accessed 20.04.2022).

[188] L. Slattery, *The Irish Times Group calls for State financial support for journalism*, www.irishtimes.com/business/media-and-marketing/the-irish-times-group-calls-for-state-financial-support-for-journalism-1.4475290 (accessed 20.04.2022).

series. In 1966, Telefís Éireann was renamed RTÉ Television and in 1978, with the launch of channel two as RTÉ1. In 1995, it adopted the name RTÉ One. The third Irish TV channel is Teilifís na Gaeilge (TG4) launched in 2007, broadcast – like the radio station – in Irish.

In accordance with the Broadcasting Act of 2009, the Irish public broadcaster relies on subscriptions and advertising as well as other commercial activities; the share of both sources in RTÉ's revenue is almost equal. In the case of subscriptions, the majority of funds (approximately 70%) go to television, with the remainder distributed among radio stations. Today 50% of productions on RTÉ are domestic productions, although it should be noted that the programming of commercial stations is also filled with Irish shows at more than 40%.

The commercial market appeared only in 1998 along with the launch of TV3. Although the channel received authorisation to broadcast almost a decade earlier, for financial and organisational reasons, including signal coverage, the Independent Radio and Television Commission revoked its licence. This led to court proceedings[189] resulting in the licence being reinstated in 1993, while investors were sought.

In 1998, Sky Digital satellite television was launched. However, the biggest expansion of domestic commercial stations did not occur until 2006 – at which time the television market expanded to include: sports (Setanta Sports), general (Channel 6, later as 3e), and cable Dublin City Channel[190]. Since 2018, the TV3 channel has been called Virgin Media One and is part of the Virgin Media Ireland group, which after the purchase of the TV3 Group, also acquired and subsequently rebranded other stations: 3e (now Virgin Media Two) and be3 (originally, from 2015, UTV Ireland, currently: Virgin Media Three). The analogue TV signal was switched off in October 2012. The digital terrestrial TV service, Saorview, owned by RTÉ and managed by 2RN, was launched in 2011.

At the beginning of this century, both public channels were watched by 40% of Irish people, while channel three, in Irish, was watched by less than 2%. Of the 60 stations viewed in Ireland[191], only 8 are national channels, with the majority of channels being British, American, or Northern Irish[192]. Sky Ireland's channel viewership is

[189] The Commission was established in 1988. Financially, TV3 was supported by the British conglomerate Granada and Canada's Canwest. Until 2009, it was owned by TV3 Group. It has been operating under its current name since 2018. The corporation also has a sports channel available exclusively on cable networks. Read more: www.wikiwand.com/en/Virgin_Media_One (accessed 30.05.2022).

[190] W. Truetzschler, *The Irish Media Landscape*, [in:] *European Media Governance: National and Regional Dimensions*, ed. G. Terzis, Bristol: Intellect Books, Chicago: The University of Chicago Press, 2007, p. 36.

[191] Data: TAM Ireland/Nielsen, www.tamireland.ie (30.05.2022).

[192] What is always highlighted is the popularity of Northern Irish Ulster TV, which is greater in the Republic of Ireland than in the country of broadcasting. Not included in the list

above 6%, with BBC programs hovering at a similar level. The market share of programs owned by the public RTÉ at the end of 2021 was approximately 23%, commercial channels (overall) – 77%. Viewership of Virgin channels was more than 19%. Consistently, the most popular stations in Ireland are RTÉ One (17%), Virgin Media One (11%), RTÉ2 (approximately 7%), BBC One (4.5%), and Virgin Media Two (3.8%). In recent years, RTÉ's second channel has experienced the biggest decline. In the country cable networks, including municipal networks, are very popular. In terms of these, most channels are distributed in Cork, Galway, and Waterford. Additionally, there are three community broadcasters in the country.

The most popular movie service in the country today, Netflix, was launched in January 2012. Its share, among all available streaming platforms, exceeds 66%, while the second largest subscriber, Amazon Prime Video, does not exceed 10%[193]. Average daily TV viewing in Ireland amounted to 2 hours and 47 minutes in 2021.

Radio

The radio in Ireland has always been a popular medium, now listened daily by up to 80% of the population. Most frequently listened to in the morning, it is geared towards news and live shows with listeners.

The origins of radio broadcasting are considered to be related to the 2BE Belfast established in 1924 and located in Northern Ireland. The regularly broadcasting 2RN Dublin began broadcasting on 1 January 1926 and was supervised by the Ministry for Posts and Telegraphs[194]. It was not until 1960 that a public entity, Radio Éireann, was established, which together with television, created RTÉ (Raidió Teilifís Éireann). Until 2009, RTÉ, which was self-regulatory, was managed by the RTÉ Authority, a board appointed by the government in consultation with the Minister of Communications, Marine, and Natural Resources. After 2009, the Office for Broadcasting was established, which took over the control function. The principles for appointing the Council itself also changed, making it more pluralistic[195].

The public broadcaster broadcasts across four channels. The aforementioned Radio 1 consists mainly of news; established in 1979 2FM broadcasts primarily music, focusing on young Irish performers; RTÉ Raidió na Gaeltachta (1972) broadcasts

of Irish channels here are stations of the type timeshift channels ('+1'), i.e. broadcasting a programme at a staggered time, relative to the original programme.

193 Data from 2019: *Ireland SVOD TV market share Q1 2019*, 1.05.2019, www.parrotanalytics.com/insights/ireland-svod-tv-market-share-q1-2019. Also: *Netflix launches in Ireland and UK today*, 9.01.2012, www.rte.ie/news/business/2012/0109/310697-netflix (accessed 30.04.2022).

194 M. Kaczmarczyk, *Początki prasy*…, p. 133. The first voice transmission of 2RN, the Radio1 signal, took place on 14 November 1925.

195 More: M. Galent, *op. cit*., p. 204.

entirely in Irish[196], while Lyric FM, which came on air in 1999, focuses on high culture. Alongside these, RTÉ Gold, Pulse, 2XM, Radio1 Extra, and Jr. have been broadcasting in DAB since 2008. An attempt to introduce the local RTÉ Radio Cork, which was closed in 2000, proved to be unsuccessful.

Over the years, the public RTÉ has competed with both BBC radio programs as well as Radio Luxembourg, due in part to the rather conservative nature of the programs. In the 1990s, licensed commercial stations began broadcasting, of which there are more than 50 today. The radio market is dominated by Bauer Media Audio Ireland, which bought Communicorp in early 2021, becoming the owner of national Today FM (est. 1997) and Newstalk (2002), as well as local ones, broadcasting in Dublin 98 FM (1989) and Spin 1038 (2002). The second concern operating on the Irish market is Wireless Group (formerly UTV Ireland), the owner of such urban stations as Q102 (Dublin) or Cork's 96 FM. There are 21 *community radio*[197] type stations officially broadcasting in the country.

According to JNLR (Join National Listenership Research) data, 80% of Irish people listen to the radio every day[198], with 53% choosing national radio. The audience of RTÉ-owned radio stations reaches nearly 2 million, including more than 1 million listeners for RTÉ Radio 1 and 710,000 for RTÉ 2fm. Today 9% of the Irish people tune in to FM. 7% listen to Newstalk and 4.7% to Radio Nova. Spin 1038 remains the most popular station in Dublin alone.

New media

Internet usage in Ireland stands at 92%, although for many years now the web constitutes the primary source of information. The three sites on the web most often used by Irish people are media sites: RTÉ News, thejournal.ie, and the Irish Independent. The former, along with 'The Irish Times' and the BBC websites, is very highly trusted by Internet users there. This shows the power and importance of media, until recently traditional, in a digital environment.

As in other countries, the traditional media in Ireland developed their websites quite quickly. In 1994, one of the first sites was launched by the publisher of 'The Irish Times', which served as the basis for creating ireland.com four years later. As Galent reminds us, there has also been an emigrant.ie website in Ireland since

[196] The closure of Saor Raidió Chonamara ('Free Radio Connemara') has highlighted the importance and awareness of the Irish language. That is why RTE was involved in the co-creation of Raidió na Gaeltachta.

[197] According to Community Radio Ireland: https://craol.ie (accessed 20.04.2022).

[198] Data for: *Radio Nova records an all time high in the latest JNLR results*, 10.02.2022, https://radiotoday.ie/2022/02/radio-nova-records-an-all-time-high-in-the-latest-jnlr-results (accessed 20.04.2022).

1987 – the world's longest-running editorial website, aimed at the employees of a certain institution, staying abroad[199]. Charging for access to online content has been tested since 2002, but still sales of digital editions are growing faster than the sales of traditional editions are dropping, with barely 16% of Irish Internet users willing to pay for online content. There is an interesting additional phenomenon: a 2019 Reuters Institute report already indicated that 61% of Irish people are concerned about the spread of false information online. Despite this, 81% go online for information, and for 51% social media constitute the main source of information, and this level has not changed in the last five years[200]. The smartphone constitutes the main tool used to obtain information (for 72%).

The most frequently used online medium is Facebook (64%), ahead of YouTube (61%), Instagram (38%), and Twitter (25%). The most popular instant messaging service is WhatsApp (69%).

Cinema

The most important film institution in the country is the Irish Film Institute (IFI), thanks to which Irish people have access to both independent cinema and European productions. It focuses on Irish film, its promotion and distribution. The IFI also manages movie archives (through the IFI Irish Film Archive) and its activities are also educational.

Support for the Irish film, television, and animation industry is still provided by Fís Éireann/Screen Ireland, whose activity is based, among other things, on promotional activities, including support for young filmmakers, as well as attracting filmmakers and investment to the country. In 2020 the Department of Tourism, Culture, Arts, Gaeltacht, Sport, and Media has allocated €27.5 million to Fís Éireann (in 2019 it was 16.2 million). Throughout 2020, Screen Ireland has supported 27 new projects, including 9 feature films, 7 documentaries and 7 animated movies[201]. The year 2021 was a record year in terms of expenditure on film productions (feature films, documentaries, animations and TV dramas) – amounting to €500 million, 40% higher than the record-breaking year 2019.

A collaborative initiative between three institutions emerged in 2017: Screen Ireland, TG4, and BAI (Broadcasting Authority of Ireland) – Cine4. Its aim is to jointly finance and support the creation of original Irish-language feature productions. In 2021, support was planned for five Cine4 productions, €25,000 for each selected by means of a competition. There are 78 cinemas in the country,

199 M. Galent, *op. cit*., p. 208.

200 Reuters Institute: Digital News Report 2021, pp. 68–69.

201 Data for: www.screenireland.ie/industry-insights/screenireland-data (accessed 20.04.2022).

equipped with 537 cinema screens[202]. In 2020, 13 Irish feature films were premiered, including co-operatively produced films. On average, approximately 500 films reach cinemas each year (in 2019 there were 509, in 2020 just over 400).

[202] Screen Ireland Statistics 2020, www.screenireland.ie/images/uploads/general/Statistics_2020_Revised.pdf (accessed 20.04.2022).

Chapter 2. THE MEDIA IN WESTERN EUROPEAN COUNTRIES

GERMANY

Germany (Federal Republic of Germany) is the largest country in the European Union in terms of population, with 83.2 million people[203]. It is not homogeneous in terms of nationality: approximately 13% of residents are people from EU countries, 3.4% from other European countries, while 4.2% are migrants from outside the continent. As recently as 2011, 92.1% of the population was German. The largest minority are Turks, followed by Poles – approximately 8% of all foreigners[204].

Germany is a federal state consisting of 16 Länder (federal states), with their own governments, parliaments and – most importantly – independent legal systems, which also regulate media and cultural issues at this level. The German media operate in a so-called 'dual system', which is not only related to the standard division into public and private media (present in all democratic countries), but also to the aforementioned two-level (federal and state) market regulation. Mutual media agreements between the federal states in practice organise the market at regional and local level, and determine its shape, e.g. in terms of limiting capital concentration. All media regulations must be settled by agreement between the Länder, which in practice translates into the need to obtain an approval of the parliament of a given state for the press, radio, or television broadcasting to appear within its territory. In view of this fact, it is assumed that there is no typical national press in Germany, but one of a supra-regional character. The case is analogous with radio broadcasting.

The media system, in its current form, was largely formed after 1945, which was directly related to the events of the Second World War and using the media of that time by the Nazis for propaganda purposes. For this reason, it is assumed that the German media market started 'from scratch' in 1945; in 1949 the post-war order was based on provisions defining the freedom of press included in the Basic Law.

There are a number of laws referring to the media in the country. Provisions relating to the freedom of the press and freedom of communication are found in Art. 5 of the German Basic Law[205]. Germany does not have a national press law, and ethics

[203] www.destatis.de/EN/Press/2022/01/PE22_027_124.html (accessed 30.05.2022).
[204] www.gov.pl/web/niemcy/polacy-i-polonia-w-niemczech (accessed 30.05.2022).
[205] K. Konarska, *Niemcy*, [in:] *Rynki medialne wybranych państw*…, *op. cit.*, pp. 117–119.

in the journalism profession are upheld by a 12-member Press Council (Deutscher Presserat) supported by highly active journalists' unions, including the largest, the German Journalists' Association (Deutsche Journalisten-Verband). It is responsible for upholding ethical standards and, as a self-regulatory body, it defends the freedom of the press against external interference. On the basis of the media laws (Landesmediengesetz), there are media offices (Landesmedienanstalt) at the federal state level, whose tasks include assigning broadcasting licences, monitoring of radio and television stations with regard to pluralism of opinion, protecting minors and the share of advertising in programming. Pluralism in the media is supervised by the Media Concentration Commission established in 1997, although a media policy to regulate concentration was already in place in West Germany in the 1970s[206].

The features of the press market include: a high concentration of capital (in practice, the market is dominated by a few large concerns – until the late 1990s the five largest ones controlled 40% of press circulation), the lack of a national free press, as well as a model based on local and regional presses, which account for ¾ of total circulation. It is estimated that daily newspapers are still read by more than 60% of Germans in the 14+ age group, while 63% go online (in the combined model, the readership rate is more than 75%). Nearly 60% of daily newspaper circulations is subscribed, making distribution superior to advertising in terms of revenue, while also facilitating the transfer of readers to the web. Although titles tend to have clear political affiliation, they are not regarded as political.

In 2022, Germany was ranked 16th on the Reporters Without Borders list; in 2020, the country was ranked the highest so far, at position 11.

Press

Considered the first newspaper in Germany, the 'Relation' (full name: 'Relation aller Fürnemmen und gedenckwürdigen Historien') was published in Strasbourg in 1605, and since 1609, alongside 'Aviso' (published in Wolfenbutel), it was the first regularly published newspaper title in Germany[207]. The first daily, the 'Einkommende Zeitungen', was published in Leipzig in 1650. Since the second half of the 18th century, literary, educational, and later cultural presses began to be published. The second half of the 19th century witnessed a massive growth of the press, which began to include the so called *General-Anzieger*, meaning popular papers[208]. The reunification of Germany

[206] Z. Oniszczuk, *Koncentracja medialna jako zagrożenie dla współczesnej demokracji w perspektywie doświadczeń niemieckich*, [in:] *Wokół teoretycznych i praktycznych aspektów stosunków międzynarodowych: księga jubileuszowa dedykowana Profesorowi Mieczysławowi Stolarczykowi*, eds. T. Kubin, J. Łapaj-Kucharska, T. Okraska, Katowice 2018, pp. 584–585.

[207] F. Bösch, *Media a przemiany historyczne: Od druku do internetu*, transl. I. Drozdowska-Broering, Warszawa 2021, p. 79.

[208] A. Matykiewicz-Włodarska, *Niemcy*, [in:] *Systemy medialne państw*…, *op. cit.*, pp. 228–229.

in 1990 was followed by opening up of the GDR media system, which for the market meant restoring the private press system and expanding the activities of West German concerns. In practice, the media of East Germany (GDR) were 'colonised' as a result of the expansion of media operating in West Germany[209].

The German press market is the fifth largest in the world. Today, it is still characterised by a large number of titles – more than 130 independent editorial offices, 327 daily newspapers (if we add local editions, this number grows to 1452) with a total circulation of 13.5 million, and a relatively small number of national titles. Magazines and the Sunday press continue to constitute the most buoyant sector, with a total estimated circulation of more than 56 million; among these, TV guides are the most widely read, but also specialist periodicals. The total number of magazines is estimated at approximately 1,300. However, it is important to bear in mind the decline in circulation and editions in this segment as well[210]. In addition to the most important, regional, local press still plays a significant role. Small-circulation local newspapers, particularly popular and significant in small communities back in the 1980s, were known in Germany as *Heimatpresse*[211], and are thematically closest to the reader. Both papers are mainly distributed in terms of subscription – up to 9.5 million copies are delivered this way.

Data from the German Association of Newspaper Publishers and Digital Publishers (Bundesverband Digitalpublisher und Zeitungsverleger, BDZV) shows that at the beginning of 2020, approximately 1.6 million weeklies were sold, mostly regarded in this country as prestigious publications with a clear political orientation. The circulation of the six Sunday newspapers exceeds 1.7 million copies in total[212]. In the first quarter of 2020, 14.5 million copies of newspapers were sold in the country each day, of which 1.65 million were digital (e-paper) editions. Compared to 2019, print sales are down 4.75%, while digital editions are up just under 14%[213].

Only 'Bild' (founded in 1952) is classified as a tabloid. The title, which had a circulation of nearly six million just three decades ago, today sells less than 1.2 million copies, although its readership is estimated at 7.8 million. In practice, there is a supra-regional press in the country, classified as national and, above all, prestigious. Currently, it consists of seven titles: 'Die Welt' (est. 1946, conservative; sales of 74,700 copies, with a reach of 380,000 readers), 'Frankfurter Rundschau' (1945, liberal-left), 'Süddetusche Zeitung' (1945, centre, sales close to 310,000), 'Frankfurter Allgemeine Zeitung' (1949,

[209] B. Ociepka, *System medialny Niemiec*, [in:] *Wybrane zagraniczne systemy medialne*, ed. J.W. Adamowski, Warszawa 2011, pp. 104–105.

[210] www.statista.com/topics/6956/magazines-in-germany/#topicHeader__wrapper (accessed 30.06.2022).

[211] Matykiewicz-Włodarska, *op. cit*., p. 243.

[212] Data: www.bdzv.de/alle-themen/print#c9088 (accessed 30.06.2022).

[213] Ch. Horz-Ishak, B. Thomass, Germany. *Solid journalistic professionalism and strong public service media,* [in:] *The Media for democracy…*, *vol. 1, op. cit.*, pp. 200–201.

centre-right; sales approximately 200,000). Alongside those mentioned, there is also the youngest one, sympathising with the left and the Green Party, 'die tageszeitung' (1978, over 45,000 sales, but a readership of approximately 290,000), 'Westdeutsche Allgemeine Zeitung', which has been published in North Rhine-Westphalia since 1948, in twenty-eight editions. Sales of the regional WAZ reach 275,000, with paid distribution of approximately 435,000)[214]. In this respect, the German press is analogous to the French.

The leading German titles have their Sunday editions, except for 'Die Zeit', whose seventh edition also serves as a weekly. They tend to have larger circulations than regular editions; for example, 'Welt am Sonntag' sells 332,000 copies. Among the weeklies, the most important are the socio-political 'Der Spiegel'[215] (1947, sales reaching 680,000), and 'Stern' (1948, liberal, almost 360,000). Other popular titles include the news weekly 'Focus', which sells 251,000 copies.

The German market is essentially based on its own capital, which – with internal limitations – has also successfully invested in Eastern European markets. Basically the only example of a foreign partnership was the British Mecom fund, which took a stake in Berliner Verlag in 2005. However, Mecom eventually withdrew from Germany, sold its stake in the daily newspaper Hamburger Morgenpost, and the daily newspaper Berliner Zeitung ended up in the hands of the home-grown DuMont Schauberg. Mecon. However, the real problem of the press market consists in the news monopoly in parts of the country – according to the BDZV, only one daily newspaper is published in nearly 60% of counties and cities[216].

Today, the press market is dominated by 10 companies, which own more than 60% of the market. The share of the largest group, Swiss-German Ringier Axel Springer (RAS), reaches 14% and its portfolio includes 'Bild' and 'Die Welt'. Südwestdeutsche Medien Holding (formerly Verlagsgruppe Stuttgarter Zeitung) operates mainly on the regional market (16 titles), also publishing 'Süddeutsche Zeitung' and 'Jetzt'; its share is approximately 9%. The third player is Funke Mediengruppe (formerly WAZ), which still holds almost 8% of the market, publishing ten TV guide magazines, fifteen for women and more than 100 advertising newspapers; the company is also active dynamically on the online and radio market. In recent years, the RAS group has grown visibly weaker – its share has fallen within a decade from more than 20%, as can be seen, for example, in the magazine segment, where it publishes magazines mainly from the 'Bild' family (e.g. 'Auto Bild', 'Bike Bild') or magazines like 'Musikexpress'.

[214] All data: IVW, cited after statista.com, eurotopics.net, internationalmediasales.net.

[215] The journalist of the magazine, Claas Relotius, admitted in 2018 to falsifying reports published in the periodical. It was one of the biggest, unprecedented scandals in the German media.

[216] K. Domagała, *Niemcy mają obcy kapitał w mediach. Dzienniki wyjątkiem,* https://p.dw.com/p/2oZzc (accessed 30.05.2022).

The sole magazine market is dominated by three companies. The first and largest is Bauer – also present in France or Poland, which publishes more than 50 magazines in addition to regional press (e.g. 'Tina', 'TV Movie', 'Cosmopolitan'). The Hubert Burda Media concern is the publisher of dozens of lifestyle, women's, TV, and children's magazines. It also collaborates with the French Hearst group, with which it holds 50% of shares each in some well-known magazines such as 'Elle', 'Elle Decoration', or 'Harper's Bazaar'. Gruner+Jahr prevails in the cooking or *people* magazine segments, but also publishes women's and family titles. The more popular ones include a group of magazines under the brand names 'GEO', 'Eltern', and 'Capital'.

In recent years, it has become very common in Germany for the media to combine local editorial offices with central ones, while also creating joint content for web portals and news editorials.

Television

The television market in Germany is quite specific. On the one hand, it consists of the public media with an unusual structure, and on the other hand, a commercial element organised by the two largest media corporations with an international presence beyond Europe.

The German public media consists, unusually, of two broadcasters, managed in two different ways. The first is ARD (Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland, or Association of German Public Service Broadcasters), established in 1950 by broadcasting organisations of the Länder (initially these were six radio stations). ARD is a federalist initiative independent of the central government and it is considered to be the world's largest non-commercial broadcaster. The first channel, Das Erste (formerly Erstes Deutsches Fernsehen, or First German Television) began broadcasting in 1954, as a joint product of broadcasters in the Länder[217]. In the years 1964 and 1969, so-called third television programs (known as Die Dritten) appeared – regional programs, broadcast within the ARD by individual national institutions such as WDF (Westdeutsches Fernsehen), or NDR (Norddeutscher Rundfunk).

ARD's activities are governed by internal statutes and the Broadcasting Act, according to which, in this case the main body consists in an assembly of its members (the representatives are the directors affiliated to the station association), headed by a chairman. A significant position is held by the Program Director together with the Program Committee, jointly determining and supervising the regional channels'

[217] ARD today is 10 stations: Bayerischer Rundfunk BR, Deutsche Welle DW, Hessischer Rundfunk HR, Mitteldeutscher Rundfunk MDR, Norddeutscher Rundfunk NDR, Radio Bremen RB, Rundfunk Berlin-Brandenburg RBB (since 2003), Saarländischer Rundfunk SR, Südwestrundfunk SWR and Westdeutscher Rundfunk WDR.

share of the national program and the production of programs for ARD (55% of the total program is made up of joint productions and individual member stations).

In 1963, the Second German Television, or ZDF (Zweites Deutsches Fernsehen, which broadcast as ARD2 in the Hesse area between 1961 and 63), begins broadcasting. Unlike ARD, ZDF is centralist in nature, as it operates on the basis of an agreement between the governments of federal states. It was created as a program alternative, but also as a kind of competition[218]. Control over the ZDF is carried out by the Television Council, which consists of representatives of the political parties of the Bundestag, representatives of the federal government, the Länder, municipalities, churches, trade unions, journalistic, environmental, and sports organisations. ZDF was also available in the GDR area.

Like in other countries, German public broadcasters are obliged by law to serve the public. Effective spending is overseen by the Commission for the Broadcasters' Financial Needs. ARD and ZDF rely on subscription fees, 70% of which are allocated to ARD, as well as advertising revenue. In the case of the two main channels – Das Erste and ZDF – airing adverts after 20:00 (*prime time*) as well as on Sundays and public holidays is prohibited, while the other public service broadcasters, with the exception of the news channel Deutsche Welle, rely solely on subscription fees. The viewership of ARD-owned channels was 24.8% (ARD-Dritte 13.8%, Das Erste 11%), while ZDF's was 18.9% (ZDF 14.1%, ZDFNeo 2.9%, ZDFInfo 1.9%)[219].

ARD stations of individual federal states jointly maintain the 3sat channel (established in 1984, aimed at German-speaking countries), the children's channel KiKA (est. 1997, formerly Der Kinderkanal, Ki.Ka), Phoenix (1997; journalism, documentaries, and news), as well as the aforementioned Deutsche Welle (international, promoting German culture and presenting the German point of view), and ARTE (cultural channel, French-German, also cooperating with public broadcasters of other European countries)[220]. The market share of each one generally does not exceed 1%. The third channels, in their broadcast areas, today have shares ranging from 10% (MDR), 8% (NDR), to 6.4 (RBB) and 6.3% (HR)[221].

The non-public television market had been developing in Germany since the 1980s, partly due to cable television, which was still being developed since the late

[218] K. Konarska, *op. cit.*, pp. 129–130.

[219] In recent years, ARD's viewership has declined and ZDF's has increased by around 5%. Data for 2021: www.agf.de/en/data/tv-data (accessed 30.04.2022).

[220] Within the framework of its association agreements, ARTE cooperates, through co-productions, exchanges of own productions and membership of ARTE's decision-making bodies in an advisory capacity, with the public broadcasters of Luxembourg, Ireland, Italy, the Czech Republic, Austria, Finland, Belgium and just Switzerland.

[221] Ch. Horz-Ishak, B. Thomass, *op. cit.*, p. 219.

1970s – in Berlin, Ludwigshafen-Mannheim, Munich, Cologne, and Wuppertal[222]. The future shape of the TV market was impacted the strongest by creating two channels at the beginning of 1984 that would later form the basis of satellite broadcasting and be available (popular) for years to come even beyond the country's borders – Sat1 and RTL (initially as RTL Plus). In 1989, they were joined by the P7[223] channel, thanks to which Germany, following the example of the USA, formed its own TV 'Big Three'. The dynamic development of commercial stations resulted in that over the next decade the television market grew to more than 30 generally available channels, and in the following years this number reached more than 250 (including local and regional channels).

The contemporary commercial terrestrial television, called *Senderfamilien*, is divided between two media groups (families). The largest of these is the RTL Group, affiliated with Bertelsmann – Europe's largest media entity and one of the largest of such entities in the world. RTL Group includes stations such as RTL, RTLII, Super RTL, VOX, and n-tv, and the market share of the group's channels in 2021 reached 26.3%[224]. The second competing concern is ProSiebenSat1Media SE, established in 2000 on the ruins of the former Leo Kirch empire[225]. Its name combines the names of two stations – Pro7 and Sat1 – in addition to which the offer includes 13 other channels, such as Eins cable, sixx, or Puls4. The market share of the stations owned by the corporation today is approximately 23%[226]. It is worth noting that, until recently, the share of RTL Group channels exceeded 32% and ProSiebenSat1Media approximately 27%.

The third player on the TV market is the Sky Deutschland network, controlled by US Comcast since 2018. It launched in 1991 as an analogue platform under the name Premiere. It was a joint initiative between the Kirsch Group, Bertelsmann, and Canal+. Premiere World emerged from the merger with DFI, a rival digital platform established in 1996. After the bankruptcy of Kirch's concern (2002) and a number of 'rescue' operations, such as entering the stock exchange, in 2008 News Corporation bought the first shares in the company and since 2009 the platform has operated as Sky. In 2011, the TV station surpassed 3 million subscribers; by the end of 2018, there were already 4.8 million. However, at the same time Sky Deutschland overtook the streaming service Netflix, whose service had 5.1 million subscribers.

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222 *Telewizja prywatna w Niemczech*, 31.03.2013, www.dnimediow.org/artykul-telewizja-prywatna-w-niemczech,239.html (accessed 30.04.2022).

223 The channel was established in 1988 and began regular nine-hour transmission on 1 January 1989.

224 O. Fahlbusch, *A Strong First Half For RTL Deutschland*, www.bertelsmann.com/news-and-media/news/a-strong-first-half-for-rtl-deutschland.jsp?atn=2862170&abp=2862170,2862222 (accessed 20.04.2022).

225 From 2006 in the hands of the Anglo-American investment fund Permira and Kohlberg, Kravis & Co (KKR), in 2013 part of its assets were sold to Discovery Communications.

226 www.statista.com/statistics/416823/market-share-rtl-and-prosiebensat1-germany (accessed 20.04.2022).

The number of households possessing active subscriptions to at least one video platform (SVoD) at the end of 2021 was 21.2 million. Amazon Prime Video (APV) remains the leader of the German market for paid video services, with almost half of German households subscribing. According to Ampere Analysis data, in 2021 APV had 12.6 million subscribers, compared to Netflix's 9.6 million, Disney+'s 4.3 million, and the RTL+ digital platform 2.7 million[227].

According to statistics, in 2011 the average time spent watching TV was 225 minutes per day. In 2021, this fell by 12 minutes. It is estimated that there are nearly 400 private broadcasters in Germany, with 21 programs broadcast in terms of public service broadcasting. Seeing how the country's demographics have changed over the past decades, there has been an increasing amount of content dedicated to minorities – Turkish, Polish, as well as Russian; 33 foreign-language programs were broadcast in the country in 2017 alone. A trend observed in Germany consists in the fragmentation of the TV audience in favour of specialised and thematic channels.

Radio

The first radio broadcast in Germany took place on 22 December 1920 – a Christmas concert performed by employees of the German Post Office live from the broadcasting building in Königs Wusterhausen[228]. Officially, the first radio show was broadcast in October 1923. On 30 March 1924, the Frankfurt-based Südwestdeutsche Rundfunkdienst AG begins broadcasting. In 1925, the Reich Broadcasting Corporation (Reichs-Rundfunk-Gesellschaft), a network of regional broadcasters was founded. The RRG, which in time became a state broadcaster, continued to broadcast until 1945, being an important part of Nazi propaganda since the mid 1930s.

Similarly to other segments of the media market, radio was also subject to a new start after the Second World War. However, it was symptomatic that only local and regional (Munich, Berlin, Frankfurt, Stuttgart) radio developed. On 3 May 1953, the Deutsche Welle channel was launched, while the nationwide public service station Deutschlandfunk (DLF) was established later in 1960. The first German radio program was launched in January 1962[229]. In 1994, DLF was

[227] D. Abbatescianni, *Amazon Prime Video is now the market leader in Germany, says Ampere Analysis*, https://www.cineuropa.org/en/newsdetail/421193 (accessed 20.04.2022).

[228] M. Marek, *How radio became a cult in its early years in Germany* (transl. Brenda Haas), www.dw.com/en/how-radio-became-a-cult-in-its-early-years-in-germany/a-55976446 (accessed 31.03.2022).

[229] The DLF was also available abroad and targeted, among others, the East German population and the German-speaking population in Eastern Europe. Hence, from mid-1963, it also produced programmes in Polish, as well as Czech, Croatian and Serbian. Read: M. Matzke, *Redakcja Polska Deutsche Welle i Deutschlandfunk. Długa historia*, www.dw.com/pl/redakcja-polska-deutsche-welle-i-deutschlandfunk-d%C5ga-history/a-16023169 (accessed 20.04.2022).

integrated into the structures of the newly established Deutschlandradio within ARD.

Deutschlandradio is a group of radio stations consisting of Deutschlandfunk, DLF Kultur, DLF Nova, Dokumente und Debatten (Dok&Deb), and DRadio Wissen. It is maintained by ARD-owned stations, in cooperation with ZDF. The radio section also includes regional radio stations of individual national broadcasters, such as WDR2, 1Life, Bayern1, and MRD Info. The total number of public stations broadcasting within ARD is 75, complemented by the aforementioned international Deutsche Welle. The estimated public radio audience exceeds 50%.

There are 283 commercial radio stations broadcasting in the country; more than 60 local stations are available in Bavaria alone, although there are also regions without such radio (Lower Saxony). This number has remained stable for the last 5 years, although the market is shrinking in terms of ownership. After consolidations and acquisitions (among others, in 2002 Holtzbrinck was bought by RTL Group), today two groups dominate. 17 stations broadcast under RTL Radio (until recently there were 31), including Antenne Bayern or Radio Hamburg. Hubert Burda Media Holding AG possesses shares in or owns 30 radio stations, including Antenne Bayern, Hitradio FFH, Radio Arabella, BB Radio, and Ostseewelle. The remainder is fragmented among dozens of owners of often individual stations, such as the Catholic Domradio, as shares in the German radio sector are mainly held by local companies. Foreign capital is also present on the radio market – an example is the French NRJ Radio. Interestingly, Bauer Media Group owns more than 150 radio stations in nine countries, but not in Germany[230]. A total of 15 channels, including three public channels and two church channels, are considered to be national, or – as in the case of television – supra-regional. Alongside these, there is also community radio, which serves the role of a public benefit institution, without the right to broadcast advertising.

The daily coverage of radio in Germany is 74.7%, resulting in a listening audience of nearly 53% of the population[231]. In 2021 the time spent listening to the radio was approximately 185 minutes daily[232]. DAB+ radio, introduced in 2011, is becoming increasingly popular. At the end of 2021, DAB+ radio was available in 27% of households. 20% listen regularly to at least one of the nearly 300 digital radio stations[233].

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230 Bauer data: www.bauermedia.com/business-areas/audio (accessed 30.05.2022).

231 Verband Privater Medien data: www.vau.net (accessed 20.04.2022).

232 www.statista.com/statistics/380673/radio-daily-usage-time-germany (accessed 30.04.2022).

233 At the end of 2020, Antenne Deutschland – the operator of the digital multiplex, which itself owns, among other things. Absolut Radio – has launched a second DAB+ multiplex with sixteen commercial radio stations. Read more at: *Digitalradio DAB+ 2021: Mehr Programme, mehr Reichweite, mehr Abverkauf*, www.dabplus.de/2021/12/15/digitalradio-dab-2021-mehr-programme-mehr-reichweite-mehr-abverkauf (accessed 20.04.2022).

New media

Germany's Internet use rate is 96%, one of the highest in Europe. Invariably, sites belonging to publishing concerns or portals of television stations constitute the most popular and initial sources of information. Not surprisingly, recent years have witnessed the rapid entry of traditional media corporations into extensive online services – from the websites of their traditional media outlets to thematic and specialised portals – with the result that they are turning into multimedia corporations (RTL, Axel Springer, Bauer).

After an initial trend of supplementing paper editions with online content, the second decade of this century saw a shift towards focusing on paid content (paywalls, subscriptions, micropayments) and a strategic cross-media policy. At the beginning of this period, in Germany nearly 30 million daily newspaper readers were taking advantage of online editions[234]. In 2015, there were 662 online newspaper listings in Germany, with a circulation of e-papers reaching more than 780,000 readers[235]. Unfortunately, in view of the huge range of free content, less than 1/10 of Germans are willing to pay for access to information today. This also results from the 'three-dimensional functional specificity' of the web, which means that it is regarded as a mass medium, a platform for accessing traditional media (this is indicated by the most frequent choice of sources), and a means of interpersonal communication[236].

The most visited websites are those run by the public media, mainly ARD (e.g. tagesschau.de), as well as other media sites such as spiegel.online, bild.de, or welt.de. Regional and local media can also account for large online audiences, regularly reaching more than 10% of Internet users. Public media websites tend to be perceived as reliable. After years of dominance, in 2020 the Internet has become, on a par with television, the initial source of news[237].

Even though as recently as 2015, more than 53% of web users downloaded or watched videos online, by 2021 this figure had already reached 85%. This coincides with the most often chosen social media, dominated by YouTube (58%), but also concerns the development of VOD and SVoD platforms. The remaining chosen social media include Facebook (44%) and Instagram (28%). In general, 78.7% of the German population are active users of social media sites. In 2021 the average time spent using the Internet was 5 hours and 25 minutes daily[238].

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234 Z. Oniszczuk, *Strukturalne następstwa cyfryzacji w niemieckim systemie medialnym*, [in:] *Systemy medialne w dobie cyfryzacji…, op. cit.,* pp. 15–16.

235 For: B. Thomaß, C. Horz, *Media landscapes: Germany*, https://medialandscapes.org/country/germany/media/digital-media (accessed 20.04.2022).

236 Z. Oniszczuk, *op. cit.*, pp. 11–12.

237 Reuters Institute for the Study of Journalism: Digital News Report 2021, Germany, pp. 80–81.

238 S. Kemp, *Digital 2021*: *Germany*, https://datareportal.com/reports/digital-2021-germany (accessed 20.04.2022).

Cinema

In 2021, there were 1,723 cinemas in Germany, with 4,931 screens available. Despite a falling number of cinemas, the number of cinemas increased by 321 compared to 2013, when the least number of available cinemas were recorded. The German box office is worth more than €373 million. On average, a German visits the cinema 1.2 times a year[239]. Cinema audiences have been declining steadily since the beginning of the 21st century – for example, 100 million visits were recorded in 2018, compared to 173 million in 2001.

After years of being divided into West Germany and East Germany, German film production hs mostly focused on television since the 1990s. In cinema, German films fought against the dominance of American productions, and as a result the share of domestic film productions barely reached over 20%. Meanwhile, it is estimated that attendance in German cinemas depends precisely on the number of domestic productions – in 2017, for example, it was 18 million (13%) lower precisely because of fewer German films. In 2021, 429 films were released in cinemas, of which as many as 45% were films of German production/coproduction. One-fifth of the screened movies consisted in American productions, the same number of European productions; the rest, 15%, were productions from outside of Europe.

The country's multi-level system of film subsidies operates identically to the rest of the media. At the federal level, there is the German Film Council (FFA Filmförderungsanstalt), recently with a budget of up to €60 million (2020). It is a body of particular importance in terms of subsidising the stage of movie post-production. In 2021, the total amount of film funding approved by the FFA and its committees topped 53 million. Of the 191 domestic premieres, 74 have received FFA funding.

One of the funds administered by the Film Council is the German Federal Film Fund (Deutscher Filmförderfonds, DFFF), which also supports co-productions, up to 20% of the film budget[240]. The fund was set up on the initiative of the Commissioner for Culture and Media. In 2021, these institutions supported a total of 115 national and international (co-produced) movies and series, and the sole funding budget was increased from EUR 15 million to as much as 50 million. The aim of the program is to strengthen Germany's competitiveness and innovation as a film production location, inspiring producers to develop new and creative formats. The DFFF is a grant awarded automatically, once all formal criteria have been met, without a Commission decision; the requested amount is non-refundable. Additionally, a number of support institutions are active at the federal state level, combining the

[239] German Federal Film Board. Facts and Figures for German Cinema in 2021, www.ffa.de/market-research-and-statistics.html (accessed 12.05.2022).

[240] https://dfff-ffa.de/en.html (accessed 20.04.2022).

conditions for funding with the requirement for localisation, thereby supporting local budgets. This is a manner of support in the form of regional movie funds, differing in principle, i.e. any form of connection to a particular federal state.

Germany is considered the largest market for television film production. Public broadcasters are nowadays particularly involved in *fiction* productions. The quality of large-format, big-budget productions, for platforms such as HBO (the series 'Babylon Berlin') and Netflix ('Dark') has also increased significantly in recent years.

AUSTRIA

Austria, with a population of almost 9 million people[241], is a federation of nine federal states, consists of a relatively homogeneous society, mainly in linguistic terms (German language), with a few minorities – Hungarian and Slovak – living in the border areas. The one metropolis, Vienna, has a population of more than 1.95 million people and concentrates most of Austria's press titles.

Austria boasts a very large number of media outlets per capita, but is notably one of the most centralised, concentrated, and non-competitive media markets in Europe[242]. Dominant public entities in practice have a guaranteed monopoly and the press is influenced by political parties, inter alia through a system of subsidies, and due to a long-standing dependence on German capital. In turn, this translates into a widespread popularity of cable networks and satellite TV, dominated by German stations.

Freedom of information is guaranteed by the constitution. There is no press law and, until 2002, press problems related, for example, to violations of the code of ethics were handled by the Press Council (*Presserat*). The institution was disbanded, never to be replaced. Journalists are organised in the Sektion Journalisten of the Austrian Trade Union Federation (Österreichischer Gewerkschaftsbund). The organisation is the most influential in the country, offering support to journalists, interviewing employers or mediating disputes. The most important legal changes did not occur until the 21st century when several media laws came into force. One of them was the Private Television Act of 2001, allowing the development of non-commercial terrestrial television stations; the other, the so-called ORF-Gesetz (2004), was an act that

[241] *Statistik Austria Bulletin: Magnitude* and *power*, www.statistik.at/en/statistics/population-and-society/population/population-stock/population-at-beginning-of-year/quarter (accessed 25.05.2022).

[242] A. Hess, *Tańcowały dwa Michały… Podobieństwa, różnice i wzajemne przenikanie rynków medialnych Niemiec i Austrii*, [in:] *Media a integracja europejska,* eds. T. Sasińska-Klas, A. Hess, Kraków 2004, pp. 84–85.

aimed to break the monopoly of the public media and facilitate competition with the German media[243].

The biggest and long-standing problem of the Austrian media consists in its marriage with politics, as shown, for example, by the system of direct press subsidies introduced in 1974, which also included newspapers of particular importance for the diversity of opinion since 1985. The subsidy program was amended in 2003, offering assistance with distribution, the professional development of journalists (journalism schools), or by introducing the criterion of contributing to regional diversity. The subsidy amounts to 9 million euros[244] and the entities receiving them are not obliged to report on the amount spent[245]. An important, and heavily criticised, solution consists in public advertising, the principles (and amount) of which are in no way transparent[246]. Additional subsidies for the press can come from the federal state authorities[247].

In 2022, Austria was listed 31st in an RSF ranking, recording a significant drop in comparison to the previous year, from 17th place.

Press

The first Austrian, or actually the first German-language newspaper, is considered to be the 'Aviso Relation oder Zeitung' published in 1609. The title was published weekly in Augsburg. In 1620, the first already regular weekly newspaper, the 'Ordinari Zeitung', made its debut, followed by the 'Winnerisches Diarium' in 1703, known as the 'Wiener Zeitung' since 1780[248].

The end of the 18th century stands for the development of censorship and the introduction of, among other things, a stamp tax; half a century later, freedom of speech was already proclaimed (effect of the Spring of Nations). After the Second

[243] D. Lechański, *Transformacja rynku telewizyjnego w Austrii*, [in:] *Media masowe na świecie. Modele systemów medialnych i ich dynamika rozwojowa,* ed. B. Dobek-Ostrowska, Wrocław 2007, pp. 222–224.

[244] During the covid-19 pandemic, the volume of subsidies increased further. More: R. Powell, *The Black Box of Media Funding in Austria*, https://metropole.at/lack-of-transparency-austrian-media (accessed 30.06.2022).

[245] P.C. Murschetz, *Government support for news media post-Covid-19: the lesson of Austria's press subsidy system*, https://en.ejo.ch/media-economics/government-support-for-news-media-post-covid-19-the-lesson-of-austrias-press-subsidy-system (accessed 1.06.2022).

[246] J. Vogt, Austria: *Greater transparency for public advertising to media needed*, https://ipi.media/austria-greater-transparency-for-public-advertising-to-media-needed (accessed 1.06.2022).

[247] A. Hess, *Dzienników coraz mniej. Zjawisko koncentracji na rynku prasy austriackiej*, „Zeszyty Prasoznawcze" 2001, no. 1–2 (165–166), p. 68.

[248] In 1810, the newspaper became an official government bulletin. It is one of the oldest titles in the world, still in circulation, and is often regarded as the beginning of the Austrian press due to its regular editions. More: A. Matykiewicz-Włodarska, *Austria*, [in:] *Systemy medialne państw Unii Europejskiej*…, *op. cit.*, pp. 9–10.

World War, the tabloid press ('Express') constituted a significant part of the market, and overall newspaper circulations were increasing, while the number of publishers was decreasing as a result of the abolition of the licensing system. Newspapers published by the armies of the four countries occupying Austria until 1955 – the United States, France, the United Kingdom and the Soviet Union – also played an important role[249]. It was in 1945 that the most important titles were established in the American sphere of influence: 'Salzburger Nachrichten', 'Oberösterreichische Nachrichten', and the illustrated 'Wiener Kurier', which was considered the first boulevard title[250]. The illustrated 'Kronen Zeitung', suspended 15 years earlier, returned in 1959 (the title was established in 1900) and is still the country's largest newspaper.

In the 1970s, the aforementioned financial aid was introduced for opinion-forming magazines published quarterly, up to biweekly magazines; it was later extended to include dailies and weeklies. Subsidies were awarded by a government committee[251] and the effects of the changes means that political parties got rid of the tabloid and deficit press, and withdrew from publishing their own party organs (e.g. 'Südost-Tagespot')[252]. This was a time when some press titles disappeared, for example, 'Express', which was taken over by 'Kronen Zeitung' in 1971, and in the following years the market began to be shared by 'Neue Kronen-Zeitung' (40% of the total newspaper circulation), 'Kurier' (15%), and 'Kleine Zeitung' (10%). Since the late 1980s, German capital has rapidly encroached on the market, with a share of up to 70% of the total circulation of dailies; some titles are also being transformed into regional editions. The form of media ownership became liberalised, while at the same time the government introduced an anti-monopoly law. In 1992, a new tabloid appeared, 'Täglich Alles', which closed in 2000, although its debut is considered the beginning of the decade of cheap journalism, which also spread to magazines and the press aimed at younger readers. In 2006, the full-colour 'Österreich' (Vienna, Linz) was launched, which was the last major debut in the Austrian press system.

According to circulation and sales figures for 2021, the contemporary daily newspaper market stands for an absolute dominance of the 'Neue Kronen-Zeitung'[253],

[249] *Ibidem*, pp. 11–12.

[250] D. Lechański, *System prasowy Austrii*, [in:] *Media masowe na świecie*…, *op. cit.*, pp. 201–202.

[251] Importantly, in Austria the media are also 'supported' by public institutions (ministries, municipalities, etc.), which allocate hundreds of million euros each year to advertising information or image campaigns. The problem is that they are legally obliged to make such expenditures, but there is no longer any control over the expenditure itself. Hence the stream of money that can be channelled to politically favourable media.

[252] A. Hess, *Dzienników coraz mniej*…, *op. cit*., p. 65.

[253] www.oeak.at/auflagedaten/download_auflagenlisten (accessed 30.06.2022). Since 2016, the online version – Krone.at – has ranked among the top three most visited sites in the country. In some provinces, no regional newspaper is published, with the exception of the 'Kronen Zeitung'.

with an average weekly circulation of 686,400 copies (print), and more than 1.26 million on Sundays and public holidays. A decade ago this was 931,600/1.55 million respectively. The average sales of this title exceed 633,000 (holiday editions approximately 1.06 million). The daily is published in six mutations for the federal states and maintains a steady market share in the daily newspaper market, and for most regions even acts as a regional title. Apart from it, the daily newspaper segment comprises 10 titles (excluding Sunday editions), which include: 'Kurier' (published since 1954, as 'Neue Kurier', today circulation 125.7 thousand, sales 113.5 thousand), 'Die Presse' (since 1848; 57.8 thousand copies/67.1 thousand), 'Der Standard' (since 1988; so-called *quality papers*; 59.3 thousand/53.3 thousand). An important part of the press landscape consists in large federal state titles: 'Kleine Zeitung' (Graz, sales average 275,900), 'OberÖsterreichische Nachrichten' (Linz; 101,600), or 'Salzburger Nachrichten' (published in Salzburg, and thus considered regional even though it is a national newspaper – circulation 68,500).

The only economic daily newspaper, 'Wirtschaftsblatt', founded in 1995, was a joint venture between Styria Multimedia AG and Bonnier. Its website was launched in 2007 and the last paper issue was published in 2016, when circulations reached 30,000 copies. The Saturday and Sunday editions of Austria's leading dailies have circulations higher than the traditional editions by up to more than 50%.

Free dailies appeared in Austria along with the publication of 'Heute' (Vienna, published in more than 566,000 copies) in 2004. Since 2006, there has been an expansion of the free press, with 2008 seeing the launch of, for example, a free edition of the 'Tiroler Tageszeitung' (founded in 1945), or the 'TT Kompakt', dedicated to the western part of the country (mainly Innsbruck; circulation over 12,300)[254]. 'Heute' was the only major title to survive the market crisis of 2008–2009.

In all likelihood, the Austrian press market would be much poorer today without German capital. Since the beginning of the 21st century, some companies began to withdraw from the country (e.g. Gruner+Jahr in 2016), others initiated consolidation processes in the second decade. However, it is still dominated by two groups. The first is MediaPrint, owned by Funke Mediengruppe (the press part of Westdeutsche Allgemeine Zeitung until 2013) and founded in 1988 as a result of an initiative of the owners of two titles: 'Kronen Zeitung' and 'Kurier'. The second major player is Styria Media Group AG, founded in Graz in 1869 also operating, for example, in Croatia and Slovenia, and the publisher of 'Kleine Zeitung' or the most popular women's monthly 'Wienerin', for example[255].

Magazine publishers are dominated by VGN Medien Holding (Verlagsgruppe News), founded in 1992, whose portfolio includes mostly women's, TV, and current

[254] M. Grünangerl, J. Trappel, T. Tomaz, Austria. *Austria. Confirmed democratic performance while slowly digitalising*, [in:] *The Media for Democracy Monitor 2021…, vol. 1, op. cit.*, p. 98.

[255] www.styria.com/en/brands/sport-aktiv (accessed 6.06.2022).

affairs magazines[256]. Additionally, political weeklies such as 'News' (since 1992) or 'Profile' (1970) remain significant in the magazine segment. Austrian weeklies are closely related to the local or regional community. The country is dominated by regional publishers, which is where they consolidate the market into smaller concerns. It is estimated that 7 out of 10 titles support Christian Democrats.

Radio

In Austria, the first permanent radio transmission was launched in 1924 and the broadcaster was the RAVAG public limited company. In 1938, the radio fell under the ownership of a German broadcaster and functioned under it until the end of the Second World War. In 1945, Reichssender Wien, a temporary state station, began broadcasting; at the same time, the British-American station, Rot-Weiss-Rot Wien, came to life, which was decommissioned only in 1955. After reclaiming independence, the radio stations came under the control of the Austrian government, becoming a public-law institution, the ÖRF (Österreichische Rundfunk), in 1958. In 1964, a group of newspaper editors and journalists initiated the first Austrian referendum aiming to free the ÖRF from political influence and end the proportional representation of political parties in its board of directors. The referendum turned out to be a great success (832,353 signatures, 17.27% of those eligible to vote), and resulted in radio independence from 1967[257], with the introduction of the ÖRF Act. On its basis, the first two channels were created. Österreichische Rundfunk became an independent entity after a subsequent reform in 1974, maintaining a broadcasting monopoly until the mid-1990s.

The modern radio market is dominated by the public broadcaster, and this is despite the 1993 legislation to grant licences to commercial operators at regional level. The two initial private local stations were established in 1995, even though it was not until 1998 that the general public monopoly came to an end, following the admission of national broadcasters a year earlier[258]. Already at that time there were nearly 60 private stations broadcasting, belonging mainly to press publishers[259]. Since 2001, owners of other media could already own 100% shares in a radio station if its coverage did not overlap with that of other media. As a result of a change in the law, the first licensed national commercial station, Krone Hit Radio, owned by the Neue

256 M. Grünangerl, J. Trappel, T. Tomaz, *op. cit*., pp. 112–113.

257 https://der.orf.at/unternehmen/austrian-broadcasting-corporation/index.html (accessed 16.05.2022).

258 A. Hess, *Tańcowały*…, p. 88.

259 *Radiolandschaft in Österreich*, https://der.orf.at/medienforschung/radio/radiolandschaftOesterreich100.html (accessed 16.05.2022).

Kronenzeitung, was established. The number of radio broadcasting licences also significantly increased, up to 126 in the second decade[260].

In addition to Ö1, this radio relies on subscriptions and advertising. Today, the public ORF broadcasts through three main radio stations: Ö1 – focuses on educational, scientific, socio-political programs, with classical music; Hitradio Ö3 – combines music (pop and rock) with information and social issues, a radio with the most loyal listeners; FM4 – aimed at the youth, based on contemporary and alternative music, broadcasts in German and English. The last radio station is the regional radio Ö2 (Österreich *2*), a 'provincial' network with separate programs for nine federal states.

With the exception of Ö1, public radio relies on subscriptions and advertising, including up to nearly 9% of public advertising[261]. Overall, public radio is listened to by 4.7 million Austrians (59.6% of the population). Its market share is as high as 72%, but the situation on the radio market has changed in recent years, to the benefit of non-commercial broadcasters. For example, in 2008, ÖRF's most popular radio program Ö3 had a 49% market share, which had fallen to 'only' 30% by 2021. The average time Austrians spend listening to the radio is 188 minutes[262], with only slight fluctuations over 20 years. Private stations are characterised by a more stable listening rate, slightly increasing in recent years.

The most popular non-public radio station, Kronehit, was founded in 2001 and is available throughout the country since 2004. Its market share in 2021 was 8% (daily reach of almost 11%), thus the station recorded a 2 p.p. year-on-year increase. The coverage of another private broadcaster, Radio Austria, barely reaches 1%. The number of granted radio licences was 124 in 2020, including 12 granted to the public broadcaster and 14 to commercial operators. Today, the market share of the latter reaches 26% at national level. ORFI regional radio stations are very popular in the country, and the daily total radio coverage in Austria exceeds 75%.

The country is still in the process of transitioning to digital radio (DAB) with broadcasting in this standard only starting in 2015 (Vienna area, 15 stations), and, interestingly, without any commitment from the public broadcaster. The first licences were distributed in 2017. Today, it is estimated that close to 20% have a DAB+ receiver, and on a monthly basis radio in this system is listened to irregularly by approximately 600 thousand Austrians[263].

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260 J. Trappel, *Market structure and Innovation Policies in Austria*, [in:] *Innovation Policies in the European News Media Industry: A Comparative Study*, ed. H. van Kranenburg, Springer 2017, p. 18.

261 M. Grünangerl, J. Trappel, T. Tomaz, *op. cit.,* p. 105.

262 *Radiotest 2021_4: 72% Marktanteil für die ORF-Radios*, 3.02.2022, www.radioszene.de/160943/radiotest-2021_4.html (accessed 12.06.2022).

263 *DAB+: Ab sofort noch mehr Reichweite für Radio Austria*, 23.09.2021, https://dabplus.at/2021/09/23/radio-austria-neu-auf-dab (accessed 31.12.2021).

Television

The first public television channel in terms of the ÖRF was launched in 1955 and the second, on a test basis, in 1961. To date, the public broadcaster's offer consists of four stations, including ÖRF III[264] and ÖRF Sport+, established in 2011. In the mid 1970s, regional programs were launched in terms of the ÖRF, and in 1984, together with Germany's ZDF and Switzerland's SRG SSR, a German-language cultural channel was launched – the satellite broadcast 3Sat. In 2001, the ÖRF, by law, was transformed into a foundation whose main task is to fulfil the obligations of a public broadcaster[265]. More than half of the 5 members of the ÖRF public broadcaster's board are politically appointed, including representatives of national and regional governments[266]. ÖRF is also a majority shareholder in the Austrian Press Agency.

Subscription was introduced in television in 1966, and today, in addition to it, public television also gains income from advertising. The proportion of ÖRF revenue in 2018 is: 63.8% from licence fees, 23% advertising, and the remainder from, for example, the sale of programs or licences.

The first Austrian nationwide commercial television was not established until 2000, and this was Vienna's ATV (formerly: W1), which, due to the inability of terrestrial broadcasting, was only made available on cable networks as a payable channel. The right to broadcast commercially at all levels came into force the following year, but it was not until 2003 that the first licences could be applied for – at that time ATV (partly owned by Germany's Tele München Gruppe) was granted one. It should be emphasised that, like in the case of press, German media companies have also played a significant role in the television segment. In 2004, Puls4, also broadcasting from Vienna, was launched, and in 2009, based on SalzburgTV, which had been broadcasting since 1995, the Austrian Red Bull owner Dietrich Mateschitz established ServusTV[267]. Thus, the relatively weak market of non-public channels became structured. It is worth mentioning that another station, Austria 9 TV, also broadcast between 2007 and 2012.

Puls4 in 2007 and ATV in 2017 became part of the ProSiebenSat1MediaAG concern – the largest commercial broadcaster in the country. The total share of

[264] Previously, it was replaced by TW1 (Tourismus und Wetter 1) from 1997 to 2011.

[265] D. Lechański, *op. cit*., p. 232.

[266] In 2001, the ÖRF changed its legal form and became a foundation. The federal government nominates nine Council members and the political parties represented in parliament nominate six. A further nine regional governments elect nine members, who are delegated by the Audience and Listener Council (Publikumsrat). After the reform, there was even more politicization and influence/pressure on journalists (mainly in terms of news coverage) in the ORF, which was met with protest from some journalists and the public.

[267] The station is distributed in Austrian, Swiss and German cable networks. Interestingly, it started illegal terrestrial broadcasting in 2000, but was quickly switched off by the authorities. In 2004, it was threatened with bankruptcy.

channels owned by the German giant was 27.4% in the 12–49 age group (down 1 p.p.[268]), with Puls4 being the most popular channel. In addition to those mentioned, the group's Austrian portfolio today comprises: SAT.1 Österreich, ProSieben Austria, Kabel Eins Austria, sixx Austria, ProSieben MAXX Austria, SAT.1 Gold Österreich, Kabel Eins Doku Österreich, ATV 2, and PULS 24. The last part of the TV market belongs to channels from the German RTL Group.

Therefore, Austrian broadcasters must compete with strong German brands, which as recently as 2015 were chosen by 59% of Austrians, while, for example, the public broadcasters 'only' 54%. In 2021, the market shares were: ÖRF1 – 10.2%, ÖRF2 – 22.1%, ATV 3.0%, Puls4 3.1%, and ServusTV – 3.7%[269]. The viewing rate of ATV2 launched in 2011 balances at 1%. The largest market shares are held by ZDF, with 3.9%, and ARD1, with 3%, and both remain stable. Other significant ones include: RTL – 3.1%, VOX – 3.2%, Pro7 and Sat1 – 2.7% each. It is the German channels that have lost the most over the last decade – some, such as Sat1, by nearly two thirds. A total of 28 national channels are broadcasting in the country today. Austrians are still more likely to watch programs via satellite than over cable networks; 80% of them receive German TV channels in this way.

Digital terrestrial television was introduced as early as 2006, generating additional costs for the newly established commercial broadcasters (in the short term), especially as the analogue signal was scheduled to be switched off in 2009. The Austrian Digital Platform was also established and set up a Digitalisation Fund, which is financed, inter alia, by the broadcasting licence fee. In 2008, digital TV already reached half of all households and in 2015 more than 90%. The analogue signal was discontinued in 2010. Today, the daily TV coverage is (only) 70%.

New media

As recently as the end of the 20th century, only one in three Austrians had access to the Internet; 10 years later, this number had exceeded 70%. Today, Internet use is up to 88%. More than 60% of Austrians use at least one social media platform, and only 12% state that they pay for online content[270].

The public broadcaster's websites can currently count on more than 9 million unique visitors per month, which stands for twice as many as a decade ago. Newspaper websites are also frequently visited by Austrians – for example, derStandard.at is

[268] Data for 2021: *ProSiebenSat1 Media SE Annual Report 2021. Growing together. Relevant. Innovative. Value-Creating,* p. 124, https://annual-report2021.prosiebensat1.com/servicepages/downloads.html (accessed 30.06.2022).

[269] Analysing these figures, it can be seen that after weaker years – with ÖRF2's share falling below 20 percent in 2019 – the public broadcaster is slightly recovering its audience, which is simultaneously declining on ATV and Puls4. German stations, however, lose the most. Data for: www.agtt.at/show_content.php?sid=95&language=en (accessed 1.07.2022).

[270] All data: Digital News Report 2021, *Austria*, pp. 64–65.

visited by more than 4.5 million Internet users every month. However, since 2016 it is the krone.at website that has held second place in terms of coverage, second only to ÖRF News online as a news source. Among the 10 most frequently visited websites, as many as seven are press sites. It is noteworthy that some of the largest media outlets (ÖRF or 'Kronen Zeitung') have separate newsrooms for online editorial offices, that operate independently of the main entities.

In recent years, there has been a significant increase in the use of mobile devices, which today constitute the primary communication tool, with 75% of people using them to find information. Not surprising, seeing how in 2017 the Internet overtook television as a news source. A digital advertising tax was introduced in Austria in 2020, and measures were implemented to stop hate speech online[271]. In terms of social media, YouTube dominated in 2021 (65% of users), ahead of Facebook (60%) and Instagram (35%). The most popular instant messenger is WhatsApp, used by 79% of Austrians.

Cinema

The Austrian film industry depends on subsidies granted by the state under the Film Subsidy Act, and European fund systems such as 'Media'. In this case the role of the public broadcaster (ÖRF) is relevant as it negotiates agreements to support the Austrian film industry with so-called 'launch offers', which mean pre-sales of film rights. In addition, there is also the thriving and state-owned Austrian Film Institute (Österreichisches Filminstitut, AIF), which supports cinema productions as a cultural product (including its promotion abroad), contributing to strengthening the Austrian film industry as well as the creative and artistic values of Austrian film. In 1981, an agreement was signed between the Film Institute and the public ÖRF, under which the ÖRF finances Austrian cinema (€8 million in 2011). In return, ÖRF retains the terrestrial TV rights in Austria and South Tyrol, and for transmission via satellite in Austria itself. The Film Institute supports Austrian productions, and since 2013 the federal contribution is €20 million per year (in 2006 it was only €9.6 million, although in 1999 it was €12.3 million). The public broadcaster also plays its part in promoting domestic cinema, with up to 124 subsidised feature films broadcast on ÖRF channels in 2020.

In addition to the AIF, there is also the Film Industry Support Austria (FISA), a grant program of the Federal Ministry for Digitalisation and Economic Investment Localisation, aiming to support domestic production, Austrian-foreign co-production and service production of cinema films, with an annual budget of more than EUR 7 million. One of the entities overseeing this funding process is Film in Austria (formerly as *Location Austria*), which acts as the Austrian Film Commission, constituting the 'first point of contact for international film productions in Austria'. Its activities consist in

[271] More on the Ministry of Finance website: www.bmf.gv.at/themen/steuern/steuern-von-a-bis-z/digitalsteuergesetz-2020.html (accessed 30.06.2022).

advising in terms of selecting suitable film locations, promoting Austria, and acting as an intermediary between Austrian filmmakers and those abroad[272].

There are 140 cinemas across the country with 562 screens available; 98% of these are digital cinemas. Up to 500 feature films are screened in cinemas annually, although in 2020 (pandemic) there were only 310. Nearly 88% are premiere productions. Almost two-thirds are European films, less than one-third American; less than 30 premieres come from other countries. The number of domestic feature film premieres has exceeded 20 productions in recent years (in 2020 there were only eight). The average Austrian goes to the cinema less than twice a year.

SWITZERLAND

Switzerland is a small European country with a population of over 8.7 million people[273], with a diverse social structure made up of four national communities: the German, French, Italian, and Rhaeto-Romance-speaking populations. Therefore, there are four national official languages in the country (provision of Art. 4 of the Constitution), which, at the same time, imposes many obligations related, for example, to the need to broadcast multilingual channels in the public media. German-speaking Swiss constitute the largest group[274], with 62.3% of the population (65.5% in 2010), and the language is spoken in nineteen cantons. French-speaking residents represent 22.8%, almost unchanged for a decade; they reside mainly in 4 cantons: Geneva, Jura, Neuchatel, and Vaud. 8% identify themselves as Italian-speaking and this percentage also has not changed for a decade, primarily in the canton of Ticino. The Rhaeto-Romance language is spoken by less than 1% of Swiss (Grischun canton). Today, cultural diversity is a part of the Swiss identity[275]; according to statistics, foreigners already constitute more than 25% of the population.

Switzerland has maintained political neutrality since the 16th century. The country is not a member of the European Community – its people rejected EEC membership in a referendum in 1992[276]. The country operates on three levels: federal, regional, and local, and is made up of 26 independent and powerful cantons. It is one of the most heterogeneous state organisms in Europe. In geographical terms, nearly 60% of its area is covered by the Alps, but it is in the Swiss Highlands (30% of the area) that

[272] https://locationaustria.at/en/about-us/service-in-austria.php (accessed 12.06.2022).

[273] www.bfs.admin.ch/bfs/en/home/statistics/population/effectif-change/population.html (accessed 10.03.2022).

[274] According to citizens' declarations, data behind the Federal Statistical Office for 2020.

[275] M. Ratajczak, *Szwajcaria*, [in:] *Rynki medialne*…, *op. cit.*, p. 180.

[276] In addition, talks on a new single market cooperation agreement that Switzerland signed with the EU broke down in mid-2021. More among others. A. Słojewska, *Szwajcarski rozwód z Unią Europejską*, www.rp.pl/Unia-Europejska/305279923-Szwajcarski-rozwod-z-Unia-Europejska.html (accessed 10.03.2022).

more than 60% of the population lives. In terms of religion, the Swiss are also divided, primarily between Catholics (34.4%), Protestants (22.5%), and non-believers (19.4%); over the years there has been a steady increase in the number of Muslims with an estimated 5.4% in the country today[277].

Switzerland's broad cultural diversity has a great impact on the manner of using the media, the organisation of the market and its priorities, because they are considered to be social institutions. The country is characterised by a high degree of political parallelism in the media, and journalists are considered to be highly professional, which is facilitated by a guarantee of secrecy of the source of information and the polemics right. Journalism is an open profession[278], and at the same time there is a strong emphasis on this professional group's adherence to professional ethics. A significant role is also played by citizens' organisations, which exercise a kind of control over the media.

In 1848, the Constitution was enacted which, with amendments, is still in force today and whose Art. 45 guaranteed the freedom of press from the very beginning. The Federal Constitution of the Swiss Confederation of 2000, in Articles 16 and 17, ensures freedom of opinion, as well as the freedom and autonomy of the press, radio, television, and other forms of broadcasting. At the same time their independence, importance for education, cultural development (Art. 93), and the free exchange of opinions are emphasised, hence the freedom of the press is equated in Switzerland with the freedom to (obtain) information. There is no press law in the country, while the electronic media market is regulated by the Federal Radio and Television Act of 1991 (with amendments). The regulator of the media market is BAKOM, which is also responsible for distributing subscription funds for the public media; these come from each household[279]. Television and radio are also controlled by UVEK, while the UBI and the Ombudsman institution look after the quality of broadcasting and handle, for example, complaints against broadcasters[280]. A compensation system has been introduced for the media, which means redistributing money between language regions: in practice, the largest, the German-speaking region (with the largest media market), receiving less than 50% of the funds distributed, contributes 70% into it, thus subsidising smaller regions. The largest journalistic association, Impressum, was

[277] More on Switzerland's migration problems: A. Porębski, *Wielokulturowość Szwajcarii na rozdrożu*, Kraków 2010, pp. 205–206.

[278] In practice, a course of at least two years is required, as per the inter-union agreement.

[279] BAKOM – Bundesamt fur Kommunikation; in French, L'OFCOM (Office federal de la communication), and in Italian, L'UFCOM (Ufficio federale della Communicazioni). The new licence fee payment rules came into force on 1.01.2019, following a referendum in which they also had their say on how much to pay. Subscription in Switzerland is collected as a tax, hence the almost 100 percent collection rate.

[280] W. A. Meier, *The Swiss Media Landscape*, *European Media Governance: National and Regional Dimensions*, ed. G. Terzis, Intellect Ltd, Bristol/Chicago 2007, pp. 186–187.

founded in 1883 and today includes almost 4,000 members, although there were still more than 5,500 at the beginning of the 21st century.

In the Reporters Without Borders' freedom of expression summary for 2022, Switzerland was ranked 14th. This is the first drop outside the top 10 since 2016, with the country ranked as high as 5th position in 2018.

Press

Despite the cultural diversity and a well-developed technological infrastructure, Switzerland still has a relatively high and fairly stable reading rate. Press titles are published in various languages: German-language titles constitute 64% of the market (72% in the early 1990s), French-language titles 19% (23%), and Italian-language titles for 8% (doubled increase). Press titles in the Rhaeto-Romance language cover approximately 1% of the market, while as many as 8% of publications are periodicals in migrant languages. In view of the mentioned fragmentation, there is no daily newspaper that can be clearly described as national, although the opinion-forming 'Neue Zurcher Zeitung' is sometimes regarded as such. The historiographical 'Annus Christi, 1597: historische erzoehlung/ der fuernembsten Geschichten vnd handlungen' is considered to be the first periodical. On the other hand, the first regular press title was the weekly newspaper 'Ordinari-Zeitung' published since 1610 in Basel. Published in German, it initiated regionalism in the press[281]. In 1780, the opinion-forming daily newspaper 'Neue Zurcher Zeitung' was founded.

A political factor dominated in the press since the very beginning, but the cultural factor was also present and it shaped the division between the general-information press and the opinion press. The former, cheap and common, relied on advertisements; opinion magazines, aimed at the wealthier part of society, were published by scientific and cultural societies or freemasonry lodges. A significant role was played by church and municipal press releases[282]. Such a division lasted until the French Revolution, the results of which – proclaiming freedom of the press (1798) and abolishing the privileges of certain social groups – had an impact on the dynamics of the development of periodicals, particularly political ones. In half a century, the number of different types of magazines increased more than fivefold.

With the beginning of the twentieth century, the workers' press developed in the country (e.g. 'Die Tat', 'Der Arbeiter'), which, however, failed to gain mass appeal. In the early 1920s, the first free press appeared. During the First World War, a kind of ideological 'split' took place in the Swiss press, sympathetic to France, Germany, or Italy, reflecting the internal social antagonisms. After the First World War, the Nazi government banned the distribution of the 'Neue Zurcher Zeitung' (NZZ), the

[281] M. Ratajczak, *op. cit*., p. 185.

[282] A ban on criticism of cantonal and church authorities came into force in the mid-18th century.

'National Zeitung' and 'Der Bund' within the Reich. The second half of the 20th century saw the appearance of Sunday editions of newspapers[283] and the notable titles included the tabloid 'Blick', which debuted in 1959.

At the beginning of the 1990s nearly 500 periodicals were published in Switzerland, not taking into account the free press or municipal bulletins. These were mostly small-circulation weeklies, and the number of dailies alone amounted to 123 titles (the most in the Zurich canton). They were characterised by a clear link to politics, with liberal and conservative-Christian content dominating, although independent titles were the ones with a larger circulation and social reach. 162 German-language newspapers were published in 2000, 52 French-language newspapers, 16 Italian-language newspapers, and two in the Rhaeto-Romance language[284]. In 2017, these were respectively: 336 (!), 59, 11, and 2[285]. During the second decade of the 21st century, newspaper subscription levels fell from 56% to a low of 32%[286].

The most important titles in Switzerland are 'Blick', distributed in fourteen German-speaking cantons with a circulation of 91,200 copies and a readership of 342,000, and 'Neue Zürcher Zeitung', the only one considered national. In 2021 this German-language daily had a circulation of 96,600 copies. In terms of francophone newspapers, 'Le Temps' has been published since 1998 – today with a circulation of 35,000. (with a readership of 93,000)[287]. Similarly as in the case of the NZZ, it is also treated as the only French-language national daily newspaper of Switzerland. As a result of a merger of other titles, the 'Luzerner Zeitung' was formed, a regional daily for five cantons, with a circulation of 101,500. 'Nordwestschweiz' remains the largest paid supra-regional title, whose brand is used by seven regional titles such as 'Aargauer Zeitung Gesamtausgabe', 'Limmattaler Zeitung', and 'BZ – Zeitung für die Region Basel'[288]. Its circulation is 119,500. Another German-language daily, the 'Tages-Anzeiger', has a circulation of 114,300. It is also worth mentioning the online platform and digital daily newspaper 'ArcInfo', created in 2018 as a result of a merger between two paper titles: the world's oldest French-language newspaper at the time, the regional 'L'Express', and its sister 'L'Impartial'. The sole platform was launched back in 2008. In

283 M. Ratajczak, *op. cit.*, pp. 186–188. It is worth recalling that the 'NZZ' opted for Swiss unity.

284 D. Ward, O.C. Fueg, A. D'Armo, *A mapping study of media concentration and ownership in ten European countries*, Netherlands Media Authority and David Ward, 2004, p. 178.

285 www.eda.admin.ch/aboutswitzerland/en/home/wirtschaft/taetigkeitsgebiete/medien.html (accessed 10.03.2022).

286 M. Eisenegger, *Main findings. The Quality of the Media – Switzerland. Yearbook 2019,* University of Zürich, October 2019, p. 6.

287 The title was created from the merger of the prestigious newspapers 'Journal de Genève & Gazette de Lausanne' and 'Le Nouveau Quotidien', and is even treated as a public good, apolitical. From January 2021. 'Le Temps' is owned by the Aventinus Foundation. Circulation data from the journal's website: www.letemps.ch/a-propos (accessed 20.06.2022).

288 www.onead.ch/en/media/nordwestschweiz/nordwestschweiz-normalauflage (accessed 10.03.2022).

2018, another French-language title, the tabloid 'Le Matin', went online, becoming the first Swiss title available only digitally[289]. It is estimated that the greatest changes in recent years took place in the French-language media, resulting in, among other things, a decline in the quality of journalism and a reorientation towards softer, more tabloid content[290].

National free press appeared at the end of 1999, with the launch of the German-language '20 Minuten' by the Tamedia concern. Its French version, '20 Minutes', began to be published in 2006, and the Italian version, '20 Minuti', in 2011. 'Metropol', owned by the international concern Metro Publication, debuted on the market in 2000 and was already closed in February 2002. 'Le Matin Bleu' debuted (in three languages) in 2005, which merged with '20 Minutes' after four years, in 2006 the business 'Cash' was introduced, followed by '.ch'. The evening 'Blick am Abend' was still published in the years 2008–18. Apart from '20 Minuten/Minutes/Minuti', the aforementioned titles were closed in 2009 as a result of the crisis facing the entire advertising-dependent media sector that had been taking place since 2008. In order to save themselves, some press titles joined larger concerns.

The contemporary press segment, not only the regional one, is organised around large publishing houses and remains heavily dependent on advertisers. The observed increase in ownership concentration and a decline in the number of permanently employed journalists has an impact not only on the number of published titles, but also the perception of the Swiss market as uncompetitive and, in central or eastern Switzerland, even monopolised[291]. Today, four publishing groups dominate.

Ringier owns 26 media brands, operating out of Switzerland in partnership with the German concern Axel Springer. Publisher of a number of television magazines and the daily newspapers 'Blick', 'SonntagsBlick' or 'Handelszeitung'. Owner of dozens of web portals, also active on the radio and television market[292]. Founded in 1893, Tamedia AG today is a part of the TX Group media network. For a long time, the corporation invested only in German-language media, but after 2000 also in French-speaking Switzerland. Today, it publishes nearly 30 titles, including. 'Der Bund', 'Basler Zeitung',

[289] *Le Matin becomes first Swiss daily to go 100% digital*, 7.07.2018, www.swissinfo.ch/eng/culture/shrinking-media-landscape_le-matin-tabloid-becomes-first-swiss-daily-to-go-100--digital/44174364 (accessed 10.03.2022).

[290] K. Imhof, *Main findings: The Quality of the Media. Switzerland. Yearbook 2012,* University of Zürich, p. 8.

[291] H. Bonfadelli, W.A. Meier, M. Schanne, Switzerland. *Highly concentrated leading news media in austerity and downsizing mode,* [in:] *The media for democracy monitor 2021. How leading news media survive digital transformation,* eds. J. Trappel, T. Tomaz, Gothenburg: Nordicom 2021, pp. 386–391.

[292] Publisher details: www.ringier.com/brands/?region=switzerland&business_area=media (accessed 10.03.2022).

'Le Matin', '24heures', or the magazine 'Femina'[293]. The third concern, Neue Zürcher Zeitung Mediengruppe, is one of the oldest and best-known Swiss publishing companies, founded in 1780. Owner of the opinion-forming 'Neue Zürcher Zeitung' (also in an international version) and its Sunday edition 'NZZ am Sonntag', as well as Internet portals under the NZZ brand. Today it is considered one of the more innovative[294]. In 2018, the regional division of NZZ merged with AZ Medien, resulting in the joint venture CH Media, which is the last of the 'four' Swiss multimedia concerns. Each of the companies has a 50% stake, managing more than 80 brands in the print, radio, TV, and new media segments. The company's website states that its media reach 'one in two residents in eastern, north-western, and central Switzerland'[295].

In the magazine segment, there has been a converging trend for several years, resulting in launching additional services (e.g. video blogs) complementing the core publishing service. An example of this strategy is 'Schweizer Familie', which is published in more than 100,000 copies. In terms of other magazines it is worth mentioning the fashion and culture magazine 'Bolero' (85,000 circulation), the economics magazine 'Bilanz' (circulation of over 30,000, with a readership of 130,000), and the TV magazine 'Tele' (88,000 circulation, approximately 250,000 readers). However, the most prestigious is still the informative German-language biweekly 'Beobachter', with a circulation of over 226,000 (with sales of 199,000) and a reach of 660,000 readers[296]. It is almost considered a separate institution on the Swiss press market.

Television

The Swiss television market in practice consists in public television (30% share) as well as satellite and cable foreign channels (approximately 60% of the share). The remainder of the TV segment is supplemented by regional programs. The most popular form of television is cable as well as streaming services. According to statistics, the linear TV viewing rate is at 120 minutes per day, and this is nearly 30 minutes less than it was even at the beginning of this century[297].

[293] https://tx.group/en/brands (accessed 10.03.2022).

[294] Swiss media companies are boldly experimenting with new formats. Tamedia tested 'robo-journalism' on the referendum results, producing hundreds of articles based on polls tailored to each constituency. Ringier hired a well-known political news presenter to boost video production efforts on its widely used websites, and the Neue Zürcher Zeitung worked on a newsletter tailored to audiences in neighbouring Germany. The NZZ also offered its articles in an audio version, as did the 'Republik' exclusively in a digital version.

[295] https://chmedia.ch/marken (accessed 10.03.2022).

[296] The title is owned by Ringier Axel Springer: www.beobachter.ch/service/impressum-169022 (accessed 1.07.2022).

[297] www.bfs.admin.ch/bfs/de/home/statistiken/kultur-medien-informationsgesellschaft-sport.gnpdetail.2022-0567.html (accessed 7.07.2022).

Swiss public television SRG SSR[298] was established in 1954, but the first program, in German and French, was broadcast in 1958. The first broadcast in Italian took place in 1963, having previously only broadcast programs with subtitles in this language. A station broadcasting in Rhaeto-Romance was launched in 1975, although it was only separated within the structure in 1995. SRG is a media company based on the Swiss Federal Constitution, the Federal Broadcasting Act, the Broadcasting Ordinance of 2007. It is a non-profit organisation with 81% of its revenue coming from licence fees (subscriptions and fees from private broadcasters) and 19% from social activities[299]. It is emphasised that such a financial model guarantees independence from political and economic groups, and provides the opportunity to produce content that would not be attractive to the market. The entity is governed by a Board of Directors and the members of SSR SRG consist in local and regional organisations, thus making it operate on an association basis.

The Federal Radio and Television Act (Bundesgesetz über Radio und Fernsehen) provides the Swiss public broadcaster with a strong broadcasting position. The Bundesrat grants it licences, in return for balanced, responsible coverage, as it recognises it as a public service entity, which should guarantee impartial coverage, transparency, and fairness, as well as equal access to the media for all language groups. It is worth mentioning that measures are also undertaken in order to ensure parity among the workforce (in 2016, the percentage of female employees was 43%).

SRG SSR manages three television studios, producing programs for eight channels, as well as special broadcasts in the Rhaeto-Romance language, which are reruns of news in German. Its structure is as follows:

- Schweizer Radio und Fernsehen (SRF) – created for the German-speaking population, broadcasts the following channels: SRF 1 (general, 20% market share), SRF zwei (sports and film, 10%), SRF info (2%);
- Radio Télévision Suisse (RTS) – for the French-speaking areas, channels: RTS 1 (22%), RTS 2 (7%), online RTS Info;
- Radiotelevisione Svizzera (RSI) – a group of channels for the Italian-speaking population, with stations RSI La 1 (21%) and RSI La 2 (6%);

[298] From 1999 to 2011, the Swiss Broadcasting Organisation used the name 'SRG SSR idee suisse' to emphasise its quality, independence and therefore credibility. In 2011. It was decided to remove the addendum from the company logo. Data on structure, shares etc. based on publication: SRG SSR Facts and Figures 20/21. Annual Report: www.srgssr.ch/fileadmin/dam/documents/publikationen/ZDF/SRG_ZDF_2021_en.pdf (accessed 19.06.2022).

[299] In 2018, a referendum was held on the citizens' initiative 'No Billag', asking whether the obligation to pay a radio and television licence fee should be abolished. The majority voted 'no', with the Swiss government announcing a reduction in the fee from CHF 451 to CHF 365, and its nature – from 2019 onwards, it is a fee per device owned. Read more: *The new Swiss corporate fee for radio and television as of 2019*, 16.01.2019, www.rsm.global/switzerland/en/news/new-swiss-corporate-fee-radio-and-television-2019 (accessed 19.06.2022).

- Radiotelevisiun Svizra Rumantscha (RTR) – programs in the Rhaeto-Romance language, broadcast regularly on SRF1, zwei or RSI La2 channels. These include: the informative Telesguard, the also informative but focused on children Minisguard, and the documentary Cuntrasts.

For the past decade or so, the viewing rates for public television channels have been stable, with minor positive fluctuations for German- and French-language stations and downturns for Italian-language ones. However, it should be noted that back at the beginning of the 21st century, the viewing rate of public stations was as high as two-thirds of the general audience[300].

Switzerland's oldest regional channel is Canal9[301], which has been broadcasting since 1984 in the canton of Valais and only started broadcasting in the entire French-speaking part since 2002. In 1987, Canal Alpha was launched, whose right to broadcast was only extended by concession in 1995. The first private German-language stations were created in the second half of the 1990s and included TeleZüri (1994), TeleBärn (1995), and Tele M1 (1997). They all belong to the CH Media concern, which grew to be the most significant television broadcaster, also broadcasting Tele1 (since 2010), film entertainment stations: 3+, 4+, 5+, 6+, S1, as well as channels addressed to people in the age group of 20–49 meaning TV24 and TV25. Between 1999 and 2001, TV3 Switzerland aired for German-speaking Swiss, followed by StarTV and Schweiz 5 (until 2008 as U1 TV) after the year 2000. Regional broadcasters in the French-speaking part include Canal Alpha, or La Télé, created in 2009 and comprising then-closed Télévision de la région lausannoise or Ici TV (broadcasting since 1993 and 1995 respectively). In addition to these, TV Léman Bleu and maxtv are available through digital platforms and cable. Teleticino has been broadcasting in the Italian-speaking part since 1994.

The market share of all commercial channels is small, with 9% for the German-speaking part, just 2% for francophone stations, and 3% dedicated to Italian-speaking Swiss. In contrast, channels available via satellite or cable networks account for the highest (total) viewership: in the above-mentioned regions of the country, this is respectively: 59%, 69%, and 64%. It is noteworthy that Italian-speaking Swiss spend the most time in front of their televisions.

Switzerland was the first country in Europe to abandon digital terrestrial transmission (DTT). The public broadcaster has been relieved of the necessity to migrate from DVB-T to DVB-T2, and the reason for adopting this solution is that the mountainous

[300] L. Weibull, *The Northern European/ Democratic corporatist media model countries*, [in:] *European Media Governance*…, p. 60.

[301] *Canal 9 met ses archives à disposition du public*, 18.10.2017, www.20min.ch/fr/story/canal-9-met-ses-archives-a-disposition-du-public-504808732713 (accessed 19.04.2022).

terrain is not conducive to developing digital terrestrial television, with only 1.9% of households using DVB-T in 2018[302].

Radio

The origins of Swiss broadcasting reach as far back as 1922, but public radio was not established until 1931, as an SRG SSR company. A medium intended to serve a multilingual society, broadcast in German and French since the very beginning, in Italian since 1933, and in Rhaeto-Romance since 1934[303]. Today it broadcasts from six radio studios (Zurich, Bern, Basel, Geneva, Lausanne, Lugano), and additionally four regional studios. It consists of 14 channels:

- German-language SRF radio stations: Radio SRF 1 (general-information, mainly with Swiss music, share 28.5% in the German-speaking part of the country), SRF 2 Kultur (culture and classical music, 2.9%), SRF 3 (popular music, 14.7%); SRF 4 News (news, talk-radio, established in 2007, with a share of 1.1%), SRF Virus (for young listeners, available online or via cable networks, with a negligible listening rate of 0.1%, and SRF Musikwelle (7.5%);
- French-language RTS radio stations: La 1ère (34.3%), Espace2 (2%), Couleur3 (5.2%), Option Musique (9.4%);
- Italian-language RSI radio stations: Rete Uno (36.4% share; information channel, general, including reports), Rete Due (4.1%, educational), Rete Tre (17.1%, aimed at the young);
- Rhaeto-Roman language RTR radio: Radio RTR, listened to by an average of 29,000 people.

Public radio is funded solely by subscription, with advertising banned. It is worth emphasising that a small part of the subscription (approximately 10%) is distributed to commercial broadcasters, who implemented public tasks related to, among others, the presentation of culturally diverse content[304]. Around 3.7 million people listen to public radio each day. Similarly as in the TV segment, this radio competes almost exclusively with private regional stations, whose market share in 2015 was estimated at 30%, and which has increased slightly today: in German-speaking Switzerland this share is 37% (3% foreign radio stations), in French-speaking Switzerland 30% (resp. 9%), and Italian-speaking 22% (6%).

[302] F. Hunter, *Switzerland becomes first European nation to end digital terrestrial broadcasting*, www.thebroadcastbridge.com/content/entry/11899/switzerland-becomes-first-european-nation-to-end-digital-terrestrial-broadc (accessed 19.06.2022).

[303] M. Ratajczak, *op. cit.,* pp. 192–193.

[304] B. Rigendinger, *What's the price of public broadcasting in Switzerland?*, www.swissinfo.ch/eng/licence-fee-debate_what-s-the-price-of-public-broadcasting-in-switzerland-/43517358 (accessed 29.06.2022).

Private radio stations began operating in 1982, after the Local Radio Ordinance came into force, although the first non-commercial radio station was Radio 24[305], in the German-speaking part, broadcasting since 1979. To this day, it remains the most often listened to radio station in this part. Other aimed at the German-speaking part of the population include local stations of the NRJ network (Energy Zürich, Luzern, Bern), Radio Zürisee, or Radio Basilisk. Among others, Lausanne FM or Rhône FM broadcast for the French-speaking part, while Italian-speaking regions include Radio Ticino[306]. Approximately 5% of the market belongs to foreign stations. 62% of Swiss people declare that they listen to the radio every day; listening time reaches approximately 90 minutes.

New media

In Switzerland today, 94% of the population (up to 97% according to Eurostat) has access to the Internet. Old media companies, which have effectively broadened the scope of their operations, dominate the online space. The best example is the TX Group, which developed the Tamedia press brands, making them the most important sources of information (the free '20 Minutes' and LeMatin.ch websites). It is estimated that until recently the concern controlled around two-thirds of the online information market. It is impossible not to mention the diversification of the Ringier group's news sources, which has not only developed 'Blick' online, but also manages more than a dozen large portals such as www.local.ch and Blue News (www.bluewin.ch).

17% of Swiss people pay to access information online, which is second only to the Scandinavian countries, a relatively good result and even more so in the French-speaking part of the country, where this figure stands at 22%[307]. Young Swiss are most likely to get their information from social media, as well as from news portals, although from a general perspective, the websites of public broadcasters and regional media are the most trusted.

A noteworthy initiative is the swissinfo.ch website, which was created in 1999. The portal belongs to the public broadcaster SRG SSR and publishes information in ten languages: in addition to the official languages also English, Spanish, Portuguese, Russian, Arabic, Chinese, and Japanese; moreover, the website has been adapted for the visually impaired. It focuses on politics, economics, the arts, science, and the media, all in relation to the problems of Swiss domestic politics or even diplomacy. The

[305] Ratajczak recalls that the first broadcasts of Radio 24 were transmitted from Italy, a result of the ban on private radio stations in Switzerland. The programme offered to the Swiss was very different from that in the public media. More: M. Ratajczak, *Szwajcaria*, [in:] *Rynki medialne*…, p. 197.

[306] More: H. Bonfadelli, W.A. Meier, M. Schanne, *op. cit*., p. 414.

[307] Reuters Institute for the Study of Journalism. Digital News Report 2021. Switzerland, pp. 106–107.

broadcaster develops thematic panels, there is also a special section for emigrants, including information concerning referendums or elections, additionally active on social media and developing apps (since 2017) – all to become a major source of information for a younger audience. The site is the successor to Swiss Radio International (SRI), which began shortwave broadcasting in 1935 as the Swiss Short Wave Service[308].

The most popular social medium is YouTube, used by 63% of Internet users. It is closely followed by Facebook (57%) and Instagram (40%). While the position of YT and FB is constant, Instagram clearly became more significant in recent years. Every day, the Swiss spend approximately 85 minutes on social media[309]. In the case of movie streaming platforms, Netflix's share has fallen noticeably in 2021, from 50% in January to approximately 40% at the end of the year. The platform-rich market is being conquered by Disney+ (14.5%, available in the country since March 2020), Amazon Prime Video (12.6%), while the fastest-growing user base is Paramount+ (6.2%), which entered the market as late as in the third quarter of the year[310].

Cinema

Due to its multilingual nature, Swiss cinema operates on three linguistic levels. Similarly as in other European countries, the film industry depends on public subsidies. Furthermore, in 2010 the Federal Office for Culture (Bundesamt für Kultur) had a budget of €10.8 million for the sole support of film projects. These funds are used to subsidise up to 20 movies each year. It is meant to support the diversity of Swiss films, at every stage of their production and distribution.

In 2001, the Federal Act on Film Production and Film Culture was adopted, which determines the principles for supporting domestic cinematography, or the instruments for its promotion. All cinematography is supported by a very wide range of sources, including SRG SSR funds. In the German-speaking part, the Zurich Film Fund finances up to 50% of the expenditure – mainly scripts, the production and co-production stage – and the distribution of cinema films (feature films, documentaries, shorts, animation, and experimental cinema). Cinéforom (Fondation Romande pour le Cinéma) was created in 2011, in collaboration with representatives of the film industry from the French-speaking part of the country, by the cantons of Fribourg, Geneva, Jura, Neuchâtel, Valais, and Vaud, and the cities of Geneva and Lausanne. With a budget of around CHF 10 million, it offers funding through several programs

[308] www.swissinfo.ch/eng/about-us/45607290 (accessed 19.06.2022).

[309] S. Kemp, *Digital 2021: Switzerland*, https://datareportal.com/reports/digital-2021-switzerland?rq=switzerland (accessed 19.06.2022).

[310] *Switzerland streaming television market share Q3 2021 for Netflix, Disney+, Amazon Prime Video, bluTV, Apple TV+ and more*, 1.11.2021, www.parrotanalytics.com/insights/streaming-wars-who-is-winning-switzerland-q3-2021 (accessed 19.06.2022).

announced each year. It is funded by public subsidies (68%) and lottery funds from Loterie Romande (32%). The remaining institutions supporting Swiss cinema include: Film and Media Art Fund, BaselRegion, Bern Film Fund, Ticino Film Commission, or the promotion agency Swiss Films, which in 2021 supported the production of 603 films, including 253 feature-length films. It is significant from the point of view of film policy that up to hundreds of million francs are allocated from the budget for digital (film heritage) support or archiving cinematographic resources. Regional film funds are also major players within in the country.

In 2021, there were 267 cinemas operating in Switzerland, and these were mainly large multiplexes, and therefore the number of cinema screens exceeds 600. Nearly 40% of tickets were sold in multiplexes with eight or more screens. 172 cinemas are German-language ones, 83 are French, and 12 are Italian[311]. In comparison, in the year 2000 there were 335 cinemas with 499 screens. However, compared to the beginning of the century, the number of cinema seats decreased by more than 8 thousand. According to Cinéforom data, Swiss films today account for less than 7% of total cinema tickets sold; American productions account for as much as 66% and other European productions for more than 22%. Despite a constantly growing range of films on offer – cinemas screen almost twice as many movies than in the 1990s – the number of viewers in cinemas is declining. This, of course, is related to the growth of SVoD.

FRANCE

One of the largest countries and media markets in Europe, inhabited by more than 67.4 million residents, of whom 5 million are migrants, mainly from Asia and Africa (for example India, Pakistan, Senegal and the Ivory Coast) and former French colonies – Algeria, Tunisia, Morocco and the Caribbean[312].

One of the fundamental guarantees of French democracy is freedom of expression, included in the Declaration of the Rights of Man and of the Citizen of 1789, the aftermath of the French Revolution. It includes the principle of free expression of thoughts and opinion as one of the most precious human rights, limited only by cases defined by law. In July 1881, the Press Law came into force, which, with many amendments, is still valid today and contains provisions relating to the rights, obligations, and specifics of the press itself: it prohibits its censorship or prescribes the transparency of publications, which means that publishers are obliged to inform readers of the economic or political connections of their shareholders. On the other hand it is estimated that the partly politicised press has an impact on the country's

[311] Cinema statistics for: ProCinemaa Facts & Figures 2021, https://procinema.ch/de/statistics/factsfigures (accessed 25.05.2022).

[312] Also the people of central and Eastern Europe, www.immigration.interieur.gouv.fr (accessed 30.06.2022).

position – for example, in the Press Freedom Index of Reporters Without Borders, it is listed 26th (2022). However, it should be emphasised that in 2016 it was listed 45th due to, among other things, the inadequate protection of journalists' sources and the increasing concentration of ownership. An example of indirect political influence remains the indirect press subsidy[313], which is still maintained at high levels and is not only offered in times of trouble, such as during the advertising crisis of 2007–2009 or in 2020 with the COVID-19 pandemic[314]. It is not uncommon for this funding to amount to more than €500 million[315]. Press funding totalling €483 million is planned for 2020–2022.

It is emphasised that French media legislation clearly corresponds to the 1950 European Convention for the Protection of Human Rights and Fundamental Freedoms (Art. 10). The 1982 Audiovisual Communications Act refers to electronic media, while the fundamentals of the journalistic profession were defined by the so-called Brachard Law, enacted in 1935 and supplemented by such provisions as the 1987 Collective Agreement for Journalists[316]. Journalists work on the basis of issued IDs, which are issued by the Commission de la Carte d'Identité des Journalistes Professionnels. There are several organisations in the country representing the interests of different groups of journalists, often with political associations. The oldest union is the Syndicat National des Journalistes founded in 1946[317].

In 1972, the Supreme Audiovisual Council (Le Haut Conseil de l'audiovisuel) was created, a body regulating the radio and television market that has been later changed, and which from 1989 to 2021 operated as the Supreme Audiovisual Council (CSA – Conseil Supérieur de l'Audiovisuel). Since the beginning of 2022, as a result of a merger between the CSA and Hadopi (Haute autorité pour la diffusion des œuvres et la protection des droits sur Internet), Arcom, or the Audiovisual and Digital Communications Regulatory Authority (Autorité de régulation de la communication

313 K. Gajlewicz-Korab, *Francuska prasa drukowana. Narodziny, rozwój, era cyfrowa*, Warszawa 2018, pp. 289–292.

314 The amount proposed by the government after 2020 is expected to reach a total of €483 million. AFP data for: *Une perfusion de 483 millions d'euros pour la presse écrite*, www.lepoint.fr/economie/une-perfusion-de-483-millions-d-euros-pour-la-presse-ecrite-28-08-2020-2389298_28.php (accessed 20.06.2022).

315 In 2008, the faltering press received subsidies totalling €600 million, with not fully transparent rules for their distribution. There was, for example, a resounding endorsement of friends of President Nicolas Sarkozy with stakes in 'Le Monde' and 'Le Figaro'; there was also an increase in government advertising, among other things. L. Abboud, *Online news site leads charge in French scandal*, www.reuters.com/article/us-france-bettencourt-mediapart-idINTRE6683I120100709 (accessed 30.06.2022).

316 K. Gajlewicz-Korab, *Francuska prasa*…, pp. 93–94. Also: M. Slufińska, *Francja*, [in:] *Systemy medialne państw*…, *op. cit*., pp. 95–96.

317 R. Kuhn, *Dziennikarstwo we Francji*, [in:] *Przyszłość dziennikarstwa w dojrzałych demokracjach*, eds. P.J. Anderson, G. Ward, Warszawa 2010, pp. 270–272.

audiovisuelle et numérique), began its operation. The volatility in the system regulating French media shows its highly regulatory nature.

A distinctive feature of the French media consists in the generally increasing use of various media, although after years of growth, interest in television has dropped, and this trend is also visible in declining print circulation, which is compensated, to some extent only, by digital purchases.

Press

Listing the most important features of the French press, one would have to begin with the term 'media of the regions'[318] which appears among media scholars when describing the dominant reach of the print media. This is because regional dailies often have higher circulation and readership, while the national press – with lower performance but relatively high readership – accounts for high public esteem and is treated as an opinion-forming source. The still relatively high readership is due to the fact that French people read newspapers in the morning, which gives the press an advantage over other media. Perhaps it is also due to the fact that print journalism is considered non-political and not divisive.

The first stage of the dynamic development of the press occurred in France in the 17th and 18th centuries. That is when, for example, 'La Gazette' (1631) and 'Le Journal de Paris' (1777) were created. The press of that period was clearly linked to socio-political movements, as evidenced by the more than 300 new periodicals produced during the events of the Great French Revolution[319]. 1863 marks the debut of the Parisian 'Le Petit Journal' – smaller in format, cheaper and, above all, lighter in content. At the end of the 19th century the market for cheap commercial papers, modelled on the American press, boomed and opinion-forming titles also thrived. One of these was the best-selling newspaper in the world afterwards, 'Le Petit Parisien', with a circulation of around two million after the first war. Another one, the socialist 'L'Humanite' (est. 1904), after becoming an organ of the French Communist Party, in turn had the highest readership in the 1940s. During the Second World War, some editorial offices collaborated with the occupying forces, and therefore the construction of a new press system, after the war, began with dealing with the past[320].

The current press system became fixed during the first post-war years[321], mainly as a result of state policies concerning creating anti-monopoly legislation or developing

[318] T. Sławińska, *Dziennikarstwo we Francji*, [in:] *Przyszłość dziennikarstwa w dojrzałych demokracjach,* eds. T. Sasińska-Klas, A. Hess, Kraków 2004, p. 51 et seq.

[319] M. Ślufińska, *op. cit*., p. 92.

[320] K. Gajlewicz-Korab, *Francuska prasa*…, pp. 114–115.

[321] M. Lardeau, *Media landscapes: France*, https://medialandscapes.org/country/france/media/print (accessed 11.04.2022). Citing data from the Ministry of Culture and Communication, Lardeau points out that in the second decade of this century, over 1,100 monthly and 2,200 quarterly magazines were still published in the country.

a system of subsidies and grants. The first symptoms of the crisis appeared in the French press in the 1970s, when the prices of major newspapers rose and the press had to contend with the increasing dominance of electronic media. Since the mid 20th century there has also been a decline in the number of dailies – from 142 in 1950 to 69 in 1994. This was a straightforward way to isolate a few strong titles, admittedly with lower circulation, but with a high readership and public esteem (for example 'Le Figaro').

The contemporary press market is divided in France into three sectors. The first is made up of national dailies, the most important of which are the opinion-forming Parisian ones: 'Le Figaro' (established in 1826, paid circulation of 347,000 copies, 1.7 million readers[322]), 'Le Monde' (1944, almost 446,000 sales, readership approximately 2.57 million) and 'Liberation' (est. 1973, circulation 90,300, readership 954,000). In addition to them, the first sector includes the following popular titles: 'L'Equipe' (2.5 million readers, 214,000 sales), 'Le Parisien-Aujourd'hui en France' (2.34 million), 'Les Echos' (710,000 readers, with a circulation of 136,500), and 'La Croix' (562,000). The national press also includes the free '20 Minutes', which debuted in the Paris region (Île-de-France) in 2002. Initially distributed at 450,000 copies and in the best months even twice as many, today it is published in twelve editions, with a total of more than 712,000 copies[323]. The complimentary press has had an impact on the crisis of the paid press, although it did not change the public's trust in it[324]. Free titles did not appear in France until 2002, and apart from the aforementioned '20 Minutes' these were 'Metro' (Paris, Marseille, Lyon, closed mid-2015) and 'Direct Matin Plus'[325]. and 'Direct Soir' was also published between 2006 and 2010.

The second group consists of local (departmental) and regional dailies. More than 50 are published in the country and their share of the total press circulation is estimated at 25%. This group includes one of the world's largest (and the largest francophone) regional dailies, 'Ouest France', published in Rennes since 1944. In 2021, its average paid circulation was nearly 629,000 copies, with a readership of more than 2 million. The second most often read daily of this range today is 'Sud Ouest' (circulation 210,500), and the next one is 'La Voix du Nord' (193,000) – each with a readership of up to 1 million people. The popularity of the local/regional press results

[322] Circulation data for 2021 and readership in Q1 2022 per ACPM – Audience et dénombrement des médias. Noteworthy, total paid circulation increased in 2021, driven by increased digital subscriptions.

[323] At the time, the newspaper was one of the editions of the daily launched in Europe by Norway's Schibsted, and was sold to Belgium's Rossel Group in early 2016.

[324] K. Gajlewicz-Korab, *Francja*, [in:] *Rynki medialne wybranych państw*…, *op. cit*., p. 79.

[325] P. Bakker, *Free daily newspapers – business models and strategies*, "The International Journal on Media Management" 2002, no. 4(3), pp. 180–181. Numerous free dailies were published in the regions, such as 'Marseille Plus', the 'Direct' series (Toulouse, Nice etc.) or 'Bordeaux7'. 'Direct Matin' was renamed 'CNews' in 2007, which was published until 2021.

from a demand for local information and is a product of the lack of television with such coverage[326]. Moreover, it is important to note the huge popularity of the Sunday press, among which the regional 'Ouest France Dimanche' (375,000), 'Le Dauphiné Libéré Dimanche' (230,000), and 'L'Equipe Dimanche' (220,000) can account for the highest circulations.

The third press segment consists of weeklies; in 2015, 558 were published in France – including 22 national ones. Socio-political publications are the most respected of this segment, while TV magazines and the women's press are the most often read. The largest periodical of the first group today is 'Le Point', with a right-wing inclination, as well as a paid circulation of approximately 280,000 and 1.7 million readers. Whereas, the most influential ones include 'L'Obs' (204,000 paid circulation, 1.57 million readers) and 'L'Express' (173,000 and 1.22 million respectively). The most often read weeklies include TV magazines such as 'TV Magazine' (4 million sales, 9.6 million readers), 'Télé 7 Jours' (approximately 930,000) and 'Télé Z' (787.000). The women's press is dominated by 'Version Femina' (2.24 million circulation, 4.9 million readers) and 'Femme Actuelle' (475,000, 2.7 million). The circulation of the international brand 'Elle', which today has a circulation of barely over 300,000, has been successively declining, but this type of press has a relatively stable position in the country, as elegant magazines have no problem finding advertisers[327].

Other titles worth mentioning include 'Paris Match' and 'L'Equipe Magazine', not to omit the satirical weekly 'Charlie Hebdo', whose editorial office became the target of a terrorist attack after a caricature of Muhammad was featured on the cover of one of its issues in 2015. The magazine, which sold an average of 30,000 copies, after the attack sold 8 million copies of the following issue, which was a sign of global solidarity in fighting for press freedom of expression. Once again, the caricature of Muhammad was featured on the cover in 2020, and the right to publish it was supported by the French President, Emmanuel Macron, who also promised financial support for the magazine's continued existence. According to the publisher's data (the magazine is not included in circulation monitoring), average sales exceed 50,000 copies[328]. Until recently, a fourth group was also distinguished, which included so-called niche magazines – cultural magazines with small circulations but also specialised press (e.g. the agricultural 'La France Agricole').

When discussing the French press, particular attention should be paid to the consolidation changes that took place in terms of the ownership structure of its

[326] K. Gajlewicz-Korab, *Przyszłość francuskiego sektora mediów publicznych w dobie funkcjonowania TNT na przykładzie France Televisions*, „Studia Medioznawcze" 2014, no. 2 (57), pp. 86–87.

[327] K. Gajlewicz-Korab, *Francja*, *op. cit*., p. 91.

[328] E. Pineau, *Charlie Hebdo uncowed after attacks – but now with bodyguards*, www.reuters.com/article/us-france-charliehebdo-idUSKBN25Y1AG (accessed 20.04.2022).

publishers, over the last decade. As a result, there are basically two groups that matter on the market today. The first is Lagardère, and its part, the Hachette Group. The second is Grupe Le Monde, publisher of such titles as 'Le Monde' or 'Télérama'. In the second case,'Le Monde' was incorporated into a business after it was on the brink of bankruptcy, and was bought in 2010 by three entrepreneurs – Pierre Bergé, Xavier Niel and Matthieu Pigasse. Concerning other market reshuffles: Patrick Drahi, associated with the telecommunications industry, in 2015 became a major shareholder in Liberation, and in the same year LVMH Médias (owner of, for example 'Les Echos') purchased 'Le Parisien-Aujourd'hui en France'. In addition to holding companies, the market also includes individual entrepreneurs such as the Dassault group (a concern dealing mostly in weapons and aviation equipment), which owns 'Le Figaro' since 2004, Bayard Presse, which is also active in Spain, Germany, and Belgium and publishes, among others, the Catholic newspaper 'La Croix', and the family-owned publisher Amaury, owner of 'L'Equipe'.

According to the French Ministry of Culture, there are 6,000 press titles published in the country (as of 2020); and more than 35,000 journalists possess a press card[329]. In 2021, there were more than 80 titles published on the French press market with circulations of more than 100,000 copies (ACPM data). Regular reading of the general press, paper and/or digital, was declared by 34% of French people. In 2017, 60% admitted that they read at least one press title (in 2014 – 64%) per week.

Radio

The first radio show was broadcast at the end of 1921 by Radio Tour Eiffel, broadcasting until 1940[330]. The first regular radio transmission took place on 6 November 1922, and the private broadcaster, supported by a radio manufacturer Société française radio-électrique (SFR) – Radiola. In 1933, RTL (at that time Radio Luxembourg[331]) began broadcasting from Luxembourg to France. Before the Second World War, fourteen commercial and twelve public operators were broadcasting in the country. During the war period, only those subordsinate to Germany were active, but after the end of the Second World War, a public broadcaster monopoly was imposed. In the face of the inability to create private radio stations, the post-war years are characterised by the development of pirate radio and, above all, broadcasting from abroad. That time marked the birth of radio Europe no. 1 (1955), which still operates now. The state monopoly on radio and television broadcasting was only repealed in 1982, in an act promulgated in the wake of the creation of the local initiatives a year earlier, and to address the issue of the illegal stations

[329] www.culture.gouv.fr/Sites-thematiques/Presse (accessed 20.04.2022).

[330] M. Ślufińska, *op. cit.*, p. 98.

[331] The radio stopped broadcasting with the outbreak of the Second World War, returning to the market after the end of the war.

that had proliferated in the 1970s. Apart from the already operational Europe1, the most popular of these private stations included Radio Verte, Radio Ivre, Radio Active and Radio Lorraine Coeur d'Acier. The aforementioned stations broadcasting from abroad included Italian Azur 102 Radio Continental, Radio Vintimille Internationale and Radio K.

Still at the end of 1990s, French radio broadcasting enjoyed record-breaking popularity, reaching 83% and more than 3 hours daily. This decreased throughout the decade, albeit not by much, amounting to 162 minutes in 2021 (data: Statista). Interestingly, the number of broadcasting stations increased. In 2017 there were 900 broadcasters, while in 2020 this number had grown to over 1000. Radio is listened to daily by over 40 million French nationals[332].

French public radio is divided into two groups: Radio France, operating in the Republic since 1944, and RFI (Radio France Internationale, est. 1975). It does not broadcast advertisements and is supported mainly by subscription fees (the so-called audio-visual fee) and own finances from advertisement[333]. Radio France[334] consists of France Inter – general information station established in 1947 and local stations associated in the FIP and FIM public radio broadcasting networks, informational France Info (est. 1987, first radio station in Europe with their own website – 1995); France Bleu (est. 1980 and operating under its current name since 2000) or a network of the local, regional and departmental stations, France Culture (1946); France Musique (1954, classical and jazz music) and Le Mouv' (music channel for young people, established in 1997).

In 2017, public radio attracted 14.5 million daily listeners in France (27% of the total audience), which rose to almost 16 million (31% of the market) in 2020 and has remained constant, although it is necessary to take the global pandemic into consideration. The largest number of listeners is attracted to France Inter, enjoying slightly over 15% of the market share, followed by France Info (6.3%, losing listeners at the quickest pace) and Culture (3.4%). RFI (formerly Poste Colonial) , a channel established in 1975, is primarily aimed at listeners abroad and financed from budget subsidies and special subventions received from the Minster of Foreign Affairs. It gained a status of an autonomous unit in 1987, and since 1996 it operates as a worldwide news service (RFI I and RFI II channels) and a music channel – RFI III. It is broadcast in French and 15 other languages ('French language abroad')[335].

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[332] www.mediametrie.fr/en/radio-audience-ile-de-france-september-december-2021 (accessed 30.04.2022).

[333] www.radiofrance.com/notre-financement (accessed 30.06.2022).

[334] Until 2009 there was still FIP – France Inter Paris, created in 1971 as a so-called 'backup radio' for RF, to broadcast in emergencies where general radio transmission would be compromised.----

[335] The rfi.fr website states that the station broadcasts in French and 15 other languages: English, Khmer, Simplified Chinese, Traditional Chinese, Spanish, Hausa, Mandingo,

The state monopoly on radio and TV broadcasting was lifted in 1982. Today, more than half of French radio users tune in to commercial stations. According to the radio.fr portal, there are approximately 1,200 channels available in France, with the aforementioned RFI being the most popular, with 13.6% market share as of the end of 2021. Along the RTL2 and Fun Radio, both established in 1980s, the station belong to the RTL Group that was formed in 2000. Shares of the second, general-theme RMC (Radio Monte Carlo, broadcasting since 1943) reach 6.8% and Lagardère-owned Europe 1 are equal to 5.3%[336]. NRJ channel, member of the pan-European consortium NRJ (owner of, for example, Nostalgie and Chérie FM) reached 3.3%, although quite recently this had risen to almost 10%.

French radio broadcasting market can be divided into the following types of stations: general (primarily public France Radio), music (Chérie FM, Fun Radio, M Radio, Nostalgie, NRJ, Radio Nova, RFM), thematic (BFM Business, Radio Classique) and local. News and music radio stations are the most popular, while thematic ones are relatively less popular.

Television

The first TV channel in France, and one of the first in Europe, was Radio-PTT Vision that started broadcasting in 1935[337]. Public television was created by a governmental decree in 1946. The first channel (La première chaîne) began broadcasting in 1948, followed by France2 in 1963. The next year ORTF, a radio and TV broadcaster was established, initially operating as an 'industrial and marketing state public enterprise'[338]; in 1968, the broadcasting of advertisements was allowed. After the decentralisation conducted in 1975, three separate channels were created – TF1 (Télévision Française 1), Antenne 2 and France Region 3 (FR3) – that operated independently of each other, even though they retained their dependence on the government. In 1992, Antenne2 was renamed France2, and FR3 became France3. In August 2000, France Télévisions started to function as a holding company.

A public broadcaster is obliged to observe the rules of diversity, broadcast important events, and protect children from access to harmful content. It is also often perceived as a politicised body (a reform conducted in the 1970s attempted to alleviate political influence), especially since 2010, when the Director of FT is appointed by

Fulfulde, Kiswahili, Persian, Portuguese, Brazilian, Romanian, Russian, Vietnamese. The channel broadcasts via 156 FM relays, on medium and shortwave, on some thirty satellites, including on the internet.

336 Data: www.mediametrie.fr/en/results-studies (accessed 22.04.2022).

337 Changed later to Radiodiffusion nationale Télévision (RN Télévision), after World War II it functioned as RDF (Radiodiffusion française, until 1949) and RTF (Radiodiffusion-télévision française, until 1964, adopting the name la Première chaîne de la RTF).

338 Subsequent, more important stages of reorganisation took place in 1965 (concerning the radio sector) and 1974 (decentralisation and termination of the ORTF).

the Prime Minister and supervised by the President. A public broadcaster is financed by subscription fees, funds allocated by the Ministry of Culture, licence fees paid by commercial broadcasters, and advertisement. The presence of commercial advertisements accompanying public broadcasts is a hot social topic. In 2008, President Nicholas Sarkozy proposed to cancel them, but this was eventually diluted to a gradual sunsetting of such content (public television with national coverage can not show adverts between 8 p.m. and 6 a.m., with some exceptions), and the complete removal of advertising was planned for 2016. This never happened, however, and today their screen time has been limited to 8 minutes per hour. In addition, cancellation of the subscription fee was proposed for 2022[339].

Presently, the public TV sector consists of France Télévisions SA, operating under that name since 2000, namely: France2 – a universal channel, France3 **–** a channel with regional elements, France4 – cultural, France5 – educational, and FranceÔ – a channel targeting the overseas market.

EuroNews is a news channel associated with the public holding company. Until recently, it was also the news channel France24 broadcasting in French, English, Arabic and Spanish[340], as well as TV5 Monde and CFI, which promote culture and the French language[341]. The latter is an operator financed primarily by the Ministry of Europe and Foreign Affairs, established in 1989 to provide foreign broadcasting stations with French TV programs[342]. All stations mentioned above belong now to France Médias Monde, a special group responsible for international broadcasting. RFI Radio and Monte Carlo Dualiya are also a part of this group. France Médias Monde broadcasts in 20 languages[343].

A separate channel is French German Arté (Association relative aux télévisions européennes), established in 1993 and since 2003 existing as a TV station independent from the France Télévision holding company. It cooperates with other European public concerns, such as ÖRF, RTBF, ERT, SRG SSR, YLE or ČT. The group of overseas channels owned by France Télévisions SA is made up of La Première[344] – a public television and radio network consisting of nine TV channels and as many local radio stations.

339 *Suppression de la redevance télé dès 2022*, www.service-public.fr/particuliers/actualites/A15693 (accessed 30.06.2022).

340 A channel considered to be the 'brainchild' of President Jacques Chirac, who pushed for the creation of a channel that could compete with foreign news channels (BBC, CNN), presenting the French point of view on international affairs (unlike EuroNews, which takes into account the voice of EU countries), but which promotes France.

341 Broadcast on the basis of an agreement between the public stations of Belgium, Canada, Switzerland and France.

342 https://cfi.fr/en/content/institution (accessed 29.06.2022).

343 www.francemediasmonde.com/ (accessed 29.06.2022).

344 Founded in 1954 as Radiodiffusion de la France Outre-Mer (RFOM), it was, among other things, part of the regional FR3 (1970s). Renamed Réseau Outre-Mer 1ère in 2010. Available on: www.france.tv/la1ere/.

These channels broadcast in the French overseas territories and the network is also the operator of the ROM1 multiplex, digital terrestrial television abroad.

Digitisation process took off in 2009, having been introduced by the digitalisation act of 2007[345]. On 1 December 2011, analogue broadcasting was discontinued, although the digitisation process, despite the creation of multiple opportunities to develop the local or regional TV infrastructure, is generally thought to be inadequate. This is largely a result of neglect of the audio-visual media targeted at the ethnic minorities, despite the occurrence of large waves of immigrants. Today, this disadvantage is persistent and cannot be alleviated. On the other hand, the digital TV introduced many new channels, such as the France.tv Slash, established in 2018 and aimed at a younger audience.

Because of the public broadcaster monopoly maintained until 1982, commercial TV began to develop only after that year, but this development was rapid. In November 1984 Canal+, the first encrypted satellite TV channel was launched, and for quite some time it remained the only such enterprise in Europe. A year later, as a response to commercial TV and market demand, broadcasting permits were granted to the entertainment channel Le Cinq (property of Silvio Berlusconi's holding) and youth-oriented TV6 (maintaining links to the contemporary socialist government). These two channels started to broadcast in the beginning of 1986. Due to the political protests related to the process of granting licenses, TV6 was cancelled after a year, to be ultimately replaced by M6, also aimed at a younger audience. La Cinq vanished from the market in 1992. In 1987, TF1 , a long-time favourite channel across France, went private. TF1 was established in 1972[346] and initially lost the most after the introduction of the digital TV, which fragmented the market but also made many stations focus on entertainment content.

Today, there are four large media corporations that enjoy huge popularity, with the two largest ones, namely the TF1 Group and Groupe M6 being scheduled for a merger. The TF1 Group includes TF1, TMC (with a target age group of 25–49 years) and TFX aimed at the 'Millennial' generation. Groupe M6, the owner of the Metropole Television (M6) is a consortium with RTL Group shares that also includes the stations and channels taken over in 2019 from the TV section of the Lagardère consortium. The third major player is Vivendi, an owner of, for example, the Canal+ group, Universal Music (music), Gameloft (video games), Dailymotion and myCanal (digital distribution platforms).

In 2021, time spent watching TV stabilised at its pre-pandemic level (in 2020 it grew to almost four hours). On average, 44.5 million French nationals watch TV daily,

[345] A. Bugno, *Zmiany we francuskim systemie medialnym spowodowane rozwojem nowych mediów i technologii cyfrowej*, [in:] *Systemy medialne w dobie cyfryzacji…*, *op. cit.*, p. 58.

[346] Its predecessor was the aforementioned Radio-PTT Vision, changed from Première chaîne de l'ORTF.

with an average screen time of 3 hours 41 minutes1[347]. 8.7 million French nationals aged 15 and upwards watch sVOD channels daily. Public channels also gained popularity. Today, the most popular public stations include TF1 that balances the mission and commercial requirements – 19.7%, France2 – 14.7%, France3 – 9.4%; M6, targeted at young people, especially girls – 9,1%; France5 – 3.3%[348]. Nearly 10 million people accesses satellite TV, which can be explained by a large number of immigrants viewing channels available in their languages through satellite. In addition, almost 39 million French citizens watch TV via cable connection or the Internet.

New media

The year 2020, when the pandemic peaked, was the best time for French press in recent years. Titles such as 'Le Monde' or 'Le Figaro' recorded a significant increase in digital subscriptions, amounting to 360.000 and 205.000 respectively. It is possible that in the case of French press, this period will prove to be the beginning of changes in the ways of using digital media, because currently only 11% of French citizens pay for access to information[349]. Process of press digitisation has not matched expectation so far, despite assistance given to electronic forms of publications (VAT cuts, agreements with Google, and development of newspaper subscriptions)[350].

According to Médiamétrie/Net Ratings, at the end of 2017, almost 52 million French nationals (83% of the population) used the Internet at least once a month. In 2021, the percentage of Internet users reached 92%. Within five years, the percentage of people who additionally use mobile devices also increased by almost 75%, from 38.5% to 65%. Until recently, French citizens were more keen on 'soft' news (entertainment, job services), but since the late 2010s, webpages owned by the traditional media have gained popularity, which applies to publishers like Figaro CCM Benchmark, Prisma Media (until April 2021 belonging to the German consortium Gruner+-Jahr, now owned by Vivendi), or TF1 Group. Websites belonging to the entertainment group Webedia have lost some of their popularity. In turn the largest coverage in the web, on every level, have the websites owned by the press publishers. Among the five most commonly visited and trusted brands, one can also find public radio and TV webpages.

The average daily time spent on the Internet amounted to 2 hours 26 minutes per person in 2021, of which over 90 minutes were spent on mobile devices. 70% of French citizens use news services, of whom 1/3 are users of free video platforms.

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347 Data for: www.mediametrie.fr/en/tv-viewing-habits-2021 (accessed 20.04.2022).

348 Yearly Médiamat 2021, www.mediametrie.fr/en/television-audiences-france-2021 (accessed 20.04.2022).

349 Reuters Institute for the Study of Journalism. Digital News Report 2021, France, pp. 78–79

350 A. Bugno, *op. cit*., pp. 61–62. Also: M. Kowalczyk, *Francja elegancja. Cała prasa w abonamencie,* www.press.pl/tresc/67990,francja-elegancja_-cala-prasa-w-abonamencie (accessed 18.04.2022).

45 minutes are dedicated each day to social media, dominated by Facebook (60%) and YouTube (57%). Television remains at the center of media consumption (75% of time spent). Movies on the Internet are watched by 16% of the French citizens, while only 10% use VoD/SvoD services[351].

Cinema

French cinematography is perceived through the lens of a struggle against the dominance of American movies, resulting in a very 'national' flavour. Media and cinemas are supported by a wide system of subsidies from, for example, National Cinematography Center. French entities are among the leading movie producers and coproduces in Europe, with Canal+ or Gaumont being prime examples.

Over recent years, the number of French cinemas has changed by only a small margin. While in 2008 there were 2076 operational cinemas, in 2017 there were 2046, while the number of cinema screens rose from approximately 5,500 to over 6,000. In 2020, there were 2041 operational cinemas in France. Multiplexes sell over a half of all cinema tickets sales, even though there are only 220 of them throughout the country. On average, approximately 550 movies are screened each year, of which almost half are produced in the USA, but over 40% of all movies are made in France, and this figure is rising steadily. In 2017 this ratio was 49% to 38%, making France one of the leading countries in the ranking of the percentage of domestic movies screened. In addition, recent years there has been a cinema renaissance. For example, in 2019, 213 mln tickets were sold – the best annual result since the mid-20th century. Paradoxically, the year 2021 was also beneficial for French cinematography, especially given that cinemas were partially closed for several months, although ticket sales still amounted to 96 million tickets, representing a 47% increase in comparison with the year 2020[352]. French productions amounted to 40.8% of all feature movies, while 42.4% were made in the USA, and 16.8 % from the rest of the world.

The production and promotion of French cinematography is headed by the Centre national du cinéma et de l'image animée (CNC, National Cinema and Animation Centre), established in 1946 as the National Cinematography Centre (Centre national de la cinématographie). This institution reports to the Ministry of Culture and is responsible for monitoring issues related to the cinema industry, supporting projects linked with national heritage, assisting distribution, and issuing grants. In addition, CNC supports independent cinemas. There is also the French Cinema Commission Film France (Commission Nationale du Film France), a state agency aided by the CNC and responsible for promoting France in cinematography, with a network of local cinematography commissions. The Department of Media Development closely operating

[351] www.mediametrie.fr/en/2021-year-internet (accessed:19.04.2022).

[352] F. Lemercier, *French cinemas report 96.17 million admissions in 2021*, https://cineuropa.org/en/newsdetail/420003 (accessed 25.05.2022).

with the Prime Minister, makes agreements with the public channels: France2, where feature movies are supported, France3, that finances co-produced documentary and animated movies, and France5 focusing on the development of documentaries.

BELGIUM

Inhabited by 11.5 million of people and located in northwestern Europe, Belgium is a federal state with a relatively complex administrative structure. In the three autonomous regions of Flanders, Wallonia and Capital Region of Brussels. There are three official languages: Dutch or Belgian Dutch, used by approximately 60% of citizens (mainly Flemings), French (30%, used by Walloons) and German (used by 10% today, even though in 1990 it was only 1%). Flanders has 6.65 million citizens, Wallonia – 3.64 million, while the capital city of Brussels has almost 1.22 million residents[353]. Speaking of politics, Flanders is traditionally Christian-Democratic, while Wallonia is socialist. Belgium is one of the smaller European countries, although it has a relatively high population density. The country also acts as a political hub of Europe with many important international institutions (NATO, UE) being located there.

Media development has its roots in the tradition of political parallelism that has reflected the social and cultural division since times immemorial. Social and political life in Belgium is chiefly influenced by the relations between the Flanders and Wallons. These national and linguistic specifics impacted the development of all media. The number of media institutions is also influenced by the demographics, as majority of the press is published for the Flemish. The end of the World War II was an important turning point for the development of local media, due to the political attitude of nearly half the dailies published at that time[354]. In addition, economic difficulties also negatively impacted their further development. In the recent years, the number of professional journalists dropped tremendously, especially in the Flemish Journalists Association (*Vlaamse Vereniging van Journalisten*)[355].

Freedom of the press is enshrined in the Constitution of 1831 that exclude issues related to, for example, the protection of the state interests. This is guaranteed by Article 7 of the Constitution, which also addresses the absence of preventive censorship. Articles 19 and 25 guarantee freedom of speech and freedom of the press as

[353] https://statbel.fgov.be/en/themes/population/structure-population (accessed 16.04.2022).

[354] B. Golka, *Kraje Beneluksu*, [in:] *Wybrane zagraniczne systemy informacji masowej (part II)*, eds. J. Adamowski, B. Golka, E. Stasiak-Jazukiewicz, Warszawa 1997, p. 88.

[355] J. Hendrickx, P. Truyens, K. Donders, I. Picone, *Belgium (Flanders) News diversity put under pressure*, [in:] *The Media for Democracy Monitor 2021. How Leading News Media Survive Digital Transformation, vol. 2*, eds. J. Trappel, T. Tales, Nordicom 2021, p. 14. Available at: https://www.diva-portal.org/smash/get/diva2:1559277/FULLTEXT02 (accessed 16.04.2022).

inalienable rights. Belgian legislation does not include any regulations concerning concentration of capital.

The linguistic diversity of Belgium is reflected in the corresponding diversity of media published for the local communities. Article 151 of the Media decree of March 2009 makes it mandatory for the public broadcasters to include subtitles in all official languages in every news program[356]. Thus, Belgium is referred to as a single country with two separate media markets.

The regulatory body for the Belgian media is VRM (Flemish Media Regulator, Vlaamse Regulator Voor de Media). The Local Journalists Association – AVBB (*Algemene Vereniging van Beroepsjournalisten in België*) – was established in 1978 after a merger of two organisations: Belgian Press Labour Union (Beroepsunie van de Belgische Pers) and Belgian Press Association (Algemene Belgische Persbond). In 1998, two organisations broke off from the national structure, namely the Flemish Journalists Association (VVJ) and the Francophone Professional Journalists Association (AJP, Association des Journalistes Professionnels). The law provides journalists with the additional guarantees related to criminal and civilian cases. Since 1963, journalism as profession has been granted an official status, resulting in many benefits. In the freedom of the press ranking made by Reporters Without Borders for the year 2022, Belgium ranked 23rd – a significant drop from the 11th place held in 2020.

Press

Belgian press dates back to 1605, when the 'Nieuwe Tijdingen' newspaper was published in Antwerp. Political papers started to appear at the end of 18th century, which was further influenced by the Constitution of 1830 that banned censorship. In the second half of 19th century the volume and frequency of published newspapers increased, which was facilitated by their lower price (thanks to lifting the mandatory fees) and resulted in better access to newspapers. In the beginning of 20th century, almost 100 papers were published throughout the country[357]. Since that time, newspapers were differentiated as elite, aimed at educated citizens, and papers for the masses. In the times of German occupation during the World War II, Belgian journalism was drastically hindered by the introduction of the preventive censorship and control over the editors.

From the mid-1950s, the country underwent a long process of mass media ownership consolidation that significantly influenced the market size and the number of the published titles, but also the positions of the press companies themselves. The latter dropped in number from over thirty to a mere five. Additionally, family-owned media companies were increasingly bought out by large consortia, usually treating media publications as a means of expanding their business portfolios.

[356] P. Musiał, *Belgia*, [in:] *Systemy medialne państw Unii Europejskiej*…, p. 35.
[357] *Ibidem*, pp. 21–22.

In 1974 small direct subsidies for the press were introduced, and until 1997 there was also a system of direct subsidies. Due to the high selectivity of the latter, political and value differences, but also systemic (linguistic) issues, these subsidies were eventually cancelled, although the government reserved the right to provide indirect support, organised on a federal level. This included lower post service fees (these subsidies amount to approximately 170 million euros) and, in case of the news media, also a 0% VAT (estimated cost of 120 million euros).

In Belgium there is no distinction between a prestigious and popular press, and majority of the media are considered to be opinion-forming, which 'is a testament to the requirements of the Belgian readers'[358]. Not only, because some papers, such as 'Le Soir' are also of great qualitative importance for European public opinion. The most important newspapers are published in Brussels. It is estimated that the printed media receive equal revenues from advertisement and sales. Less than 50% comes from the subscription model. The most popular papers are: French-speaking 'Le Soir' (est. 1887, social-democratic profile; circulation in 2020: 68.000 copies[359]), Dutch 'Het Nieuwsblad' (est. 1929, circulation 190.000[360]) and 'Het Laatste Nieuws' (est. 1888, circulation approximately 288,000), 'De Standaard' (founded in 1918 in Antwerp, circulation: 95,000), and also Dutch 'De Morgen' (1978, circulation close to 50,000) – modelled on the French 'Liberation', opinion-making and progressive.

Today, the only title remaining in the national free press segment is the bilingual 'Metro'. Launched in 2000, in 2012 it was acquired by the Concreta and Rossel groups, and published by their company Mass Transit Media. It was to become more news-oriented and serious, aimed at older readers. After the 2008 crisis, the newspaper gradually began to increase its circulation even up to a quarter of a million copies. Following the buyout of MTM's stake, the sole owner of 'Metro' is Rossel; the daily reaches 788,000 readers and records 1.4 million visits per week to the Metrotime and Zita websites[361]. Its publisher aims to build a strong digital brand. The Rossel Group also owns another free newspaper, the French '20 Minutes'.

Ownership in the Belgian press segment is worth a special mention. The largest media companies in Flanders are Mediahuis, formed in 2014 from the merger of the Corelio Media and Concentr[362] and De Persgroep, which owns the country's best-sell-

358 Golka, *op. cit.*, p. 89.

359 Data: Eurotopics. www.eurotopics.net/en/148689/le-soir (accessed 14.04.2022).

360 www.internationalmediasales.net/international/portfolio/detail/het-nieuwsblad/ (accessed 14.04.2022).

361 Since 2003, shares in 'Metro' were held by the Rossel and Mediahuis groups; the latter sold off its share in 2020. www.rossel.be/category/non-classe/ (accessed 14.04.2022).

362 In 2006, the group acquired the Walloon conglomerate Mediabel, whose main activities are regional newspapers and free titles. It is the publisher of, among others. 'De Standaard' and 'Het Nieuwsblad', while Concentra, publishing regional 'Het Belang van Limburg' or 'Gazet van Antwerpen'.

ing 'Het Laatste Nieuws', 'De Morgen' and HLN.be – the most popular news webpage[363]. An important group is the Roularta Media Group, founded in 1954 and now operating a multimedia format. It includes the local media in Flanders – the business newspapers ('De Tijd' and 'L'Echo'), and the free Sunday paper 'De Zondag'. In addition to these, the group has a portfolio of magazines, in Dutch and French, general interest ('Knack'), sports, women's press, lifestyle or health magazines[364]. In Belgium, the Netherlands and Germany, Roularta is the leader among magazines aimed at readers aged 50+. In the French-speaking part, the most important actor is the aforementioned Rossel, active since 1887 and publisher of, for example, 'Le Soir'.

The third player in the French-speaking Belgian market is the IPM Group (Société Anonyme d'Informations et de Productions Multimedia), whose activities focus on online media, but whose press brands include the conservative 'La Libre Belgique', 'Paris Match Belgique' or the liberal-right 'La Derniere Heure/Les Sports'. Readership of the traditional press is on a steady decline in Belgium, especially among French-language titles. Only 22% of Flemish admit they read newspapers on a daily basis.

Radio

The history of Belgian broadcasting dates back to 1913, when the first radio concert in Europe was broadcast in long wave. The first TSF radio station, on the initiative of Queen Elizabeth, was installed in an annexe of the Royal Palace in Laeken, but on 19 August 1914, due to the threat of war, the installation was demolished on the orders of King Albert[365]. Belgian broadcasting, however, began to develop back in the 1920s. In 1922, a licence was granted for the first local commercial radio station. It was Radio Antwerpen, better known as Radio Kerkske (Little Church Radio), because its transmitter was located in a church tower[366]. The following year, the Belgian Broadcasting Corporation founded Radio Belgique, which began broadcasting in French. In 1930, the state-owned radio broadcaster, NIR (Nationaal Instituut voor de Radio-omroep), was established, financed solely by subscription fees, without any advertising. NIR began broadcasting in February 1931, in both Flemish and French.

From the beginning of the German occupation of Belgium, in May 1940, private radio initiatives were banned by the Nazis, although there were still attempts to

[363] Hendrickx, Truyens, Donders, Picone, *op. cit.*, pp. 8–13.

[364] Women's magazine portfolio sold in 2018: www.roularta.be/en/homepage (accessed 11.03.2022).

[365] Based on RTBF story: www.rtbf.be/entreprise/a-propos/histoire (accessed 16.03.2022).

[366] *Radio Antwerpen – History*, www.offshoreradiomuseum.co.uk/page52.html (accessed 11.03.2022). After the war, Radio Kerkske will start broadcasting briefly in 1955, but will be closed down by the authorities due to lack of a licence.

broadcast Belgian national radio, through Radio Lille and Radio Paris II[367]. After the end of the World War II, the private Flemish stations that had operated before the war laid the foundations for four regional entities within the NIR: Ghent, Antwerp, Kortrijk and Hasselt. In May 1960, the NIR was dissolved and two institutions were created in accordance with new legislation: Belgian Radio and Television for Dutch broadcasts (BRT, Belgische Radio- en Televisieomroep) and Radiodiffusion-télévision belge (RTB) for French-language ones. The state broadcasting monopoly was maintained for state-owned entities, and the first pirate radio stations, such as Radio 245 came on air. In 1961, the Troisième Programme was launched.

To meet the needs of the linguistic communities, at the end of 1977, RTB changed its name to RTBF (Radio-télévision belge de la Communauté française), precisely to clearly emphasise the Walloon character of the institution. The German-speaking part – Belgischer Rundfunk (BRF) – is also divested, while BRT retained its name until 1991. It was not until 1981 that commercial radio broadcasting was allowed in the country, albeit without the ability to broadcast commercials ads, which changed after 1985. As a result, however, the illegal local radio stations gradually disappeared, with official ones starting to operate as early as 1982 in Wallonia, and 1987 in Flanders.

Back in the 1990s, Belgium had three types of radio: local, city and regional. In the case of national radio, Radio Contact was the sole broadcaster until 2001, while after 2001 the radio market was enhanced by VMMa-founded Qmusic (now owned by DPG Media) and 4FM (then Think Media, now also DPG). Thanks to these initiatives, within a decade the share of the public broadcast channels fell from 85% to approximately 60%. It is estimated that the Walloon radio stations are more competitive towards the public broadcaster than the Flemish ones.

The Belgian public radio broadcaster (RTBF/VRT) broadcasts four basic channels: the news channel La Première/Radio1, VivaCité/Radio2, the jazz and classical music-oriented Musiq'3/Klara (formerly Radio 3), the pop music-playing Tipik/MNM (Music and More). Since 1983, the youth-oriented Flemish Studio Brussel has operated, and its counterpart the equivalent of which is Classic 21 radio.

Commercial radio stations most often belong to multimedia concerns like Rossel. The stations most listened to in the French-speaking part are[368] public VivaCité (12% of listenership), Bel RTL and Radio Contact (both almost 10.9% each) and Radio Nostalgie (10.6%). The stations owned by the public broadcaster are listened to by 32% of the audience.

[367] www.radioheritage.net/europe/countries-belgium.htm (accessed 16.03.2022). At the beginning of 1943, BNRO (Belgische Dienst voor Radio-Omroep) broadcasts as a radio station of the Belgian government-in-exile, via the BBC's European service.

[368] Statista data: www.statista.com/statistics/543830/audience-market-share-belgian-french-speaking-radio-stations/ (accessed 11.06.2022).

Television

The first trial programme of Belgian television, within the framework of INR-NIR, began broadcasting in February 1931, in both Flemish and French. In 1952, the INR took over responsibility for television services and in 1953 the first general programme[369], in both national languages, was officially launched: La Une (French) and TV1 (renamed Eén in 2005). In 1959, INR-NIR is integrated into the Department of Culture, while the 1960 law creates Belgian Radio and Television – RTB/BRT. In 1977, a second channel – TV2 (Flemish part) and RTBis (French) were launched.

Still in the late 1950s, Dutch, German and French stations begin to appear in the country as a result of the development of cable television. This affected the position of the public broadcaster, which now had to face a competitive environment that was a novelty to them. However, it would not be until 1981 that a new law allowed the presence of paid TV, regional television and, most importantly, private television in both Wallonia and Flanders. It would take Wallonia six years to launch a private competitor to the public monopoly and eight years for Flanders. In the 1990s, cultural and linguistic communities and the media gained greater independence, including political autonomy.

In 1991, BRT was renamed BRTN (Belgische Radio- en Televisieomroep Nederlandstalige Uitzendingen), and on 1st January 1998 the broadcaster adopted the name VRT (Vlaamse Radio Televisie Omroep). As of this year, the Belgian public media operated as a public corporation rather than state entities. Emphasising the Flemish character of the station, after years of declining market share, VRT became the market leader again at the beginning of the 21st century. VRT is subsidised from multiple sources: from state subsidies (based on periodic decrees) as well as from advertising and sponsorship[370]. In addition to the aforementioned radio, VRT today broadcasts three general channels: Eén, the more modern Canvas, and Ketnet, aimed at the children and adolescents (the latter two were both established in 1997). In addition, the broadcaster manages the online platform VRT NU and Ketnet Junior available within its framework. For RTBF, the Walloon public broadcaster, the subscription is similar. The Belgian government authorised advertising on RTBF channels in 1989, and the broadcaster itself competes on the Belgian market with French TF1. La Une, Tipik (founded in 1977 as RTBis[371]) and La Trois (1997) are part of RTBF.

In both Flanders and Wallonia, more than a dozen regional TV stations are broadcast, some of which are subsidised by state grants.

Private broadcasters began operating in Belgium in 1987 (Wallonia) and 1989 (Flanders) respectively, ending the public broadcasting monopoly. After the

[369] www.rtbf.be/entreprise/article_1952-naissance-de-la-television-avec-tele-bruxelles?id=3469 (accessed 11.03.2022).

[370] www.vrt.be/en/about-vrt/finance/ (accessed 15.03.2022).

[371] https://www.rtbf.be/entreprise/a-propos/histoire#1977 (accessed 15.03.2022).

commercial stations were allowed to enter the market, both public channels started to face considerable financial problems, so state intervention was necessary. Broadcasting subsidies were awarded, amounting to nearly €250 million each.

The first national commercial broadcaster, VTM (Vlaamse Televisie Maatschappij), was founded in 1989, mainly as a result of pressure from European institutions that drew attention to the necessity to abolish the public service broadcasting monopoly. It is worth noting that the VTM station was to be guaranteed an 18-year monopoly on TV advertising, but one of the conditions was that the press concern would own at least 51% of the shares. Eventually the owners were nine entities, including groups such as Roularta and De Persgroep, which became sole owners of the channel in 1998[372]. In 1993, the Roularta concern launched the first regional TV channels in Flanders, for the province of West Flanders – Focus and WTV. These stations, broadcast under the Regionale Media Maatschappij (RMM), were owned by it until 2020.

In 1994 the SBS group launched VT4, a channel which, unable to operate on a level playing field, was forced to broadcast from London. The station was also available on cable networks, and it was not until 2002 that VT4's owner applied for a Flemish licence. In 1999. Roularta sets up the business Canal Z, in partnership with the newspaper De Tijd; in 2001 its French-language counterpart, Canal Z, was established.

The image and direction of Belgian non-public television was influenced by the rivalry between VT4 and VTM, whose owner launched Ka2 (today as Q2) back in 1995. In the music field, the response to TMF Vlaanderen, founded in 1998, was the youth-oriented JimTV. The channel closed in 2015. A lifestyle Vitaya was still launched in 2000, operating under the name VTM3 since 2020. The first paid channel available in Flanders was Filmnet, launched in March 1985 for Scandinavians and parts of Benelux (later available also in, for example, Poland). In the 1990s, it had more than 180,000 subscribers. In 1997, it was renamed Canal+, and since 2005 it has been owned by telecoms operator Telenet, and today operates under the name Play More. Canal Plus launched the paid TV channel Canal Plus Belgique in 1989. In 2004, BeTV, a cable TV platform, was launched to replace C+Belgique.

The first private TV station in the Walloon region was RTL-TVI (Télévision Indépendante), which was granted a nine-year broadcasting licence in 1987. The channel was owned by the Luxembourg-based RTL Group and the Walloon conglomerate Audiopresse[373]. Back in the mid-1990s, RTL also launched the youth-oriented Club RTL and PlugTV (today PlugRTL). The channels are part of RTL Belgium, owned by the merged DPG Media and Groupe Rossel since March 2022. The corporation also owns the online entertainment platform RTL Play and the news channel RTL Info[374].

[372] In 2018 Roularta sold its stake to De Persgroep, today: DPG.

[373] In 2005. RTL/TVI abandoned its Belgian licence, which was stricter than Luxembourg's.

[374] Following the sale of RTL, the last major foreign media outlets 'reverted' to domestic entities. www.rtlbelgium.be/en/marques/ (accessed 16.03.2022).

DPG Media itself furthermore includes stations such as VTM Kids, VTM Gold, VTM2, the aforementioned VTM3 and the VTM Go service.

According to statistics, in 2021 Belgians spent an daily average of 5 hours and 13 minutes watching TV and movies[375], 63% of which was devoted to linear TV. However, other studies show that the daily time spent watching TV in 2020 was significantly lower: 222 minutes for the Dutch community and 230 minutes for the French-speaking regions[376].

Today's leaders of the Dutch part of the TV market[377] are the public Eén (32.5%), VTM (17.8), Vier (6.9%) and Canvas (5.2%). The total share of the channels operated by public broadcasters exceeds 42%. The French-speaking part of Belgium is also dominated by a public channel, La Une (approximately 20.7%), followed by RTL-TVI (18.4%) and TF1 (11.7%). Tipik is watched by 5.7% of viewers and the third public channel, La Trois, by no more than 1.5%. Nearly 4.2% of the share belongs to the youth channel AB3 (Antenne Belge 3).

The country fully transitioned to digital broadcasting in 2010, when analogue was discontinued by the Walloon public broadcaster RTBF. VRT abandoned analogue terrestrial broadcasting at the end of 2008. The on-demand TV (SVoD, Subscription Video on Demand) segment is still dominated by Netflix, which has a 49% share of users in Flanders, although the number of subscribers declined in early 2022. At the same time, there has been rapid growth in subscriptions to DPG Media's Streamz platform and Disney+; both were launched in 2020 and already have a market share of approximately 8% each.

New media

At the end of 2021, the number of internet users in Belgium stood at 10.95 million, while the internet usage rate has reached 94%, having increased by more than 20% in the last decade alone. Belgian internet users have been using it for years mainly to search for information about services, products or events, and to keep in touch with family and friends[378]. Still, 49% of internet users do not use the websites of state offices. One in three Belgians watches video content online.

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375 Video Observer data, survey of 2,500 people aged 18–64. Source: L. Klingert, *Belgians spend over five hours watching videos every day*, www.brusselstimes.com/215579/belgians-spend-five-hours-and-thirteen-minutes-watching-videos-per-day-study-finds (accessed 31.05.2022).

376 www.statista.com/statistics/1124247/daily-television-viewing-time-in-belgium/ (accessed 31.05.2022).

377 Data for 2021: www.statista.com/statistics/543958/market-share-tv-channels-dutch-speaking-belgium/ (accessed 31.05.2022).

378 S. Kemp, *Digital 2021: Belgium*, https://datareportal.com/reports/digital-2022-belgium (accessed 16.04.2022).

Although Brussels' 'Le Soir' was the first French-language website in the country, the local press had not begun to introduce digital versions of its editions in earnest until after 2000. The financial 'De Tijd' was the first to offer its readers an online edition, while 'De Standaard' introduced the PDF model. Digital press sales only started to become popular after 2010, which was facilitated by the introduction of iPads from Apple[379]. Only 16% of Belgians pay to access online news today. Flemings most often use the daily newspaper site 'Het Laatste Nieuws' (48%) and VRT Nieuws (35%) for information. For Walloons, the most important source of information is the RTL News online service (39%), followed closely by the public RTBF website (30%)[380]. Among social media, Facebook clearly dominates, used by 69% of Belgian internet users; followed by YouTube (52%) and Instagram (31%).

The internet is the most frequently chosen source of information for 78% of users, with a slight 4% downward trend over the last five years. Traditional media have lost significantly more in this area: the press is a source of information for 32% of users and television for 64%. Interestingly, the information provided by the public media is the most trusted in this field. However, there is a concern about the level of disinformation online, resulting in the formation of specialised fact-checking organisations. Among the new tools used by Belgian residents, smartphones are the most popular (59%). On average, Belgians spend 5 hours 45 minutes daily online.

Cinema

In 2020, there were 476 cinemas[381] in Belgium, including 68 in Brussels alone, 228 in Flanders and 180 in Wallonia. Belgian cinemas were visited by more than 5.5 million viewers during this period, although it should be noted that the year before it was more than 20 million. However, culture in the country has not previously faced the effects of the pandemic lockdown.

At a national level, companies involved in film and audiovisual production can count on support under a programme called Tax Shelter. Established in 2003, it is a form of government-approved tax incentive for film productions, either Belgian or co-produced. It provides producers with an attractive way to finance projects, investors with a tax exemption and the Belgian state gains from increased economic activity and spend[382].

Various economic and cultural funds also operate in the country regionally. The former are designed to attract productions to various regions of Belgium and to stimulate investment in the national audiovisual industry. The amount of support is

379 T. Evens, K. Raeymaeckers, *Media landscapes: Belgium,* https://medialandscapes.org/country/belgium/media/digital-media (accessed 16.04.2022).

380 Reuters Institute for the Study of Journalism: Digital News Report 2021, Belgium, p. 67.

381 Belgian Statistical Office data: https://statbel.fgov.be (accessed 31.05.2022).

382 www.belgiumfilm.be/film-financing/tax-shelter (accessed 16.04.2022).

determined by economic criteria and granted by institutions under the authority of the regional governments – Screen Flanders for Flanders, Wallimage for Wallonia and the screen.brussels fund for Brussels. Cultural funds are in turn intended to support local cinematography initiatives and projects, and international co-productions. The cultural criterion is the deciding factor here, and the support is granted by the following respectively: Flemish Audiovisual Fund (Vlaams Audiovisueel Fonds) and Cinema and Audiovisual Centre (Centre du Cinéma et de l'Audiovisuel).

THE NETHERLANDS

Populated by nearly 17.6 million people (2021 figures[383]), with an area of approximately 41,000 km^2, the Netherlands is yet another of Europe's multilingual countries. The two official languages are Dutch, the national language, which is also spoken in northern Belgium, and Frisian. Despite the fact that 14% of the country's citizens are migrants, i.e. people born abroad[384], the Dutch form a rather homogeneous society.

The foundation of the Dutch media and freedom of expression in general is Art. 7 of the Constitution: 'No one needs permission in advance to use the press publicly in thought or feeling, except for the common responsibility in accordance with the law'. It primarily protects against slander or insult. It is maintained that the state should not interfere in the operations of a public broadcaster, which is why the government created the Media Commission (Commissariaat voor de Media) in 1988. Its role is, inter alia, to allocate frequencies, grant licences to local public broadcasters (one for each municipality), supervise non-commercial programmes and the observance of the length of advertising time, and to control the websites and activities of local, regional and national broadcasters[385]. It was only in 2009 that the Dutch government established the right for journalists not to reveal their sources, except in matters fundamental to national security or where the state interest would so require. It is worth noting that the Netherlands has no anti-trust law, and press publishers are more often than not asked to employ a sort of 'self-restraint'. The country has its own Press Fund to support newspapers and magazines.

The most important journalistic organisation is the Dutch Association of Journalists (Nederlandse Vereniging van Journalisten), which is a combination of a trade union and a professional organisation. The NVJ is headquartered in Amsterdam and has nearly 8,000 members (figures from www.nvj.nl), 1,000 fewer than just a few years ago. Local and regional media are organised in the Dutch Federation

[383] https://opendata.cbs.nl/statline/#/CBS/en/dataset/83474ENG/table?ts=1655833806480 (accessed 30.04.2022).

[384] www.cbs.nl/en-GB/visualisations/dashboard-population/origin (accessed 30.04.2022).

[385] Ł. Zweiffel, *Holandia*, [in:] *Systemy medialne państw Unii Europejskiej*…, *op. cit.,* pp. 170–171.

of Local Public Broadcasters (Organisatie van Lokale Omroepen in Nederland). The professional organisation for the movie and television industry is the Association of Professional Film and Television Workers (Beroepsvereniging van Film- en Televisiemakers).

The 2008 Media Act regulates radio and television to a limited extent, but the entire media policy of the country focuses on the organisation of the public broadcasting system. Provisions are applied to the print media to prevent free market distortions caused by vertical or horizontal media consolidation. Dutch public media are co-produced in the cooperation with private organisations and associations. The country also has a Press Council (De Raad voor de Journalistiek), which is a self-regulatory body chiefly governing matters concerning journalistic ethics[386].

Even at the beginning of the 21st century, the Netherlands was still considered a 'newspaper country', with paid newspapers read by more than half of the population and TV usage much lower than in most European countries. Today, there has been a clear shift of the preferred information sources in favour for the Internet.

In the Reporters Without Borders ranking for 2022, the Netherlands was ranked 23rd, out of 180 countries assessed in terms of the level of press freedom. This is the first time it recorded such a low position, as in 2020 it was ranked 6th, and in 2016 was even awarded 2nd place. This decline ought to be attributed to the dominance of two Belgian entities in the media market.

Press

The oldest Dutch newspaper dates from 14th June 1618 and was titled 'Courante uyt Italien, Duytslandt etc.'[387], which translates as 'News from Italy, Germany etc.'. 'Courante' was long issued as a single broadsheet, with only one side printed. Only around 1620 was double-sided printing introduced, and in 1669 the title merged with the 'Amsterdamsche Courant'. The last change was its takeover in 1903 by 'De Telegraaf', which is still published today[388]. In 1656, the first issue of the 'Opregte Haarlemsche Courant'[389] was published – then under the name 'Weeckelycke Courante van Europa' and, having later merged with the 'Haarlems Dagblad', it is still published under the latter name as a regional newspaper.

At the beginning of the 17th century, the press was published in Amsterdam, with new publications gradually appearing in other Dutch cities too. At the time,

386 Zweiffel, p. 171. Also: www.rvdj.nl/.

387 H. Crijns, *An international news medium – the European dissemination of 17th century Dutch Newspapers*, www.europeana.eu/en/blog/an-international-news-medium-the-european-dissemination-of-17th-century-dutch-newspapers (accessed 30.04.2022).

388 https://archief.amsterdam/inventarissen/details/127 (accessed 30.04.2022).

389 M.R. García, *Meanwhile, in Holland, the oldest newspaper in the world gets rejuvenated*, https://garciamedia.com/blog/meanwhile_in_holland_the_oldest_newspaper_in_the_world_gets_rejuvenated (accessed 30.04.2022).

the press covered many topics concerning international affairs, including the Thirty Years' War in the years 1618–1648[390]. This was due to the fact that the Dutch press had a great deal of freedom to write about foreign affairs, although in the case of domestic issues it tended to adhere to the official line of the authorities[391]. From the 18th century onwards, Dutch newspapers were published primarily in French, chiefly due to the spread of this language around the world.

It is estimated that the Dutch press was strongly ideologised until the beginning of the second half of the twentieth century, due to the connections to political parties or religious organisations. This changed only in the wake of the transformations of the last two decades of that century, which included the increasing consolidation of capital in the media. It is worth noting that in the 1980s there were 25 publishers in the market, while in 2000 there were only 10. Today, the four largest groups control 95% of the market, with two of them – De Persgroep and Mediahuis – controlling more than 80%. In the 21st century, the number of independent publishers dropped to one-fourth of its previous number, and the aforementioned consolidation also resulted in the reduction of the number of dailies to one per city. As recently as the end of the last century, more than 80% of newspapers were delivered by subscription.

The circulation of the Dutch press is evenly distributed between national and regional titles. Outside the West Netherlands and its major cities, regional dailies dominate (17). Despite the rapid growth of online media, in 2015, the daily readership of newspapers in the 13+ group fell below 50% for the first time in history (44% when referring only to paid press), although at the beginning of the 21st century it exceeded 70%. Since 2017, the readership of newspapers (both paper and digital) has stabilised, and is still 47% in 2021[392]. Less than 20% of press revenue today comes from published advertisements, which means a two-thirds drop over the same period.

According to NOM (Nationaal Onderzoek Multimedia[393]) data, national dailies reached more than 3 million readers aged 13+ in 2020, and this has been a consistent figure for several years. In 2000, daily circulation exceeded 5 million. What is being pointed out is that due the impact of the pandemic, the level of demand for reliable information and interpretations has increased. The daily reach of newspaper websites has grown year-to-year by 13%.

More than half of paid circulation in the Netherlands is made up of national newspapers, whose circulation figures are still impressive. The country's only conservative

[390] A. der Weduwen, *Dutch and Flemish Newspapers of the Seventeenth Century, 1618–1700. 2 vols.*, Brill, 2017, p. 181.

[391] H. Krauze, *Polska inspiracja prasowa w Holandii w latach 1791–1794*, „Rocznik Historii Czasopiśmiennictwa Polskiego" 1962, no. 1, pp. 50–51.

[392] 35% in print only. Data: Dutch Media Monitor 2021, www.mediamonitor.nl/wp-content/uploads/Dutch-Media-Monitor-2021-Dutch-Media-Authority-English-summary.pdf (accessed 22.04.2022).

[393] www.nommedia.nl/en/2234236/NOM-reports.html (accessed 22.04.2022).

tabloid 'De Telegraaf' (est. 1893), is published with a circulation of nearly 360,000, and the only national title with local mutations published since 1946, the also conservative 'Algemeen Dagblad', enjoys a circulation close to 342,000 copies. The opinion-forming, considered progressive and centre-left 'de Volkskrant' (est. 1919) still has a circulation of over 300,000, and the liberal-conservative 'NRC Handelsblad' (published since 1970) has a circulation of approximately 145,000. Other titles worth mentioning include Amsterdam's 'Het Parool', a socially concerned and based on in-depth articles 'Trouw', financial 'Het Financieele Dagblad' or the longest-running newspaper in the English language, and 'NIS News Bulletin' founded in 1965.

Since the early 2000s, declining readership of the most-read daily titles has been very pronounced, ranging from approximately 30% ('de Volkskrant') to 60% ('De Telegraaf'). The 2009 crisis also affected newspapers, with publishers beginning to take a closer look at their costs, which were no longer offset by advertising revenues.

Free national dailies are no longer published in the Netherlands. In 1999, two titles were launched almost simultaneously: 'Spits' (11 June) and the fourth edition of the European 'Metro' (21 June). In 2007, the first issue of 'De Pers', and the free tabloid 'DAG' were published. The former two recorded circulations of 400,000 each, and 'De Pers' even 500,000 copies. The first to collapse was 'DAG' (2008), followed by 'De Pers' (2012), 'Spits' was withdrawn in October 2014 and 'Metro' finally closed on 20 March 2020[394]. Nearly 40 free titles other than dailies are still published in the country.

However, there are no Sunday newspapers. Although regional newspapers 'De Twentsche Courant Tubantia' and 'De Telegraaf' introduced such editions in 2004, they were closed down in 2008 and 2009 respectively. In addition, the Dutch media landscape lacks typical tabloid newspapers or a specialised sports press.

Until a few years ago, there were eight large publishing groups in the country, most of them owned by Belgian capital. However, the reshuffling of the market in 2016 meant that today 80% of press circulation is in the hands of two publishers: DPG Media and Mediahuis[395]. The former includes the most important national and regional titles such as 'de Volkskrant', 'Trouw', 'De Gelderlander' or 'De Stentor'. Mediahuis is the publisher of, for example, 'De Telegraaf' and 'NRC Media', as well as the regional 'Dagblad De Limburger' or 'Noordhollands Dagblad'[396].

Throughout the country, weeklies continue to hold a strong position, with the segment dominated by DPG Media ownership. This is the result of the sale of Dutch media company, Media Netherlands by Finnish Sanoma, in April 2020 (among

[394] *Metro, the last Dutch free newspaper, is killed off by coronavirus*, 17.04.2020, www.dutchnews.nl/news/2020/04/metro-the-last-dutch-free-newspaper-is-killed-off-by-coronavirus (accessed 22.04.2022).

[395] H. Vandenberghe, L. d'Haenens, *The Netherlands. On media concentration and resilient freelance journalists, [in:] The Media for Democracy Monitor 2021…, vol. 1, op. cit.*, p. 278.

[396] At the end of 2020. Mediahuis has acquired regional conglomerate NDC.

other things, this transaction enabled Sanoma to acquire the regional titles owned by Alma Media). The Dutch most commonly choose TV guides, women's magazines, children's magazines and gossip magazines. Among the domestic owners in this segment, we should mention, for example, Audax Groep, and, among the most important opinion weeklies, the country's oldest, 'De Groene Amsterdammer' (est. 1877, with circulation over 23,000) and 'Elsevier Weekblad' (est. 1945, with a circulation of nearly 60,000). A popular idea is to include free inserts in magazines.

TV market

The role of television in the Dutch media system is significant, mainly due to the setting of new trends in entertainment television (*reality shows*). It is worth noting, for example, that commercial broadcasters have to divide the airtime between specific content, and there is a requirement for public support for a programme. The first experiments with television took place in the 1930s, thanks to the involvement of the rapidly growing Philips technology company.

In practice, NPO (Nederlandse Publieke Omroep), the Dutch public broadcaster, is a network of public radio and television companies affiliated with it. It was established in the 1930s and still maintains a decentralised character today, with statutory functions in news, sport, education and culture. The NPO is made up of various broadcasting associations that represent social, religious or political movements, or a specific target group – such as young people or the elderly. Currently these stations are: AVRO TROS, BNNVARA, NOS, NTR, EO, HVMAN, KRO NCRV, MAX, VPRO, the two right-wing broadcasting organisations that were licensed in 2010 (POW, WNL) as well as two from the beginning of 2022 (ON, ZWART)[397].

The Dutch Television Foundation, i.e. NTS (Nederlandse Televisie Stichting), was established in 1951 on the initiative of the public radio stations (AVRO, KRO, VARA and NCRV) and was intended to represent all broadcasters at the time. In the same year, the first NPO1 channel was launched; a second programme was created in 1964 followed by a third in 1988. In January 1956, the first news programme, NTS Journaal, began broadcasting, with the government's stated task of producing neutral programmes such as news and sport.

In 1962 the Dutch Educational Television (NOT, Nederlandse Onderwijs Televisie) was launched. In May 1969, NTS merged with the Dutch Radio Association to form NOS (Nederlandse Omroep Stichting) – the Dutch Radio and Television Foundation, producing programmes for the public media, and the Advertising Foundation (STER)[398]. In the same year, a law was passed in the Netherlands restricting access to electronic media from political or religious institutions, in favour of any non-commercial organisation. This marked a significant expansion of the market.

[397] https://over.npo.nl/organisatie/about-npo/our-organisation (accessed 16.04.2022).

[398] The organisation was given a monopoly on advertising activities on radio and television.

The main channels broadcasting within the NPO are NPO1, NPO2 and NPO3 (until 2014 which Nederland1, 2, 3), respectively with family (including sports), information and cultural programmes, and aimed at young people. The Dutch public media are funded by both subscription and advertising. The legitimacy of such funding was publicly debated during the 2008–09 crisis years, not least in the face of a decline in subsidies from public sources. However, the public media sees its mission as an important venue for debate on serious topics, even those presented in controversial ways, so, as mentioned in the introduction, the country is the cradle of European paradocumentary and *reality shows*. As early as 1994, the Dutch were able to watch the 'Dood op verzoek' programme ('Death on Request'), which showed euthanasia procedures, albeit without the moment of death. The latter has already been shown on channel NPO 2 ('Levenseindekliniek', or 'End of Life Clinic' movie), sparking a discussion about the limits of the right to show such content in public.

The most important and best-recognised manufacturing entity is Endemol, founded in 1994 as a result of the merger of the concerns owned by Joop van Ende and John de Mol. The concern focused on formatted TV programmes (Big Brother, Fear Factor) and paradocumentaries, *docu soap* or shows for children and young people. At the end of 2014. Endemol merged with Core Media and 21st Century Fox, and today operates as the Endemol Shine Group.

In 2016, 92.6% of the Dutch population (aged 6+) watched at least one minute of linear TV, and this was the first year of decline in 10 years. During this time, viewing time has also decreased, dropping below 200 minutes in 2015 (first exceeded in 2003) to only 154 minutes in 2021 (drop of 6 minutes y/y). The total time spent in front of the TV, including VOD, was approximately 200 minutes per day. Changes in how and when people watch TV have been influenced by, among other things, the introduction of streaming platforms and the development of VOD services. Today, Netflix has more than 2 million subscribers in the Netherlands, and has to compete with Disney+, which has been present from 2019 in approximately 640,000 households. Videoland (RTL) is thriving, with more than 1 million subscribers (up 20.9% year-on-year), while the NLZiet platform (public and commercial broadcaster) was established in 2014 and already boasts 200,000 subscribers[399]. A further three platforms have been announced for launch in 2022: HBO Max, Viaplay and the UK's Sky-Showtime. The situation on the VOD platform market is therefore analogous to the one that followed the introduction of commercial channels, when public stations lost more than half of their market share over the following two decades. Today, in terms of audience, NPO1 and RTL4 lead the way with combined shares of more than 1/3rd of

[399] C. Dziadul, *Strong growth for RTL streaming services*, www.broadbandtvnews.com/2022/03/17/strong-growth-for-rtl-streaming-services (accessed 20.04.2022). Also: J. van Broekhoven, *Getest in Totaal TV: kabelkiller en videorecorder NLZIET*, www.totaaltv.nl/nieuws/getest-in-totaal-tv-kabelkiller-en-videorecorder-nlziet (accessed 20.04.2022).

the market, and followed by NPO2 and SBS6[400]. The share of public channels is a total of 36.3%, followed by 24.6% of RTL group and 15.9% of Talpa.

As far as media companies are concerned, in the Netherlands, the division is in practice between the channels of the RTL Nederland group and Talpa TV group, with the former broadcasting, for example, family channel RTL4, the youth channel RTL5 and the men's channel RTL7, while the former has, for example, the family channel SBS6, the women's channel Net5 and the youth channel Veronica. Until 2017, the most important entity was Finnish-owned Sanoma SBS, which was sold to John de Mol, owner of Talpa Network. Following the takeover of SBS Broadcasting, negotiations began for a merger with RTL Nederland and the creation of one large, homegrown network. The planned merger was announced in mid-2021, awaiting approval of the plans by the European Commission and the Dutch Authority for Consumers and Markets. The latter, however, issued a refusal at the beginning of 2022.

The Dutch are most likely to watch football matches, programmes like *reality shows*, game shows and competitions. Local or regional stations broadcasting in Dutch are also popular. The Netherlands switched completely to digital terrestrial broadcasting back in 2006, the second country in the world to do so.

Radio

The beginning of radio broadcasting dates back to 1919, when the first signal was transmitted from Scheveningen. The commercial system was replaced by the state system the very next year. Since 1947, the NRU (Netherlands Radio Union) has functioned as a cooperative of broadcasting associations. In the same year, two channels were launched: Hilversum1 and Hilversum 2 (under this name until 1985), and the Radio Nederland Wereldomroep international station. The third programme was established in 1965 and, as like many such cases in Europe, it was a response to illegal stations broadcasting from offshore waters, such as Radio Veronica (1960) and Radio Noordzee (1964).

The public broadcaster NPO consists today of 5 specialised channels: NPO Radio1 (news), Radio2 (family), 3FM (rock music), Radio4 (classical music, culture), Radio5 (minority content, education). In addition, there are digital radio stations: Radio2 Soul&Jazz, FunX 6 aimed at 15–35 year olds, Sterren NL presenting Dutch music, and the fully self-produced, musical station 3FM KX. In addition, each of the twelve provinces has its own branch of public media, as do the local communities, whose radio stations are subsidised by municipal taxes. There are nearly 300 such stations broadcasting in the Netherlands, although in their case it is difficult to speak of profitability.

One of the first commercial radio stations were established in 1988: Radio10 – broadcasting by cable from abroad (the channel was officially an Italian station

[400] SKO agency data for 2021. Source: www.telecompaper.com/news/dutch-daily-tv-viewing-time-down-slightly-in-2021--1410051 (accessed 20.04.2022).

broadcasting by cable), Sky Radio and Cable One, operating only until 1989. The law allowing commercial broadcasters was not passed until 1992, after which time some of the radio stations previously present on cable networks were allowed to broadcast using FM. Of the more important new stations it is worth mentioning a business *talk radio* channel, Business Nieuws Radio (BNR), launched in 1998 and owned by the publisher of 'Het Financieele Dagblad'. To this day, it is the only radio station of its kind in the country.

The last decade has seen significant consolidation on the radio market resulting from the aforementioned acquisitions. Consequently, the most important radio stations have been included in the structure of major media corporations. The leading commercial radio stations in the Netherlands belong today to the Talpa Network and include, for example, Radio538, Sky Radio, Radio Veronica and Radio10. DPG Media is the owner of Qmusic[401]. The most popular radio in terms of audience reach is now Radio 538. The highest listenership, is, in turn, enjoyed by the public NPO Radio2 (approximately 13%), followed by Radio10 and QMusic who have shares of nearly 11% each. Overall, the share of Talpa-owned radio stations stands at 33%, followed by the public NPO (30%) and DPG Media (just under 9%)[402].

The most important radio stations are youth music stations. Although traditional radio listening has declined by nearly an hour since the beginning of this century, it still stands at approximately 160 minutes a day, and has been fairly stable for years.

New media

The Internet usage rate in the Netherlands is 96%, one of the highest in Europe. The online platform Nu.nl, owned by the publisher of Sanoma magazine, is the most visited news portal in the country, with 41% of internet users. The second is the website of the public NOS News, followed by Algemeen Dagblad online; the website of 'De Telegraaf' daily newspaper has clearly lost a lot of its previous popularity. Interestingly, the Dutch favour local and regional news websites, as well as content on sites owned by the RTL giant[403].

In 2005, digital press was launched in the country. In 2016, the 'digital circulation' had already reached 1 million subscriptions, at which time publishers also started to introduce paywalls. Even so, digital sales did not compensate for the loss of revenue from the sale of paper editions. The major media, however, operate behind a paywall. For example, the financial 'Het Financieele Dagblad' can now count on more than

401 E. Lauf, S. Brennecke: *Mediamonitor 2021*, p. 34. Report available at: www.mediamonitor.nl/wp-content/uploads/Mediamonitor-2021.pdf (accessed 21.04.2022).

402 H. Vandenberghe H., L. d'Haenens, *op. cit*., p. 277.

403 Reuters Institute for the Study of Journalism. Digital News Report 2021, Netherlands, pp. 90–91.

6 million users per month. However, only 17% of the Dutch population is willing to pay to access information online.

An interesting phenomenon in the Netherlands is the rapid growth of online-only media, especially as the *majority* of them focus on news. These include the qualitatively new Decorrespondent.nl, with 70,000 users, or the aforementioned Nu.nl. There is also no shortage of specialised webpages covering specific areas of life – from finance to culture or lifestyle.

More than 25% of households in the Netherlands use multimedia packages including digital TV, telephony and internet. 15 million citizens are social media users. The most commonly used platforms include WhatsApp messenger, YouTube and Facebook, and until recently the Dutch were also die-hard Twitter users. Streaming services such as Spotify and Apple Music are also very popular.

Cinema

In 2021, there were 282 cinemas operating in the country with more than 1,000 screens in total. In both cases, there has been an increase for several years. Over the past five years (2017–2021), the number of Dutch movies screened has increased (54 in 2017, 75 in 2019), while the share of US productions has fallen, from 75% to just over 50%. The average share of European films is 20–25% (with an exception of the lockdown period)[404]. The share of streaming in the film industry's revenue is clearly growing.

The Dutch Film Fund (Nederlands Filmfonds, NFF) is the main institution responsible for supporting Dutch movie production. In 2021, it helped finance a total of 37 Dutch movies, mainly mainstream ones (21), which received twice as many grants as artistic productions (resulting in the share of the latter being only a half of the former). And still in 2019. NF has supported 19 mass and 12 niche productions. The NF also subsidises approximately 50% of production costs of documentaries and animation, close to 70% of short films, and over 30% of experimental cinema. NF supports minority productions and co-productions, and provides rebates for production costs incurred within the country. It includes the Dutch Film Commission, which is a kind of intermediary between the creative media industries, foreign producers and production companies.

[404] During the pandemic period, there was a marked decline in the number of cinema premieres, including domestic productions. The number of feature-length films fell from 492 to 340 in 2020 (for Dutch films from 75 to 43 respectively). More data: Film Facts & Figures of the Netherlands. Summer 2022 issue. www.filmfonds.nl/media/inline/2022/6/16/fff_2022_v20_spreads.pdf (accessed 30.05.2022).

Chapter 3. THE MEDIA MARKETS IN SOUTHERN EUROPEAN COUNTRIES

SPAIN

The Kingdom of Spain is the fifth most populous country in the European Union, with more than 46.7 million inhabitants. The country is divided into 17 autonomous regions and is not ethnically homogeneous. Although it has one official language, Spanish[405], official status has also been given to Catalan, spoken by nearly 17% of the population, Galician (8.2%) and Basque (1.5%). Nearly a fifth of the population are immigrants, mainly from Morocco, Colombia and Romania.

Spain's media system, as in Italy or Germany, is described as 'dual'. The journalists there are often politicians or people connected to politics, and social movements still organise around the press. This has a historical basis, dating back to the period of authoritarian rule and the new opening and significant transformation following the death of Gen. Francisco Franco (1975), a period known as *La Transición*[406], that lasted until 1982. It is also the result of regional diversity (affluent north of the country, poorer south, which becomes apparent, for example, during economic crises) and broad media policy. All this is reflected in the level and quality of media use, even today.

An important indicator of the condition of today's media in Spain is the fact that any legal basis allowing their democratisation has only been established until after 1978, when the new democratic Constitution was passed[407]. It contains, inter alia, articles on the free expression and dissemination of thoughts, ideas and opinions, the prohibition of censorship, definitions of the limits of freedom of expression and the control of public media (Art. 20). Kuś notes, however, that 'against a European backgroup, Spain is an important exception as a country that does not have

[405] With Spanish spoken by some 500 million people worldwide, the potential for Spanish-language media is enormous. More: M. Kuś, *Hiszpania*, [in:] *Rynki medialne wybranych*…, *op. cit.*, p. 49.

[406] R. Sajna, *Spain*, [in:] *State media systems*…, *op. cit.*, p. 145.

[407] Provisions for freedom of printing were found in the previous Constitution of 1812. Kuś further recalls that the new Basic Law 'started the process of increasing the autonomy of the country's individual regions', resulting in two levels of media market regulation – regional and national. Read: M. Kuś, *Hiszpania*, [in:] *Rynki medialne wybranych*…, p. 53.

a national institution regulating the audiovisual media market', although guidelines were written at the beginning of the 21st century.

An extremely important document for the media system and the journalistic profession is the Organic Law of 1997, that not only clarifies the provisions of the Constitution, but also sets out a number of rules related to the functioning of the media itself[408]. A distinctive feature of the Spanish media system is that market regulation started first at community rather than national levels. Interestingly, to this day, there is no national regulatory entity[409], and those that have been created, such as the National Commission for Markets and Competition, do not have the independent status, as they are governmental institutions or operate under the authority of the Communities.

In the freedom of the press ranking for 2022, Spain ranked 32nd.

Press market

The history of the Spanish press dates back to the mid-17th century, with the publication of the so-called *gacetas* or news bulletins[410]. In 1661, 'Gazeta de Madrid' and 'Gazeta Nueva' began to be published. Over the next decades, literary or religious magazines will gain popularity, with general publications clearly losing readers. The reason for this will be both the high level of illiteracy and the high price of the publications itself. In 1758, the first daily newspaper, 'Diario de Madrid' appeared, containing mainly advertisements, job offers and tips and trivia. In 1792, the first Catalan newspaper, 'Diario de Barcelona'[411] began to be printed in Barcelona, and with some pauses, it remained in publication until 2009 (since 1994 in digital form only). The 19th century marks the development of the opinion-forming press. The flagship title of this period is the centrist 'Faro de Vigo', founded in 1853, the oldest Spanish newspaper still published today.

At the beginning of the 20th century, up to 2,000 newspapers were published throughout the country. There are nearly 10 regional journalist organisations, united in the FeSP (Federation of Journalist Trade Unions). However, these organisations did not play an important role as trade unions due to the small size of their membership. Besides, journalism has never been free of politics in Spain – for a long time it was a closed and controlled profession, due to,

[408] D. Głuszek-Szafraniec, *Publiczni nadawcy w autonomicznych regionach Hiszpanii,* Katowice 2020, pp. 76–79.

[409] R. Sajna, *op. cit.*, pp. 146–147.

[410] J. Jaroszyk, *System medialny Hiszpanii*, [in:] *Wybrane zagraniczne systemy medialne*, ed. J.W. Adamowski, Warszawa 2008, p. 177.

[411] A. Checa Godoy, *Prensa y partidos políticos durante la II República*, Universidad de Salamanca 1989, p. 287.

for example, influence of the National Press Council and the training system at the official School of Journalism. It was only in 1966 that the use of preventive censorship in the media was relaxed[412].

We can divide the Spanish press market into two segments: national and regional. Nationally, a distinction is made between the so-called Madrid newspapers, the Barcelona press, general press and thematic newspapers (sports and economic publications). 'The big four' Madrid newspapers consist of the left-wing 'El País' (founded in 1976, presently sold in 79,600 paper copies and over 100,000 digital subscriptions), centrist 'El Mundo' (1989; paid circulation 40,000 copies, readership approximately 438,000), now the oldest, conservative 'ABC' (1903; 57,100 copies), and also conservative, 'La Razón' with a Catholic profile (founded in 1998; approximately 51 000 copies). The role of national opinion-forming dailies is played by, formally regional, Catalan dailies – 'La Vanguardia'[413] (1881, 74,200 copies) and 'El Periódico de Catalunya' (1978, approximately 66,000 copies). A publishing phenomenon, similar to the one present in other southern European countries, is the special position of sports dailies, originating from a love of football and, in particular, the rivalry between the country's two biggest football clubs, Real Madrid and FC Barcelona. 'Real's daily newspaper' is 'Marca' published in the capital since 1938, and the Spain's most widely read daily newspaper today. Even at the beginning of this century, its sales exceeded 400,000 copies, but today it is 58,000. There has been a visibly marked decline in readership, which reached 2.5 million in the first decade of the 21st century and today amounts to 'only' 859,000 readers[414]. Madrid's other sports magazine is 'AS' (est. 1967). FC Barcelona is supported by the daily newspapers 'Mundo Deportivo' (1906) and 'Sport' (1979) published in Barcelona.

Mediterranean countries share a characteristic trait – the high status of economic titles within the press system. While economic newspapers were virtually non-existent under Franco, by the early 1990s there were four in Madrid alone. After the closure of one of the leading periodicals, 'La Gaceta de los Negocios' in 2013, the remaining three are still published: the oldest, 'Cinco Días' (founded in 1978, approximately 20,000 copies sold in 2017); the slightly younger 'Expansión' (established in 1986, 11,400 copies), and 'El Economista' published since 2006 (13,700 copies).

[412] M. Kuś, *Telewizja publiczna w Hiszpanii. Pomiędzy polityką i rynkiem,* Wrocław 2013, pp. 17–20.

[413] Since 2011 also published in Catalan.

[414] Data behind: www.unidadeditorial.es/categoria.aspx?id=prensa (accessed 16.05.2022).

Changes caused by the economic crisis of 2006–2008 contributed to the dismissal of almost 10,000 press journalists[415]. The crisis also resulted in the collapse of many Spanish magazines, and the withdrawal of many daily newspaper supplements from existing ones. These were an important part of the market segment, as they often acted, and continue to act, as magazines meant to increase circulation (e.g. 'Mujer de Hoy'). According to data from the Estudio General de Medios, more than 50% of Spaniards read magazines in 2000, while in 2016 this figure had dropped to 37.3%. The largest weeklies are still women's periodicals: 'Pronto' (1.7 million readers, decrease of more than 40% in a decade), 'Hola!' and 'Lecturas'. The second segment that experienced a particularly severe loss during the crisis was the free daily newspapers. By this time, several free newspapers had been published in the country, including, for example, 'Metro', 'Que!', 'ADN' and '20 Minutos'[416]. Today, only the latter is published by the Madrid-based company Multiprensa Y Mas.

Among the other Spanish titles, 'Mia' is the most widely read is magazine addressed to women, while 'Qué me dices' is a popular magazine targeted at men. Many papers on the market are Spanish versions of the most popular foreign titles like 'Men's Health'.

Spain today is characterised by a large number of dailies (127 at the beginning of the 21st century), mainly local and regional, although the overall level of circulation of copies per thousand inhabitants is one of the lowest in Europe. A low readership rate remains a negative differentiating factor, underpinned by, among other things, long-standing illiteracy, distrust of newspapers (used for years for propaganda) and an audience preference focused on entertainment rather than information[417]. The local press in Spain is called *prensa de proximidad*, which means 'close-range press', and sometimes also 'regional press'. As far as the regional press is concerned, it is impossible not to mention the press organ of the Basque Nationalist Party, the daily newspaper 'Deia' (est. 1977), published in both Basque and Castilian, advocating the autonomy for the Basque Country but critical of ETA. Among Basques, 'El Correo' is the most widely read newspaper, and the region's largest title is 'El Diario Vasco' (1934), published in Spanish[418]. Galicia is dominated by 'La Voz de Galicia', distributed throughout Spain and partly edited in Galician.

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415 V. Sapunov, *Wzrost bezwzględności w zarządzaniu mediami w Europie Zachodniej w warunkach kryzysu finansowego,* „Zeszyty Prasoznawcze" 2011, no. 1–2 (205–206), pp. 121–122.

416 R. Salaverría, B. Gómez Baceiredo, *Media landscapes: Spain,* European Journalism Centre 2017, https://medialandscapes.org/country/spain (accessed 20.04.2022).

417 R. Sajna, *Media hiszpańskie. Od „Gazety Madryckiej" do latynoskiej teleSUR,* Toruń 2006, pp. 68–71.

418 D. Głuszek, *Media w Baskijskiej Wspólnocie Autonomicznej*, „Zeszyty Prasoznawcze" 2004 , no. 1–2 (177–178), p. 96.

In 1986 Spain became a member of the EEC, and this was the beginning of the expansion of foreign conglomerates[419]: German Axel Springer, Gruner+Jahr, Bauer and Bertelsmann, Italian DeAgostini or French Hachette. The expansion resulted in the aforementioned Spanish versions of Western magazines. In the regional markets, they have tended to emerge as joint shareholders – for example, News Corporation and Hersant, although, much like in Italy and Greece, they failed to launch any tabloid. In a sense, the *prensa del corazón*, or 'press of the heart', is entertainment aimed at women[420].

The strong dependence of the press on advertisers, naturally affected the health of the entire press market during the period of the aforementioned crisis. As a result, the level of capital consolidation increased as a remedy to cut excessive publishing costs, although large media monopolies and the level of media consolidation had already been on the rise[421]. Today, the core national publishers consist of several large groups. The first of these is the Prisa group, which also operates in 23 other countries and includes 'El Pais', 'AS', 'Cinco Dias' and 'El Huffpost'[422]. The second is Grupo Vocento[423], created in 2002 from the merger of Grupo Correo and Prensa Española, with a portfolio of 15 titles that includes the national 'ABC' and regional magazines such as 'Sur', 'Hoy' or 'El Correo'. The third press conglomerate is Unidad Editorial, which has been operating since 2007– since the merger of Italian Unedisa and Spanish Recoletos. Its flagship brands are 'Expansión' (economics), 'Marca' (sport) and 'El Mundo'. The largest Catalan publishers are Grupo ZETA, owner of titles such as 'Sport', 'El Periódico' and 'Diario Córdoba', and GrupoGodo, with titles such as 'La Vanguardia' and 'Mundo Deportivo'.

Radio

The origins of Spanish broadcasting date back to the 1920s. State supervision of the radio broadcasting system was introduced in mid-1924, resulting in the ability to grant concessions. The first to receive them were EAJ-1 Radio Barcelona and Radio España (EAJ-2), which started broadcasting later that year[424]. The point of origin of the radio network is The Cadena Sociedad Española de Radiodifusión (Cadena SER), formed by the merger of radio stations affiliated to the Radio Union, in the

[419] Remarkably, Spanish media groups have also attempted overseas expansions – Prisa is an example.

[420] D. C. Hallin, P. Mancini, *Systemy medialne. Trzy modele mediów i polityki w ujęciu porównawczym,* Kraków 2007, p. 97.

[421] R. Sajna, *Media hiszpańskie*… pp. 65–66.

[422] Publisher details: www.prisa.com/en/info/prisa-a-global-group (accessed 31.03.2022).

[423] https://en.vocento.com/who-we-are/press (accessed 31.03.2022).

[424] J. Jaroszyk, *op. cit*., p. 189.

framework which Unión Radio Madrid began broadcasting in 1925[425]. Two years later, it was already broadcasting a joint news programme with Radio Barcelona. The state-owned Radio Nacional de España (RNE) did not start broadcasting until 1937, during the Spanish Civil War, becoming the official and only (governmental) medium[426].

Within a decade, the number of operating private radio stations had increased to 68 (with 150,000 radio receivers[427]) and radio became highly desirable, especially for propaganda during the Civil War of 1936–1939. Local stations were established, broadcasting on shortwave, and the first FM radio started broadcasting in 1957.

The first half of the 20th century was marked by rampant censorship and subjugation to the RNE, with which every broadcasting radio station had to connect when transmitting a news service[428]. This requirement expired in 1977, after Franco's death. Additional prohibitions were also extended to music allowing the broadcasting of one foreign song per every three Spanish songs[429]. It was only the end of Franco's regime that allowed significant changes (institutional, but also social ones) to be introduced in the radio broadcasting. The state-owned and propaganda media were transformed into the State Social Media. At the end of the 1970s, the third radio programme RNE3, previously broadcast in Madrid, officially became a national channel.

A noteworthy landmark for the position of Spanish radio was the attempted coup on 23rd February 1981 (prevented by King Juan Carlos). On that day, Colonel Antonio Tejero seized the television station, preventing it from broadcasting, and leaving radio as the only medium able to provide up-to-date coverage of events in the country. For this reason, in Spanish history, this time is referred to as '*el tejerazo*', literally 'the night of the transistors'[430], and is considered a key moment for the perception and importance of radio as a medium expressing the public opinion.

As Spain is diverse in terms of population and territory, the changes have not left the autonomous communities and regions unaltered. Prior to 1980, there was no Basque language radio station broadcasting in the Basque Country and it

[425] *Unión Radio Madrid funkcjonowała wówczas jako SER (Sociedad Española de Radiodifusión), tj. Hiszpańska Spółka Radiofoniczna*. This radio station 'belonged' to the Republicans, Frankists' established the RNE at the time.

[426] N. Pielacińska, *Środki masowego przekazu w konstruowaniu tożsamości narodowej na przykładzie instrumentalizacji hiszpańskiej copli w czasach panowania Francisco Franco*, [in:] *Dziennikarstwo i media muzyczne a polityka*, eds. D. Baran, A.M. Trudzik, Opole 2020, pp. 44–45. The author recalls that it was founded by supporters of General Franco.

[427] J. Gracia, M.A. Ruiz Carnicer, *op. cit*., p. 56 (after Pielacińska). In the 1950s, there were approximately 3 million, two decades later already 8 million.

[428] Pielacińska, *op. cit*.

[429] R. Sajna, *Hiszpańskie media*…, pp. 41–43.

[430] A. Jaskiernia, *Publiczne media elektroniczne w Europie*, Warszawa 2006, p. 162.

was only in November 1982 that Euskal Irrati Telebista, the Basque Public Broadcasting Service, began operating there. Its tasks included development and reinforcement of the Basque language, as well as cooperation with the educational system[431]. In 1983, Catalunya Radio was founded, followed by Radio Asociacio de Catalunya. In Galicia, in turn, Radio Galega was launched in 1985; followed by Onda Madrid and the Andalusian Canal Sur[432]. In December 1987, the Telecommunications Ordinance, which regulated the Spanish radio market, came into force; there was a partial liberalisation of the broadcasting law, although the monopoly of the national telecommunications operator, Telefonica, was continued.

Today, the RNE's public radio structure broadcasts the following channels: Radio Nacional – general profile with news and cultural information, but also entertainment, until 2008 operating under the name Radio1; Radio Clásica – focused on classical music and high culture; Radio 3 – strictly alternative, thematically covering all types of art, dedicated to young people; Ràdio 4 – radio in Catalan and broadcasting in Catalonia; Radio 5 Todo Noticias – news, more journalistic; Radio Exterior de Espa*ña* – launched in 1971 and aimed at Spanish-speaking listeners abroad. Of the regional stations, we need to mention the Catalan Catalunya Radio, Andalusian Sur Radio, Galician Radio Galega and Basque Radio Euskadi.

In the early 1990s, the daily listenership of general news stations was 66 minutes, and that of radio in general was 105 minutes. Almost 30 years later, general-purpose radio stations were already being listened to for approximately 40 minutes daily, which was gradually 'taken over' by formatted radio[433]. 2003 marked radio's peak with people listening to more than 117 minutes per day on average; in 2021, this dropped to just 92 minutes[434]. Daily radio coverage is estimated at 26 million listeners, of whom 11 million listen to general radio. The largest and most popular network is Prisa-owned Cadena SER, with more than 4.1 million listeners and as many as 10.5 million unique users online. The second most listened-to commercial radio station is Cadena COPE, a Catholic radio station whose shareholder is the Spanish Episcopal Conference, with an audience of 3.5 million. The third major player is Atresmedia-owned Onda Cero with approximately 2.1 million listeners. The station was formerly part of the National Organisation of the Spanish Blind. LOS40, which broadcasts on DAB+, is part of the Prisa group and also enjoys large popularity. In 2021, RNE's public radio channel had 997,000 Spanish listeners, recording the biggest drop in recent years, by more than 400,000.

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431 D. Głuszek, *Media w Baskijskiej Wspólnocie Autonomicznej*…, *op. cit*., pp. 92–95.

432 J. Jaroszyk, *System medialny Hiszpanii*, [in:] *Wybrane zagraniczne systemy medialne*, ed. J.W. Adamowski, Warszawa 2008, pp. 190–191.

433 D. Głuszek-Szafraniec, *op. cit*., p. 89.

434 www.statista.com/statistics/451403/radio-listening-time-per-day-in-spain/ (accessed 16.06.2022).

The radio market in Spain is fairly stable, thanks to its high 'resilience' to shifts in advertising, and to the high listenership of programmes hosted by prominent radio personalities (Luis del Olmo, Carlos Herrera). In addition to the concerns mentioned (Prisa, Atresmedia), part of the radio market is in the hands of the former Mediaset. As the entities mentioned are now multimedia groups, this division is also reflected in the TV market.

Television

The first television signals were broadcast in the 1940s, but regular broadcasting did not begin until the following decade. The first programme of the TVE public broadcaster, La1, was launched in 1956 from Madrid. The official launch was scheduled for the anniversary of the Falanga and the Feast of Christ the King – 28 October. The first broadcast was the opening Mass, conducted in front of the image of St. Clare, the patron saint of local television.

In the early years, television operated strictly as a propaganda tool; due to its poor coverage, the Frankists funded receivers for cultural centres located in the countryside. Initially, it was also assumed that the main source of income would be the subscription fee for the use of receivers, but the idea was already abolished in 1964, due to small coverage of the TV and also poor collectability of the fee itself[435]. Thus, the funding of TV was based on advertising, which accounted for almost 98% of TV revenues in the 1970s, with the state budget being another source of income. Due to an over-reliance on the economic situation in the state, changes in the television segment of the media (introduction of private broadcasters) and non-transparent management policies, the financial situation of the public broadcaster deteriorated year by year. After years of 'attempts' at reform, the provisions of the RTVE Funding Act came into force in 2010, introducing a new way of funding public media: henceforth public subsidies offered a source of income (from central and regional budgets) and 1.5% of the gross annual income of telecommunications operators and 3% from private television broadcasters[436]. An additional source of funding is a small subscription fee, levied on income taxes[437].

In 1962, supervision over radio and television was separated; in 1973, a joint radio and television broadcaster, RTVE, was created, emerging from the influence

[435] M. Kuś, *Telewizja publiczna w Hiszpanii*…, *op. cit.*, p. 19.

[436] *Ibidem*, p. 101. This method of funding is being met with protests from operators who consider this form of levy to be unfair, especially as, for the time being, SVoD platform owners are exempt from the levy; www.telecompaper.com/news/spain-to-require-mnos-to-continue-funding-rtve--1406448 (accessed 22.06.2022).

[437] A. Leistner, *Public broadcasting: Licence fees in Europe compared*, www.euronews.com/2018/05/17/public-broadcasting-licence-fees-in-europe-compared. Also: *Spain has most affordable public broadcasting in Europe*, 31.01.2017, www.publicmediaalliance.org/spain-affordable-public-broadcasting-europe (accessed 22.06.2022).

of the Ministry of Information and Tourism. It would not become an autonomous public enterprise until 1977, subordinate to the Ministry of Culture, although the independence of the public media would prove to be a mere charade for a long time. A crucial event in the history of the development of public media will be the provisions of the 1978 Constitution and the RTVE statute finally passed in 1980[438]. In 1966, TVE launched Channel Two, while the act concerning for Channel Three was voted on later, in 1983. As a result, regional public television stations began to emerge, leading to an emergence of ETB1 (Basque Country) and TV3 (Catalonia). In total, 18 such stations would be created over the next twenty years. A little earlier, in 1980, the first Catalan regional television station began broadcasting, followed by the Basque Euskadi Irratia in 1982.

On 1 January 2007, pursuant to Act 17/2006 on State Broadcasting, TVE and RNE, hitherto playing an identical role to the public service broadcaster, merged to form the RTVE corporation – Radio Televisión Española[439]. Public television therefore broadcasts under RTVE, whose structure includes: basic general stations – La1 and La2, thematic channels, such as 24-hour news Canal 24h, sports channel Teledeporte, children's channel Clan, and channels aimed at the Spanish-speaking population living abroad – TVE Internacional and Star TVE, dedicated to American viewers. In addition to the aforementioned three commercial stations, the basic TV offering was later complemented by Cuatro, established in 2005, and LaSexta, launched in 2006[440].

Before the commercial market was regulated, paid satellite Canal10 began broadcasting from London via Intelsat in January 1988. It was met with little interest, however, and ceased broadcasting as early as September that year. In the same year, the Private Television Act was introduced, allowing ten-year broadcasting licences and giving the opportunity to introduce three television channels to the market. These were selected after a turbulent, and politicised, concession process built on informal relationships between owners. It resulted in a concession for Tele 5, a channel owned at the time by Silvio Berlusconi; Antena 3, owned by the Godo Group; and Canal Plus, owned by Univision Canal1.

In 1989, the Hispasat satellite communication system was launched, through which the digital platform Digital Plus (2003) and other channels began broadcasting. By 1995, there were already eight channels of independent regional broadcasters and the changes in the commercial sector resulted in the market share of

[438] M. Kus, *op. cit.*, pp. 19–24.

[439] www.rtve.es/rtve/20190709/quienes-somos/2099863.shtml (accessed 22.06.2022).

[440] Onda Digital's first digital terrestrial channel, Quiero TV, appeared in 2000; after its demise, other channels – Net TV and Veo TV – debuted on the market, which also did not survive. Originally launched in 2001, Sexta closed down two years later and just returned to the market in 2005.

the public broadcaster falling below 50%. A plan for the development of digital terrestrial TV was introduced in 1998, and the analogue TV signal was switched off in 2010, making Spain one of the first countries in Europe to do so.

What characterises the Spanish television market today is the low significance of local stations, larger prevalence of thematic channels, and a foreign capital share of the audiovisual market not exceeding 25%. Four groups can be distinguished: national channels, regional channels (with the highest audience in the autonomous regions of Catalonia, the Basque Country, Galicia and Madrid, Valencia or Andalusia itself[441]), local and thematic stations. Despite an ever-widening range of television offerings and a high level of market saturation, there has been a steady decline in time spent watching linear television. After the 2003 peak (4 hours, 5 minutes), in 2011 the time dropped below four hours, and in 2021 it was only 3 hours 27 minutes. Total viewing time, including SVoD channels, is estimated to reach nearly 5.5 hours per day. Television is dominated by foreign programmes and formats, mainly American and Latin American programmes (telenovelas, reality shows, etc.) and, as is typical of Mediterranean media, football events. 42% of viewers watch paradocumentary fiction programmes.

Viewing figures for the basic channels in 2021 are as follows: Telecinco (15% market share), Antena 3 (13.8%), La1 (9%) and LaSexta. The viewership of the Second Channel of the public TV fluctuates around 2%. Interestingly, the top of the most-watched stations has not changed for several years, although in the first decade of this century, for example, La1 could count on an audience of nearly 25%, and the third most popular was Cuatro (over 7%). This shows the scale of audience migration, however, mainly towards streaming platforms and paid stations.

Spanish media groups are generally indigenous companies and, with the exception of Grupo Prisa, they basically do not operate abroad. Prisa was founded in 1972, but has no TV presence today, having sold its stake in Canal+ in 2014. As a result, the commercial TV market is now shared between Italy's Mediaset and Atresmedia. The former owns not only two of the three most-watched channels, Tele5 (Telecinco) and Cuatro, but also thematic channels: Factoría de Ficción (movies and series), Boing (for children), Divinty (aimed at women), Energy (aimed at men), and BeMad (sports and adventure), founded in 2016. In turn, Atresmedia owns Antena3, LaSexta, Mega, Neox and Nova, the latter two having been launched in 2005.

New media

The long-standing monopoly of the state-owned Telefonica was not conducive to the rapid expansion of the IT infrastructure. The privatisation of the operator,

[441] Regional media institutions are merging into the Federation of Autonomous Radio and Television (FORTA). More: K. Churska-Nowak, M. Kuś, *Rytuały wyborcze i media masowe w systemie politycznym współczesnej Hiszpanii*, Poznań 2011, pp. 43–44.

Compania Telefonica National de España, began in 1992, but it was not until the 21st century that the situation began to change dramatically. As a result, in a country where the percentage of internet users numbered a mere 10% in the late 1990s, by 2007 it had risen to over 50%. Today, the number of Internet users in Spain totals 43.6 million (93% of the population)[442].

Spanish publishers were relatively quick to appear online. The first periodical published in an electronic version is considered to be the 'Boletin Oficial Del Estado' (1994). On the other hand, one of the first Catalan titles available online was the weekly newspaper 'El Temps'[443]. In the same year 'El Mundo' appeared online, and 'El País' made its online debut in 1996, already introducing paid content in 2002 – El País Digital. In terms of the coverage and readership of news portals, Spain is no different from most European countries, as media websites are the primary source. The websites of the Spanish press– 'El País', 'ElDiario', and 20Minutos.online – now have the largest coverage[444]. The public broadcaster went on line late – in fact, the rtve.es website started to develop after 2004, when the company's new organisational policy had taken shape[445]. Only 12% of Spanish internet users agree to pay for online access to information.

Until 2010, the main purpose of using the Internet was to access email; today, as much as 80% of the population are active social media users who devote nearly two hours daily to this activity, out of just over six hours daily Internet contact. Social media are dominated by YouTube and Facebook (70% and 66% of users, respectively). Nearly 25% of Spaniards use Telegram, although WhatsApp is the dominant instant messenger (up to 83% of Internet users).

Cinema

There were 706 cinemas operating in Spain in 2021. Just ten years earlier, there had been 763, but after years of obvious crisis, this number dropped to barely 675 in 2016. Looking at the number of cinema screens, steadily maintained at over 3,500, it can be said that the industry has been enjoying stabilisation for several years. In 2021, total cinema ticket sales in Spain amounted to 41 million and attendance was 45% higher than in 2020, but it must be taken into account that these were years of numerous COVID-19 restrictions, due to which, for example, only 60% of cinemas were operating in the first half of the year.

442 www.statista.com/statistics/1306497/internet-users-spain/ (accessed 30.05.2022).

443 D. Głuszek-Szafraniec, *Metamorfozy cyfrowe w hiszpańskim systemie medialnym – strategie wydawnictw prasowych w epoce digitalizacji*, [in:] *Systemy medialne w dobie cyfryzacji*…, *op. cit*., p. 70.

444 Reuters Institute for the Study of Journalism. Digital news Report 2021. Spain, pp. 102–103.

445 M. Kuś, *Hiszpania*, *op. cit*., p. 64.

Movies in Spain are subsidised by state and regional special purpose funds, such as the Consejeria de Cultura Andalucia – Agencia Andaluza de Instituciones Culturales (Andalusian Agency of Cultural Institutions), the Cultural Department of the Basque Country, the Catalan Institute of Cultural Companies, etc.[446]. There are also 19 regional Movie Commissions in the country. However, the primary funding body is the Institute of Cinematography and Audiovisual Arts (Instituto de la Cinematografía y de las Artes Audiovisuales, ICAA). It is an independent body, part of the Ministry of Culture and Sport, reporting directly to the Secretary of State for Culture, which sets out the policy for supporting the movie industry and audiovisual production in the country. In 2021, it granted €15 million to 47 movies. Other institutions include Doctv Latinamerica, which produces and distributes documentaries. The public RTVE is also an important centre of support for domestic filmmaking. In 2018, the public media subsidised 75 movies, including 41 feature productions, primarily made for TV. Some of the amounts are also special fees from TV broadcasters.

In Spain, around 1,500 films are premiered annually. In 2017, a total of 241 Spanish movies were produced, rising in number to 231 in 2019, and in the difficult 2021 there were 273 new movies, marking the highest annual movie production in the 21st century. In 2018–2019, this share reached approximately 15%, in 2021 it was 16.6%[447]. There is a marked decline in the American movie share – until recently they accounted for 75% of the cinema repertory; today it is less than 50%. By contrast, the share of European films has almost doubled in recent years, and now stands at over 15%[448].

PORTUGAL

Today, Portugal has a population of nearly 10.34 million people[449]. The country is linguistically and culturally homogeneous; there are 480,000 foreigners, with the largest group being the Brazilian population of 105,400. Thus, it has no language

[446] List of supporting institutions and funds at: www.olffi.com/country/Film-Funding-Spain-45.html (accessed 30.05.2022).

[447] *Spain: Movie theater attendance in 2021 rises 45% compared to 2020 and closes December with pre-pandemic figures*, 2.01.2022, https://observatorial.com/news/entertainment/34076/spain-movie-theater-attendance-in-2021-rises-45-compared-to-2020-and-closes-december-with-pre-pandemic-figures (accessed 30.05.2022).

[448] *Statistical Yearbook 2020. Cinema reopening in Europe. Europa Cinemas.* Network Review no 37, Cannes 2021, p. 28. According to this source, the number of cinema screens exceeded 3,700.

[449] Portuguese Statistical Office: www.ine.pt/xportal/xmain?xpgid=ine_main&xpid=INE&xlang=en (accessed 31.03.2022).

restrictions when it comes to access to national media[450]. In the political system, the Socialists and Social Democrats (centre-right) have been the dominant parties for years, with the third force being the Christian Democrats.

Until recently, Portugal was among the countries with a less developed media market, the modern origins of which can be traced to the long-lasting dictatorship of Marcel Caetan (successor to António Salazar), which lasted from 1926 to 1974. It was overthrown by a military coup, known as the 'Carnation Revolution', which changed the balance of political power in the state[451]. But not only. The country began to embark on a path of democratic change, within which the censorship-free media market also transformed.

The nationalisation of the market, which began after 1974, changed the market balance of power for almost a decade, and from 1986 – when Portugal joined the EEC – the process of re-privatisation began. It resulted in media moving out of the hands of family interests and into the structures of larger media groups, including the foreign economic entities that appeared on the market. This was the aftermath of rising production costs, the necessary investment in technology, but it also had a political and social dimension. Free market regulation in the media was ensured by the Cavaco Silva cabinet (1985–1995), which liberalised and privatised the media market, opening it up to, inter alia, private television initiatives. Hundreds of radio stations, which had been operating since the early 1980s without licences, were also legalised at the time, and state shares were withdrawn from the most important newspapers – 'Diário de Notícias' and 'Jornal de Notícias'[452].

The 1980s saw a re-evaluation of journalistic ideas and the adoption of an economic perspective, which, paradoxically, influenced the subsequent gradual detachment from politics, but also prevented full autonomy and a long-lasting lack of strategy for the professional protection of journalists[453]. On the other hand, a decline in the level of media pluralism began to be observed, with over-concentration, occasional state involvement (such dependence is still indicated today at regional

[450] J. Fidalgo, *Portugal. Impoverished media struggling for survival*, [in:] *The Media for Democracy Monitor 2021 How Leading News Media Survive Digital Transformation, vol. 1*, eds. J. Trappel, T. Tomaz, Gothenburg: Nordicom, University of Gothenburg 2021, p. 326.

[451] E. Wiśniewska, *Historia i współczesność prasy portugalskiej,* „Zeszyty Prasoznawcze" 2009, no. 3–4, pp. 93–94. Years after the revolution, the media were still seen as politically committed to rebuilding the media order.

[452] Party titles have disappeared over time – the exception being 'Avante!', the press organ of the Portuguese Communist Party, founded in 1931. *90th Anniversary of «Avante!», the newspaper that gives voice to the organised struggle of the workers and popular masses* (speech by the party secretary, Jeronimo de Sousa), 15.01.2021, www.pcp.pt/en/90th-anniversary-avante-newspaper-gives-voice-organised-struggle-workers-and-popular-masses (accessed 20.04.2022).

[453] C. Baptista, M. Torres da Silva, *Media diversity in Portugal: political framework and current challenges*, „Media & Jornalismo" 2017, vol. 17, no. 31, p. 15.

and local levels), as well as restricted access to the journalistic profession and a lack of self-regulatory mechanisms being the most important problems. Article 38 of the Constitution guarantees freedom of expression, which may not be restricted by any form of censorship; Articles 38 and 39 of the Constitution set out the principles of freedom of the press and media[454]. The regulator of the market is the Regulatory Authority for Social Communication (ERC, *Reguladora para a Comunicação Social*), established in 2005. The State Communication Authority (Autoridade Nacional de Comunicaçãos) is also active[455]. The National Union of Journalists (Sindicato Nacional dos Jornalistas) was established in 1934.

In Reporters Without Borders 2022 press freedom ranking, Portugal was ranked 7th, although as recently as 2016 it was not even among the top 20 countries. There is a clear presence of the Catholic Church in the media, including in local and regional media. Non-national media constitute a special category of media here, to which special tasks, even a mission, are assigned[456].

Press

The first Portuguese press title was the newspaper 'da Restauração', which was described in the subheading of the first issue as *Gazeta em Que Se Relatam as Novas Que Houve Nesta e Que vieram de Várias Partes*. It was published at the end of 1641[457] and consisted ot 12 pages. In the following years, however, the development of journalism stagnated, and was influenced by ideas spreading as a result of the revolutions in neighbouring France and Spain[458]. The press was seen as part of the politics and did not enjoy social acceptance, a situation that intensified in the mid-20thcentury. This is one of the reasons why Portugal still has one of the lowest newspaper readership rates in Europe.

The Portuguese press is relatively young: apart from 'Diário de Notícias' (est. 1864) and 'Jornal de Notícias' *(*1926), the majority of the main newspapers were only founded in the second half of the 20th century. Readership remains the biggest problem, as the periodicals there have to contend with a lack of trust caused by political entanglements, as well as the level of public education that still is not

454 Full text of the Portuguese Constitution: *Constitution of the Portuguese Republic. Seventh Revision [2005],* www.tribunalconstitucional.pt/tc/conteudo/files/constituicaoingles.pdf (accessed 31.03.2022).

455 R. Sajna, *Portugalia*, [in:] *Systemy medialne państw Unii Europejskiej*…, *op. cit.*, pp. 262–263.

456 C. Baptista; M. Torres da Silva, *op. cit.*, pp. 16–17.

457 M. Goucha Soares, *Foi o primeiro jornal português. E ajudou D. João IV a consolidar o poder em 1640,* https://expresso.pt/sociedade/2017-12-01-Foi-o-primeiro-jornal-portugues.-E-ajudou-D.-Joao-IV-a-consolidar-o-poder-em-1640 (accessed 20.04.2022).

458 J. P. Sousa, *Gazeta „da Restauração" (1641–1642) – a introdução do periodismo noticioso em Portugal*, [in:] *Notícias em Portugal: estudos sobre a imprensa informativa (século XVI–XX),* ed. J.P. Sousa, Colecção Livros ICNOVA, pp. 51–52.

too high. At the beginning of 2000, the percentage of people with a university degree barely exceeded 11% in the country; today it is over 34%, but the profile of readers has also changed, with more people oriented towards online content and television. The audience structure of the daily press tends to be made up of educated and politically active people, for whom it acts as an opinion-forming source of information. Hence, somewhat contrary to European trends, the circulation of the economic and business press increased in the early part of this century, with the surprising success of two national titles – the weekly 'Sol' and the daily 'i', established in 2007 and 2009 respectively. Despite both debuting during the crisis, they still hold their own today[459].

However, the crisis at the end of the first decade of this century changed the layout of the press segment. In 2010, Portugal's only tabloid '24Horas' closed down; five years later, the media group Ongoing, publisher of '24Horas', 'Semanário Económico' (closed in 2009), 'Diário Económico' (online only since 2016) and 'OJE' ceased. The conglomerate specialised in the economic press and stayed in the market for 10 years, having previously acquired the holding company Económica and being one of the more important publishers in the economic magazines segment[460].

'Correio da Manhã' remains the leader among dailies in the *quality* segment – its newsstand sales in 2021 exceeded 50,800 copies (a decade ago it was over 120,000), representing as much as 61.4% of the daily newspaper market share. This is followed by 'Jornal de Notícias' (19,800 copies sold), the sports 'Record' (18,200 copies) and 'Público' (10,600 copies)[461]. In 2020, total sales of national dailies in Portugal fell from 94,900 to 82,900 copies. The weekly magazines segment is dominated by 'Expresso', with sales close to 50,000 copies, 'Sábado' (17,300 copies) and the title that is losing the most readers – 'Visão' (11,700). Of the economic press, the most widely read in Portugal is 'Jornal de Negócios', launched in 1997 as a website and published in print since 1998. Apart from it, mention should be made of 'O Jornal Económico', which is edited by journalists from the aforementioned 'Diário Económico', the free 'OJE' or 'Sol'.

The dominant type is the popular press, but in the last decade the circulation of women's and sports titles has been declining significantly, although they still maintain high readership rates, including online[462]. The leader of the women's press are the weeklies: 'Maria' (est. 1978, circulation 90,000), 'TV 7 Dias' (approximately

[459] Effort data is not available as both titles are not audited by APCT.

[460] Of the other periodicals, it is worth mentioning the closure of the afternoon paper 'A Capital', light in content weekly 'O Independente' or 'Tal & Qual'. More: E. Wiśniewska, *op. cit*., pp. 101–102.

[461] Data for: S. Dias, *CM é líder na imprensa portuguesa com quota de mercado de 61,4%,* www.cmjornal.pt/tv-media/detalhe/cm-e-lider-na-imprensa-portuguesa-com-quota-de-mercado-de-614 and www.apct.pt/analise-simples (accessed 20.04.2022).

[462] E. Wiśniewska, *op. cit*., p. 102.

70,000) and 'Nova Gente 57,600). A large proportion of magazines have lost more than half their circulation in the last decade, and often as many readers. Portuguese publishers responded to the global crisis-induced decline in advertising revenues by making a bolder entry into multimedia[463], mainly television, which gave them the opportunity to expand their audience and allowed them to balancing the costs of publishing a dwindling press.

Like other European countries, Portugal is also experiencing a phase of dynamic growth in the free press. In 1996, the first issue of 'Jornal da Região', appeared on the market, however, the beginning of this segment is commonly associated to be the transformation of the free weekly 'Destak' into a daily newspaper in 2004 (the title had been published since 2001). In addition, between 2006 and 2008 three new publications entered the market, namely 'Global Notícias', 'Metro' and 'Meia-Hora', which was heralded as the first free newspaper. The title collapsed in 2010, becoming part of 'Metro' (publication ceased in 2016), and of all the titles previously mentioned, only 'Destak' is still published today.

The media are concentrated in large, often young, indigenous media groups, which essentially function as multimedia companies. One of the most important players in the press sector is the Cofina group, founded in 1990, which publishes the leading newspapers ('Correio da Manhã', 'Destak') and magazines; in 2013 it launched the cmTV channel (Correio da Manhã TV)[464]. Global Media Group (formerly: Controlinveste) publishes in print, for example, 'Jornal de Notícias', 'Diário de Notícias' and the sports 'O Jogo'; the group focuses mainly on online activities today[465]. An important concern is also Impresa, founded in 1972 (as Sojornal[466]) by former Prime Minister Francisco Pinto Balsemão. Today it focuses mainly on the television segment (SIC family channels), but until recently it was the leading press publisher in Portugal. At the beginning of 2018, it sold 12 titles to the just-formed Trust In News group, leaving behind its flagship product, 'Expresso' magazine. Following the deal, Trust In News, owned by former journalist Luis Delgado, became the largest magazine publisher in the country. Its portfolio includes 'Exame', 'Jornal de Letras', 'TeleNovelas', 'TV Mais' or 'Visão'.

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463 A. Rubaj, *Konsekwencje cyfryzacji na przykładzie Portugalii*, [in:] *Systemy medialne w dobie cyfryzacji*…, *op. cit.*, s. 39.

464 Publisher's website: www.cofina.pt/business-overview.aspx?sc_lang=en (accessed 31.03.2022).

465 Publisher's website: www.globalmediagroup.pt/marcas/media/ (accessed 31.03.2022).

466 As Impresa, the entity has been operating since 1991. More about the history and brands of the group: www.impresa.pt/en/apresentacao-do-grupo/2019-01-28-Our-history, 28.01.2019 (accessed 31.03.2022).

Television

Portugal is one of the so-called 'TV countries'; at the beginning of the 21st century, the Portuguese watched TV for 3 hours 35 minutes per day, and in 2016 this time increased to 4 hours 47 minutes[467]. One of the reasons for this big leap was the rapid growth of paid TV. The contemporary television market is divided between the public broadcaster RTP and the commercial channels SIC and TVI, established in the early 1990s with a licence to broadcast until 2021.

Radiotelevisão Portuguesa (RTP) was created at the end of 1955 and was defined as a state television service. In 1957, RTP1, the first regularly broadcast public service channel, was launched[468]. In 1968, the range was expanded to include the RTP2, aimed at a more discerning audience. Channel Two still focuses today on cultural, educational, social, religious programmes, independent films and Portuguese cinema, but also 'real life' programmes. In addition to the aforementioned stations, RTP also broadcasts the 24-hour news channel RTP3, created in 2001 as the NTV channel for Porto and operating RTP3 since 2015, and the RTP-based TV archives RTP Memória (2004). We should also remember the regional programmes, as well as RTP Madeira and RTP Açores, established back in the 1970s, or RTP África (1998). Among the freely accessible stations, there is also ARTV, known as Canal Parlamento, which was created in 1998 to broadcast the Assembly of the Republic. In 2004, RTP merged with public radio broadcaster RDP, and from 2007 they formed a new entity: Rádio e Televisão de Portugal.

RTP1 operates based on a mixed model and subsists on advertising, public subsidies and an additional source of income – a tax included in electricity bills. On RTP2, as in the case of the public radio, advertising is not allowed. A decade ago, the two main public channels were gathering close to 30% of viewers (RTP1 – 23.8%, RTP2 – 5.6%); in 2021, the viewership of the former was just over 10% and that of the latter was close to 1%[469].

SIC is Portugal's first non-public television station, launched in October 1992 and owned by the Impresa Group. It was within its framework that the first 24-hour

[467] F. Correia, C. Martins, *Media landscapes: Portugal*, https://medialandscapes.org/country/portugal/media/television (accessed 19.04.2022).

[468] The first broadcasts took place a year earlier. Colour television emerged in 1980. More: *1ª Emissão Experimental da RTP*, https://arquivos.rtp.pt/conteudos/1a-emissao-experimental-da-rtp/ (accessed 20.04.2022).

[469] *Audiências TV: SIC entra em 2022 a liderar mas vê TVI encurtar distância*, 10.01.2022, www.meiosepublicidade.pt/2022/01/audiencias-tv-sic-entra-em-2022-a-liderar-mas-ve-tvi-encurtar-distancia (accessed 20.04.2022). Interestingly, in February 2022, for the first time ever, the Portuguese cable TV channel, CMTV, achieved a higher viewership than RTP 1 (10.7% vs 9.1%). B. Pekic, *CMTV most watched channel in Portugal for first time*, https://advanced-television.com/2022/02/08/cmtv-most-watched-channel-in-portugal-for-first-time (accessed 22.04.2022).

news channel, SIC Notícias[470], was launched in 2001, as well as the first thematic programme, the now defunct SIC Gold. Currently, under the SIC brand, it broadcasts 8 channels, including SIC Internacional, founded in 1997 and aimed at Portuguese people living outside their homeland. The second most important non-public channel is TVI, which has been broadcasting since 1993 and is owned by Media Capital Group, founded in 1992. It is the only non-Portuguese media entity since the Spanish Prisa group became the majority shareholder in 2005, clearly making its presence felt in the Portuguese audiovisual sector[471].

The first cable networks appeared in 1994 (TV Cabo, later incorporated into Zon Multimédia) and to this day paid TV in Portugal is dominant, with 80% of households using it[472] and with a TV market share exceeding 37% (2020), the majority of which is owned by two entities, MEO and NOS, which offer integrated telecommunications services. From the perspective of the development of digital television and paid platforms, the Portuguese television market today operates within a closed framework, as exemplified by the outcome of the tender in 2009 for the launch of a fifth terrestrial channel. The tender was cancelled by the market regulator, the Entidade Reguladora para a Comunicação Social (ERC), following protests from private owners who feared greater market fragmentation and a drop in advertising revenue[473]. Digital terrestrial television had just started broadcasting in 2009 and the analogue signal was discontinued in April 2012, and from that point onwards the 'slow expansion of the DTT offering' began[474]. In 2015, the American Netflix platform made its debut in the country.

The Portuguese mostly prefer telenovelas, football matches and programmes, and news services. The former, known in Portugal as 'fiction', alongside talk shows, quizzes and films, dominate the commercial stations. And they have the largest audience in the country. The most popular channel is SIC, with a market share of

[470] This station replaced CNL (Canal de Notícias de Lisboa), established in 1999, the first regional news channel, broadcast by cable and satellite, targeting Lisbon residents.

[471] In addition to television, he is the owner of several radio stations, including. Rádio Comercial, Rádio Clube Português. Read Eli M. Noam and The International Media Concentration Collaboration, *Who Owns the World's Media?: Media Concentration and Ownership around the World*, Oxford University Press, 2015, pp. 233–234. Also: J. Fidalgo, Portugal…, *op. cit*, pp. 321–323.

[472] The growth of pay-TV is rooted in the diversification of access to technology and the integration of telecommunications services. This field is dominated by two players, MEO and NOS, offering combined TV, mobile and internet services. Consequently, the increase in the number of channels available via this route is also having an impact.

[473] The dominant telecommunications operator Zon Multimédia, and Telecinco SA, represented by a group of journalists requesting the creation of a news channel, entered the competition. Source: *Portugueses querem quinto canal*, 13.02.2009, www.cmjornal.pt/tv-media/detalhe/portugueses-querem-quinto-canal.

[474] R. Sajna, *Portugalia*, *op. cit*., p. 271.

nearly 18% at the end of 2021; share of TVI (Televisão Independente), which still had an audience of approximately 30%, was less than 17% at the time. As both stations, much like the public ones, are experiencing steady declines – losing out to paid TV and mainly streaming platforms – the position of the latter should be expected to strengthen. According to Marktest, there were 4.3 million paid TV subscribers at the end of 2021, in 95% of households[475]. As many as 25% of Portuguese people have subscribed to at least one SVoD service, chiefly Netflix, Disney+ and HBO.

Radio

European radio broadcasting began in the 1920s, initially coping with technological and political challenges. Similar problems were also present in Portugal, where the organisation of radio services and broadcasters began in the early 1930s. The strengthening of public interest was then accompanied by the parallel activity of private broadcasters. The first experimental transmissions began in 1934, and the public broadcaster, Emissora Nacional de Radiodifusão (ENR) was established in August 1935, taking over the country's public broadcasting services[476]. Until 1940, it was dependent on the postal operator, Correios, Telégrafos e Telefones (CTT), when the law setting out the framework for the public broadcaster came into force.

After the Carnation Revolution, the ENR was reorganised and renamed Radiodifusão Portuguesa (RDP) in 1976, under which name it operated until 2004. After a merger with RTP, it became part of Rádio e Televisão de Portugal on that year. It consists of: Antena1 (news, mainly with native music), Antena2 (cultural radio, broadcasting since 1948) and Antena3 (est. 1994), aimed primarily at a younger audience, as well as RDP Internacional[477] focusing on foreign countries and RDP África (1998) established with the former colonies in mind. Eight stations are broadcast exclusively digitally, online or via satellite. The combined listenership of the main three stations was just 7.1% at the end of 2021, a decrease by 1.1 p.p. in comparison with the previous year; the share of the most popular station, Antena1, was 4.1%.

Since the beginning of Portuguese broadcasting, private radio stations operated in the country, some of which were nationalised in December 1975. An example of such stations is one of today's most popular broadcasters, the Rádio Clube Português (RCP), founded in 1931. The network was renamed Rádio Comercial in 1979, became part of the RDP, and was later privatised again in 1993. It was eventually

[475] B. Pekic, *Portugal: 4.3m pay-TV subs*, https://advanced-television.com/2021/12/08/portugal-4-3m-pay-tv-subs-2 (accessed 22.04.2022).

[476] https://media.rtp.pt/80anosradio/historia/criacao-da-emissora-nacional/ (accessed 22.04.2022).

[477] Its predecessor, Serviço de Ondas Curtas da Emissora Nacional, had been broadcasting since 1936.

acquired by the Media Capital Group in 1997. Since the mid-1970s onwards, the rest of the private stations basically operated illegally, and it was only the reforms of the 1980s that restored the dual order. Today, it is estimated that nearly 300 radio stations, mostly local, are broadcasting in the country, the majority of them located in Lisboa, Porto and Aveiro area. More than 250 are classified as general stations, and barely approximately 20 are thematic (including 5 news stations). Radio has less than 4% of the media market, although it is highly underestimated. Daily listenership exceeds 3 hours.

Ownership of the radio market is spread across several large groups. By mid-2022, Grupo Media Capital Rádios (MCR) was the largest, with a market share of 38.7%. In May, Bauer Media Audio announced their acquisition of MCR, thus expanding the portfolio of the German giant, debuting on the Portuguese market with the country's most popular stations, musical Rádio Comercial (20.1% listenership), M80 (9.4%), a network of thematic stations or the local Cidade FM[478]. The other major group is Grupo Renascença[479] Multimédia, founded in 1934, with a share of 34.8%, growing year-on-year by nearly 2%, and owned by various organisations of the Roman Catholic Church. It broadcasts RFM (listenership 19.6%) or the news and music Rádio Renascença (7.4%). Interestingly, the company's Rádio Sim (2008–2020), which presents religious and classical music services, has not garnered much interest. It is also worth mentioning the news station TSF, established in 1988 and owned by the Global Media Group, which is one of the three most popular news stations in the country, with a listenership of 2.6%.

Digital radio (DAB) has been developing in Portugal since 1998. It is estimated that 33% of the Portuguese listen to the radio via the internet. 25% of local radio stations are concentrated in the three main cities – Lisbon, Porto and Aveiro – while 23% of municipalities have no licensed radio[480]. According to data in the fifth wave of listening (December 2021), 84.8 of the Portuguese population listened to the radio at least once a week[481].

[478] *ERC analisa a evolução do setor da Rádio em Portugal na última década*, 30.06.2022, www.erc.pt/pt/a-erc/noticias/erc-analisa-a-evolucao-do-setor-da-radio-em-portugal-na-ultima-decada (accessed 25.06.2022).

[479] The concern also owned the regional Christian daily newspaper 'Diário do Minho', which today belongs to the company Diário do Minho, Lda.

[480] ww.erc.pt/pt/noticias/a-radio-em-portugal-uma-decada-de-intervencao-regulatoria (accessed 30.04.2022).

[481] Bareme Radio study. www.marktest.com/wap/a/n/id~283a.aspx (accessed 1.05.2022)

New media

In 2014, 67% of households in Portugal had access to the internet; in 2021, the percentage of its users reached only 78%[482]. Nearly 70% of Portuguese people are active users of social media, 97% of them using mobile devices. In 2021, Facebook was the most common social media in the country (73%), ahead of YouTube and Instagram.

The first traditional medium on the Portuguese internet was the public RTP website. Of the dailies, 'Público' (1995) was the first to debut, of the non-domestic press, the regional daily 'Setúbal na Rede' appeared in 1998; 'Jornal de Notícias' and 'Diário de Notícias' were the first to introduce regular online editions. At the beginning of the second decade, many editors were also developing websites dedicated to citizen journalism[483]. Today, Portugal is one of the pioneers of a cross-media strategy, mainly due to the policies of major telecom players and consolidation processes. As a result, monomedia groups are increasingly rare here.

Although back in the first decade of the 21st century, the Portuguese were not willing to pay for online content, and it was difficult to adopt an effective business model for monetising digital services there, it was only around 2013 when a marked increase in paid online subscriptions to leading dailies has been observed. Today, payment for accessing information online is up to 17%, with information aggregators such as Sapo.pt and Noticiasaominuto.com becoming more popular. This translates into a level of investment in new technologies and the quality of media content. This does not mean, incidentally, that digital editions of newspapers are not being developed – in the second decade of the 21st century, more than 220 press titles were thriving online[484].

The internet, on a par with television, has become the main source of information for 77% of Portuguese people. Interestingly, free digital projects have been launched regionally to facilitate the acquisition of reliable information, such as Medio Tejo or Sul Informação. Their popularity and social relevance continues to grow[485]. Digital piracy continues to be a problem – in November 2021 alone, a Portuguese court ordered the closure of 17 Telegram channels that offered illegal access to press and audiovisual content. Earlier, in May 2021, the Portuguese Charter on Human Rights in the Digital Age was approved. It is a document that provides citizens with basic rights, including protection against those who produce, reproduce and disseminate disinformation[486].

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482 Data based on Marktest Bareme Internet 2021 and Digital News report 2021.

483 R. Sajna, *op. cit.*, p. 275.

484 A. Rubaj, *Konsekwencje… op. cit.*, p. 40. In the text, the author analyses the number of visits to news websites and the online press.

485 Reuters Institute for the Study of Journalism. Digital News Report 2021, Portugal, p. 96–97

486 *News Flash – Portuguese Charter of Human Rights in the Digital Age*, 21.05.2021, www.gpa-

Cinema

According to the Audiovisual Institute, Portuguese cinemas are visited by an average of more than 7 million viewers each year. The number of annual premieres varies between 130 and 140; in the record-breaking year of 2008, 234 movies premiered and were seen by 16 million viewers. By 2015, the number of domestic productions had reached approximately 20. After 2016, this number increased to more than 40 (2019 figures), but they accounted for only 1.5% of the share of premieres. American productions dominate cinemas (the most popular domestic movie of 2019 was 'Variações', directed by João Maia).

Public funding has a huge importance for the development of Portuguese cinema. In 1971, the Portuguese Cinema Institute (Instituto Português de Cinema – IPC) was established to assist movie production technology, distribution and broadcasting, as well as to represent Portuguese cinema in the international organisations and promote cinematic culture in the broadest sense[487].

The greatest momentum in the support and promotion of Portuguese cinema has been witnessed in the very last decade. In 2011, the Portuguese Film Fund (Fundo de Apoio ao Cinema) was established, on the initiative of IndieLisboa – Associação Cultural. The fund is intended to help the post-production of Portuguese movies, including, for example, creating soundtracks. Also on the initiative of IndieLisboa, the Portuguese Film – Portuguese Film Agency was created in 2013, supporting and promoting the premieres of Portuguese films at important festivals. In 2019, in turn, the Portuguese Movie Commission (PFC) was established by the members of the government responsible for the areas of culture and tourism. The PFC's main objectives include maintaining synergies between the creative industries and tourism, as well as promotion Portugal internationally as a filming destination, or communication with regional film commissions and industry associations[488].

The largest film distributor continues to be Zon Lusomundo Audiovisuais, which has more than half of the market share. The second is Cinemas NOS, a pioneer of the digitisation of the movie industry and the introduction of digital 3D cinemas in Portugal. The first IMAX was launched in 2013.

In 2021 there were 543 cinemas operating in the country. Of the 244 movies screened in cinemas, 16 were Portuguese productions. In the pre-pandemic years, however, the proportions were very different, even if it is difficult to indicate a developmental trend here. For example, the number of Portuguese premieres looked as follows: in 2019. – 47 movies, in 2016 – 27, and in 2013 – 20); the total number

sa.pt/en/news/News-Flash-Portuguese-Charter-of-Human-Rights-in-the-Digital-Age/597 (accessed 22.04.2022).

487 www.ica-ip.pt/en/ica/who-we-are/about-us/ (accessed 22.04.2022).

488 https://portugalfilmcommission.com/en/pfc/about-us/ (accessed 22.04.2022).

of movies screened in cinemas: in 2019 – 391, 2016 – 398, 2013 – 348. In the he last two decades the number of premieres of European movies has tended to increase.

GREECE

Greece is home to more than 10.4 million people, although as recently as the early 2000s the population was over 11.2 million. It is relatively homogeneous ethnically, with one official language – Greek. The Greek state officially only recognises the religious Muslim minority, which accounts for less than 1% of the country's population, although following the ratification of an agreement with the newly formed Republic of North Macedonia in January 2019, there was also the question of recognising the Macedonian minority as well[489]. 40% of the country's population lives in Athens.

The Greek media market, and in particular the press, has always developed in a political environment. This was the case until the 1830s, when the country was limited by Turkish rule, as well as in the second half of the 20th century, when political parties were formed. In 1967 the rule of military junta began, lasting until 1974. After the overthrow of the junta, it is only possible to talk about the development and modernisation of the state and, of the media system. In 1973, Greece abolished the monarchy. Even shortly after the events of 1974, Greece was thought to be a country where the media were saturated with politics, but in the 1980s changes began to accelerate. New investors and owners entered the press market; television began to dominate the coverage and the media itself gradually moved away from politics[490]. It was not without significance that Greece joined the European Union (then the EEC) in 1981. This was preceded by the introduction of a constitutional parliamentary republic in 1975[491].

Freedom of expression is guaranteed in Greece under the provisions of the Constitution of 1975, Art. 14 of which provides the opportunity for freedom of expression, guarantees the right of response, and introduces provisions regulating, among other things, the prohibition of the property consolidation. The Constitution abolished press censorship, leaving an exception for electronic media (radio, television and cinema), although in the event of an attack against religion, national security (military secrets) or insults towards the president, the prosecutor may demand a ban on publication. A provision for state control of radio and television was

[489] *Greece's invisible minority – the Macedonian Slavs*, www.bbc.com/news/stories-47258809 (accessed 30.01.2022).

[490] S. Papathanassopoulos, *Greece: Press Subsidies in Turmoil*, [in:] *State Aid for Newspapers, Media Business and Innovation; Theories, Cases, Actions*, ed. P.C. Murschetz, Springer, New York 2013, p. 241.

[491] A. Nowosad, *Grecja*, [in:] *Systemy medialne państw Unii Europejskiej*…, *op. cit.*, pp. 111–113.

also introduced. The most relevant values relating to the operation of the media are indicated in Part Two of the Constitution[492]. It was only in 2001 – when after a series of political corruption scandals and the disclosure of the links between the worlds of politics, business, and the media – that the Constitution included a provision on media freedom, transparency and pluralism[493].

Despite a number of changes, modern Greek media have not avoided the identity crisis that followed the collapse of the economy in 2010. This exposed the weaknesses of the local press market and its direct political dependence, linked to, for example, the system of subsidies, publication of advertisements of public institutions, or tax breaks. As a result, the position of Greece in the Reporters Without Borders press freedom index dropped from 35th place in 2009, to 99th in 2014. At that it was clearly visible that many journalists whose activities were not sufficiently protected by law, decided to leave their profession. In 2022, the country was ranked 108th by Reporters Without Borders, although as recently as 2020 it was ranked 65th.

Greece has a press law, but to this day journalists do not have legal guarantees for the protection of professional secrecy, which greatly complicates the exercise of their profession. There are several associations and trade unions of journalists, press publishers or television broadcasters in the country. Only 32% of citizens express trust in media messages (information), although this is still an increase of 5 p.p. compared to previous years. This was certainly influenced by the pandemic period. More than 50% express negative opinions about the media[494].

Press

The first Greek press titles were published in the 18th century, but Turkish rule (Greece declared independence from the Ottoman Empire in 1822) made it impossible in practice to develop its own journalism. One of the first titles was 'Ephemeris'[495], published between 1790 and 1797. This title, like many others at that time, for example, 'Ermis o Logios' (1811) or 'Ellenikos Telegraphos' (1812), was published outside Greece, in Vienna[496]. The first strictly Greek periodical publication was a newspaper published in Athens from 1873 onwards, also called 'Ephemeris'[497].

[492] M. Kaczmarczyk, *System medialny Grecji*, [in:] *Systemy medialne państw bałkańskich*, red. Z. Oniszczuk, M. Gierula, Humanitas Sosnowiec 2009, p. 128.

[493] A. Nowosad, *op. cit.*, pp. 112–113.

[494] Reuters Institute for the Study of Journalism. Digital News Report 2021. Greece, pp. 82–83.

[495] In the case of proper names, the Latin notation has been used in this chapter, which makes it easier to read the correct names of media or Greek institutions.

[496] M. Kaczmarczyk, *op. cit*., pp. 132–133.

[497] K. Mastoridis, *Ephemeris and the first steps of the Greek Press*, „Hyphen, a Typographic Forum" 1999, vol. 1, no. 3, s. 74–75.

The modern Greek press is published chiefly in the capital. Greece's readership is one of the lowest in Europe – according to WAN-IFRA (World Association of News Publishers), in 2010 there were only 53 copies per thousand inhabitants[498]. However, it must be stressed that, as a medium, the press had already clearly weakened after the opening of the commercial television market, in the second half of the 1980s, although it managed to maintain its status as the second most important source of information. By the end of 1990, it had again moved closer to political parties, although at the same time this was a period characterised by more pluralism and criticism of the authorities. The quality of the Sunday press then increased, while the evening newspapers invariably enjoyed the highest readership.

At the end of the 1990s, there were 82 titles available countrywide, including 8 morning papers, 13 afternoon papers, 22 Sunday papers and 16 weekly papers (mainly in Athens). As many as 6 newspapers were financial, 13 were sports publications and more than 600 titles were issued locally and regionally. The crisis of 2010–2018 verified the existence of very many Greek periodicals: 84 national newspapers closed down, including the closure of a conservative 'Apogeymatini' in 2010, or centre-left 'Eleftherotypia', published from 1975 to 2011[499]; in Thessaloniki alone four titles disappeared from the market, and several newspaper inserts were also withdrawn. But not only that, as four major publishing houses, the DOL, Pegasus Publishing S.A., Imako Media S.A., and Liberis Publications also collapsed[500]. In 2016, the total number of daily newspapers was already close to 280 titles[501].

More than 20 national dailies were still being published in 2019. One of the older newspapers, the more centrist 'Ethnos' (1913–2019), which still maintained a Sunday edition until August 2020, has now disappeared from the market. It is estimated that it is the Sunday press in Greece that generates more than 50% of all print media sales. Alongside the aforementioned press and national newspapers, afternoon and weekly newspapers are popular in Greece; after then Greeks choose sports or financial press titles. Of no small importance are the gossip periodicals, rivalling the free Sunday newspaper inserts, which print in-depth articles and sections related to art or science. One of the most prestigious dailies is the political and financial 'I Kathimerini', founded in 1919. The daily newspaper has a weekly

498 S. Papathanassopoulos, A. Karadimitriou, Ch. Kostopoulos, I. Archontaki, *Greece*. *Media concentration and independent journalism between austerity and digital disruption,* [in:] *The Media for Democracy Monitor 2021: How Leading News Media Survive Digital Transformation, vol. 2, op. cit.*, p. 183.

499 The publisher was C.K. Tegopoulos. The title went bankrupt in 2011, but in 2013 lawyer Harris Oikonomopoulos attempted to relaunch its publication. After a year, he too gave up publishing the newspaper. More: S. Papathanassopoulos, *Greece: Press Subsidies*…, p. 244.

500 S. Papathanassopoulos, A. Karadimitriou, Ch. Kostopoulos, I. Archontaki, *op. cit*., p. 218.

501 S. Papathanassopoulos, *Media landscapes: Greece*, https://medialandscapes.org/country/greece/media/print (accessed 30.01.2022).

circulation of 14,100 and 56,500 for Sunday editions; it is also published in English, in Athens, and distributed with the 'International Herald Tribune' nationally and in Cyprus.

Another important periodical is the centre-left afternoon paper 'Ta Nea', described as an 'opinion tabloid'. Founded in 1931, this daily newspaper was anti-regime during the junta's rule and in the 1990s maintained close connections with the Socialist Party. Its circulation today does not exceed 10,000 copies, and unlike its competitors, it does not have a Sunday edition. Other noteworthy newspapers include one of the oldest titles, 'Makedonia', founded in 1911 and also covering international issues; 'To Vima tis Kyriakis', published since 1922 Sunday edition of one of the most widely read liberal dailies 'To Vima', or the most widely read Sunday weekly 'Proto Thema'[502], founded in 2005 and considered populist, especially on migration issues.

Compared to other European countries, the free press appeared later in Greece, at the end of 2000. It was then that 'Metrorama' (later renamed 'Metro') debuted in Athens. In 2003, 'City Press' entered the market and succeeded in attracting the largest number of readers (with a circulation exceeding 270,000 copies). Later years saw the launch of 'Magnesia' (2007) and 'Free Sunday' (2008), but neither of these titles is published today, which is directly related to the slump in the advertising industry and the crisis. It is noted, however, that attempts are still being made to introduce various free periodicals, such as the weekly 'Lifo' (2005) and the 'Athens Voice' distributed in Athens and Thessaloniki.

An interesting example of the profound changes in the Greek market are the shifts in ownership, as concentration trends have been on the increase for several years. In relation to the early 21st century, the number of press publishers has more than halved to less than 40. Most of the significant titles today are in the hands of Greek businessmen, some controversial, such as Tassos Karamitsos, Giannis Alafouzos or Evangelos Marinakis[503]. In 2017, the latter took over one of the oldest in the country press group, until recently considered to be the strongest, namely the Lambrakis Press Group (founded in 1922). In its place, Marinakis set up the Alter Ego Media S.A. group.

The morning daily 'Kathimerini' (and its Sunday edition and English-language version) is in the Skai Media Group portfolio, owned by Greek shipowner Giannis Alafouzos. The Skai brand, however, involves mainly audiovisual media and online

[502] 'To Vima' is considered the most opinionated newspaper. This once leading title of Greece's largest media group Lambrakis was published in print until 2010, after which it moved online. 'Proto Thema' keeps sales at 40,000.

[503] M. Sidiropoulou, *Boats to Broadcasters*: *Greek Shipowner Amasses Political Power*, https://balkaninsight.com/2019/04/19/boats-to-broadcasters-greek-shipowner-amasses-political-power (accessed 30.05.2022).

portals like sport-fm.gr. Today, Greece is dominated by multimedia entities, often publishing a single newspaper title, such as Daphne Communications (part of Antenna Group), which publishes the TV magazine 'MyTV', or 'Real News', a Sunday title owned by Nikos Chatzinikolaou.

A significant factor in Greece's press landscape is government subsidies, which have created a system of clientelism in the media, that turned out to be dangerous, even if it is not based on direct interference with the content of messages. Aid to publishers emerged only after the Second World War, in the form of, for example, subsidies for the purchase of paper or, later in the 1950s, also tax exemptions (the state thus controlled the amount of print runs, as they determined the scale of subsidies). The subsidiarity system was maintained after 1974, particularly as the necessary technological upgrades were carried out, and generally in response to the rising publishing costs. The support system was particularly evident at the end of the 20th century, the decade in which commercial media developed. The aid provided by the state exceeded €40 million, but has been reduced over time until it was abolished after 2012[504].

Radio

The origins of radio in Greece date back to 1923, when the Ministry of the Navy started the first experimental broadcasts, but the first regular broadcasting radio station was established in 1928 in Thessaloniki[505]. The right-wing government of dictator Joanis Metaxas announced the construction of a state broadcasting system in 1936; the idea was realised two years later and Greece was one of the last countries to launch a state radio – YRE (Ypiresía Radiofonikís Ekpompís, i.e., Broadcast Radio Service). From 1941 – when the country was occupied by the Axis States – the radio was renamed AEPE Greek Radio Company (Anónymi Etaireía Radiofonikón Ekpompón), and after the liberation in 1945 the National Radio Committee – EIP (Ethnikó Ídryma Radiofonías)was established. The public ERT, which still exists today and from which Greek public radio was spun off in 1988, has only been established after the fall of the junta, in 1975[506].

The first state radio programme was focused on news and education, and did not broadcast commercials. The second channel, established in 1952, was based on – mainly Greek – popular music and lighter content, while the third channel,

504 S. Papathanassopoulos, *Greece: Press Subsidies in Turmoil*…, *op. cit.*, pp. 247–248.

505 T. Zaharopoulos, *The Evolution of Public Service Radio Broadcasting in Greece: From Authoritarianism to Anarchy and Irrelevance*, www.globalmediajournal.com/open-access/the-evolution-of-public-service-radio-broadcasting-in-greece-from-authoritarianism-to-anarchy-and-irrelevance.pdf (accessed 30.04.2022).

506 M. Varoucha, *A brief history of radio in Greece, and a small museum in the Peloponnese* (transl. Nefeli Mosaidi), www.greeknewsagenda.gr/topics/culture-society/7034-radio-museum (accessed 30.04.2022).

founded just two years later, ran a cultural programme. In all cases, of course, the content was subject to censorship. By the early 1960s, 12 radio stations were already broadcasting within the EIR structure. In 1975, the state-owned company EPI, or Greek Radio and Television, was established. Today, in addition to the three basic channels, public radio hosts ERA Sport and Kosmos 93.6, featuring mainly reggae, jazz and world music. In total, 19 radio stations broadcast regionally (including two in the Macedonia region), while the Voice Of Greece, available via satellite and the Internet (called ERT5 in the case of the latter), is dedicated to foreign audiences. It is also worth mentioning the two cultural and information channels for Thessaloniki – 102FM and 95.8 FM.

The Greek commercial radio sector has developed in accordance with the political circumstances, despite being the media sector that operated unregulated for a longest time. Since the 1950's, five private stations, run by local government, owned my the military or non-profit were broadcasting in the country. Even earlier, a zone of 'free radio', or pirate[507] radio also began to emerge, with Radio Free Greece being a notable example. Under free market conditions following 1975, the first non-pirate radio only started broadcasting in 1987 – Athena 9.84 FM, and this happened under a law (1730/1987) that created a single public entity, ERT, and above all allowed the creation of private urban radio initiatives. Other established radio stations were Kanali1 (Piraeus) and FM-100 (Thessaloniki). In 1988, the first 29 broadcasting licences were granted[508].

As Zaharopoulos and Papathanassopoulos point out, vague regulations have resulted in some broadcasters knowingly operating outside the authorisation system for a long time. As a result, it was estimated that at the beginning of the 21st century, among approximately 1058 radio stations as many as 928 were broadcasting without an official licence, and in 2016 there were still almost 600. In the past decade, the number of stations has fallen to approximately 900, and in 2020 the number of broadcasters was estimated at 622[509]. Significantly – apart from the public ones, all are local, regional or municipal in nature.

Greek radio is dominated by information and music, often indigenous. There is also a strong emphasis on multicultural radio (e.g. Athens & Thessaloniki Community Radio, Radio Filia) for tourists and immigrant populations. Skai Radio, Real FM and Rythmos are among the most listened to regional radio stations. Sports radio is growing in popularity, for example. Nova Sport FMand, above all, internet

[507] Pirate radio stations were in a sense only 'legalised' in the late 1980s. More: A. Nowosad, *op. cit.*, pp. 124–125.

[508] Concessions for free-to-air channels were granted for four years, for pay channels for five to 15 years. Source: A. Woźniak, *Proces koncesyjny na przykładzie wybranych państw europejskich,* „Analiza Biura KRRiT" 2008, no. 1, p. 4.

[509] *Radio broadcasting in the EU on the decline*, https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20200213-1 (accessed 30.06.2022).

radio. After years of daily listenership exceeding 200 minutes, today people listen to approximately 3 hours of radio.

TV

The underdevelopment of Greek television is rooted in the blocking actions of the military as well as the companies – the press publishers. The first television shows date only to the mid-1950s, with television broadcasts to the beginning of the following decade (Thessaloniki)[510]. The first public show did not take place until 1964, and the occasion was the wedding of the monarch Constantine II to Anna Maria. State television began regular broadcasting in 1966, one year after trial runs. Thus, Greece was one of the last countries to see the emergence of this medium and, as with radio, its development was closely linked to internal political circumstances. Not only that: television was popularised precisely during the military dictatorship[511].

From February 1966, the state television broadcast on the general channel ERT-1, in parallel the Greek Armed Forces opened its own station, TED (Τηλεόρασις Ενόπλων Δυνάμεων)[512]. In 1985, the now-famous ERT (Ελληνική Ραδιοφωνία Τηλεόραση) was established, and two years later merged with the two available programmes, renamed ET-1 and ET-2 respectively. In 1988, a channel aimed mainly at the inhabitants of the northern part of the country, Macedonia, was created; it broadcast from Thessaloniki and officially became ET-3, the third channel of the now public broadcaster, treated as a regional channel. In the 1980s alone, nearly 140 television stations of varying coverage were established across Greece[513].

Most important from the point of view of the development of Greek television was Law 1866 of 1989, which deregulated the monopolised TV market (two years after the changes in broadcasting) and allowed the creation of private initiatives. As Greek researchers point out, it has resulted in the rapid advantage

[510] These events are linked to shows at the Thessaloniki International Fair. More: T. Karamanis, *The Role of Culture and Political Institutions in Media Policy: The Case of TV Privatization in Greece*, Hampton Press, 2003, p. 88. Also: N. Kampouris, *Thessaloniki International Fair: The History of the Region's Biggest Event*, https://greekreporter.com/2018/09/08/thessaloniki-international-fair-a-historic-flashback-of-south-east-europes-biggest-event (accessed 30.06.2022).

[511] A. Syngellakis, *Television in Greece*, [in:] *Television in Europe*, eds. J.A. Coleman, B. Rollet, Intellect Books 1997, pp. 101–102.

[512] In 1970 it was renamed Yened and functioned officially as a military service information channel. 'Freed' from military guardianship in 1982, it took the name ERT-2. However, as Karol Jakubowicz reminded us, even the changes associated with the overthrow of dictatorships, in Spain, Portugal or Greece, were not able to separate the political elite and the media. More: K. Jakubowicz, *Media publiczne. Początek końca czy nowy początek,* Warszawa 2007, pp. 102–103.

[513] M. Kaczmarczyk, *System*…, *op. cit.*, pp. 135–136.

of commercial media. In 1995, the regulator there, the ESR (Ethnikó Simvúlio Radhiotileórasis, or National Broadcasting Council), obliged them to serve the public interest, present objective information and high-quality programmes.

Greece's public broadcaster, ERT S.A. (), relies on state finances, subscriptions paid in electricity bills, and commercials, with a maximum of 10 minutes per hour of programming. Its task is to organise and develop the broadcasting sector, education and entertainment, and to present the proceedings of the Greek Parliament. ERT today broadcasts a total of six channels and, in addition to the three core channels, these include: the ERT Sports group of channels, available through the ERTFLIX ERT platform; the satellite ERT World, distributed for Greeks living abroad; ERT News, broadcasting from March 2022. In addition, parliamentary Vouli TV was launched in 1999, broadcasting the proceedings of the Greek Parliament. The ERT board is elected by the Greek government.

When writing about the Greek public media, it is impossible not to recall the bizarre case of political interference in 2013, when, by decision of the ruling Conservative party, the public media was temporarily shut down and then replaced by a new entity. This peculiar 'reform' was carried out by the Conservative party, on 11 June the transmitters of the public media were switched off and the government in communiqués announced that it would reform the public media and get it 'back on track'. Greek television was criticised for being biased especially during the 2009 crisis, but also for a marked reduction in the quality of the programmes themselves. The signal was not resumed until 10 July, ERT was then renamed EDT – 'Greek Public Television' (Elliniki Dimosia Tileorasi). This name was in turn changed on 4 May 2014 to NERIT – New Hellenic Radio, Internet and Television (Néa Ellīnikí Radiofonía, Ínternet kai Tīleórasī). Exactly two years after the beginning of this unprecedented change, on 11 June 2015, the coalition of the former opposition (left-wing Syriza + right-wing Independent Greeks[514]) reinstated the former structure and name of ERT, as well as – as Papathanassopoulos emphasises – politically-oriented programmes, which is why it is questioned whether ERT should be called a public medium or nevertheless a state-run medium[515]. In such a convoluted and politically entrenched situation, it is also hardly surprising that ERT's channels have low viewing figures, which – cumulatively – do not even reach 10%.

The transformation of the television market was to shake up the non-public media the most, however, as the Greek authorities decided to 'restore order and

[514] Following the dissolution of Parliament in December 2014, the new elections of January 2015 saw the victory of the far-left Syriza, which had already promised a return to the previous form of public media during the election campaign.

[515] P. Iosifidis, S. Papathanassopoulos, *Greek ERT: State or Public Service Broadcaster?*, [in:] *Public Service Broadcasting and Media Systems in Troubled European Democracies*, eds. E. Polonska-Kimunguyi, C. Beckett, Palgrave Macmillan, London 2019, pp. 132–134.

legitimacy' to the media. In pursuit of these intentions, they decided to reduce the number of terrestrial broadcasting licences available, from the previous eight to four, and to organise an auction for them[516]. In doing so, new rules have been drawn up for their allocation, including the period for which they are to be valid (10 years) or the number of people they employ (400 in general channels and 200 in thematic channels). As a result of the reorganisation, stimulated primarily by political affiliations, new licences were acquired by the two existing channel broadcasters Skai TV and Antenna TV, while the others were won by businessmen with links to football clubs – Vangelis Marinakis and Ivan Savidis.

In 2016, the Council of State ruled that the licence tender was unconstitutional and that the ESR lacked oversight, invalidating the process. A renewed auction was held in 2017, offering ten-year licences, expected to cost €35 million[517]. However, it is not only for this reason that the Greek private television market can be described as unstable, despite the fact that it experienced a particularly dynamic growth in non-state broadcasting initiatives in the 1990s. The first ones began operations back in 1989: in November Mega Channel was launched, and on 31 December Antenna (Ant1)[518].

In 1990 Greek viewers had access to the Alter channel (then as Channel 5), which ceased broadcasting at the end of 2011. The Communist Party of Greece supported the creation of station 902TV in the same year, broadcasting until 2012 (here one of the reasons was the problems caused by the digital switchover). In 2013, Epsilon TV began broadcasting in its place, after 2018 as Open TV. In 1991, journalists from the daily Makedonia founded Makedonia TV (Μακεδονία TV), broadcasting from outside Athens (today from Marousi). The last channel to start broadcasting in the 1990s, was Star Channel, owned by the New Television S.A. concern of Greek businessman, Giannis Vardinogiannisa. One of the youngest stations, owned by Nea Tileorasi SA (New Television), is Alpha TV, established in 1999 on the basis of the closed Skai TV[519]. Interestingly, Skai itself was reintroduced in 2006 and is one of the few surviving on the market today.

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[516] *Only four Greek TV channels get licences, eight to close*, www.euractiv.com/section/digital/news/only-four-greek-tv-channels-get-licences-eight-will-need-to-close/ (accessed 30.06.2022).

[517] K. Hope, *Highest Greek court blocks Syriza media law*, www.ft.com/content/c8d5347e-9bd0-11e6-8f9b-70e3cabccfae Also: *Six media groups submit bids for Greek TV licences*, www.reuters.com/article/greece-media/six-media-groups-submit-bids-for-greek-tv-licences-idINL8N1P62ZG?edition-redirect=in (accessed 30.06.2022).

[518] Although the viewership was at its highest, and exceeded 22%, due to financial problems, the channel was closed in 2016. It returned to the market four years later, after being auctioned off by Marinakis's Alter Ego Mass Media S.A.

[519] The channel was launched in 1993 and was intended to complement the offerings of the two dominant stations at the time, Ant1 and Mega. Its headquarters are located in Piraeus.

Nearly 120 channels are currently broadcasting locally and regionally. However, their offerings are more general in nature, as they broadcast soap operas, reality shows, sports programmes or films alongside news programmes. Due to poor infrastructure and legislation, cable television has hardly developed in the country, as it was recognised in 1995 that only the public broadcaster could create such networks. And although the provision was abolished three years later, the cost to investors over that time did not encourage the development of this form of service. Digital terrestrial television was launched in 2006, but initially only with channels from the ERT family. It was not until 2009 that the other broadcasters launched digital channels through their established operator Digea. The platforms included: Alpha, Skai, Ant1, Open Beyond, Star, Mega and Makedonia TV. Due to the closure of ERT, the analogue signal was only switched off in 2015[520].

According to Nielsen data, in 2016. the most watched TV stations were Antenna (15.7%), Alpha TV (14.5%), Star (10.5%) and SkaiTV (9.8%). Greek television today consists of magnate-owned multimedia corporations, already mentioned in earlier sections of the study, such as Skai Group[521]. Their main field of activity is the development of digital media as well as thematic TV channels.

New media

Greece has among the lowest levels of Internet use in Europe, which is caused, inter alia, by infrastructure difficulties due to the terrain (mountains surrounded by the Ionian and Aegean Seas). According to various sources, the percentage of Internet users at the end of 2021 was 73% (Digital News Report, CIA World Factbook), 75.7% (ITU, The International Telecommunication Union), or 78.1% (Internet World Stats)[522]. In 2020, in the 16–74 age group, 19.9% of Greeks declared that they had never used the internet[523], and these figures are in line with Eurostat indications, which show that the percentage of internet users reaches 78% (2020 data, with a European average of 88%)[524]. It is worth noting the dynamics of growth – in 2015, according to a study by the Greek National Centre for Social Research, internet users accounted for just under 60% of the population.

The first Greek newspaper title to launch its online edition was The Athens News (1995). Over time, despite the weak growth in the number of internet users and the development of network infrastructure, Greek online media developed along a similar trajectory to other European countries. Today, all major titles, such as 'Ta

[520] A. Nowosad, *op. cit.*, p. 134.

[521] Papathanassopoulos, Karadimitriou, Kostopoulos, Archontaki, *Greece*, *Media concentration…*, pp. 180–181.

[522] https://datareportal.com/reports/digital-2021-greece (accessed 30.06.2022).

[523] Hellenic Statistical Authority data: www.statistics.gr/en/ (accessed 31.03.2022).

[524] https://ec.europa.eu/eurostat/databrowser/view/tin00028/default/table?lang=en (accessed 30.06.2022).

Nea', offer access behind a paywall, but for the most part, publishers' digital revenues still do not offset the expenditure on paper editions. Just over 10% of their revenue comes from digital sales, with opinion polls showing that only 12% of Greeks are willing to pay to access content online. As in Poland, Greeks are less trusting of online editions of traditional news media than of typical horizontal portals such as newsbomb.gr or dikaiologitika.gr, which is the most trusted source of information. One of the first, and most important, online TV services is Skai TV (skaitv.gr), established in 2006, offering live broadcasts and VOD. Since 2009 Antenna TV has been distributing the programme online via channels on the Netwix service[525].

Against the backdrop of the relatively weak independent electronic media, and as a result of the financial crisis that hit the media hard, online journalism initiatives are very interesting. They thus form a group of alternative digital media. The first, Press Project (pressproject.gr) was founded back in 2010, and aggregated various news stories. After two years, the service had 2 million unique visitors per month[526]. In 2013, the English-language MacroPolis website was created, in 2016 as many as two crowdfunding news websites: Insidestory.gr, which, for an annual fee of €60, offers a wealth of valuable journalistic content, including investigative reporting, and Athens Live – aimed mainly at visitors to Greece[527].

For almost 85% of Greeks, the Internet is an important source of information, which they search for using mainly Google's tools, followed closely by the native search engine in.gr. It is estimated that around ¼ of the advertising market already involves digital media. In 2016, 1/3 of Greeks used social media, the most popular of which were Facebook, Twitter, LinkedIn. In 2021, the dominant social media is You Tube, used by 78% of Internet users, Facebook (76%) and Instagram (50%). Interestingly, the most important instant messenger in the country is Viber[528].

Cinema

On 29 November 1896, the first public film screenings of moving pictures took place in Athens. In the following years, as a result of socio-political circumstances related to, among others, the Ottoman rule, the Greeks were not interested in

[525] https://antenna-group.com/portfolio/netwix/ (accessed 30.06.2022).

[526] The service also published, among other things, material relating to Greece and provided by WikiLeaks. More: P. Iosifidis, D. Boucas, *Media Policy and Independent Journalism in Greece*, Open Society Foundations, May 2015, p. 33. Online access: www.opensocietyfoundations.org/uploads/7aa33e1e-6d0a-4739-94da-42eef04c316f/media-policy-independent-journalism-greece-20150511.pdf (accessed 20.06.2022).

[527] D. Boucas, P. Iosifidis, *Alternative Digital Journalism in Greece Under Conditions of Austerity*, [in:] *The Emerald Handbook of Digital Media in Greece: Journalism and Political Communication in Times of Crisis*, eds. A. Veneti, A. Karatzogianni, Emerald Group Publishing 2020, p. 9.

[528] Reuters Institute for the Study of Journalism / Digital News Report 2021, Greece, pp. 82–83.

the development of cinematography[529]. Later, development of the country's cinematography was halted by the Second World War. After its end, however, Greek cinematography began to flourish and the 1950s–1960s are still considered the 'golden age' of Greek cinema[530]. The flagship picture of the period is, of course, the American-Greek film 'Zorba the Greek', directed by Mihalis Kakogiannis. The film premiered in 1964. Earlier, in 1961, a law defining the rules for the development of cinema infrastructure came into force on the initiative of the Ministry of Industry.

In 1970, the Hellenic Film Centre (today: Elliniko Kentro Kinimatographou, then a film institute operating as General Film Investments) was established to support independent productions and also to finance feature films. Back at the beginning of the 21st century, it was an average of 15 films per year, after which the number increased, reaching 38 in 2017! In addition to these, GCF supports short productions.[531] The largest part of the budget goes to support new filmmakers, but priority is given to established filmmakers for Greek cinema. Within the GCF is the Greek Film Commission, responsible for, among other things, attracting foreign productions to the country and promoting cinematic Greece abroad. The public broadcaster is also one source of funding for cinema. In 2017, ERT financed or co-financed 22 Greek films, to the tune of €1.3 million, or approximately 1.5% of income required by law.

Until the mid-1980s, Greek cinema was in permanent crisis, a consequence of regime change and lack of investment, and translated into declining audiences. The early 1990s saw the start of investment in city cinemas and small chains promoting Greek productions, while at the same time the entry into the multiplex market began. The result was a growing number of cinemas, up to 500 in 2009. In 2019, there were 547 cinema screens in the country, including 444 digital screens[532].

Greek films account on average for approximately 7 percent of the total cinema repertoire, although this percentage dropped to 5.3 percent in 2019. There has also been a decline in audience numbers over the years, by approximately 7% per year, which may be related to the growing number of online streaming subscriptions. Although cinematography itself is not very developed, the country benefits from its geographical position and attractive locations, resulting in a number of world blockbusters being co-produced there ('The Bourne Identity', 'Mamma Mia'). For more than a decade, the Greek state has been making

[529] V. Karalis, *A History of Greek Cinema*, Bloomsbury Publishing 2012, pp. 1–3.

[530] According to some, it goes back as far as the mid-1970s. Source: Enterprise Greece presentation. *Film Industry. New Opportunities for International Investors,* Nov. 2018, www.enterprisegreece.gov.gr/images/public/Greek-Film-Industry_November-2018.pdf .

[531] www.gfc.gr/en/hellenic-film-commission/film-commission.html (accessed 20.06.2022).

[532] UNIC, the Union Internationale des Cinémas/International Union of Cinemas. Annual Report 2020. www.unic-cinemas.org/fileadmin/user_upload/Publications/UNIC_AnnualReport_2020.pdf (accessed 30.06.2022).

a number of changes to the law in order to facilitate work and successfully attract investment to the film industry.

ITALY

At the end of 2021, Italy had a population of just over 58.9 million people. They are a nationally homogeneous state with as many as twelve minority languages officially recognised, which is the highest number of regional and minority languages in western European countries[533]. A country of socio-political contrasts, with a clear division between the north, the richer part, with a higher political and civic culture, and the south, which is characterised by clientelism and egalitarianism, and which has always been more political[534].

Although freedom of the press is guaranteed by the 1947 Constitution, of which Art. 21 states that 'everyone has the right to express freely his or her ideas by word, writing and any means of dissemination. The press may not be subject to a licensing system or censorship […] publications against good morals are prohibited', successive Italian governments have treated the media as political property, in practice often censoring content. As early as the 1940s, the media reflected political forces, and the coalitions that were formed were mostly co-founded by the Khadecks. In 1948, the Press Law (Legge 8) came into force, and the first attempt to regulate the radio and television market was the 1975 law (Nuove norme in materia di diffusione radiofonica e televisiva) while the 1981 law (Legge 416) dealt with the issue of ownership in the media[535]. The biggest changes came in 1990, with the entry into force of Law no. 223 (Lege Mammi) on the activities of public and private radio and television broadcasters, under which media dualism was systemically recognised, thereby officially abolishing the monopoly of the public Rai at the national level. In 1997, a regulator in the area of the media, AGCOM – Autorità per le Garanzie nelle Comunicazioni (Communications Authority) – was established.

Media regulation is haphazard in nature and results from the ad hoc need to regulate certain spheres, as well as a large number of different types of legislation[536]. One ought to recall the government-regulated prices of newspapers until 1988, or the rules established in 1981 for the publication of newspapers by political parties and journalists' cooperatives (as a result of the declining profitability of the press, which was being replaced by television). As in other Mediterranean countries, the possibility of granting support and subsidies to the press also plays an important

533 A. Sierp, *Minority Language Protection in Italy: Linguistic Minorities and the Media*, "Journal of Contemporary European Research" 2008, vol. 4 no. 4, s. 304.

534 M. Magoska, *Kultura polityczna we Włoszech*, [in:] *Media a intergacja…*, *op. cit*., pp. 68–70.

535 J. Jastrzębski, *Włochy*, [in:] *Rynki medialne…*, *op. cit.*, pp. 237–238.

536 *Ibidem*, p. 242.

role here. It is not without reason that the Italian market is considered to be one of the least competitive among EU countries, as indicated, for example, by Reporters Without Borders' press freedom tables. For 2022. Italy was ranked 58th, and in 2016 it was even ranked no. 77. In its contemporary form, the local media market is primarily associated with the figure of three-time Prime Minister Silvio Berlusconi, whose Fininvest conglomerate has been the main player in the Italian media since the 1980s. However, if one were to look at the history of the Italian media more broadly, it is clear that, together with the spheres of politics and economics, they function on an almost equal level, and intermingle.

The lack of continuously updated statistical data makes it difficult to present a complete picture of today's media, but efforts have nevertheless been made to keep all of them as up-to-date as possible.

Press

The first handwritten newspapers (*avvisi*), which reported the latest news, appeared as early as the 16th century. At the beginning of the 17th century, publications similar to today's newspapers (*gazzette*) began to appear, whose role went beyond simply informing[537], began to emerge. This entire century can be considered the beginning of official newspapers in all major Italian cities and, characteristically, they are usually had no titles[538]. In 1664, the informative 'La Gazzetta di Mantova' (for the province of Mantua) began to be published, and is the oldest local newspaper still in print.

As late as the 17th century and early 18th century, periodicals in Italy were mainly literary; after this period, official journals and regular newspapers of a political nature begin to be published (Naples, Bologna, Parma), with Venice becoming the most important publishing centre[539]. The period of the French Revolution is the time of the greatest transpositions in Italian journalism. It is also worth recalling that in the mid-19th century, the illiteracy level in the country stood at 78%, which was not conducive to the development of the press in general[540]. The most important titles of the Italian press were established in the second half of the 19th century: 'La Nazione' (1859), 'Roma' (1862), 'La Gazzetta Piemontese' (1867), 'Corriere della Sera' (1876) or 'Il Messaggero' (1878). In 1849, 'L'Osservatore' and 'Il Costituzionale Romano' begin to be published, from which the later 'L'Osservatore Romano' (1861)[541], the official journal of the Holy See. However, in this period the press was mainly local, with no national daily newspaper. In the early 20th century, the first

[537] J. Sondel-Cedermas, *Włochy*, [in:] *Rynki medialne*…, *op. cit.*, pp. 331–332.
[538] www.treccani.it/enciclopedia/giornale (accessed 25.05.2022).
[539] Here the 'Diario Notizioso' has been published since 1759.
[540] J. Sondel-Cedermas, *op. cit.*, p. 335.
[541] www.osservatoreromano.va/pl/pages/archive.html (accessed 25.05.2022).

illustrated women's magazines entered the market; after the end of the First World War, however, the market itself stopped developing, due to fascist rule. 'Defascism' in the media would begin with the fall of Benito Mussolini's dictatorship in 1943[542]. The first decade after the war would be dominated by the daily press. In 1955, the important progressive weekly newspaper Espresso was founded and the migration of Italians from the countryside to the cities continued until the end of the 1970s, affecting the market situation. The 1970s saw the first wave of ownership reshuffles.

In the first half of the 1980s, parts of the press took up committed positions, and the financial difficulties of the print media market tied it to non-media interest groups (e.g. the Fiat-related Gemina company)[543]. In the second half of the 1980s, gadgets, games, additional folders etc. were introduced into the press market to boost sales of the waning press. The 1990s, and in particular the political revolution of 1992 associated with the replacement of discredited, corrupt party elites, was a period of the press breaking out of party shackles and adopting a critical stance; it was also the time when it entered the monopolising television market era of 'Berlusconism', which lasted until 2012[544].

The three main publishing centres in the country today are Rome, Milan and Turin. There are no typical tabloids in the daily press, and it tends to be treated as opinionated and prestigious. Today, barely 15 percent of Italians reach for a newspaper as a source of information, and barely more than 5.5 million read the daily press regularly. This is one of the lowest reading rates in Europe, which is influenced by at least two factors: information tends to be sought by an active and informed public, and there is still a significant rate of functional illiteracy in the country (mainly in its southern regions)[545].

The Italian press is usually divided into four segments: national dailies, local and regional press, free press and magazines. Of the first group, the largest circulation figures today are: 'Corriere della Sera' (published in Milan with a circulation of 255,000, with a readership of more than 1.7 million); 'La Repubblica' (Rome, 230,000 circulation and 1.6 million coverage); 'La Stampa' (Turin, circulation approximately 150,000). The Vatican's L'Osservatore Romano is published with a circulation of approximately 10,000, and its Sunday edition is published in eight languages, plus Italian.

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542 J. Sondel-Cedermas, *op. cit*., p. 344.

543 M. Krzysztoszek, *Kryzys we włoskim sektorze prasy drukowanej – przyczyny i skutki*, „Media i Medioznawstwo" 2011, no. 1 (1), pp. 92–93.

544 Only after 2012, a period in which the former prime minister will have been convicted of, among other things, using underage prostitutes, abuse of power and tax fraud, will it be possible to speak of 'post Berlusconism'.

545 *Analfabetismo funzionale in Italia*, https://italiaindati.com/analfabetismo-funzionale-in-italia (accessed 25.05.2022).

Italy remains one of the few countries in Europe where the free press is still an important market segment. Three titles are published in the country: 'Metro' – published since July 2000; 'Leggo' – published since 2001 and initially distributed in 15 cities, today only in Rome and Milan[546]. Between 2001 and 2012, in Florence, Bologna and Milan, the owner of 'Corrière della Sera' still published the free 'City'.[547] Sports dailies are also among the titles with the largest circulations. Founded in 1896, 'La Gazzetta dello Sport' is published with an average circulation of 100,000 copies, but records a readership in excess of 1.5 million[548]. The second title is Rome's 'Corriere dello Sport', founded in 1924 and read primarily in central and southern Italy.

Of the magazines, those aimed at women, such as 'Grazia' (est. 1938), 'Epoca' (1950) and the most important, 'Panorama' (1961). The so-called 'The War of Segrate' was fought over the latter between Silvio Berlusconi and Carlo de Benedetti – publishers interested in taking over the shares from Mario Formenton, director of then most important Mondadori publishing house, who died in 1987. As a result of this, there were important ownership changes in 1991: eventually Berlusconi took control over Mondadori publishing house, and this further destabilised the Italian media market.

The Italian press market is centred around three large media groups, as sealed by an ownership change in 2016, when L'Espresso merged into Gruppo Editoriale L'Espresso with the newly formed Italiana Editrice (Itedi, publisher of, among others, 'La Stampa')[549]. A year later, the company changed its name to GEDI Gruppo Editoriale and today, in addition to its flagship dailies, it has a portfolio of 10 local newspapers, online portals and radio stations. GEDI Gruppo Editoriale is a leading digital concern in Italy.

The other major entity is CairoRCS Media, owner of seven daily newspapers (including 'Corriere della Sera', 'La Gazzetta dello Sport') and fifty magazines (including TV, '7' and 'Io Donna')[550]. The third major concern is The Caltagirone Editore,

[546] Its publisher boasts of having turned 'Leggo' into Italy's first community newspaper in 2016. www.caltagironeeditore.com/en/group-eng/ (accessed 25.06.2022).

[547] P. Bakker, *Reinventing newspapers. Free dailies – readers and markets.* Available: www.researchgate.net/publication/254748535_Reinventing_newspapers_Free_dailies_-_readers_and_markets (accessed 25.06.2022).

[548] The website is visited daily by almost 3.4 million internet users. www.cairorcsmedia.it/en/our-brands/la-gazzetta-dello-sport (accessed 15.06.2022).

[549] Also in 2016, the FCA Italy S.p.A. group. (formerly FIAT) withdrew its stake from RCS. *Rcs, Espresso e Itedi: nuove ombre sul futuro dei giornali*, 21.03.2016, www.editoria.tv/rcs-espresso-itedi-ombre-futuro-giornali (accessed 16.06.2022).

[550] It is worth noting the structure of Italian media concerns. The aforementioned CairoRCS includes a total of 130 brands, in addition to traditional media, 25 websites, 50 social media and a football club.

established in 1996, which owns six leading dailies, including 'Il Messaggero' or 'Il Mattino', as well as a number of online services.

Radio

In 1924, the Italian Radio Union (Unione Radiofonica Italiana) was founded, which in December 1927 adopted the name EIAR (L'Ente Italiano per le Audizioni Radiofoniche). The URI's first radio station was launched back in October 1924. In the 1930s, Italian radio broadcasting was implicated in fascist activity, acting as a propaganda medium (the clearly growing popularity of the medium was exploited). In 1946, two stations were created: Rete Rossa (broadcasting in the south) and Rete Azzurra (north). In 1950, the broadcaster underwent restructuring that saw its repertoire expand to include the cultural Terzo Programma; radio itself began to become a culturally relevant medium[551]. In 1954, Rai (Radiotelevisione Italiana) was created. In 1962, public radio was entrusted with broadcasting to foreign countries, but it was not until the 1970s that market deregulation and mergers of private local stations took place. In 1975, Rai International was created, later functioning as an autonomous entity within the Rai structures.

Today's public radio is made up of channels: Rai Radio1 (news, popular music and sports), Radio2 (more entertainment programmes), Radio3 (high culture), Isoradio (for motorists) and Rai Gr Parlamento, as well as a group of stations broadcasting on the digital platform Rai Play Sound: Radio1 Sport, Rai1 Sport, Rai2 India, Rai3 Classica, Radio Kids and the reminiscent archive material Rai Radio Techete'.

The development of commercial radio came in the 1970s, with the emergence of typical entertainment radio stations such as the Neapolitan Radio Kiss Kiss and RDS (Radio Dimensione Suomo), but also those combining entertainment with political programmes: Radio Milano International, Radio Centopassi or Radio Popolare; in 1982 Radio Italia was launched. The second half of the 1980s and the first half of the 1990s were a difficult period for Italian broadcasting, mainly due to the dominance of television. In 1995, Radio DeeJay and Radio Capital (both now part of Gedi GE), one of the most popular to this day, were established.

The leading radio stations are owned by GEDI GE, RTL 102.5 Group and Mediaset. The non-networked channels are RDS, Radio Italia and Kiss Kiss. 24 Ore Group owns one of the more listened to Radio24, but the highest listenerships are recorded by: RTL 102.5, with 6.3 million Italians, RDS with 4.9 million, Radio DeeJay with 4.6 million, Radio Italia with 4.5 million, and Mediaset-owned Radio 105 with

[551] G. Mazzoleni, *Italy*, [in:] *The Media in Europe: The Euromedia Handbook*, eds. M. Kelly, G. Mazzoleni, D. McQuail, SAGE 2014, p. 132.

4.1 million (data: Statista)[552]. Public RAI Radio, which is sustained by subscriptions and advertising, attracts approximately 3.6 million listeners (programme 1), 2.8 million (Rai Radio 2). Of the local stations, Radio Marte and Radio Company are worth mentioning. Radio in Italy today is listened to regularly by approximately 34 million people, including 17 million daily.

TV

The state-run Programma Nazionale (today: Rai) has been linked to the Christian Democrat party from the beginning, and strongly influenced by the Catholic Church[553]. Its mission is governed by a three-year contract with the Ministry of Communications, while it operates as a public-state company, managed by a Council whose composition is established by agreement between the Chamber of Deputies and the Senate. Rai is funded by subscriptions and advertising – a proportion of approximately 68% to 24%; the rest of the income comes from other sources (sale of licences, etc.).

The first public television channel, La Rai 1, was established in 1954, with a second channel, Rai Due, launched in 1961 and Rai Tre in 1979, as a political compromise between Aldo Moro (Christian Democrats) and Enriko Berlinguer (Communists). In every sense, the 1970s were an important period in the history of Italian television – for a new media law gave RAI the right to reorganise the broadcasting sector and henceforth parliamentarians, not the government, appointed its 16-member supervisory board[554]. Although the Constitutional Court allowed private broadcasters at the local level in 1976, the general ban on nationwide broadcasting initiatives was maintained. In the 1980s, the commercialisation of the public media progressed, as a direct result of the expansion of the Fininvest group's channels: Canale5, Italia1, Rete4. This is because these offered viewers cheap entertainment – South American serials, teleseminars and talk shows – to which the public Rai adapted.

Today, the public Rai consists of basic channels: general Rai1 and Rai2[555], cultural Rai3, youth Rai4 (since 2008), and Rai5 – about the arts, created in 2010. These are accompanied by a group of thematic stations such as Rai Gulp (for children, since 2007), Rai Scuola (documentary, educational, since 2009), Rai Movie or Rai Sport (both 1999). Rai also broadcasts regional channels targeting, among others, people in the Italian-speaking part of Switzerland, namely Rai Ladinia and Rai Südtirol.

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[552] *Rai: Reports and Financial Statements as at 31 December 2019*, www.rai.it/dl/doc/1599380088985_A%20_%20RFA%20_%20RAI%20_UK%20002.pdf (accessed 15.06.2022).

[553] M. Magoska, *op. cit*., p. 72.

[554] It remained the prerogative of the government to grant television concessions, as well as to control the fulfilment of the public service mission.

[555] The first is more family-oriented, the second is aimed at residents of large cities.

Officially, the first national commercial channels would not appear on the market until 1990, although by then the aforementioned 'supra-regional three' Berlusconi channels would already be successfully operating in the Italian market. Still in 1974, the cable station Telemilanocavo was launched, which, as a result of the legislative changes of 1974–76, finally started operating as the local Telemilano station in 1978. In the years to come, Berlusconi would create a television network, unifying the programming across dozens of private local stations. Broadcasting programme bands together effectively laid the foundations for the creation of the Canale5 network in 1980, which became the first supra-regional and therefore national television brand. By merging the stations, Berlusconi circumvented the ban on launching national channels, for which the public broadcaster has been guaranteed a monopoly[556].

Already in the first half of the 1980s. Fininvest is made up of three networks of supra-regional channels: the aforementioned Canale5, Rete4 – established in 1982 and bought from Mondadori in 1984, and Italia1 – previously launched by Rusconi[557]. By taking over these networks, Berlusconi has created a wide range of network television stations, aimed at different audiences (general channel, women's channel and youth channel), capable of not only competing effectively with Rai, but also quite quickly outstripping it in terms of viewership. Of interest, in 1984 one of the first European music channels, Videomusic, was launched in Italy.

In 1993, as part of the restructuring of the Fininvest group, Mediaset[558], the conglomerate responsible for production and film and television assets, formally the owner of the 'Big Three', was spun off. In 1994, on the other hand, there was what can only be described as a politicisation of the Italian media, which had to do with the launch of Silvio Berlusconi's political career and the creation of his party, Forza Italia. In the years in which Silvio Berlusconi was Prime Minister – i.e. 1994–1995, 2001–2006, 2008–2011 – his prerogatives enabled him to influence, inter alia, public media employment (journalists or popular evening programme hosts who criticised his actions, such as Michele Santoro, Daniele Luttazzi or Enzo Biagi, were dismissed). Combined with Mediaset's dominant market position, during these periods Berlusconi had influence over 90% of the television market, against which one speaks of an Italian media monopoly. In this way, through the changes to the law Berlusconi was also able to strike at competition in the digital pay-TV market from the Sky Italia platform, owned by the Australian magnate Rupert Murdoch's

[556] P. Mancini, *Dziennikarstwo we Włoszech*, [in:] *Przyszłość dziennikarstwa w dojrzałych demokracjach*, eds. P.J. Anderson, G. Ward, Warszawa 2010, pp. 260–262.

[557] The network was launched in January and already sold to the Berlusconi conglomerate in November.

[558] G. Balbi, B. Prario, *The history of Fininvest/Mediaset's media strategy: 30 years of politics, the market, technology and Italian society*, "Media Culture & Society" 2010, vol. 32, no. 3, pp. 391–409.

conglomerate and created in 2003 from the merger of the existing TelePiù and Stream TV platforms. In 2005, Mediaset launched its own PPV platform, Mediaset Premium, on which, for example, Rai's public television channels went, blocking their broadcast on Murdoch's platform. In addition, the number of allowed advertising minutes on commercial stations was reduced in 2010, which was clearly interpreted as a direct attack on the Australian's Italian media interests. Digital terrestrial television was launched in 2003, but the originally predicted year of switch-off, 2006, was postponed until 2012.

The first thematic channel, Happy Channel, started broadcasting in 1998 (it existed until 2006), and of the other major channels, apart from those owned by Mediaset, it still broadcasts today, among others. La7 (created in 2001 on the basis of Telemontecarlo), Nove (until 2016 as Dee Jay TV), the 'radio on the air' that is RTL 102.5, and local stations. Highly popular are the news stations – Sky TG24 (since 2003), Rai News24 (1999) and TGCom24 (since 2011, in the hands of Mediaset and MediaForEurope)[559].

2021 Italian television ended with the lowest viewing figures in a decade. The only broadcaster to record an increase in audience was public broadcaster Rai, with a share of 36%. Stations from the Mediaset group could count on an audience of 31.9%, those belonging to Discovery Italia 7.4% and those from the Comcast/Sky Italia group 6.2%[560]. As recently as the beginning of the second decade of the 21st century, 93% of the Italian population declared that they watched TV; today this is down 3%. The average time Italians spent in front of the TV was 3 hours and 18 minutes. The so-called community media, or local media initiatives of foundations or NGOs, are considered to be the most pluralistic. SVoD platforms are experiencing growth in popularity, with Netflix seeing an increase in unique users from 7.5 million to 8.7 million in 2021, as is sports platform DAZN (from 1.5 million to 2.4 million). There were declines in the number of subscribers to Amazon Prime Video (down 100,000, to 6 million), Disney+ (minus 400,000, to 2.6 million) and Sky Group-owned NowTV (from 1.3 million to 1 million).

New media

As recently as 2016, the level of internet use in Italy did not reach 80%, mainly due to a very low rate among the over-75s, poor technological facilities in households

[559] Mediaset Italia S.p.A. is now a pan-European project of MediaForEurope, based in the Netherlands. The corporation focuses its main fields of activity on the production and distribution of free-to-air and pay-TV. Interestingly, it may also become the owner of the UK's Channel4. More: www.mfemediaforeurope.com/en/group/relevant-facts/ and: (MAC), *Berlusconi chce kupić brytyjski Channel 4*, www.press.pl/tresc/71579,berlusconi-chce-kupic-brytyjski-channel-4 (accessed 5.07.2022).

[560] B. Pekic*, Italy: Only Rai sees audience growth in 2021*, https://advanced-television.com/2022/05/06/italy-only-rai-sees-audience-growth-in-2021 (accessed 15.06.2022).

and a general low interest in IT networks[561]; this made Italy one of the most backward European countries in this respect. Today, the internet is available in 89% of households and the percentage of web users according to data from the Digital News Report has reached 93%[562]. As with the overall development of the country, the development of the Internet was determined by the north-south divide in the country. The largest increase in the number of internet users in the south of Italy was between 2015 and 2020, and this was an increase of 27%.

The first online newspaper title was 'L'Unione sarda' (1994). In 1996, the websites of the public Rai, as well as the website of the daily newspaper Il Sole 24Ore, debuted online. The traditional media websites, as well as the blogosphere, which was important because of criticizing the authorities, developed rapidly after 2000.

The daily time spent online has already increased to almost 6.5 hours. The portals belonging to Mediaset/MediaForEurope have the largest online reach, but the ANSA Press Agency website and the website of the daily newspaper La Repubblica are also in the lead. Interestingly, the level of trust in online information almost equals the credibility of television broadcasts. In addition to the Italian news agency, private media such as Sky, La7 and 'Corriere della Sera' are at the forefront of the most trusted news sources on the web. Only 13% of Italians use paid content.

Since 2017, there has been a steady increase in the importance of mobile devices in communication. Amongst social media, Facebook and You Tube definitely dominate, although the popularity of both platforms declined slightly year-on-year.

In the third quarter of 2020, nine out of ten internet users in Italy watched online videos on a monthly basis, with viewers spending almost 19 minutes per session on the YouTube website. The rise in popularity of entertainment sites is a direct consequence of the impact of the country's global coronavirus pandemic, which caused a 50 percent increase in viewership in the days following the March 2020 mandates. While video streaming sites and OTT platforms remain one of the most popular website categories for internet users in Italy, even after the immediate impact of the COVID-19 outbreak, search sites were used by more than 94 percent of digital audiences in Italy. Both Google.com and the national domain Google. it were among the most visited sites by Italian users, with Google.com amassing more than two million visits in December 2020. In 2021 Facebook was the social media platform that recorded the highest number of users in Italy, gathering more than 38 million. The popular social network reached more than 80 percent of Italian internet users. The most-used social media platforms in Italy are YouTube and WhatsApp. Despite the popularity of Facebook, according to a survey of Italian

[561] Sondel-Cedarmas, *op. cit.*, pp. 361–362.

[562] All data on news sourcing and page credibility: Reuters Institute for the Study of Journalism / Digital News Report 2021, *Italy*, pp. 88–89.

internet users in April 2020, respondents identified the main social media platforms (Facebook, Instagram, Twitter) as responsible for spreading false or inaccurate information regarding the coronavirus outbreak in the country.

Cinema

The golden years of Italian cinema were in the 1960s, which is evidenced by the number of films produced at the time: in 1968 alone, there were 450 films. In comparison, in the weakest year to date, 1993, only 50 film pictures were made in Italy, which accounted for 17% of all films screened in cinemas at the time. Currently, the percentage varies between 25 and 30%, and the average number of films produced per year exceeds 200 (in 2018 there were 273)[563]. Italy thus remains one of the leading countries in terms of such a high share of domestic production in the annual box office. It is estimated that 2/3 of the films are privately funded productions, with the remainder being publicly financed. American productions dominate the cinemas, with the proportion of European productions fluctuating around 12%. Overall, cinema revenues in Italy are falling, a trend opposite to much of Europe. However, this does not apply to the Italian productions mentioned.

Public funding is primarily provided by the budget of the Ministry of Cultural Heritage, Activities and Tourism, while Rai and Mediaset are considered major employers in the film industry. Cinecittà is a public company, operating under the Ministry, whose mission is to support Italian cinematography and the audiovisual industry. As part of Cinecittà Studios, it manages and coordinates the work of the historic film studio at Via Tuscolana, and also handles archival work. In addition, 16 regional film commissions, mostly established at the beginning of this century, are thriving in the country. Their tasks, in addition to promoting the regions, include stimulating the development of cinematography, providing financial and organisational support[564]. Their beneficiaries may be both Italian or foreign entities. In addition, the Ministry is launching a number of ad hoc instruments, such as tax breaks, or targeted funds (such as Fund for Film Distribution, intended to cover up to 30% of cinema distribution costs, or support funds for producers, exporters, etc.)[565].

An important role in the Italian film industry is played by the National Association of Audiovisual Digital Cinema Industry (Associazione Nazionale Industrie Cinematografiche Audiovisive Digitali). As it reads, 'ANICA is the trade association

[563] In 2021, 153 films premiered and, excluding the pandemic year 2020, this was 70% of the 2019 production. In percentage terms, in 2020 Italian films accounted for as much as 55% of the repertory.

[564] www.italiafilmservice.com/subsidies-et-finance/regional.html (accessed 30.06.2022)

[565] A. Trabattoni, *Italian government ramps up support for Italian film sector*, www.screendaily.com/news/italian-government-ramps-up-support-for-italian-film-sector/5170997.article (accessed 30.06.2022).

representing the Italian film and audiovisual industry'. Founded in 1944, the organisation is tasked with establishing relationships with key players in the public and private system, for the strengthening of the film sector[566].

There are more than 1,300 cinemas in the country, more than half of which are chains with between two and seven screens, and nearly 50 multiplexes with eight or more screens. In total, there are 3,667 active cinema screens in Italy (as of 2020)[567].

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Yearly Médiamat 2021, www.mediametrie.fr.

Part 3. MEDIA IN POLAND

Chapter 1. HISTORY OF THE POLISH MEDIA

1. The Polish press in the period 1661–1918

The history of the Polish press, as in most parts of Europe, begins in the 16th century, when occasional prints, still irregularly published, appeared in then Republic. They included accounts of important events, such as wars, court ceremonies or religious ceremonies. However, they did not yet constitute a press in the modern sense, as they were not published regularly. The official year of the birth of the Polish press is considered to be 1661, when, on the initiative of then King Jan Kazimierz, the 'Merkuriusz Polski' was published regularly every week for six months. It was first published in Krakow, then in Warsaw, and an Italian edition was also published, which served as a source of information on Poland for the foreign press and authorities of European countries[568].

In the last decades of the seventeenth century and the first half of the eighteenth century, various more or less regularly published press titles appeared in Polish cities; most often their publishers were religious congregations or clergy associated with them, but their limited reach and small circulation meant that its social impact and role was severely restricted. There was a revival of publishing activity in the second half of the 18th century, during the Enlightenment, when several important periodicals appeared in the major Polish cities, mainly in Warsaw, in the pages of which political and world-view discussions took place. These titles represented different political parties and thus became a platform for the presentation of different political ideas and concepts: both conservative and clerical ('Gazeta Warszawska') and progressive ('Monitor', 'Gazeta Narodowa i Obca'). As in other European countries, the press was only available to the elite, as it was low-cost and expensive[569].

[568] L. Piwońska-Pykało, *Prasa polska do 1795 r.*, [in:] *Prasa, radio i telewizja w Polsce*, eds. D. Grzelewska, R. Habielski, A. Kozieł, J. Osica, L. Piwońska-Pykało, Warszawa 2001, pp. 9–12.

[569] *Ibidem*, pp. 12–24.

An important, though difficult, époque in the history of Poland, and therefore of the Polish press, was the period of partition, when Poland disappeared from the maps of Europe for more than 120 years and its territory was divided between three great neighbours: Russia, Prussia and Austria (1795–1918). During this period, especially in the 19th century, other European countries saw a rapid quantitative and qualitative development of the press. This was also happening in the Polish territories incorporated into the partitioned states, but much more gradually. The development of the press was obstructed by the policies of the occupying states, which limited the development of the Polish press through a restrictive system of censorship and press licensing. It was during this period that a specific feature of the Polish press crystallised – its patriotic, and therefore political, commitment. Indeed, the publishers of the press considered it their task, even their historical mission, to replace non-existent or malfunctioning educational, educational and cultural institutions, to act to maintain national identity and to resist the partitioners. This period also saw the establishment of a specific publishing geography and three different press market models, but it is worth emphasising that it was during this period that the gap in civilisational development in relation to the leading European countries widened significantly, including in the category of press development[570].

2. The inter-war period and the Second World War

The end of the First World War in 1918 saw Poland regain its independence and the period of rebuilding statehood began. Poland was reborn as a democratic state and the constitution adopted in 1921 included guarantees of press freedom. The inter-war period can be regarded as a period of intense press development, although it was difficult to catch up with the century-long backlog in such a short time. The development of the press was facilitated by democratic legal regulations, but a serious barrier was the poverty and illiteracy of a large part of the population[571].

During the interwar period, many dailies were published in Poland, as in other European countries, as they were the fastest source of information at the time. The daily news press was characterised by considerable politicisation, with much of it published by political parties or circles, and individual newspapers and magazines supporting specific political groupings, even if they were not formally affiliated with them. Next to the news press, in the 1930s the sensationalist press aimed at a mass readership took an increasingly important place. An example of such a daily newspaper was the 'Ilustrowany Kurier Codzienny' ('IKC'), published in Krakow by Marian Dąbrowski. The Catholic press published by various structures and institutions

[570] J. Osica, *Prasa lat zaborowej niewoli*, [in:] *Prasa, radio i telewizja w Polsce*, eds. D. Grzelewska, R. Habielski, A. Kozieł, J. Osica, L. Piwońska-Pykało, *op. cit.,* pp. 27–57.

[571] R. Habielski, *Polityczna historia mediów w Polsce w XX wieku*, Warszawa 2009, pp. 36–42.

of the Catholic Church also accounted for a significant part of the press market (more than 25%).

In the inter-war period, radio was established in Poland, as in other European countries, and although initially an elite medium, it began to play an important role in the cultural and political life of the country. The history of Polish radio broadcasting began in 1925, when the company Polskie Radio was granted a monopoly concession to broadcast radio signals in Poland and began building a broadcasting infrastructure and, a few months later, broadcasting a regular programme. In subsequent years, regional Polish Radio stations were launched in Krakow, Poznan, Katowice, Vilnius, Lviv and Lodz. In 1931, a modern and high-powered broadcasting station was launched in Raszyn near Warsaw, thanks to which Polish Radio could be received in 80% of the country. Started in the 1930s production of low-cost radio receivers significantly influenced its popularisation[572]. World War II erupted on 1 September 1939 with Nazi Germany's attack on Poland and its occupation of the western half of the country. In mid-September, the eastern part of the country was attacked by Soviet troops. Once again, Poland was divided and found itself under occupation. This meant the liquidation of the pre-war press and its replacement by the press published by the occupying forces. Despite the ban, an underground press was published throughout the occupation as an alternative to the propaganda-saturated official press. During the Second World War, Polish Radio did not operate, the infrastructure was destroyed or taken over by the occupying forces, and the possession of radios was forbidden under penalty of death[573].

The outbreak of war and the anticipated repression of the intelligentsia in particular, and therefore of journalists, prompted many to flee to various parts of Europe and even beyond. In exile, they were involved in the publication of various press titles intended for the military units or clusters of Polish emigrants forming in various places. After the end of the war, when it became clear that Poland would be a communist country on the decision of the victorious powers, many of them remained in exile and continued to publish the press for the Polish community.

In the initial period after the end of the Second World War, the largest concentration of Polish émigrés was in London; hence it was there that the largest number of titles of the émigré press were published, which to a large extent continued the pre-war titles and reflected the balance of power on the pre-war political scene. The press wrote about the injustice that had befallen Poland as a result of the Great Powers' decision, particularly lamenting the loss of a large eastern section that had been incorporated into the Soviet Union.

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[572] *Magia radia – krótka historia polskiej radiofonii*, www.polskieradio.pl/39/156/Artykul/2262237 (accessed 24.03.2021).

[573] R. Habielski, *Polityczna historia mediów w Polsce w XX wieku*, *op. cit*., pp. 147–152.

The second important émigré centre was Paris, where Jerzy Giedroyc published the monthly Kultura between 1947 and 2000, and where the editorial office in Maisons-Laffitte near Paris became the most important centre of the cultural and political life of the Polish émigré[574].

3. The Polish media system under communism (1944–1989)

The functioning of the media is always conditioned by the political and economic system in place in a particular country. After the Second World War, Poland became a communist country, the Polish People's Republic (PRL), where the principle of separation of powers and democratic principles of government did not apply and civil rights and freedoms were severely restricted. Full power was exercised by the Communist Party (Polish United Workers' Party – PZPR), or rather by its leadership, the PZPR Central Committee. Such full control also applied to the media. There was a special structure in the Communist Party leadership to control the media, it was there that instructions were drawn up on the topics to be covered in the media and their execution was controlled. As in all institutions in the state, all senior positions in the media were also filled by the party, which was supposed to guarantee loyalty to the party leadership and ensure that official and unofficial orders of the party leadership were carried out. The media were supposed to 'speak with one voice', forming a 'media orchestra', playing under the dictates of the secretary of the Central Committee in charge of information policy, which in practice was propaganda[575].

The press, radio and television were treated as tools of the Communist Party, which used them to influence society ideologically. Journalists were referred to as 'ideological frontline workers' and it was expected that properly crafted media messages would effectively shape people's views, attitudes and even behaviour. Control of media content was exercised through a well-functioning system of preventive censorship, exercised by a specially established institution – the Central Office of Press, Publication and Audience Control[576].

The Communist Party's political supervision of the press market was also ensured by the form of ownership and the need to obtain a licence to publish a press title (press licensing). The press in the People's Republic of Poland belonged exclusively to so-called socialised publishers, which meant that only institutions and organisations could publish it; private publications were thus excluded. There were no market mechanisms at work in the press market, as it, like the economy

[574] www.kulturaparyska.com/pl/ludzie/pokaz/g/henryk_giedroyc/multimedia/galerie/dom-maisons-laffitte (accessed 20.05.2021).

[575] T. Goban-Klas, *The Orchestration of the Media. The Politics of Mass Communications in Communist Poland and the Aftermath,* Westview Press, Boulder 1994.

[576] *Słownik terminologii medialnej*, eds. W. Pisarek, Kraków 2006, p. 23.

as a whole, was centrally planned and controlled. It was the party that decided the number of press titles published and their circulation by limiting the allocation of paper for printing.

Throughout the communist period, there was not enough press relative to the demand, and most of the titles published contained propaganda content instead of responding to the authentic interests and expectations of the readers. The press deficit mainly concerned magazines (colour press) of an entertaining or at least non-political nature: women's magazines, children's press, hobby press, travel press, etc. There was, however, no shortage of dailies, especially those published by Communist Party structures with a clear political agenda and propaganda.

In the PRL press market, the Workers' Publishing Cooperative 'Prasa-Książka-Ruch', owned by the Central Committee of the PZPR ran a monopoly. In the 1970s and the 1980s. 'Prasa-Książka-Ruch' published approximately 85% of the total circulation of newspapers published in Poland (92% of dailies and over 70% of magazines). It was the sole distributor of newspapers, owned the majority of printing plants and printing houses in the country, and even had its own research institution – the Press Studies Centre in Krakow[577].

Throughout the communist period, only the state-owned Polish Radio and Polish Television (TVP) functioned in Poland. Immediately after the end of the war, the rebuilding of Polish Radio began, which gradually expanded, increasing the number of antennas and the number of field centres. In the 1970s, it built the structure in which it operated over the following decades: four national and 17 regional programmes. The most important and the only programme with nationwide coverage, and thus with the highest listenership, was Polish Radio Programme One broadcast on long wave. In many corners of the country it was the only programme available. It was universal in character and for the communist authorities it was the most important from a propaganda point of view. From the 1970s onwards, Programme Three was also very popular as an entertainment programme, with a formula of original spoken-word programmes that was innovative for the time. Programme Two was aimed at the most discerning listeners, broadcasting classical music concerts, cultural programmes and discussions with prominent people from the world of culture and science. Its listenership was considerably lower than that of Channel One and Channel Three, as was that of Channel Four, of an educational nature[578].

Work on the launch of television in Poland had already begun before the Second World War, with experimental broadcasting starting a few months before the outbreak of the war, but the outbreak of war halted this work for more than a decade.

[577] K. Pokorna-Ignatowicz, *Robotnicza Spółdzielnia Wydawnicza „Prasa-Książa-Ruch" w polskim systemie medialnym*, Kraków 2016, pp. 237–238.

[578] www.polskieradio.pl/39/156/Artykul/2262237,Magia-radia-krotka-historia-polskiej-radiofonii (accessed 24.03.2021).

In the late 1940s, this work was resumed, resulting in the official launch of Polish Television (TVP) on 25.10.1952. Initially, its reach was very limited: a major obstacle to its popularisation was the lack of TV sets, which were imported from abroad and their price was exorbitant. Gradually, however, in the following years, its coverage was increased by building up the broadcasting infrastructure and launching more field centres in large cities (Łódź, Kraków, Katowice, Wrocław, Poznań, Gdańsk), and the production of TV sets also started[579].

In 1960, the legal status of broadcasting was regulated by law, creating a body to oversee their activities – the Broadcasting Committee. The Radio and Television Committee, commonly referred to as the Radiocommittee. This institution, which included Polish Radio and Polish Television, was modelled on the Soviet model and was directly subordinate to the government and the Communist Party leadership. The chairman of the Radiocommittee was of ministerial rank and a member of the government. Under this law, the Radiocommittee had exclusive rights to broadcast radio and television signals in the country. Thus, the state-owned Polskie Radio and TVP had exclusive broadcasting rights and were directly subordinate to the government and party[580].

From the 1970s onwards, the party authorities considered television to be the main medium with a unique political role and exercised complete control over it using it fully for propaganda purposes[581]. This decade saw its greatest development, with a lot of funding. At the beginning of the decade, Polish Radio and TVP moved to new premises – a modern complex on Woronicza Street in Warsaw, where they still operate today. In the early 1970s, TVP's Second Programme was also launched and broadcasting in colour began by introducing the SECAM system, in which all television stations in the 'communist camp' operated. In the mid-1970s. There has been a change in the model of mass communication in Poland, with television becoming the most popular medium, the main source of information and entertainment for Poles. In addition to the great technological advances, the decade of the 1970s was also a time of great development. It was also a period of rapid growth in television production, for which no money was spared. Films and television series for adults and children, entertainment programmes, comedy shows were produced, theatre plays were transferred to the television screen, some of which were exported to other communist countries and even to television in Western European countries. It is worth remembering, however, that all the growth of television in this decade was for

[579] A. Kozieł, *Za chwilę dalszy ciąg programu. Telewizja Polska czterech dekad 1952–1989,* Warszawa 2003, pp. 13–43.

[580] Act of 2 December 1960 on the Committee for Radio and Television Affairs "Polish Radio and Television", Dz.U. 1960, no. 54, pos. 307.

[581] K. Pokorna-Ignatowicz, *Telewizja w systemie politycznym i medialnym PRL. Między polityką a widzem,* Kraków 2003, pp. 107–133.

purely political reasons. Television was the main propaganda tool of the communist authorities, with the help of which the authorities' information policy known as 'propaganda of success' was implemented. It involved convincing the public of successes in various areas and bright prospects for the future, and eliminating negative information from the media that could undermine the desired optimism[582].

The propaganda of success was spread by the media, mainly on television, until the end of the decade, despite the fact that, by the end of the decade, the country was sinking into a great economic crisis, which led to strikes and social protests in the summer of 1980. Their result was the creation of Solidarity, which, although formally a trade union, became a major social movement seeking to democratise the existing political system, including the media. However, these aspirations were brutally suppressed by the imposition of martial law on 13 December 1981. For several months, the military took over Poland; Solidarity was outlawed, civil liberties were curtailed and total control of the media was once again taken. The 1980s were a miserable and difficult time. Not only was there a failure to democratise the political system, but there was also a failure to contain the economic crisis, which deepened and, by the end of the decade, led to a near collapse of the economy and exacerbated public frustration.

4. Transformation – building a democratic media system in Poland

In 1989, the process of systemic transformation began in Poland with the aim of transforming the communist system into a democratic one. The event that started this process was the Round Table talks (from 6 February to 5 April 1989) – the negotiations between representatives of the communist government and the opposition on the future of the state. These negotiations covered a wide range of issues, including, among others, changes in the Polish political system, economy, social life and media system. They resulted in the signing of the 'Round Table Agreements' on 5 April 1989, a political contract containing agreements whose implementation in the following months and years led to the building of democracy and a market economy in Poland.

One of the issues discussed at the Round Table was changes to the media system. It was decided that a new – democratic – media system should be built in Poland based on some key fundamental values: freedom of speech and a pluralistic media market. It was decided that the media should start operating according to the rules typical of European democracies. It was considered necessary to modernise and expand the range of media on offer, as the media infrastructure was old and worn out; technologies were obsolete and Poland lagged far behind in terms of media development in Europe. It was recognised that the state's (or rather the party's) monopoly

[582] *Ibidem*, pp. 91–107.

on the media market had to come to an end, that restrictions on the publication of newspapers and censorship had to be abolished and that access to the media, including above all radio and television, had to involve opposition circles, hitherto deprived of such opportunities. The implementation of these provisions began immediately after the signing of the Round Table contract[583].

On 8 May 1989, the first issue of Gazeta Wyborcza, the opposition's daily newspaper, was published, the publication of which had been agreed at the Round Table, recognising that the opposition needed to be able to present its views and candidates before the elections announced for 4 June 1989. The publisher of the daily was Agora, founded a few days earlier, and Adam Michnik became the editor-in-chief.

On 17 May 1989, the Act on State Relations with the Catholic Church lifted previous restrictions on the Church's access to the media, guaranteed the Church's presence in the programmes of state radio and television antennas and – of crucial importance a few months later – gave the Church the right to establish its own radio and television stations. This provision would become the legal basis for the establishment of Catholic radio stations between 1990 and 1993.

Of key importance for the press market were the amendments to the Press Act (of 1984) and the Censorship Act (of 1981)[584]. As a result, the mode of establishing press titles was changed, the previous concession system (involving the need to obtain a licence to publish a title) was replaced by a registration system requiring the publisher to only register the title. No restrictions were placed on the publishers; they could be private individuals or business entities, as well as representatives of foreign capital. Fundamental to the process of building a democratic media system was the abolition of the caesura by the Act of 11 April 1990[585]. In addition to legal changes, the second factor that changed the press market in Poland was connected with economics – the introduction of market principles in the economy. Press publishing started to be treated as an economic activity. The state stopped interfering in the press market and it was no longer the authorities, but the readers-consumers who started to decide the fate of publishers and press titles[586].

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583 K. Pokorna-Ignatowicz, *From the communist doctrine from media to free media. The concept of a new information order in the Round Table Agreement,* [in:] *The Polish Media System 1989–2011*, ed. K. Pokorna-Ignatowicz, Kraków 2012, pp. 11–21.

584 Ustawa z dnia 31 lipca 1981 r. o kontroli publikacji i widowisk, Dz.U. z 1981 r. Nr 20, poz. 99 and Ustawa z dnia 26 stycznia 1984 r. Prawo prasowe, Dz.U. z 1984 r. Nr 5, poz. 24 [Act of 31 July 1981 on the control of publications and performances, Journal of Laws of 1981 no. 20 item. 99 and Act of 26 January 1984 Press Law, Journal of Laws of 1984 no. 5 item. 24].

585 Ustawa z dnia 11 kwietnia 1990 r. o uchyleniu ustawy o kontroli publikacji i widowisk, zniesieniu organów tej kontroli oraz o zmianie ustawy Prawo prasowe, Dz.U. z 1990 r. Nr 29, poz. 173 [Act of 11 April 1990 on the repeal of the Act on the control of publications and performances, the abolition of the bodies of this control and the amendment of the Press Law, Journal of Laws of 1990, no. 29, item. 173].

586 T. Goban-Klas, *The Orchestration of the Media*…, *op. cit*., pp. 205–226.

Making changes to the law has proved relatively straightforward. Much more difficult was the implementation of the new rules. The biggest issue to be resolved was the ownership of existing newspaper titles. In democratic systems with market economies, the press is privately owned, publishers compete with each other for the attention and favour of readers, and anti-concentration laws ensure pluralism and prevent excessive market concentration by one entity. The new regulations concerned new titles that would be allowed to emerge without restriction, but it had to be decided what to do with the existing titles and with the monopolist in the press market – RSW 'Prasa-Książka-Ruch' – that belonged to the Communist Party, which had been dissolved in the meantime. The demand to abolish the PCF monopoly was also one of the key conditions of the contract signed at the Round Table.

On 22 March 1990, the Sejm adopted a law on the liquidation of the corporation[587]. It established the Liquidation Commission, whose task was to carry out the liquidation process – the valuation of the assets of the former RSW and their transfer to new owners, which aroused great emotions in the journalistic community. They were prompted by provisions in the law that gave the Liquidation Commission the right to sell a newspaper by tender or transfer it free of charge to the journalists working there if they set up a 'journalists' cooperative'. When deciding on the fate of the privatised titles, the Commission had to take into account the conflicting expectations of the journalistic community, which was interested in taking over the titles it created free of charge, and of those who believed that the proceeds from the sale of the party concern should feed the state budget. In a bid to satisfy these mutually exclusive expectations, the Commission gave just over half of the titles free of charge to newly formed journalistic cooperatives and sold just under half. Another peculiarity of this method of privatisation was that the Commission had a great deal of freedom in deciding to whom and for how much it would sell a particular title, as it did not have to be guided by the criterion of the highest bidder[588]. Many of its decisions were controversial, culminating in public accusations of bias and unfair decision-making, and even lawsuits dragging on for several years afterwards. As a result of these decisions, the press titles of the liquidated RSW passed into the hands of new owners, which included journalist cooperatives, new political entities and the French Hersant conglomerate[589].

The process of press privatisation and its transfer into the hands of new private owners ended the stage of building a democratic and free market press market in

[587] Ustawa z dnia 22 marca 1990 roku o likwidacji Robotniczej Spółdzielni Wydawniczej „Prasa-Książka-Ruch", Dz.U. z 1990 r. Nr 21, poz. 125. [Act of 22 March 1990 on the liquidation of the Workers' Publishing Cooperative "Prasa-Książka-Ruch", Dz.U. of 1990, no. 21, item. 125].

[588] K. Pokorna-Ignatowicz, *Robotnicza Spółdzielnia Wydawnicza „Prasa-Książa-Ruch" w polskim systemie medialnym*, *op. cit.*, pp. 157–161.

[589] *Ibidem*, p. 199–211.

Poland. In the following years, the market underwent a series of changes, the owners of publishing houses changed, many new titles were established and many more failed, the process of concentration and commercialisation progressed, and in time the market became dominated by large media corporations, mainly foreign[590].

Between 1989 and 1992 – when the new press market was being formed – there were heated debates in political circles about the shape of the new broadcasting model. The Round Table contract decided to leave radio and television unchanged, thus postponing the problem. However, rapid changes in the political scene and the introduction of democratic principles in the press market meant that, despite the lack of legal regulations governing who could carry out broadcasting in Poland and on what terms, a new model began to build as early as 1990. On 15 January 1990, Radio RMF FM began broadcasting in Krakow (initially under the name Radio Małopolska Fan), in September of that year Warsaw's Radio Zet, and in the following two years mostly local commercial radio stations were established in various parts of the country. Around 30 local Catholic radio stations were also established at the same time, as well as several local television stations[591].

The basis for the new broadcasting model was regulated by the Act of the end of December 1992, which established a free and pluralistic electronic media system – thus creating a typical European dual model consisting of a public sector (Polskie Radio and Telewizja Polska) and a commercial sector[592]. It created the National Broadcasting Council, which grants licences to broadcasters and is supposed to safeguard freedom of speech in radio and television, defend the independence of broadcasters and the interests of viewers. The law also described the rules for the operation of commercial and public service broadcasting and introduced a 33 percent limit on foreign capital in companies applying for a licence. The Broadcasting Act also built up a public sector consisting of 18 radio companies (Polskie Radio S.A. and 17 regional Polish Radio stations) and Telewizja Polska S.A.

Of key importance for the structure of the emerging audiovisual media market was the first concession process (1993–1994), in which nationwide and local radio and television concessions were awarded, thus creating a commercial sector. The concessions went to the private TV station Polsat, three national radio stations: two commercial Radio RMF FM and Radio Zet, the religious Radio Maryja, more than 40 local religious stations as well as more than 130 local commercial radio stations. In the second half of the decade, further radio and television licences were granted.

590 T. Mielczarek, *Raport o śmierci polskich gazet*, Warszawa 2012, pp. 113–140.

591 K. Zdrojewska, *The radio market in Poland: from the first commercial stations to formatted radio networks*, [in:] *The Polish Media System 1989–2011*, ed. K. Pokorna-Ignatowicz, Kraków 2012, pp. 83–93.

592 Ustawa z dnia 29 grudnia 1992 r. o radiofonii i telewizji, Dz.U. 1993 Nr 7, poz. 34 [Act of 29 December 1992 on radio and television broadcasting, Dz.U. 1993 no. 7, pos. 34].

In contrast to the press market, the broadcasting sector was dominated by Polish capital due to the statutory limitation on the amount of foreign capital in entities applying for a licence.

After a few years, a process of concentration of ownership and management began in the radio market, as small commercial radio stations were unable to secure sufficient revenue from the advertising market and began to be taken over by stronger competitors who, having taken over a dozen or so such stations, formed them into a network and imposed a profiled format on them. The process of concentration in the radio market through networking and formatting continued in the first decade of the 21st century.

The construction of the commercial sector in the television market began in 1994 with the granting of a nationwide concession to the private TV station Polsat, which for the first few years was the only competitor to the public TV station, TVP. Admittedly, there were also a few local commercial television stations broadcasting during this period, but these could not withstand competition from the national broadcasters and quickly went out of business. The second half of the 1990s saw the emergence of a third big player in the TV market, the commercial TVN, which played a key role in the rivalry between the big broadcasters in the following decade. In the 21st century, the Polish market has been dominated by three big broadcasters: two commercial ones (Polsat and TVN) and the public TVP[593].

An important event affecting the structure of the TV market in Poland and its reception was the digitisation of terrestrial broadcasting, which was completed in 2013. As a result, it has expanded the number of channels commonly available to more than 30. In addition, more than 300 Polish-language programmes are now available on satellite and cable TV. However, the market is still dominated by the same big three broadcasters, which create numerous thematic channels in addition to their main universal antennas. In contrast, there has been a systematic decline in viewership of the main universal channels in favour of specialised channels.

For commercial media operating offline and online according to business strategies, the primary source of income is the broadcasting of advertising. The transformation process of the media system has resulted in a new media market dominated by private broadcasters and press publishers operating according to business strategies. It is also worth remembering that Polish public service broadcasters also have the right to broadcast advertising and are therefore in competition with private operators. Almost alongside the newly forming media market grew the advertising business, which would expand in value and size year on year[594].

[593] K. Vanevska, *Commercial television*, [in:] *The Polish Media System 1989–2011*, *op. cit.*, pp. 95–100.

[594] J. Dzierżyńska-Mielczarek, *Rynek mediów w Polsce. Zmiany pod wpływem technologii cyfrowych,* Warszawa 2018, pp. 134–140.

Over the following decades, the media market, already operating according to democratic principles, changed and new players appeared on the market, some of whom were spectacularly successful, while others failed, Competition grew fiercer. Consolidation and commercialisation processes intensified so that strong players became stronger and stronger and eliminated or acquired weaker players. In the early 21st century, further changes were taking place due to the development and popularisation of new digital technologies[595].

The transformation of the media system in Poland took place during the early 1990s. It therefore did not take too long to build a democratic media system in Poland, in which the media are guaranteed freedom, finally confirmed in the 1997 Constitution, and are treated as the 'fourth authority'. The experience of almost three decades allows us to conclude that not all Polish media enjoy the freedom due to them in a democratic system, while the problem of politicisation of the media and political involvement of many of them is still present. The situation in the public media sector is particularly difficult in this respect.

Under the Broadcasting Act of 29 December 1992, the state broadcasters Polskie Radio and Telewizja Polska became public media. The public sector in Poland consists of 19 joint-stock companies of the State Treasury: one television company – TVP S.A. and 18 radio companies: Polskie Radio S.A. and 17 regional radio broadcasting companies. Public service broadcasters are only partly funded by the universal licence fee, as they can also participate in the market by broadcasting advertisements[596]. A serious problem with their financing is that in Poland, about 70% of households with radio and television sets do not pay the licence fee, even though they are obliged to pay if they own a receiver. Non-payment of subscriptions is due to both ignorance (many viewers believe that since they pay, for example, cable TV providers, they no longer have to pay subscriptions) and 'civil disobedience', as a protest against the quality of these media, especially their politicisation. Indeed, political dependence on the political party currently in power has been the biggest problem since their inception. They are treated by politicians as 'loot' after winning an electoral battle. Changes in the political scene bring changes in leadership positions in the public media, then also in the lower levels of management, and finally in the journalistic teams – the 'people of the new president' replace the 'people of the former president'. In addition, this problem is getting worse rather than better[597].

595 *Ibidem*, pp. 58–64.

596 M. Oleszkowicz, *Public media in Poland*, [in:] *The Polish Media System 1989–2011*, *op. cit*., pp. 111–120.

597 K. Pokorna-Ignatowicz, *The Polish media system in a process of change: between the market and politics*, [in:] *Business and Media at the Down of the 21st Century. Polish and Slovenian Experience,* eds. K. Pokorna-Ignatowicz, M. Majorek, London 2017, pp. 1–11.

The public media was subjugated by Poland's ruling Law and Justice party on an unprecedented scale. A few weeks after taking power, a so-called 'small amendment' to the Broadcasting Act was passed at express speed, changing how public media authorities could be appointed, thereby replacing the previous mode of open competitions conducted by the National Broadcasting Council with political selections. In the first days of 2016, the existing public media authorities, elected a year earlier through competitions, were dismissed and replaced by new ones with links to the ruling party, who almost immediately dismissed dozens of people, including leading journalists of news and journalism programmes. Various communities protested against the subjugation of the public media by the new government, and demonstrations of thousands were held across the country against the curtailment of freedom of expression and the independence of the public media. The National Broadcasting Council issued a communiqué declaring the actions of the Law and Justice party as a violation of the principles of independence, pluralism and independence of public media, and the actions of the new public media authorities getting rid of journalists *en masse* as a political purge carried out on behalf of the ruling party. Protests by the opposition, international organisations and the public failed to change the situation. The public media has been turned into a 'national media' and made into an instrument of propaganda, unilaterally presenting only the authorities' point of view. It is difficult to call these media public in this situation, because in view of their total subordination to the ruling party, their lack of independence and pluralism of views, they have become party media, presenting, as in the communist era, the 'only right' point of view of the authorities[598].

[598] A. Jaskiernia, K. Pokorna-Ignatowicz, *Public service media vs. sovereign national media: transition of public service media in Poland*, [in:] *Public Service Media Renewal. Adaptation to Digital Network Challenges, Series: Studies in Communication and Politics,* eds. M. Głowacki, A. Jaskiernia, Peter Lang, London 2017, pp. 171–192.

Chapter 2. CONTEMPORARY MEDIA IN POLAND

2.1. Press

In research on the Polish media system, several criteria are used for classifying the press:

- Frequency of publication. This is the most straightforward and therefore the least problematic criterion, as each newspaper title has a specific schedule for subsequent issues. The basic division according to this criterion is between dailies and journals, also known as magazines. Daily newspapers, also known as dailies, are published at least twice a week, but most often six times a week (daily editions plus a weekend edition). Magazines are titles that appear regularly at longer intervals as weeklies, biweeklies, monthlies, quarterlies, biannuals and annuals.
- Range – territorial area. According to this criterion, the press is divided into:
  - national, more commonly referred to as nationwide, available throughout the country,
  - regional, distributed on a provincial (region) basis,
  - local. The local press category is the most difficult to define precisely according to this criterion, as it includes both relatively large titles published within a county and much smaller ones distributed in a municipality, and even very small ones available in the parish or district. For these latter publications with the smallest reach, an additional category is sometimes distinguished by calling them sub-local presses. However, this criterion has lost its relevance in the age of digital media, when virtually all print press titles have their own websites, eliminating the previous barriers of territorial accessibility. Nowadays, a better criterion to distinguish the local press from the regional and, above all, the national press is its subject matter. This is because the local press focuses on issues that are important for the local community, that are relevant to the readership because they affect them directly, that have a real impact on their lives and concern the area they call home. And although nowadays the processes of globalisation and the development of digital technologies give us access to practically all media around the world, the local press (in print or digital versions) is still the

source of information on issues that directly affect the inhabitants of a given region, as it is there that the public finds information about events in their area. It is therefore not surprising that local media, including the local press, are considered a key element of local communication and crucial for local democracy and the functioning of civil society on a regional basis[599].

- Topics – what the content is about. According to this category, the press is presented at its points of sale: we have shelves with news (dailies and opinion weeklies), women's, sports, music, computer press, etc.
- Target group – this category relates to readers and answers the question of who the title is intended for. This category distinguishes press for children (in different age groups), adolescents, women, men, Catholics, fans of cooking, growing flowers, pet lovers or winter sports enthusiasts, etc. This category largely coincides with the previous one, i.e. the topic.
- Ownership. As a rule, the press is privately owned by its publishers. The largest press publishers in Poland are large media corporations operating in various sectors of the media market, not only in Poland, but also in other European countries. In terms of revenue from press sales (print and digital), the leaders in the Polish press market are: Bauer, Ringier Axel Springer, Agora, Burda. Only Agora consists of Polish capital; the others are businesses with European capital, mainly German[600]. In addition to them, there are a number of smaller Polish publishers on the market, including private entrepreneurs, commercial companies, church institutions and third sector organisations. An interesting phenomenon on the Polish market is press published by local government structures or institutions dependent on them. In many small regions and towns, the magazine published by the local government is the only local press publication, in others it competes with the private commercial press[601]. This type of press arouses controversy among Polish media experts, with some even believing that such publications should not be considered press because, being published by the local authorities, they do not perform a supervisory function over them, but are newsletters and promotions of the local authorities. On the other hand, these magazines perform all the other functions ascribed to the media, and therefore to the press, i.e. informational, educational, cultural and, above all, integrative functions in relation to the local community, so they not only qualify as press legally but also practically. However, it is worth

[599] S. Michalczyk, *Społeczności lokalne i regionalne jako zadania informacyjno-publicystyczne*, [in:] *Komunikowanie Lokalno-regionalne w dobie społeczeństwa medialnego*, eds. S. Michalczyk, K. Brzoza, Katowice 2018, pp. 11–30.

[600] O. Cendrowska-Dąbrowska, *Niemieckie koncerny prasowe w Polsce w latach 1989–2008*, Warszawa 2009, pp. 39–65.

[601] J. Kępa-Mętrak, *Prasa samorządowa w polskim systemie medialnym*, Kielce 2015, pp. 101–139.

remembering that they do not have a supervisory function vis-à-vis the local authority[602].

The basic legal act concerning press publishing in Poland is the Press Law of 26 January 1984[603]. Press publishers are affiliated (if they so wish, as there is no obligation to do so) to the Chamber of Press Publishers, which has been operating since 1996[604]. The market position of press titles – circulation, sales (paper and digital editions) and readership – is researched by the analytical company PBC (Polish Readership Research)[605].

2.1.1. Daily press in Poland

The daily press formed the basis of the Polish press market almost until the end of the 20th century. During communism, when throughout its entirety the press could not meet the demand for it due to a paper deficit, it was decided by political decree that the scarce paper should be allocated first to the daily press. The press deficit thus concerned magazines, the colour press, rather then daily newspapers. At the end of the 1980s, in Poland, there were 10 newspapers with nationwide coverage, the most important of which, with a circulation of more than one million, was the 'Trybuna Ludu' – the organ of the Central Committee of the Communist Party. In addition to national newspapers, regional newspapers were also published, their editorial offices located in the capitals of 17 Polish regions. In some of these regions, only one regional title was published, in others – for example in Krakow – three regional were issued.

After the regime change in 1989 and the introduction of free market principles in the press market, the number of dailies increased significantly as new titles joined the existing ones, whose publishers expected readers to willingly swap their old titles for new ones unencumbered by the communist past. In the case of national newspapers, these predictions proved accurate, with only one daily newspaper published before 1989 – the 'Rzeczpospolita' – remaining on the market; the other national dailies do not have a 'communist past'[606]. However, in the regional newspaper market, the competitive battle was won by titles published before 1989[607].

602 D. Krawczyk, *Postrzeganie prasy samorządowej przez środowisko dziennikarskie. Kontrowersje wokół wydawania periodyków przez jednostki samorządu terytorialnego*, „Państwo i Społeczeństwo" 2017, nr 3, pp. 55–68.

603 Ustawa z dnia 26 stycznia 1984 r. Prawo prasowe (tekst jedn.: Dz.U. z 2019 r. poz. 1914 z późn. zm.). Act of 26 January 1984 Press Law (consolidated text: Dz. of Laws of 2019, item 1914 as amended).

604 https://iwp.pl/ (accessed 5.03.2022).

605 https://www.pbc.pl/ (accessed 15.06.2022).

606 J. Konopka, *The national market for daily newspapers after 1989*, [in:] *The Polish Media System 1989–2011*, ed. K. Pokorna-Ignatowicz, Kraków 2012, pp. 53–68.

607 T. Galka, *Local media*, [in:] *The Polish Media System 1989–2011*, ed. K. Pokorna-Ignatowicz, Kraków 2012, pp. 121–136.

At the turn of the century and in the first decades of the 21st century, both the number of titles published and their circulation were declining[608]. Currently, newspaper sales are close to breakeven. An illustration of this trend can be found in the example of the largest opinion-forming newspaper 'Gazeta Wyborcza', whose sales in the 1990s were around half a million copies a day; in 2009 this had fallen to around 370,000 and 10 years later it stands below 60,000.

There are currently 10 newspapers with a nationwide circulation in Poland, 7 of them are general-information newspapers (including: three serious opinion-formers – 'Gazeta Wyborcza', 'Rzeczpospolita' and 'Dziennik Gazeta Prawna', two tabloids: 'Fakt' and 'Super Express', the other two titles are the extreme right-wing 'Gazeta Polska Codziennie' and the radical Catholic 'Nasz Dziennik'), two are devoted to economic topics ('Puls Biznesu' and 'Parkiet'), and one to sports ('Przegląd Sportowy'). The chart below shows the sales of the largest national dailies (print and online versions combined) in the second half of 2021.

'Fakt' – published since 2003 by the Ringier Axel Sringer conglomerate, a tabloid modelled on the German 'Bild'. The appearance of 'Fakt' significantly changed the situation on the daily press market, as firstly it quickly became the largest newspaper in Poland, dethroning the opinion-forming 'Gazeta Wyborcza' and weakening the position of the 'Super Express', and secondly it caused a decline in sales of regional dailies.

'Super Express' – the first Polish tabloid published since 1991 by the Polish holding company ZPR (which has publishing, radio and television operations in Poland). In the 1990s, it competed with 'Gazeta Wyborcza' for first place in the sales rankings.

'Gazeta Wyborcza' – published since 1989 by the Agora company – is Poland's largest opinion-forming newspaper. Its publication was agreed at the Round Table and in the early days it was the press organ of the democratic opposition. It quickly built a strong position on the market by adding regional and thematic supplements to the national edition. Now regarded as a liberal-left newspaper with good political journalism.

'Rzeczpospolita' – published since 1982 as the press organ of the government. After the transition period, it already specialised in economic and legal journalism as a private and independent. It is currently published by the Polish publisher Gremi Media and presents a liberal-right option.

'Dziennik Gazeta Prawna' – published in this format since 2009 by Infor Biznes. It was formed from a merger of 'Dziennik' and 'Gazeta Prawna', of which it is a continuation. He specialises in legal and economic topics.

'Gazeta Polska Codziennie' – published since 2011 by Forum SA, with a conservative-right character.

[608] J. Dzierżyńska-Mielczarek, *Rynek mediów w Polsce. Zmiany pod wpływem technologii cyfrowych*, Warszawa 2018, pp. 174–182.

'Nasz Dziennik' – published since 1998 by Spes with a radical Catholic-nationalist profile. Associated with Radio Maryja and circles of the most conservative elements of the Polish Church. It is the only national daily newspaper that is not subject to an external auditor, so its market position is unknown.

The regional press market is dominated by state-owned Orlen corporation, which in 2021 bought the Polish Press Group, owned by German media group Verlagsgruppe Passau, which publishes 20 regional dailies in Poland, including two published in Krakow: 'Dziennik Polski' and 'Gazeta Krakowska' as well as 120 local weeklies.

2.1.2. Magazines

According to the Polish Statistical Yearbook, nearly 7,000 magazines are currently published in Poland[609]. This figure includes all periodicals published at least once a year – not only the popular colour magazines available at various press sales points, but also scientific, trade and strictly specialised publications. The vast majority of them are low-volume, distributed to those interested in their subject matter through their own distribution system, and therefore widely unavailable. Many are abandoning paper form in favour of online publication.

Under communism, magazines and especially the colour press were far too few in number in relation to the demand for them. The largest deficit was in the women's press, with only a few titles published, and throughout this period the most popular magazine in Poland was the weekly 'Przyjaciółka', with a circulation of more than one million. There was no sensationalist or gossip press at all. It is therefore not surprising that after the opening up of the press market in the last decade of the 20th century, it was in these sectors that most new titles were created. In the 90s, more low-cost women's weeklies and previously unknown expensive and prestigious women's monthlies, gossip and sensationalist magazines, and much more were created. Some secured a permanent place in the market, while others collapsed and were replaced by similar one but with a different title. Within a few years, the press deficit was eliminated, competition between titles and publishers began to intensify and ownership in the press market started to concentrate. This process of dynamic and vigorous growth of the colour press from the late 20th century was halted in the first decade of the 21st century, and the second decade saw a systematic decline in press sales[610].

Currently, the most popular weeklies in Poland are cheap colour TV programme guides and celebrity gossip magazines, called weekly yellow magazines. Despite a systematic decline in sales, they are still very popular, with the highest sales figures

[609] https://stat.gov.pl/obszary-tematyczne/roczniki-statystyczne/roczniki-statystyczne/rocznik-statystyczny-przemyslu-2019,5,13.html (accessed 6.01.2022).

[610] J. Grzybczak, *Magazines and their publishers*, [in:] *The Polish Media System 1989–2011*, ed. K. Pokorna-Ignatowicz, Kraków 2012, pp. 69–82.

being achieved by the repertory magazine 'Tele Tydzień', and the gossip magazines 'Życie na Gorąco' and 'Twoje Imperium'. The weekly magazine 'Angora', containing reprints from the national and international press, also maintains a good position. In the group of bi-weeklies, low-priced women's magazines are at the top of the sales rankings: 'Pani Domu', 'Przyjaciółka' and 'Tina'. Women's magazines, but more expensive, more serious, more extensive magazines are also the most popular in the group of monthly magazines: 'Twój Styl', 'Claudia', or 'Poradnik Domowy'[611].

An important type of periodical in every country, and therefore also in Poland, are the so-called opinion magazines. These are weekly newspapers dedicated to commenting on political events, economics, social issues, culture. Their readership consists of people with higher intellectual aspirations, with a stronger-than-average interest in contemporary issues and insightful reflection on them. The authors of the texts are journalists with established track records and authority among readers, who often read to discover the opinion of the author. Such magazines present a specific political option, even if they are fully independent of political circles. In this group, there are also declines in sales, but not as dramatic as experienced by dailies.

'Polityka' is a weekly newspaper published by an employee-owned company with a long tradition. Published since 1957, during the communist era it was considered the most important and best socio-political weekly in the country. After the turbulence of the transition period, it managed to maintain its position on the market thanks to its high journalistic standards. The paper's political line can be described as liberal-left.

The conservative-Catholic 'Gość Niedzielny' has been published in Katowice since 1923. Being published by the Catholic Church, it is not a typical weekly opinion magazine, but due to its combination of typically religious themes with commentaries on current Polish politics, it is included in this group. In the religious sphere, he presents the views of the conservative element of the Polish Church; in the political sphere, it stands on the right.

'Newsweek' is the Polish edition of the American 'Newsweek'. It has been published since 2001 by Ringier Axel Spingier. The paper's political line can be described as liberal-left.

While 'Polityka' and 'Newsweek', in spite of their clear political option, present the typical objectivity of opinion magazines in commenting on political events and high standards of journalistic professionalism, other weekly opinion magazines (apart from 'Tygodnik Powszechny') are already clearly involved on one side of the political scene or even linked to it by capital and personal links. The right side of the Polish political scene, albeit different factions of it, is represented by 'Sieci', 'Do Rzeczy', 'Gazeta Polska' and 'Wprost'. On the left stands 'Przegląd'.

[611] www.wirtualnemedia.pl/wiadomosci/prasa/wyniki-sprzedazy-prasy (accessed 10.03.2022).

A unique title in every respect is the Catholic 'Tygodnik Powszechny', which was created in Krakow in 1945 and is now published by a company owned by the Tygodnik Powszechny Foundation. During the communist period, it was regarded as the only opposition magazine in Eastern Europe, as it tried, as far as was possible at the time, to present reality objectively. From the beginning, it was a magazine of the highest journalistic standards, aimed at the Catholic intelligentsia. On religious issues, it advocated for a more liberal approach from the Church. After the transition period, the magazine became independent of the formal structures of the Church and continues to toe its liberal line. It is valued by readers, not only Catholic readers, for its high standards of journalistic professionalism and courage in presenting its views. It is the only title in the group of weekly opinion magazines (and not only in this group) to maintain a stable market position, which should be considered a major success.

2.1.3. Press publishers

The Polish press market is highly concentrated in terms of ownership. It is dominated by several large publishers: Bauer, Ringier Axel Springer, Agora, Polska Press, Edipresse Polska, Burda International Polska. Apart from Agora, the others are foreign concerns. In contrast, Polish publishers dominate among the dozen or so smaller – but significant – publishers.

Bauer

The largest press publisher in Poland is Wydawnictwo Bauer, which has been present on the Polish press market since1991. It is part of the German Bauer Media Group holding company, which also owns the RMF FM radio group and the Interia.pl portal. It publishes dozens of magazines, including the most popular titles in its segments. It specialises in publishing low-cost TV programme guides (the most popular in this group is 'Tele Tydzień') and low-cost entertainment and advice weeklies and biweeklies (more than a dozen titles, the most popular being 'Życie na Gorąco', 'Chwila dla Ciebie'). It also publishes popular women's press ('Tina', 'Świat Kobiety', 'Przyjaciółka', and several others of this type) and luxury magazines, including the most popular luxury women's monthly 'Twój Styl' (and its version for men). Computer, gardening, cooking, automotive, youth and popular science titles complete the portfolio. The publishing house has two modern printing plants in Poland (in Ciechanów and Wykroty)[612].

[612] http://www.bauerpolska.pl/ (accessed 20.03.2022).

Ringier Axel Sringer

Ringier Axel Springer Polska is part of Ringier Axel Springer Media AG, which was established in 2010 and has publishing operations in Central and Eastern Europe (Poland, Hungary, Slovakia and Serbia). It is the publisher of Poland's most popular newspaper, the tabloid 'Fakt', and the only sports daily 'Przegląd Sportowy' on the Polish market. The publisher's portfolio also includes the weekly opinion magazine 'Newsweek', the prestigious economic 'Forbes', the most popular automotive weekly 'Auto Świat' and the monthly 'Komputer Świat'. The corporation is very active in the digital sector, owning Poland's largest internet portal Onet.pl and several others, including the popular gossip site Plejada[613].

Agora

The Agora S.A. concern is the largest media concern with Polish capital and an example of the success of a domestic publisher with European giants. Agora was established in 1989 to publish 'Gazeta Wyborcza'. The market success of 'Gazeta', which after a few years was selling in a circulation of almost half a million and was generating large profits for the publisher from advertising, allowed Agora to enter other media sectors by firstly developing the portfolio of published press titles, then by getting into radio, outdoor advertising, entertainment (Hellios cinemas), internet and television. Currently, in addition to 'Gazeta Wyborcza', Agora publishes several magazines with different themes: culinary ('Kuchnia'), guidebook ('Opiekun') and shopping ('Avanti', 'Logo'). It is also a publisher of books, mainly on biography and reportage. It also has its own modern print shop in Warsaw[614].

Burda International Poland

Burda International Poland, present in Poland since 1995, is part of the international Burda International group with operations in 17 countries. In Poland, it publishes fashion and sewing magazines under the common subtitle 'Burda', popular and luxury women's monthlies ('Claudia', 'Gala', 'Glamour' and 'Elle'), numerous advice magazines ('Dobre Rady'), garden ('Mój Piękny Ogród'), culinary ('Przyślij Przepis') and the Polish edition of the popular 'National Geographic'. Its portfolio also includes the popular science 'Focus' and its themed editions[615].

In 2022, Burda bought the press titles published by Edipresse Polska S.A., the Polish subsidiary of the international Swiss media company operating in Poland since 1995 and specialising in parenting ('Mamo to Ja', 'Twoje Dziecko'), people ('Party', 'Flesz'), consumer and luxury press ('Uroda').

[613] https://www.ringieraxelspringer.pl (accessed 20.03.2022).
[614] https://www.agora.pl/grupa-agora (accessed18.03.2022).
[615] https://www.burdamedia.pl (accessed18.03.2022).

3.1. Radio broadcasting in Poland

Poles enjoy listening to the radio. In 2019, radio was listened to daily by 72.2% of people aged 15–75, or almost 22 million listeners[616]. The average listening time is almost 4 hours 30 minutes per day, more on weekdays, slightly less on weekends, and has remained at a similar level for years. These figures are among the highest in Europe. Traditional radio is still the most common way of listening to the radio, although the proportion of people listening to the radio via the internet is steadily increasing. Some radio stations offer listeners free mobile apps to listen to their 'live' programme, while there is a fee to use their programme archives and other services.

Although radio listening has remained the same for two decades, radio listening habits are changing. Until last year, most people listened to the radio at home, although listening in car receivers was growing. In 2019, these proportions reversed. Radio is listened to primarily during the day, with peak listening times between 7 and 8am. The most active listeners are those aged 40–59[617]. Listeners show great loyalty to their favourite radio stations. More than half listen to just one station a day. Almost three quarters listen to no more than two stations a day and just under 6% listen to more than three. The oldest listeners are the most loyal to their favourite station, with almost 70% of them listening to just one station[618].

The Radio Trak radio audience survey covering almost all radio stations broadcasting in Poland is conducted by Kantar Polska on behalf of the Radio Research Committee. The results of the survey are used by almost all radio broadcasters as well as radio advertising brokers and media houses[619].

Radio has consistently ranked third in the revenue of the overall advertising market (after TV and internet) for several years, at around 8%.

3.1.1. Structure of the radio market

Radio broadcasters operating on the Polish media market can be grouped and characterised according to several criteria.

The range specified in the concession. According to this criterion, we can divide radio stations into:

- nationwide, i.e. broadcasting throughout the country. The nationwide programmes are: the four antennas of the public radio (Polskie Radio S.A.): Jedynka, Dwójka, Trójka and Polskie Radio24 (Czwórka), two commercial stations: RMF FM and Radio Zet, and the Catholic Radio Maryja.

[616] https://iloveradio.pl/radiowizja-2019-czyli-na-falach-eteru-w-2019-roku-raport/ (accessed18.03.2022).

[617] *Ibidem*.

[618] KRRiT, *Informacja o podstawowych problemach radiofonii i telewizji za 2018 r.,* https://www.gov.pl/attachment/dc305c00-d5fa-4d4a-a24a-12aa3f249e24 (accessed 2.03.2022).

[619] www.millwardbrown.com/subsites/poland/services/syndicated/radio-track (accessed 2.03.2022).

- supra-regional
- local

Types of radio broadcasters (including forms of ownership):

- The Public Service Media (PSM) sector was created by the Broadcasting Act of 29 December 1992, which describes its structure and tasks, commonly referred to as its 'mission'. Public radio in Poland comprises 18 media companies: Polskie Radio S.A. (four nationwide channels: Jedynka, Dwójka, Trójka, Czwórka – now Polskie Radio24 – and for foreign countries Radio Poland) and 17 regional Polish Radio stations located in the largest Polish cities. Like public service television, public service radio broadcasters subsist on subscriptions, but they also have the right to broadcast advertisements. This dual funding system (subscription and advertising) was considered to best serve market pluralism and ensure that public service stations compete effectively with commercial broadcasters[620].
- Commercial stations operate on the basis of licences issued to them for 10 years by the National Broadcasting Council and subsist almost exclusively on advertising revenues (spots, product placement and sponsorship), supplemented by revenues from premium SMS service fees for participation in on-air competitions. This sector is made up of the two national broadcasters RMF FM and Radio Zet, several so-called supra-regional stations (e.g. Radio TOK FM), and around 150 local radio stations, the vast majority of which belong to (or are otherwise dependent on) the four largest commercial radio groups: RMF Group, Eurozet Group, Time Radio Group (ZPR Media), Agora Radio Group.
- The social sector in Polish radio broadcasting (nonprofit) consists of licensed broadcasters with no commercial activity (no commercials). Currently, the status of community broadcaster is held by the nationwide Catholic Radio Maryja and 7 local religious stations.

Radio Maryja is a nationwide religious station broadcasting from Toruń since December 1991, founded and still managed by Tadeusz Rydzyk. Radio Maryja belongs to the Redemptorist Congregation and has aroused considerable controversy since its inception because of the radical views expressed by the journalists and guests of the programmes broadcast on its air. On the religious side, the radio presents views of traditional Catholicism, often at odds with contemporary Catholic Church teaching, such as a negative attitude towards the European Union and people with other political views. The radio is systematically involved in current Polish politics by supporting right-wing political groups or individual politicians with radical views. The station's signal is transmitted via satellites to Europe and North America and via the internet. The Radio listeners who make up the 'Radio Maryja Family' are elderly and

[620] M. Oleszkowicz, *Public media in Poland,* [in:] *The Polish Media System 1989–2011*, *op. cit.,* pp. 111–120.

very religious, with low education and economic status.

Taking into account the criterion of the target audience, Polish radio stations can be divided into:

- For adults – the vast majority of stations
- For young people and young adults
- Academic (prepared and led by students)
- For children

Due to the nature of the programme:

- Universal information and music – format with a predominance of music of different genres over words, news blocks at fixed times. This is the programming format used by most commercial radio stations, but they differ in their music format.
- News & Talk – a clear preference for words over music. Frequent news blocks, with conversations between them between the programme host and invited guests – experts commenting on current events. The only such commercial station in Poland is TOK FM.
- Musical – a definite preference for music of a particular genre over words. The topics of conversation and information are also mainly concerned with music, e.g. RMF Classic.
- Religious – the topics of the programme are primarily concerned with topics related to religion. The best-known Catholic radio station in Poland is the nationwide Radio Maryja.

By the type of music played – the music format:

AC – Adult Contemporary – 'music for the mature listener', i.e. for people aged 30–55. It broadcasts mainly music from various mainstream genres from the last 50 years, but without 'aggressive' varieties (e.g. hard rock, heavy metal, hip-hop, techno, dance).

CHR – Contemporary Hit Radio (CHR) – contemporary hits – for a wide range of listeners, mainly the so-called commercial group. It broadcasts contemporary music of various genres, creates playlists (top40), creates trends.

Classical – a classical music radio format aimed at discerning and educated listeners with an interest in culture.

Within these main formats, more specialised formats may also be distinguished.

3.1.2. Radio broadcasters

In 2019, 297 radio stations were operating in Poland, 199 of which belong to six radio groups: RMF Group, Eurozet Group, Time Radio Group (ZPR Media), Agora Radio Group and Polskie Radio (Polskie Radio S.A. and Auditorium 17. The share of stations belonging to these groups in listening time was 82%, with independent local

stations accounting for the remaining 12%[621]. According to research by the National Broadcasting Council, such a degree of concentration in the radio market is high, although lower than in the television market[622]. The radio market is dominated by commercial radio stations belonging to the so-called 'big four': RMF Group, Eurozet Group, Time Radio Group (ZPR Media), Agora Radio Group.

The RMF Group (formerly Broker FM), is part of the Bauer Media Group – a holding company with operations in the publishing, printing, radio and Internet segments[623]. The group's flagship radio station is Radio RMF FM – Poland's first commercial radio station broadcasting from Krakow since January 1990. The name RMF FM stands for Radio, Music and Facts and FM is the broadcasting band. The station's format is AC, or contemporary music, and also the greatest hits of the last three decades, aimed at a wide audience, especially the commercial group. In keeping with its name, RMF FM Radio's programme strategy focuses on good, popular music and professional news services. It addresses its programme to a wide audience, with a particular focus on those aged 20–39. For many years, RMF FM has been the most listened to radio station in Poland and has strengthened its position as the leader in the radio market in terms of the number of listeners RMF FM (with a daily audience of nearly 9 million listeners), advertising revenue, brand recognition and citation by other media. The group also includes RMF Classic (since 2003), which broadcasts classical and film music for listeners of all ages with sophisticated musical tastes, and more than 20 local RMF MAXXX stations (since 2004), aimed at young listeners (18–34 years of age), playing dance, pop, R&B and hip-hop music in CHR format, as well as RMFon.pl – an internet music platform offering more than a few dozen thematic internet radio channels with a diverse repertoire and the news portal RMF24.pl offering information on events in Poland and abroad[624].

The Eurozet Group, owned by SFS Ventures (60 percent share) and Agora SA (40 percent share), is engaged in the production and broadcasting of radio programmes, the sale of advertising time, brokerage activities for stations and websites, as well as the creation and management of websites. Currently, the Eurozet Group comprises five radio stations (Radio ZET, Antyradio, Chillizet, Meloradio, Radio Plus) as well as Internet services (min. planeta.pl and radiostacja.pl), Studio ZET, which produces

621 https://iloveradio.pl/radiowizja-2019-czyli-na-falach-eteru-w-2019-roku-raport/ (accessed 18.03.2022).

622 *Ibidem*. The KRRiT bases its opinion on two components: the TOP4 indicator measured by the advertising revenue shares of the four largest radio groups (in 2017 it was around 50%) and the TOP4 radio audience (82% in 2017). According to the KRRiT, the former indicates a medium level of market concentration, while the latter is very high level, already verging on pluralism.

623 www.gruparmf.pl/o-nas,articles,11.html (accessed 24.03.2022).

624 *Ibidem*.

commercials and is involved in cross-media projects and marketing places and events Eurozet Live[625].

Radio Zet is the second largest radio broadcaster in Poland, with a daily audience of almost 5 million listeners with a music and information profile similar to RMF FM (Adult CHR format aimed at a wide audience, but mainly the commercial group).

Meloradio is a group of 19 local stations, broadcasting in 22 Polish cities (formerly under the name Radio ZET Gold) offering music from the last five decades in soft AC format.

Chillizet is a music and culture radio, presenting chillout music and jazz. The programme airs in Warsaw, Krakow, the Tricity area and Katowice.

Antyradio is a supra-regional station broadcasting alternative rock music in 16 Polish cities.

Radio Plus is a supra-regional network of community radio stations with a socio-religious profile offering soft AC (classic hits) music. Radio Plus is a network of diocesan local radio stations (a project run jointly with the Time Group).

Radiostacja.pl is a streaming platform for listening online to over a hundred different radio stations and music channels.

Planeta.pl is a website with current news from politics, entertainment, show business, advice.

Pakiet Niezależnych (The Independent Package) is a commercial agreement between 58 local independent radio stations across Poland and Eurozet, concluded in order for these stations to acquire advertising.

Time Radio Group is part of the Polish ZPR Media group, which, in addition to its activities in various sectors of the media market: press (i.a. 'Super Express', 'Murator'), television (Polo TV and Eska TV), and the Internet (IDMnet – an online media house specialising in comprehensive Internet marketing activities), it is also involved in entertainment and event activities, including the organisation of concerts and trade fairs[626]. The radio sector of the Time Group consists of Radio Eska, Radio Eska Rock, Radio VOX, SuperNova (formerly Radio WAWA).

Radio ESKA – the group's most recognisable brand – is the largest network of radio stations received in 42 Polish cities, the most popular in the age group 16–34 years old, playing music in the CHR (Contemporary Hit Radio) format.

Radio Eska Rock, true to its name, broadcasts rock music and is aimed at an audience of listeners aged 20–39. It can be listened to in the traditional way in Warsaw and is also available on websites and applications for mobile devices.

Radio VOX FM is a supra-regional radio station broadcasting dance and disco polo music in 20 Polish cities.

[625] www.eurozet.pl/O-nas (accessed 24.03.2022).

[626] www.grupazpr.pl/o-nas (accessed 24.03.2022).

Radio WAWA is a network of local radio stations playing exclusively Polish music from the last few decades, aimed at the 25–45 age group and broadcasting in over a dozen Polish cities.

Radio Plus is a network of diocesan local radio stations (a project run jointly with Eurozet).

Agora Radio Group is part of a Polish media conglomerate founded in 1989.

Radio TOK FM – the 'First News Radio' – is a supra-regional station in the 'news & talk' format (words make up around 90% of the programme). It broadcasts a news bulletin every 20 minutes and the programme schedule consists of original journalistic and thematic programmes with guests – experts, scientists, politicians. These programmes focus on current political events, economics, culture, various scientific fields. The radio's audience is primarily residents of large cities with a university and secondary education.

Radio Złote Przeboje (Golden Hits) is a network of 24 local stations broadcasting in major Polish cities, including Warsaw, Krakow, Lodz, Poznan, Gdansk-Sopot-Gdynia, Wroclaw and cities of the Silesian agglomeration. The station's music format is the biggest hits of the 1980s, 1990s and 2000s.

Radio Pogoda is a music station aimed at older people broadcasting old popular music hits (of several decades of the 20th century) in eight Polish cities (Bydgoszcz, Gdansk, Katowice, Krakow, Poznan, Opole, Warsaw and Wroclaw).

Rock Radio is 4 local radio stations (in Warsaw, Krakow, Poznan and Opole) playing classic and contemporary rock music for metropolitan listeners aged 30–50.

Agora's radio offer is complemented by the Internet radio Tuba.FM, through which one can listen to the best genre stations such as Rock, Pop, Dance, Hip-Hop, Polish Hits, Best of '70, '80, '90, as well as those playing only the hits of the most popular artists.

4.1. Television in Poland

4.1.1. TV viewing

Television is still the most important medium in Poland. Poles enjoy watching TV and are the European leaders in this respect. The time spent in front of the screen, although decreasing by a few minutes each year, still remains high at more than 4 hours. In 2019, Poles watched TV for an average of 4 hours and 16 minutes per day[627]. More than 95% of households have at least one TV, and almost half have two or more. Despite the steady increase in viewing video content via the internet, still around one fifth of Poles only use traditional TV (digital terrestrial) and the majority of households (63%) use pay-TV (satellite or cable). More than half of the TV audience

[627] https://businessinsider.com.pl/media/tv-radio/ogladalnosc-telewizji-w-2019-roku-dane-nielsena/ffwwf89 (accessed 2.04.2022).

is made up of people aged 55+, meaning that there is a steady decline in the number of young people watching TV in the traditional way[628].

The market for video-on-demand (VoD) services has been growing steadily for several years. VOD services are offered by traditional TV broadcasters (vod.tvp.pl, Ipla.tv, player.pl, HBO GO), telecom operators (Orange, Jambox, T-Mobile, Play NOW, Netia VOD), digital platforms (Canal+, Cyfrowy Polsat), cable networks (UPC on demand, TOYA VOD, INEA) and subscription services (Netflix, Amazon Prime Video). At the same time, the number of people using illegal VOD services is falling[629].

A study of TV reception in Poland was carried out by AGB Nielsen Media Research on a sample of the Polish population over 4 years of age using telemetry technology[630]. It involved installing special telemetry devices in TV sets that automatically record every 'remote control movement', i.e. measuring every second of the programme and channel watched. At night, these devices send each day's data to a central control room, where detailed calculations are made. This ensures that the audience results are accurate and objective (as they are unencumbered by the declarations of viewers who do not always tell the truth). It is an expensive technology, but broadcasters pay to use it because with such accurate and objective audience results they can negotiate advertising budgets with advertisers.

The TV market share of the 'big four', i.e. the largest channels available in the free-to-air digital terrestrial package (TVP1, TVP2, TVN, Polsat), is decreasing year on year. In 2019, it was 36.3%. This is a normal trend, as viewers are increasingly opting for thematic channels and smaller terrestrial channels year on year.

The most popular programmes watched on TV are Polish and foreign films and series, while more than half of the viewers also watch news services, comedy shows and concerts. As in previous years, the most popular programme turned out to be the TVP2 series M jak miłość, which has been aired for 19 years by TVP2, watched by around 5 million viewers[631].

Younger viewers (one in three aged 23–37) are increasingly moving away from traditional viewing to self-framing the TV series they watch (several episodes at a time – so-called binge-watching), using primarily streaming services and the VOD offer of terrestrial broadcasters[632]. The number of Polish-language channels has grown year

[628] KRRiT, *Informacja o podstawowych problemach radiofonii i telewizji za 2018 r.,* pp. 10–12, https://www.gov.pl/attachment/dc305c00-d5fa-4d4a-a24a-12aa3f249e24 (accessed 3.04.2022).

[629] *Ibidem*, p. 18.

[630] www.agbnielsen.pl/ (accessed 2.04.2022).

[631] https://businessinsider.com.pl/media/tv-radio/ogladalnosc-telewizji-w-2019-roku-dane-nielsena/ffwwf8 (accessed 6.04.2022).

[632] KRRiT, *Informacja o podstawowych problemach radiofonii i telewizji za 2018 r.,* p. 13, https://www.gov.pl/attachment/dc305c00-d5fa-4d4a-a24a-12aa3f249e24 (accessed 3.04.2022).

on year, with 393 channels at the end of 2018[633]. However, the vast majority of these are available on cable or satellite pay-TV packages.

4.1.2. Structure of the television market

As with other sectors of the media market, the television market can be described taking into account two main criteria: type of broadcasters and the way the programme is received (or how the programme is delivered).

A breakdown according to how television is received in the 'classic' way – via a TV set.

According to the method of television reception or the method of programme delivery (the same criterion only framed differently), Polish viewers have the option of receiving television free of charge or after purchasing access to pay-TV (cable or satellite). In both cases, however, they are obliged to pay a licence fee to the public media (radio and television licence). Obligation to pay is based on owning a reception device (i.e. owning a radio receiver and/or television set) and not on whether one watches the programmes of the public broadcasters.

1. Digital terrestrial television (digitisation completed in 2013) offers free of charge about 30 programmes from both types of broadcasters: public and commercial.
2. Cable TV. Its largest operators are: UPC Polska Sp. z o.o., Vectra SA and Multimedia Polska SA holding a combined 74% share of this market. The remaining shares belong to several hundred local cable operators.
3. Satellite TV. In Poland, there are two satellite TV providers: Canal+ and Cyfrowy Polsat, who split their market share roughly 50/50.

On satellite platforms and cable networks, in addition to the programmes available free of charge in the terrestrial package, Polish-language programmes of foreign broadcasters are offered (e.g. Discovery, Nickelodeon, Cartoon Network).

4.1.3. TV broadcasters

There are two types of television broadcasters on the Polish television market: public television – TVP S.A. and commercial stations. The Polish TV market is dominated by three broadcasters: TVP (the public broadcaster) and the two commercial ones Polsat and TVN, whose combined market share was around 75% in 2018.

The commercial sector on the Polish television market is made up of commercial stations operating on the basis of licences issued to them for 10 years by the National Broadcasting Council. Commercial broadcasters subsist almost exclusively on advertising revenues (spots, product placement and sponsorship). The main players in the commercial TV sector are Polsat and TVN.

[633] www.akpa.pl/ofirmie.php (accessed 3.04.2022).

Public television – TVP S.A. – was established from the Broadcasting Act of 29 December 1992, which also describes its structure and tasks. The only public television broadcaster in Poland is Telewizja Polska S.A. (Polish public broadcaster). Public television – like public radio broadcasters – is a state-owned company (the suffix S.A. stands for joint-stock company, and all shares belong to the state) and earns revenue from subscription fees and advertising. In addition to the headquarters in Warsaw, TVP has 16 regional branches in provincial cities. TVP broadcasts: three nationwide programmes: TVP1, TVP2, TVP Info, 16 regional programmes created by regional branches, a programme for foreign countries TVP Polonia, and 8 specialised programmes: TVP Culture, TVP History, TVP ABC (for children), TVP Sport, TVP HD, TVP Seriale, TVP Entertainment, TVP Parliament.

Cyfrowy Polsat Group

Telewizja Polsat, owned by Polish businessman Zygmunt Solorz-Zak, was the first nationwide commercial television station to start operating under a 1993 concession from the National Broadcasting Council. Being the only competition to the public television station (TVP), Polsat rapidly gained popularity and revenue from the advertising market. Initially, the programme was based on low-cost television productions, for example South American soap operas, but the real success was the introduction of programmes featuring disco polo music, popular in the 1990s, to the Polsat schedule. Thanks to the station's great popularity (half of the TV audience, shared only with TVP) and the large proceeds from the advertising market that followed, Telewizja Polsat developed into a large media and telecommunications concern currently bearing the name Cyfrowy Polsat. Currently, the Polsat group is a listed company (Cyfrowy Polsat has been listed on the Warsaw Stock Exchange since May 2008), with Zygmunt Solorz-Żak still holding the majority of shares. The Polsat group includes:

- Telewizja Polsat – offering more than thirty TV channels and the IPLA online video service. Several of its channels are available free of charge in the DTT package (Polsat, TV4, TV6, Fokus TV, Eska TV, Polo TV), a dozen specialised channels are available to subscribers of cable TV and its own digital platform (channels, sport, film, news) and the online video service IPLA.
- Cyfrowy Polsat satellite platform providing access to around 200 Polish-language channels (including almost 100 in HDquality). It also offers PPV, VOD Home Movie Rental, online TV, catch-up TV, Mobile TV in DVB-Technology, as well as broadband Internet access in wireless LTE and HSPA+technologies[634].

[634] www.cyfrowypolsat.pl/ (accessed 14.04.2022).

- Polkomtel, operator of the Plus mobile network and provider of LTE internet technology,
- Netia S.A. – telecommunications operator, provider of television, fixed-line and mobile Internet services for private users, companies and institutions (as of May 2018, a majority stake in Netia SA is held by Cyfrowy Polsat S.A).

TVN Group

TVN began broadcasting on 3 October 1997 under a supra-regional concession for central and northern Poland. The concession was issued to the ITI company created by Mariusz Walter (long-time TVP journalist and producer) and manager Jan Wejchert – the founding fathers of TVN television. The station's coverage was extended thanks to an agreement between TVN and Telewizja Wisła, which broadcasts supra-regional programming in southern Poland and was later formally incorporated into TVN (in 2004).

Alongside the entertainment television formats typical of commercial television, from the beginning TVN has relied on good journalism – informative, interventionist and investigative. On the very first day, broadcasting of its own news programme 'Fakty' – a competitor to TVP's 'News' – began. A measure of the quality of journalism presented by TVN is the number of Grand Press awards won by its journalists – as many as 16 for reporting, investigative journalism, news, specialist journalism[635].

TVN, having competition in the form of TVP and Polsat, focused on 'top-shelf' commercial entertainment, offering its viewers formats popular abroad: in 1999, the quiz show 'Millionaires' went on air, followed by 'Dancing with the Stars', 'Agent' and 'Got Talent!'. However, the station's biggest success was the broadcast of 'Big Brother', which became the most watched programme in Poland in 2001. TVN also launched 'breakfast programmes' on Polish television by introducing the daily morning programme 'Dzień dobry TVN'. Because TVN offered viewers good journalism, new entertainment formats and its own innovative ideas, after 2000 it became the next big player on the Polish TV market after TVP and Polsat, receiving large advertising revenues as it gained the largest audience in the commercial group.

TVN television has undergone several ownership changes. Its first owner was Poland's ITI, then France's Canal+ (51%, ITI remaining), in 2015 it owned 100%. TVN was bought by the US media conglomerate Scripps Networks Interactive, from which it was bought by another major US conglomerate Discovery Communications in 2018.

Currently, the TVN Discovery Group offers its flagship channel TVN and the TTV channel in an all-access digital TV package, a dozen specialised programmes available on cable TV and the Canal+ digital platform (including the news channel TVN24,

[635] M. Kozielski, *TVN nadaje już od 20 lat – od Waltera do Discovery*, www.press.pl/tresc/50254,tvn-nadaje-juz-od-20-lat (accessed 14.04.2022).

the leader in this category) and the VOD service TVN Player[636]. Warner Media and Discovery completed the merger on 8 April 2022.

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