

Chapter 10

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Central and Eastern Europe

European broadcasting has come under fierce criticism in recent years for failing to provide a balanced public forum for all political and cultural perspectives and viewpoints. There are notable examples in Western Europe where public service broadcasters fulfill their mission to provide diversity and pluralism in their programming. In the young democracies in Central and Eastern Europe, however, public service broadcasting is still heavily politicized; every change in political power triggers immediate changes in the management and governing structures of public service broadcasters. Commercial broadcasting in this region often promotes the interests of the broadcasters' owners, which commonly coalesce with those of the political elites. In this environment, examples of objective news coverage and solid investigative reporting are marginal and public service broadcasting can fail to provide balanced information.

The chapter focuses upon Central and European television in comparison with the experience of Western Europe.¹ This study describes the general historical evolution of European broadcasting, as radio and television in Central and Eastern Europe shifted from the old state-controlled model found under communist regimes to dual systems. The chapter contrasts the public broadcasting and commercial sectors in terms of the regulatory and legal framework, organizational and management structure, audience share, and funding. The chapter also considers the main challenges from digitalization and technological convergence. Given this background, the chapter then analyzes how far television in the region functions in its gate-keeping role as a balanced public forum, considering evidence for evaluating the objectivity of news reporting on television in both public service and commercial broadcasting. Lastly, it also describes the watchdog role of television news in ensuring government transparency and stamping out corruption. Overall the chapter concludes that, despite considerable reform, serious limits remain on media systems and, far from being a balanced public forum or independent watchdog of the powerful, television in the region (especially public broadcasting) continues to favor state interests.

European broadcasting at a glance

A historical outline

The television business in Europe has seen similar, although not simultaneous, development in Western, Central and Eastern Europe. The sector remained largely controlled by the state for more than half a century. Unlike other systems, such as the U.S., the European broadcasting

developed in the past almost three decades on the dual public-private pattern combining public service broadcasting (increasingly competing with the commercial sector and often becoming the weaker side) and the commercial broadcasting (controlled by private owners).

Television in Western Europe was originally envisaged as a national enterprise in charge of promoting culture and education and the dissemination of controlled political information. The Reithian motto “to inform, to educate and to entertain” became in the early days of broadcasting the cornerstone of broadcasting not only in the U.K., but in other Western European nations. The first phase in the development of broadcasting in Europe was the development of state or public service radio and television. The second phase, starting in 1955 when ITV network kicked off in the U.K. was characterised by the development of the dual system, combining public service broadcasting with private television. The development of the dual system developed during the 1980s in the rest of Western Europe. In France, for example, the state monopoly on broadcasting saw its final days in 1982 when private players were permitted on the market, however the state has continued to play an important role in the regulation of broadcasting.

In Central and Eastern Europe, broadcasting remained a state propaganda machine until the fall of the Berlin Wall in 1990. The post-communist countries in Europe saw a similar, however delayed, pattern of development. Soon after 1990, post-communist governments in Central and Eastern Europe began the reform of their national broadcasting systems, which was conducted on two fronts: first, the transformation of State broadcasters into public service broadcasters and second, the build-up of a private sector in broadcasting with the opening of the frequency spectrum to private players. By 1991, for example, Slovak Television (STV) formally became a public service broadcaster and in the early 1990s, six private TV operators were licensed. In some countries, the State would-be public service broadcaster maintained its hegemony in broadcasting until late 1990s. In Hungary, for example, the first private TV operators landed in the country only in 1997. The 1990s were marked by a series of turbulences, including *media wars* waged by emerging political elites against journalists who were trying to build an independent media sector. At the same time, the process was marred by confusion stemming from lack of clear policies or legal frameworks, which led in many places to an explosion of unlicensed broadcasting outlets. In Poland, for example, by early 1993, 57 illegal television broadcasters operated and only between 1993 and 1997, the major nationwide TV broadcasters were licensed.

Some experts talk about a generic “European” model that was employed in the course of the media reform in post-communist nations, which is based on two components: a private media sector complying with domestic legislation and rules imposed by national regulators; and a public service broadcasting sector, which should be independent from the State. The reform of the broadcasting

sector in Central and Eastern Europe was therefore part of a larger process of “Europeanization”, encompassing the instituting of political liberties and building media structures. This process varied widely from country to country. Although it affected all of these transitional states, each nation has developed its specific broadcasting legislation.² Further east, in some states that gained in the 1990s their independence from the former Soviet Union, such as Uzbekistan or Belarus, we still see some unreconstructed hold-outs of State-controlled broadcasting systems.

Audiences and programming

Television markets in Europe are experiencing increasing fragmentation of the audiences due to the entrance of more players on the market and the expansion of the distribution networks. However, the bulk of nationwide audience is still concentrated in many markets on the three largest channels. Czech Republic, Croatia and France were among the most concentrated markets in 2006. In contrast, the German and Romanian markets were the least concentrated. Worth noting is that the Italian market does not appear so concentrated in various measurements of the number of channels. In reality, if we measure the influence of the two main broadcasting groups in the country, public service RAI with its three channels and the private Mediaset group with three channels, Italy is the most concentrated broadcast market in Europe. Mediaset is owned by the Milan entrepreneur Silvio Berlusconi, who returned to power as Prime Minister, for the third time, in April 2008. As he controls also much of RAI, the Italian public service broadcaster, it is safe to say that 90% of the Italian media was for almost a decade (except for the period 2006-2008, when Berlusconi lost power) in the hands of a single entrepreneur.

[Table 10.1 goes here]

In general, in Western European countries, public service television usually commands the largest audience on news programs. In Central and Eastern Europe, however, private TV stations newscasts tend to dominate. In 2003, for example, only the public service broadcasters in Bosnia and Herzegovina, Croatia, Italy, Poland, Romania and the U.K. managed to command higher audience shares than their private competitors, and since then, public service broadcasters in Croatia, Romania and Poland saw their audiences diminish.

[Table 10.2 goes here]

Regulation

Broadcasting regulation in Europe is part of the broader political process. The main rationale behind the creation of a regulatory framework in the early days of broadcasting was the limited number of frequencies. This “scarcity rationale”³ called for public service broadcasters to provide

generalist channels and to ensure universal coverage, with due care for programming for minorities. Since the beginning, broadcast regulators were under the influence of political institutions and their representatives who were seen as legitimate representatives of the public. However, the history of broadcasting, mainly in the post-communist countries, was a series of political pressures and interference with the work of the regulators aimed at pursuing economic and political interests.

The main tasks of the broadcast regulators include:

- Licensing of broadcasting activities (including sometimes setting of programming criteria and public service obligations in the license contracts).
- Monitoring how broadcasters fulfill the requirements hammered out in legislation and license contracts.
- Enforcement of legal provisions and sanctioning (ranging from warning to fines and revocation of the broadcast license).

In some countries, the broadcast regulators have also some specific tasks such as appointing management bodies of the public service broadcasters and development of media policy and proposals of laws. Nationwide broadcast regulators regulate all terrestrial broadcasters (nationwide, regional and local) and broadcasters airing via cable and satellite. In some countries, the State is directly involved in regulating the broadcasting. In Estonia, for example, licensing of private broadcasters and monitoring of their work is carried out by the Ministry of Culture. In the Republic of Macedonia, until three years ago, the Government was licensing broadcasters, albeit in cooperation with the Broadcasting Council. With the change in legislation in 2005, the Macedonian Broadcasting Council there took over from the Government this task.

The regulatory frameworks in Europe consist also of a “technical” component, represented by a manager of the frequency spectrum. The influence of technical regulators in broadcasting varies from country to country. Usually, their involvement in broadcast regulation is minimal, their task being to inform the broadcast regulator about available frequencies and to confirm to those companies licensed by broadcast regulators the right to use a certain frequency. With the rise of new technologies and convergence of technological platforms, there is a tendency to merge the two regulators. Such models have been established mostly in Western Europe.⁴

The independence of the regulators is central to the health of the broadcasting sector because they are those that shape the market. Legislation almost everywhere guarantees freedom of expression and sets obligations on broadcasters to present unbiased and objective information. But how this legislation is implemented depends to a large extent on the regulators who are there to

monitor any breaches of legal provisions. However, in this process, regulators are still faced with harsh pressures, most commonly coming from political and business circles.

The appointment procedures still leave room for political interference. The Czech Council for Radio and Television Broadcasting (RRTV) has its members officially appointed by the Prime Minister. But in practice, the whole process is in the hands of the Chamber of Deputies, the lower house of Parliament. Their right to appoint and sack these members makes the regulator a heavily politicized institution, which mirrors the political parties in the Chamber of Deputies. The Prime Minister's final approval is a mere formality.

The involvement of the civil society organizations in the appointment procedures of the regulators was seen as a positive step in diluting the political control over these bodies. In Lithuania, a majority of the regulator's members come from professional associations. Nine of the thirteen members are appointed by professional organizations or groups such as painters, cinematographers, writers and journalists. That reduced significantly the opportunity for the Government or Parliament to meddle in the regulator's internal affairs. However, the civil society involvement can be easily hijacked by political power and businesses. In some countries such as the Czech Republic, where civil society organizations can nominate members for the regulatory body, political parties have started to recruit these candidates to serve their interests.

Besides political circles, lobbying of commercial TV stations is also threatening directly the independence of the regulators. There have been numerous cases of corruption involving the broadcasting regulators in Central and Eastern Europe. One of the most notorious such scandals was the 'Rywingate' in Poland where the National Broadcasting Council was involved in illegally changing legal provisions to satisfy the interests of private media interested in purchasing more outlets.⁵ Legislation generally sets provisions on the conflict of interest for the regulator's members, barring members of political parties or of Government structures and people linked with broadcasting and broadcasting-related companies to be appointed on these bodies. Despite such provisions, in most of the cases they are affiliated to various political circles. Rarely, are members of the broadcasting councils appointed based on their professional qualifications.

Public service broadcasting

Public service television has enjoyed a special place in the European broadcasting landscape, being envisaged as a vital contributor to democracy and as a constitutive part of the European cultural heritage. Its mission was also to offer an alternative to, and even to raise the standards of, commercial television.⁶ In the past decade, however, public service broadcasting has come under fierce criticism. The European Commission, for example, has demanded more transparency and

accountability in the finances of public service broadcasting. The World Trade Organization (WTO) criticized the privileged position that public service broadcasting has been enjoying in terms of funding, which in many cases comes from license fees imposed on households, or State budget money.⁷

During the mid-1990s, the monopoly of the former State broadcasters in Central and Eastern Europe was dismantled. Following the entrance of private broadcasters in these markets, public service broadcasters have seen a continual, and in many cases steep, decline in their audiences. Despite the deteriorating environment for the public service broadcasting, the concept still gathers support. “The argument for public service broadcasting remains compelling. Public service broadcasting is not only a bulwark against commercial trends that, left unchecked, would be likely to drive standards further down, reducing the less lucrative strands towards invisibility. It also provides essential leverage for raising standards in all program genres.”⁸

Governing structures

Although legally and in theory they are public organizations independent from the State, PSB operators in Central and Eastern Europe have always experienced harsh politicization. They have shown acute deficiencies in their governance structures, easy manipulability of the sources of funding and slow reform of their programming to be distinguished from commercial broadcasters. It is common for the governing bodies of the public service broadcasters to be filled with people close to the local political elite. It has become a norm that each change in administration triggers immediate changes in the boards and management of the public service broadcasters, which has shown that these stations continue to be treated as the fiefdom of the politicians in power.

The obligations imposed on public service broadcasters are based on three main principles: programming tailored to public service broadcasting, impartial and accurate information, and universal access. The PSB programming obligations include:

- Airing independent, accurate, impartial, balanced and objective news and information;
- Ensuring diversity of programming and viewpoints;
- Broadcasting a certain proportion of news, cultural, artistic, educational, minority, religious, children’s and entertainment programming;
- Promoting local culture and values;
- Producing and broadcasting programs relevant for all the regions in the country;

- Providing free-of-charge airtime for public interest announcements, such as healthcare, road safety, and urgent messages of state authorities.

A number of countries impose a set of common obligations on both public and commercial television stations, but they vary significantly. Public service broadcasters are required to produce and air cultural and educational programming, programs for minorities, and regional news. Public service broadcasters are expected to play a much wider societal role than the commercial stations, including promotion of local culture, traditions and values.

Public service broadcasters are governed by two main structures. They have on the one hand a council of governors, which enforces the station's general policy and oversees the station's budget and activities; and on the other hand, a management board, responsible for carrying out the daily management of the broadcaster. The management body is led by a general director. Sometimes, the general director has significant powers, making the position in itself a third layer of governing power. There are variations from this model. Czech Television (ČT), for example, also has in place a commission that supervises the activity of the council and management and carries out a financial audit of the station. Estonian public service broadcaster ETV is governed by an "external" council, which is in charge of appointing the station's management and monitoring their activities. The performance of the governing structures is essential in securing the independence of the public service broadcasters and the quality of their programs. The appointment procedure of these structures has much in common with those in place for the national broadcasting regulators. Their members are generally pushed through by Parliaments. As a result, PSB governing structures change according to the changes in the political power. In various Central and Eastern European countries, the general director plays a crucial role in the governing equation. In some countries, such as Romania, the director is chosen by Parliament and that has obvious negative influence on the station's independence. Romania is also sporting an oddly dangerous system, according to which the station's general director is at the same time the Chair of the Council of Administration, the structure in charge with supervising the station's management. In other words, the station's director is at the same time the *controller* and the *controlled*.

Who pays the bill?

The system of funding public service broadcasting is also of major importance for the independence of these stations, which are generally large enterprises with bloated staff. The funding of the public service broadcasting is a hybrid model, combining revenues from various sources. The most common are the license fees paid by TV households, State subsidies, and commercial income

from advertising and broadcasting rights. Some of them also generate cash from donations and renting technical equipment and other assets.

The financing of public service broadcasters from the State budget is seen as the most hazardous model as it automatically creates dependence of the broadcaster on the State structures. The license fee, paid by all owners of TV sets, was considered for years as the most appropriate model of financing PSB because it does not come directly from the State budget, ensuring more financial independence. At the same time, simply imposing a public service television license fee on taxpayers is not sufficient to secure the financial independence of the public service broadcaster if the fee is not linked with economic indicators allowing its fluctuation according to the economic outlook. In many countries, Parliament or the Government decides when to increase the fee, using this as an instrument of pressure on broadcasters.⁹ With the exception of France where the license fee decreased by 0.1 % between 2003 and 2007, and Switzerland where it did not change over the period, in all other European countries, the license increased by a percentage of between 0.8 % in Denmark to 12.5 % in the Czech Republic.

[Table 10.3 goes here]

However, in many countries, there is a decline in paying the license fee due to a combination of factors, including deficient systems of collection, widespread poverty, and the refusal of householders to pay the fee because they do not see any value for it. In Central and Eastern Europe, public service broadcasters have experienced in recent years serious economic hardships, some of them, such as Macedonian MRT, being on the verge of collapse.¹⁰ The financial and management independence is crucial for the editorial independence of the public service broadcasters. They need sound financing to be able to carry out investigative and news reporting and also management structures that are guaranteed immunity against external pressures. Public funding is the basic financing model for public service broadcasting due to cultural and political reasons. Yet the political and social acceptance of the license fee may go down where new digital receiver equipment makes this model of collection (based on the possession of a radio and/or TV receiver) problematic. In Poland, the Government wants to abolish the license fee in 2008, while in Slovakia, various economists have called for a referendum to see whether citizens still want to pay the license fee.

Another problem that public service broadcasters will face in terms of financing is the fact that the revenue from license fee, despite being the most stable and predictable source of financing, remains a static source. It has grown generally, but still does not have a potential to meet the needs of the public service broadcaster in the digital market. That makes even more imperative the need to establish a model of automatic indexing of the fee according to the rate of inflation and other

economic indicators. In the Netherlands, for example, the license fee was replaced by a government contribution to public service broadcasting. This money is raised by imposing a supplement to income tax. "Realizing the developments in the market (multi-media, and the change in the media value chain) public broadcasters cannot, in the long run, avoid co-operation with commercial companies performing gate-keeping functions. Thus, it may be more and more difficult to separate public broadcasting from the wholly commercial market and its sources of financing, and to draw a clear line between commercial and non-commercial activities."¹¹ Nissen speaks about three solutions in solving the PSB financing conundrum. They are either to expand the basis for collecting the fee to all types of devices able to receive and display public service media, or to abandon the fee completely and find a new source of financing, or to change the fee regime to a compulsory "excise duty" collected from all households and citizens.¹²

Commercial television

Commercial television in Europe has undergone a process of consolidation and concentration of ownership. Legal ceilings on concentration of ownership have prompted media owners in many countries to resort to various ways of hiding the traces of their ownership in order to escape legal requirements on their ownership. In Central and Eastern European countries, broadcasters were used by their owners more as a tool of pursuing the political or business interests or their owner or their cronies. Lack of transparency on the media ownership is a direct threat to the editorial independence of these media outlets.

In general, commercial television in Europe is sacrificing quality in their desperate search for ever-higher audiences, which are the engine of advertising spending. Commercial TV stations in Western Europe are usually under some general obligations to serve the public interest, but the same cannot be said about the young democracies in Central and Eastern Europe where strict public service obligations are not imposed on commercial broadcasters. In general, both public service and commercial broadcasters are bound to a legal set of general content obligations such as protection of minors, a ban on incitement to ethnic or religious hatred and so forth.¹³ In some countries, commercial broadcasters are subject to a set of additional programming obligations stipulated in the license agreement. But, otherwise, commercial broadcasters are not imposed distinct public service obligations.

In general, commercial television is not a reference for investigative journalism and quality news programs. Their main yardstick of success is the size of their audience. Therefore, in their effort to beef up their ratings these stations increasingly promote lowbrow entertainment and sensationalist newscasts. In many Central and Eastern European countries, commercial TV stations

rarely employ self-regulatory mechanisms and their journalists are often targets of direct or indirect pressures.

The most negative development in the commercial television sector, with serious repercussions mostly on their news coverage, has been the steady concentration of ownership, which translates into concentration of influence that can be used for political, personal, ideological or commercial gains.¹⁴ Following the opening of the Central and Eastern European markets in the 1990s, several Western groups built large TV networks in the region. The largest pan-regional television operators in Central and Eastern Europe include the U.S. company Central European Media Enterprises (CME), German RTL Group, part of the Bertelsmann media conglomerate, the Swedish Modern Times Group (MTG), News Corporation and German ProSiebenSat.1 Media, which bought SBS Broadcasting in 2007. With the exception of a few countries, legislation commonly forbids cross-ownership between two broadcasters with similar footprints and between print media and broadcasting media. However, in the past decade, media owners have used sophisticated ownership structures to hide their ownership. One preferred way to do this was registering media companies in offshore countries such as Cyprus or in states such as Switzerland where confidentiality of ownership is guaranteed. For years, the real ownership of Romanian and Bulgarian broadcasters remained a mystery. Lack of transparency of media ownership hides conflicts of interests and owners' interference with the stations' programming.¹⁵

Changing times and new technologies

The fast development of new technologies, with digitalization of broadcasting and technological convergence, is fundamentally changing the media environment. The past several years have seen major shifts in the media archeology. Some analysts in the 2000s have dwarfed the importance of the digitalization and the potential of the Internet in the media business. But it has become clear that digitalization does not merely mean replacing analogue production and distribution technology with digital equipment. Digitalization is already altering the workflow in the process of program production and prompts for retraining of the staff to respond to the new challenges. At the same time, it opens a whole range of new media services to the public. The main drive in the dynamics of the broadcast media is the technological convergence, which triggers unprecedented changes in the market, regulatory framework and user behavior.

The market

The main trend in today's media market is its internationalization, with the main actors on the media scene becoming international corporations that go beyond national frontiers. They have no territorial links or cultural obligations. The internationalization of the media market is

accompanied by a sustained process of concentration in the value chains of different parts of the media industry. Distribution via the old analogue terrestrial networks was a neutral technical function fulfilled usually by telecom companies that used to be public corporations, Nissen wrote. But digitalization is creating “a more differentiated value chain” comprising a new important function, that of gatekeeper.

“They are the ones who control customer access to content and those who make and package channels. The signal carrying the TV channel is encrypted, compressed and packed in bundles (“multiplexes”) and can only be decoded and accessed by users/customers who have paid a subscription to receive the channels. Handling this subscription system (often called “Subscription Management System” or SMS) and the “Electronic Program Guides” or EPGs that are comparable in function to the search machines we know from the Internet are two key functions of the whole delivery system. Those who are in control of these functions also control to a large extent the whole value chain.”¹⁶

Challenges on regulatory frameworks

Regulation is tightly linked in Europe with the State. The behavior of governments and parliaments in shaping new models of regulation is crucial in the new context. Expansion of satellite distribution covering cross-national territories, the increase in the number of large transnational media corporations and the boom in the distribution of content via the Internet created an international market of content, which is already outside the regulation.

One result of these trends has been more freedom of choice for the viewers and listeners. But it is still questionable whether the new media means, in reality, free choice and more diversity. TV programs have become commodities traded by commercial companies in a growing market, which is in search of completely new business and economic models. “It is self-evident that such a market will tend to become homogenous, leaving little room either for content of an experimental character or for programs catering for small language groups, national and regional cultures, all of which characterize the European scene.”¹⁷

The traditional pattern of consuming television was based on the access to scheduled programs. The digital revolution is already changing this pattern. With the use of digital personal video recorders (PVR) becoming increasingly popular, consumers of broadcasting are in the position of better controlling their choice. In other words, the viewers are now in the position to watch “what-when-and-how” they want. This change in the pattern of media consumption has led in a very short time span to a marked fragmenting and individualization of the audiences.

Where the PSB is going

The arguments in favor of the public service media used to be in the analogue media environment of a technical and economic nature. The rationale behind the privileged position of the public service broadcasting had to do first with the scarcity of the frequency spectrum. This argument was also the rationale behind the regulation of broadcasting since the inception of commercial broadcasting. At the same time, with a limited number of frequencies up for grabs, the argument for creating and maintaining a space for a public service broadcaster that would cater to the general public, parts of which could not find their programs on commercial broadcasters, was compelling. But such arguments are becoming obsolete as with digitalization, the frequency spectrum is enlarging extraordinarily. Therefore, the arguments for public service media turn now to be more value-based and set root more in cultural policies, Nissen argued.

In this new environment, the public service broadcasting has to reinvent itself. One of the most important quantitative criteria for its success should be universal reach. They have to reach the entire population with a wide range of content. Until now, most PSBs based their programming philosophy on the “flow paradigm” whereby popular, more commercial programs worked as the “lead in” to distinctive programs such as news, current affairs and culture. With increasing interactivity, on-demand and multi-channel systems, public service broadcasters will have to create schedules that are more distinctive and slash commercial programming.

Secondly, practitioners argue that public service broadcasters should refocus on the quality of content and its price. The governance structures of the PSB must also be fundamentally revamped. In many countries, especially in Central and Eastern Europe, public service organizations are usually linked with the governmental power. With a few exceptions, public service broadcasting is coming in many European countries under increased politicization. In explaining this trend, Nissen speaks about a change in the culture and the nature of political communication. Last century print media lost much of their affiliations with political parties, becoming “omnibus newspapers” targeting mass audiences in a competitive, commercial market. That was seen by political parties and governments as a loss in their system of communication to their constituencies. The political codes and behaviors have also seen major changes. “The strategic, long-term perspectives based on political ideology and formulated in party programs have been toned down and replaced by a more tactical way of operation in day-to-day politics. In such a scenario, the communicative aspects of political initiatives, both the message itself and its timing, often have just as much importance as their material substance.”¹⁸ With the segmentation and individualization, public service media have to adapt to a completely new model, moving away from collective broadcasting to a model based on providing tailor-made content and services.

The fate of news

In this fast changing environment remodeled by the new technologies, two trends dominate the news production and distribution. First, the number of sources of news is expanding at a fast pace, making access to information much easier than in the analogue world. Secondly, the growth of news distributors is accompanied by an unprecedented loss of the value of reference that the media had in the analogue world.

How much these trends do affect the overall quality of news is at the heart of the debate. One school of thought argues that the new media are killing journalism. Andrew Keen, the leading contemporary critic of the Internet, argued that the online world transformed journalists into bloggers. He calls the blogosphere a “rebellion against the authority of professional journalists”¹⁹ and bitterly criticizes the cult of the amateur that the Internet has promoted. In such an environment, the sources of news are “personalized networks of friends” that are increasingly pushing traditional media out of the game. The tradition of balanced reporting, proponents of this critical school say, is going to be lost with the unregulated broadcasting via the Internet.

The opposite opinion is that the Internet and new technologies only help journalism. The web 2.0 is a viable platform for the journalism of the future. Moreover, the defenders of this viewpoint say, trends such as blogging and USG (user-generated content) should not be seen as dangers to balanced, impartial, objective journalism but rather as a conscience keeping an eye on journalism. The expansion of the news production is also a reaction to the weaknesses and bias of the journalism profession, which in numerous occasions performed dishearteningly.

Between the two opposing opinions, other voices argue that the digital era is in fact a redefinition of the economy of the media. The journalism’s monopoly has been shaken and a more networked type of journalism was born. There must be made a clear distinction between journalism, which is and will remain a profession, and the general communication, which has been made easier and more convenient by the Internet. In this environment, the key is finding viable economic models as those employed in the traditional media market are unworkable. In other words, media have to adapt to the new environment shaped by the Internet. Those media companies that anticipated the upcoming shifts in the media ecology have already established a strong foot on the new platforms.

Media gatekeepers and the concept of a balanced public forum

What has changed in the functions and roles of the news media? The idea of a balanced public forum, where journalists as gatekeepers include all sectors and viewpoints, has long been central to the discussion about the objectivity of news. The concept implies that the news media should reflect all perspectives and points of view in any major controversy, as well as including the

voices of a diverse range of actors, groups, and interests. In particular, in election campaigns, balanced coverage emphasizes the inclusion and fair treatment of all parties and candidates, so that citizens can make informed choices at the ballot box. Partisan balance of reporting during election campaigns is only one aspect of this broader phenomenon but it is particularly important for democratic governance. If the major news agencies are heavily skewed in favor of the incumbent power-holders, then citizens will lack access to a wide range of independent sources of information to evaluate the performance of the government and to assess the policy proposals of opposition parties and candidates.

There are two notions of how this process should operate.²⁰ *'Internal diversity'* emphasizes that any specific media outlet should contain a rich plurality of perspectives and viewpoints, exemplified by including both liberal and conservative commentators in the editorial pages of major newspapers, or by devoting equal time in the main TV news bulletin to the speeches of spokespersons on either side of a dispute. Alternatively *'external diversity'* emphasizes the need for a plurality of perspectives to be evident across media markets and a wide range of outlets, without major restrictions or censorship limiting freedom of expression. External diversity can be achieved, for example, by the publication of a wide range of highly partisan newspapers and magazines – reflecting all points of view across the political spectrum from anarchist, communist, liberal, conservative, to the radical right - available on book-stands and news-agents, as well as through the internet. Each partisan publication can preach to a particular sector, but pluralism is still preserved through the unrestricted choice of media outlets. The issue of media pluralism is often analyzed exclusively in its aspect of external pluralism, related to the effects of the concentration of ownership on editorial policies and standards. Internal pluralism is equally important and, in this respect, the public service broadcasting in Europe was meant, among other things, to be a corrective for market failure. Therefore, where public service broadcasting fails to provide a balanced public forum in many Central and Eastern European countries, despite strict obligations through legislation to play precisely this role, this has had negative repercussions on public opinion formation.

In evaluating the degree of internal or external balance in the news on television, content analysis methodologies have examined television news both quantitatively and qualitatively. The quantitative approach measures 'stopwatch' balance, by weighing the amount of time devoted to reporting about each party, candidate, interest group, issue, or spokesperson.²¹ In particular, the stopwatch concept is applied most strictly during election campaigns by measuring the time devoted to particular political parties or candidates in any television news program, or measuring the amount of coverage aggregated across a particular TV station or channel. More exposure, it is assumed, provides political actors with a greater advantage during election campaigns. Stopwatch balance can

also be applied to assess the proportion of time that other actors are presented in newscasts, such as the balance between the coverage of the business sector and trade unions in an industrial dispute, or the gender and minority balance in news reports. In politics, the set of topics tackled in newscasts is analyzed in interconnection with the issues attached to various political parties. For example, disproportionate coverage of international security issues in the election campaign in the U.K. in 1987 was seen as favoring the Thatcher government.²²

The notion of 'equal time' is relatively easily measured and hence widely used by monitoring agencies. To be more meaningful, however, this simple indicator needs to be supplemented by a more qualitative examination of the news' contents.²³ After all extensive coverage can be devoted to a party or political leader, but this can all be heavily critical. A more comprehensive assessment needs to include 'directional' balance measured by the tone of the reporting, including whether the news coverage is regarded as negative, neutral, or positive.²⁴ In theory, news can be categorized as impartial if stories include all relevant sides in a report and by contrast it is biased if the news is inadequately critical or if it is overtly partisan. In practice, however, making such judgments is often difficult and controversial.

More broadly still, the notion of balance can also be applied to many other aspects of news coverage, such as how much soft versus hard news is aired by TV newscasts. 'Hard' news encompasses business and economy, consumer affairs, education, environment, health, home security and crime, international affairs, political party affairs, political affairs, public services, social issues. 'Soft' news, by contrast, encompasses arts and culture, celebrity, entertainment, human interest, lifestyle, religion, science, sports, women issues.²⁵

Television news as a balanced public forum

In general, TV stations in Europe have been scrambling over the past decade to find innovative, dynamic and frequently sensationalist program formats. There is a tendency to hybridize television formats, mixing news and political debates with light entertainment. This is part of the larger trend of building newscasts on a markedly tabloid structure from where hard investigative reporting is being removed. In the Central and Eastern European countries, news production is under pressure equally from the market and from political agents and owners. All-news TV channels have unfolded at a fast pace in the region, gaining healthy popularity. With the appetite for news reaching new heights, news has become the favorite genre on television. However, that is not translated in most of the cases in solid reporting and high-quality news production, which are often rare commodities.

Moving away from the State

Public service broadcasters in the Central and Eastern European countries have been continuously criticized for failing to play their public service role. Their transformation from State-run to public service broadcasters, much influenced by Western models and practices, has been difficult, with the State and politicians unwilling to lose their control over these stations. However, over the past two decades, public service broadcasters in Central and Eastern Europe have generally managed to move away from authorities and stopped being the mere mouthpieces of the incumbent governments. At the same time, commercial broadcasters have come closer to the ordinary citizens.²⁶ Most public service television in the region have managed thus to produce more impartial programs with an evident distance.

In general, public service broadcasters tend to devote more time to domestic political life and international affairs than commercial TV stations. (See Tables 10.4 and 10.5) At least half of the content in primetime newscasts on public service television is devoted in a series of Central and Eastern European countries to domestic political affairs and international news. In Hungary, for example, the national and international political life was covered on the country's largest commercial TV in 2007 in only 9 per cent of the total program of the primetime newscast. Otherwise, domestic political life and international news account on private TV stations for under 40 per cent. There are exceptions such as Serbia where the widely acclaimed private station B92 devotes over 50 per cent to such issues or Bosnia-Herzegovina where private NTV Hayat covers these topics in over 66 per cent of the primetime newscast's time.

(Tables 10.4 and 10.5 about here)

At the same time, broadcasters have made some progress in producing and airing unbiased news (See Tables 10.6 and 10.7). Content analyses have shown that both public service and commercial broadcasters in a number of countries surveyed in the region take a neutral attitude in the majority of their reports.²⁷ Some negative examples remain the leading commercial broadcasters in Montenegro and the Republic of Macedonia, where 34 per cent and 58 per cent of their news reports have been catalogued as positively or negatively biased, respectively. Among public service broadcasters, the worst balance was found in Moldova, where the country's public service broadcaster was positively biased toward the State and other authorities in half of its total primetime news programming.

(Tables 10.6 and 10.7 about here)

Public service broadcasters

Although public service broadcasters in the transition countries in Central and Eastern Europe have managed to move away from the State authorities, they are still far from fully fulfilling

their public service role in creating a balanced public forum. In this region, the tradition of the communist State control over broadcasting has left a heavy legacy on the region's media. Regimes have continued to use these broadcasters to strengthen their power and in the much war-battered former Yugoslavia, television was a tool of propaganda and source of instigation to ethnic hatred. Today, despite reforms of the State broadcasting behemoths, the old practice of acting as an institution biased in the favor of the State and political power still survive, preventing real progress to fully-fledged public service broadcasters. There can hardly be found in the region a public service broadcaster that managed to articulate fully its program structure to fit the public interest. "[...] The traditional difference in news between public and commercial media appears to be fading," wrote Radenko Udovičić based on a content analysis study that covered news in ten South-Eastern European countries.²⁸ "It should come as no surprise that the market is gaining increasing control over the media and that the media field has been the most attractive field for public relations for quite some time. Media are controlled by a combination of private ownership, advertising strongmen, elite sources, State pressure and cultural dominance."²⁹

The frailties of the news coverage on the public service broadcasters have their roots in the days of monopolistic State television during communism. Critical stances on the news during communist State television would never target the Government or State bodies. In the 1990s, Hungarian public service television MTV was visibly favorable to the Government. Only recently, the station made more progress toward impartiality and independence. In general, smaller TV stations in Hungary tend to be more biased than the large ones.³⁰

The newscast on RTS1, the first channel of the public service broadcaster in Serbia, has traditionally attracted the largest audience, beating sometimes even popular soap operas or quiz shows aired by commercial stations. The program has equally stirred fierce criticism for failing to be a public forum and being more a supporter of the Government and the ruling party. After 2000, RTS managed to achieve greater editorial autonomy, making more efforts to promote pluralism of opinions in its news programming.³¹

RTS is seen as a promoter of State policies rather than an independent outlet that would serve first as a public forum where a wide variety of opinions would find place. RTS1's primetime newscast is usually "comprehensive" and free of attacks on anyone. However, it still proved a lack of professionalism in various instances. For example, when covering Kosovo, the Albanian majority-populated new independent State, which used to be part of Serbia, the news is dominated by the preponderant public opinion and prejudices. News reports on this issue include statements by local and international officials and experts. However, the station has repeatedly failed to make room in its news reports for the viewpoint of the Albanian side.³²

One of the most extreme examples of a public service broadcaster blatantly favoring the authorities is Moldova. Public television here is devoting the bulk of its news coverage to the authorities, mostly the President of the country. News reports about irrelevant appearances and acts of the President, such as opening a tractor station in a village or addressing Parliament on his economic initiatives, can go as long as six minutes. At the same time, the station is constantly avoiding covering topics that can put the Government in a negative light. Some of the commercial stations regularly report on such sensitive issues.³³ In Moldova, commercial broadcasters are closer to offer an open forum for debate and pluralism of opinions. The station's first channel, Moldova1, is notorious for interviewing *only* officials. There is almost no report including opinions of common people. During electoral campaigns, commercial stations always polled ordinary people and candidates for the mayor's office in the capital Chisinau while Moldova1 has never run any single poll. Moreover, the opinions of officials aired by the public service broadcaster go on usually unchecked and unquestioned. Moldova1 has never included in its reports the opinion of any independent experts or representatives of non-governmental organizations.

A similar situation was found in Serbia where private TVs rather than the public service broadcaster sometimes fulfill better the role of a balanced public forum. Commercial television B92 often promotes civil society activism in its newscasts, something that public service does not do regularly.

In most countries in Central and Eastern Europe, public service broadcasters have a completely different approach in their news coverage than their commercial peers. Commercial TV station Nova TV in Croatia makes its news simpler and easier to understand, while the public service station HTV has become known for a more serious approach in presenting the news, which is more conservative and treats more weighty topics. That is, in the opinion of some media experts, a guarantee of credibility. In Croatia, when it comes to diversity of topics and actors presented in the news, the differences between the public service broadcaster and the commercial stations are minor. Croatian public service TV puts some more emphasis on the economic and business news, political affairs and public service topics. At the same time, HTV relies more on "official sources" and ignores celebrities. This could be explained by the fact that the public service broadcaster pulls in some 80% of the national audience in news and current affairs programs.³⁴

In Western Europe, both public and private broadcasters fulfill better their role of a balanced public forum. The largest single group presented on news is the general public, followed by political parties. In Italy, celebrities are popular on TV newscasts, while experts are more often present on news in the U.K. Although a broad range of stakeholders are given access to news, TV stations in Western Europe have the tendency to rely rather on political institutions and the general

public, marginalizing civil society organizations and interest groups. More worrying is the gender imbalance in some Western European countries. The most frequent faces on newscasts in three Western European countries (U.K., Italy and Norway) covered by a 2006 study are males, with women representing only one fifth of the interviewees in news bulletins.³⁵

Media watchdogs or lapdogs?

When studying how television newscasts contribute to the creation of a balanced public forum, it is important to look also at how they manage to play their watchdog role. By blatantly avoiding certain topics or presenting some issues in a biased manner, due to outside pressures from groups of interests or powerful political actors, television cuts the access of certain voices from the screens.

Serbian station B92 is an example of a private broadcaster tirelessly watch-dogging over powerful interests. The station follows a strict editorial policy focused on serving the public by creating a space for a wide array of opinions and on covering issues that other stations do not do. B92 is known for its solid investigative reporting on sensitive issues such as corruption and crime. Founded in 1989 as a youth radio broadcaster in Belgrade, B92 expanded into a multimedia house that runs today a regional radio station, a nationwide TV station, a website, and a cultural center. It was highly praised internationally for its brave coverage and promotion of human rights. TV B92 launched its broadcasting in 2000. It has gained since then high popularity, becoming the fastest developing broadcaster in the country.³⁶

But such examples are rare in Central and Eastern Europe. In the Republic of Macedonia, the commercial TV station A1, the largest in the country, was in several instances promoting the interests of its owners rather than sticking to principles of impartiality and objectivity. The station became known for promoting events organized by the “Ramkovski foundation”, an organization founded by the station’s owner.³⁷ The same could be said about the commercial NTV Hayat in Bosnia and Herzegovina, which runs numerous positive reports about various companies. That was seen by media observers as concealed advertising. However, any connections with these companies are not always easy to prove.

Newscasts are increasingly tabloidized, more markedly on private TV stations. On the one hand, this is triggered by the public’s appetite for frugal and frivolous topics, which brings hefty ratings to the TV stations, but on the other hand, many television stations choose to focus on frivolous topics such as cases of domestic violence, petty thefts or celebrity fares in order to avoid reporting on sensitive issues. Their coverage is becoming increasingly *apolitical* instead of being politically neutral.

In Romania, especially until 2004, some of the largest TV stations, indebted to the State budget after they failed to pay back taxes, turned their newscasts into tabloid news programs in order to avoid relevant but controversial issues, which could have triggered controls and harassment from the State tax offices or other administration bodies. Romanian commercial TV station Antena1 constantly skips relevant political, economic and social issues, and rather reports in primetime newscasts about topics such as a several-month-old baby in the United States who received a recruitment letter from the army or about a cat that traveled 800 kilometers to find its masters.³⁸ Such news reports are less common on the Romanian public service channel, which leads its newscasts mostly with hard news on politics and foreign affairs, and only at the end of the newscast devoting time to trivia.

It was said hitherto that public service broadcasters have moved somewhat away from the State. However, old habits remain in place and it is on public service television that you see more positive bias in the coverage of the State structures, partly triggered by the pressures exerted by political power. In contrast, on private television, there is a more marked slant in favor of allies and businesses related to the owners of the private TV stations.

But there are cases where all stations are the same when it comes to news coverage. In Montenegro, public service television and commercial TV stations report similarly in primetime newscasts on sessions of Parliament and press conferences. Differences are related mostly to the manner in which they define their priorities and how they package the reports. What is common for both private and public service broadcasters in this country is the disheartening lack of criticism in their reporting. News reports look rather like promotional reports. The public service television, TVCG is also known for its laudatory tone in covering Montenegro's State policies.³⁹

The watchdog function of the media continues to be jeopardized when journalists are often subjected to criminal prosecution based on secrecy or defamation laws. Such practices have been found in twenty European countries despite campaigns by international organizations for decriminalization of such laws.⁴⁰ Even in Western European countries, such as Germany and the Netherlands, governments misuse the law to protect themselves from incriminatory evidence proving their incompetence. In Ireland, the editor and a reporter of *The Irish Times* have been sued for refusing the orders of the courts to disclose the source of published information in an investigative report on corruption surrounding the country's serving prime minister.⁴¹ Recent years witnessed renewed efforts by politicians to control the media. "As the impact of the media, especially television, has grown, political leaders have not only grown more sophisticated, hiring "spin doctors" and trying to win the media over with blandishments or privileges. They have also grown more intolerant of criticism. The Czech Prime Minister, Mirek Topolánek, accused the media

of bias against him and threatened to enact a new law to curb press freedom. In Slovakia Prime Minister Robert Fico branded the media as “the political opposition”.⁴²

In Romania, setbacks in the country’s anti-corruption campaign were linked to a bitter infighting within the media for and against the reformist President Traian Băsescu. The saga of a corruption case in Romania and the manner in which it was handled by the political power show the weakness of the public service broadcaster in defending its independence. On 10 October 2007, Romanian public service broadcaster TVR aired in its primetime newscast a video featuring the minister of agriculture Decebal Traian Remeş allegedly receiving bribe from a former minister of agriculture, in exchange for favoring a businessman in a public tender. The secretly filmed video showed Remeş accepting EUR 15,000, 20 kilos of sausages and 100 litres of plum brandy via a middleman. Following the ruckus provoked by the video, Remeş resigned. He refused to make any comments. Instead of criticizing his colleague for what he did, the country’s Prime Minister threw a tantrum against TVR for what he called Remeş’s “public execution”.

The shooting stirred a heated debate, with the director of the station himself saying publicly that the video was illegal and incorrect because it breached the presumption of innocence. Media organizations and the broadcast regulator said that it was legitimate to air the video because it served the public interest.⁴³ The story was followed by politicians’ intense attacks against the station. TVR’s board reorganized the station’s news department in two divisions, one dealing with news and sports and the other working on research for the news programs. One of the most critical journalists in the station, Rodica Culcer, was given the generous task to supervise the two departments. In reality, the move was aimed at denting the scope of Culcer’s decision-making. Such reorganization inside State institutions has been a typical practice through which ruling parties in Romania managed to reduce the decisional power of non-loyal people. They preferred such strategies to other moves, which would have attracted criticism and accusations of censorship. More independent journalists were then removed from the primetime newscast to unattractive afternoon or night news slots.⁴⁴

The interferences of owners into the programming of their TV stations badly hurt the news coverage. The private Top Channel in Albania was particularly biased as its owner has also a majority stake in the digital TV platform Digitalb. Top Channel’s coverage sometimes went too far in promoting the interests of its owners. It ran, for example, a report about a family with three sons who were all paralyzed by a genetically inherited disease. The report did not refrain from saying that despite the poverty of the family, the only entertainment for the sick children was the programming aired by DigitAlb, which made their parents to buy a DigitAlb subscription card every month.⁴⁵

In examining how television news ensures a balanced public forum, it is important to look at how the concentration of ownership leads sometimes to narrowing the specter and diversity major media owners. Opinions differ on how concentration of media ownership affects pluralism of content. Some researchers argue that concentration hinders the free formation of public opinion, a basic principle of the foundation of democratic societies. Others argue that on the contrary, concentration of ownership does not have a negative impact on pluralism and diversity in the news because larger media conglomerates are able to invest in solid newsrooms and investigative reporting. Without money, media outlets will only resort to reproducing or rewriting wire and TV reports, without being able to do in-depth reporting. The larger media holdings become the more they cut costs and struggle to maximize their bottom line. A trend that has characterized the television market over the past years was the focus on cost reductions, which badly hit the capacity of these stations to produce investigative reporting. Solid news coverage and investigative reporting are also affected by the interests of the owners to maintain a healthy flow of advertising money. Owners are afraid that programs that are controversial or too specialized for a large audience can dent their sales or audience. The news coverage and editorial lines of these broadcasters further suffer in transnational media companies because of the lack of transparency on the ownership of these outlets. "The traditional link between the owner of the media and the audience served created transparency (the audience knew who the owner was) and responsibility (the owner lived "among" the audience, and could also be approached personally). This link does not exist in the transnational media, or only to a very limited extent. The traditional responsibility to serve the audience and enlighten or educate the public, especially in relation to democratic processes, has suffered accordingly. The focus on profits and the corresponding focus on the audience not as the public but as consumers have direct consequences on the programming schedules [...]."⁴⁶

There is then the group of broadcasting owners interested in promoting various political or ideological views. The cases abound in both Eastern and Western European countries. It has been shown, however, that direct interventions of owners in the work of journalists are rare. More worrying is the self-censorship professed at a large scale by editors and journalists, who avoid raising issues that are in conflict with the owner's views and economic interests. Other studies have shown, however, that there is no direct link between media concentration and content diversity and pluralism in quantitative terms. The diversity of content is influenced by another clutch of factors such as the resources of the media outlet, the size of the market where certain media operate, and the set of regulatory obligations imposed on them. "Where commercial broadcasters have minimum or no positive regulatory obligations there is a distinct lack of programming of high social

value and an absence of domestic investment in programming with a heavy reliance on imported programs.”⁴⁷

In a content analysis covering Italy, the U.K., Norway and Croatia, Ward identifies the establishment of three tiers of broadcasters: broadcasters that have programming of high social value; established commercial broadcasters with some high social value programming; and commercial broadcasters whose schedules are essentially entertainment and import-based programs. Although the first tier is mainly represented by public service broadcasters, it is not exclusively the playfield of public media. The newscasts on public service broadcasters are largely dominated by hard news⁴⁸, with the U.K. channels boasting the greatest percentage of international news coverage unlike its Italian peer, RAI, whose first channel tends to focus on nationally based topics. The preferred topics tackled by newscasts are issues related to home security and crime. Only U.K. channels give more prominence to political affairs. Foreign affairs, political affairs and social issues are also included in news bulletins on both public service and commercial broadcasters.⁴⁹

Conclusions

Television, which has remained the most influential medium and source of information for decades, has failed to play a major role in building a balanced public forum in Central and Eastern Europe. Started as a State enterprise back in the first half of the last century, television broadcasting has developed in Europe into a dual model. The State released its control over broadcasting in Western Europe in the 1980s to let private broadcasting kick in and compete in the market. The same we saw in the 1990s in Central and Eastern Europe.

On a positive note, over the past decade, public service broadcasting has made visible progress toward more independence and balanced coverage in the news in Central and Eastern Europe. Linked not long ago with the State structures, for which they acted as a mere mouthpiece, public service broadcasters have managed to move away to a certain extent from State authorities. Another encouraging development in the region over in the past ten years was a certain professionalization of the broadcast media, with TV stations taking a more neutral stance in their news reporting. Public service broadcasters have managed to preserve certain distinctiveness in news coverage. They air more serious content, covering more extensively political affairs and foreign news, while commercial TV stations are usually recognized for their trivial and sensationalist approach in the selection of topics and the manner of coverage.

On a more negative note, however, television is still far from building a balanced public forum in Central and Eastern Europe. Public service broadcasters are still prone to favor State institutions or politicians in power. They are confronted with political pressures on their boards,

which are still elected and controlled by the political power. These realities, more difficult to uncover and analyze scientifically, have been proved through investigative research in the field. Far from being concerned about its role in the society and obsessed by ratings, audience and advertising sales, commercial broadcasting has come closer to the ordinary citizen and is sometimes excelling in covering social issues. However, in most of the cases, the news coverage on commercial broadcasting is either aiming at scoring high ratings through tabloid programming or has become a mere tool for pursuing the personal, economic and ideological interests and ambitions of the stations' owners. Despite a fragmentation of TV audiences, television news still attracts massive interest, being watched and accessed on a larger number of platforms. Television news still plays an important role in shaping the public opinion. In this context, much is expected from public service broadcasting. Bolstering public service values in broadcasting through regulation, financial support of the media that promote objective and balanced news coverage, and continual efforts aimed of professionalization of journalists, are essential for improving the balance in the news coverage.

Table 10.1: Channel fragmentation index, 2006

<i>Country</i>	Channel fragmentation
Czech Republic	2706
Croatia	2394
France	1832
Slovakia	1773
Poland	1585
Slovenia	1570
Spain	1566
Serbia	1490
Hungary	1481
Lithuania	1451
Italy	1428
Estonia	1294
U.K.	1221
Latvia	1016
Republic of Macedonia	927
Bulgaria	896
Romania	893
Germany	792

Note: Fragmentation is measured by the Herfindahl-Hirschman Index: Calculations based on the market shares of channels.

Sources: Thomas Kirsch. 2007. *Television 2007. International Key Facts*, October 2007. IP International Marketing Committee (CMI).

Table 10.2: Most watched newscasts, 2006

Country	Channel	Type of channel
Bulgaria	BTV	Private
Croatia	HTV1	Public
Czech Republic	TV Nova	Private
Estonia	ETV	Public
France	TF1	Private
Germany	ARD	Public
Hungary	TV2	Private
Italy	Canale 5	Private
Latvia	LNT	Private
Lithuania	LTV	Public
Macedonia	A1	Private
Poland	TVP1	Public
Romania	Pro TV	Private
Serbia	RTS1	Public
Slovakia	TV Markíza	Private
Slovenia	Pop TV	Private
Spain	TVE1	Public
Switzerland	SF1	Public
Ukraine	Inter	Private

Source: Marius Dragomir and Mark Thompson (eds.). 2008. *Television across Europe: Follow-up Reports 2008*. OSI research

Table 10.3: Television license fee cost per year, Euros, 2006

	2006
Denmark	294
Norway	248
Sweden	221
Germany	204
U.K.	196
Slovenia	132
France	117
Croatia	108
Italy	104
Macedonia	64
Poland	49
Czech Republic	44
Slovakia	35
Romania	14
Bulgaria	None
Lithuania	None
Albania	4

Sources: Thomas Kirsch/ IP International Marketing Committee (CMI). 2007. *Television 2007. International Key Facts*, October 2007; Thomas Kirsch/ IP International Marketing Committee (CMI). 2006. *Television 2006. International Key Facts*, October 2006; Thomas Kirsch/ IP International Marketing Committee (CMI). 2005. *Television 2005. International Key Facts*, October 2005;

Table 10.4: Coverage of topics on public service TV

	Domestic political life	World affairs ¹	Country's international politics	Economy and business	Culture, art, education, ecology, religion	Sports	Crime	Social protection and healthcare	Other
Albania (TVSH)	24	13	11	16	18	3	3	7	5
Bosnia & Herzegovina (BHT)	24	11	20 ²	11	14	0	10	3	7
Bulgaria (BNT)	21	19 ³	7	4	19	3	1	5	21
Croatia (HTV)	23	23	6	8	12	4	-	1	23
Hungary (MTV)	19	4	2	8	12	2	-	15	38
Macedonia (MTV)	25	17	14	17	11	0	-	5	11
Moldova (Moldova 1)	14	12	5	21	21	-	-	19	8
Montenegro (TVCG)	25	12	17	15	10	9	-	2	10
Romania (TVR1)	29	16	0	9	8	8	12 ⁴	5	12
Serbia (RTS)	8	19	30	8	13	0	-	5	17

Note: Percentage of total programming hours

Source: Compiled from Radenko Udovičić (ed.). 2007. *TV prime time domestic news - monitoring and analysis of TV news programs in 10 SEENPM countries – Indicator of public interest*. Sarajevo: Media Plan Institute.

¹ This includes also reports on war crimes and terrorism.

² This includes also reports on war crimes.

³ This includes also reports on war crimes and terrorism.

⁴ This includes also reports on justice and internal affairs.

Table 10.5: Coverage of topics on commercial TV

	Domestic political life	World affairs	Country's international politics	Economy and business	Culture, art, education, ecology, religion	Sports	Crime	Social protection and healthcare	Other
Albania (top Channel)	15	10	2	17	6	5	5	9	31
Bosnia & Herzegovina (NTV Hayat)	25	21	18 ⁵	9	7	4	1	1	10
Bulgaria (bTV)	17	16 ⁶	7	4	24	5	2	5	20
Croatia (Nova TV)	24	17	5	6	9	4	-	1	34
Hungary	7	2	0	3	12	3	-	9	64
Macedonia (A1)	21	11	4	37	7	1	-	4	15
Moldova (TV7)	25	3	1	15	15	14	-	20	7
Montenegro (TV IN)	16	19	9	20	10	6	-	4	16
Romania (Antena 1)	17	6	1	9	13	6	6 ⁷	7	35
Serbia (B92)	19	17	16	7	10	1	-	7	23
Serbia (RUV)	16	2	14	25	11	0	-	2	30

Note: Percentage of total programming hours

Source: Compiled from Radenko Udovičić (ed.). 2007. *TV prime time domestic news - monitoring and analysis of TV news programs in 10 SEENPM countries – Indicator of public interest*. Sarajevo: Media Plan Institute.

⁵ This includes also reports on war crimes.

⁶ This includes also reports on war crimes and terrorism.

⁷ This includes also justice and internal affairs.

Table 10.6: Directional balance on public service TV

	Positive attitude	Neutral attitude	Negative attitude
Albania (TVSH)	11	88	1
Bosnia & Herzegovina (BHT)	7	91	2
Bulgaria (BNT)	-	100	-
Croatia (HTV)	28	60	12
Hungary (MTV)	5	93	2
Macedonia (MTV)	31	61	8
Moldova (Moldova 1)	50	45	5
Montenegro (TVCG)	46	38	16
Romania (TVR1)	2	89	9
Serbia (RTS)	24	65	11

Note: Percentage of total programming hours

Source: Compiled from Radenko Udovičić (ed.). 2007. *TV prime time domestic news - monitoring and analysis of TV news programs in 10 SEENPM countries – Indicator of public interest*. Sarajevo: Media Plan Institute.

Table 10.7: Directional balance on commercial TV

	Positive attitude	Neutral attitude	Negative attitude
Albania (Top Channel)	0	83	17
Bosnia & Herzegovina (NTV Hayat)	5	93	2
Bulgaria (bTV)	0	100	0
Croatia (Nova TV)	7	83	10
Hungary (RTL Klub)	9	78	13
Macedonia (A1)	11	66	23
Moldova (TV7)	17	75	8
Montenegro (TV IN)	41	42	17
Romania (Antena 1)	7	80	13
Serbia (B92)	9	71	20

Note: Percentage of total programming hours

Source: Compiled from Radenko Udovičić (ed.). 2007. *TV prime time domestic news - monitoring and analysis of TV news programs in 10 SEENPM countries – Indicator of public interest*. Sarajevo: Media Plan Institute.

¹ The focus of this paper is represented by what we generically call Central and Eastern Europe, a cluster of countries which have been studied extensively in the past five year, although it does not cover the countries of the former-Soviet Union, except for Moldova where content analysis studies have been carried out recently. The study also discusses some Western European broadcast markets for comparison.

² Marius Dragomir, Dušan Reljić, and Mark Thompson. (Eds.). 2005. *Television across Europe: regulation, policy and independence*. Budapest: Open Society Institute.

³ Digital Strategy Group of the European Broadcasting Union. 2002. *Media with a purpose. Public Service Broadcasting in the digital era*.

⁴ France (the High Council for Broadcasting, CSA), Italy (the Communications Guarantee Authority, AGCOM) and the U.K. (Ofcom) are some examples of such a regulation pattern.

⁵ 'Poland' in OSI/TV Across Europe, pp. 1,097-1,098.

⁶ Marius Dragomir, Dušan Reljić, Mark Thompson (eds.). 2005. *Television across Europe: regulation, policy and independence*, Budapest: Open Society Institute, p. 25.

⁷ Marius Dragomir, Dušan Reljić, Mark Thompson (eds.). 2005. *Television across Europe: regulation, policy and independence*, Budapest: Open Society Institute, p. 22.

⁸ Marius Dragomir, Dušan Reljić, Mark Thompson (eds.). 2005. *Television across Europe: regulation, policy and independence*, Budapest: Open Society Institute, p. 23.

⁹ Marius Dragomir, Dušan Reljić, Mark Thompson (eds.). 2005. *Television across Europe: regulation, policy and independence*, Budapest: Open Society Institute, p. 62.

¹⁰ The Macedonian State had to inject cash in the country's public service broadcaster in 2007 to save it from extinction.

¹¹ Digital Strategy Group of the European Broadcasting Union. 2002. *Media with a purpose. Public Service Broadcasting in the digital era*.

¹² Christian S. Nissen. 2006. 'Public service media in the information society' (Report prepared for the Council of Europe's Group of Specialists on Public Service Broadcasting in the Information Society (MC-S-PSB); Media Division, Directorate General of Human Rights, Council of Europe.)

¹³ Marius Dragomir, Dušan Reljić, Mark Thompson (eds.). 2005. *Television across Europe: regulation, policy and independence*, Budapest: Open Society Institute, p. 66.

¹⁴ Marius Dragomir, Dušan Reljić, Mark Thompson (eds.). 2005. *Television across Europe: regulation, policy and independence*, Budapest: Open Society Institute, p. 67.

¹⁵ Marius Dragomir, Dušan Reljić, Mark Thompson (eds.). 2005. *Television across Europe: regulation, policy and independence*, Budapest: Open Society Institute, p. 69.

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- ¹⁶ Christian S. Nissen. 2006. 'Public service media in the information society' (Report prepared for the Council of Europe's Group of Specialists on Public Service Broadcasting in the Information Society (MC-S-PSB); Media Division, Directorate General of Human Rights, Council of Europe.)
- ¹⁷ Christian S. Nissen. 2006. 'Public service media in the information society' (Report prepared for the Council of Europe's Group of Specialists on Public Service Broadcasting in the Information Society (MC-S-PSB); Media Division, Directorate General of Human Rights, Council of Europe.)
- ¹⁸ Christian S. Nissen. 2006. 'Public service media in the information society' (Report prepared for the Council of Europe's Group of Specialists on Public Service Broadcasting in the Information Society (MC-S-PSB); Media Division, Directorate General of Human Rights, Council of Europe.)
- ¹⁹ 'New Media is killing Journalism'. 2008. Debate at the Frontline Club. London: 2 May 2008.
- ²⁰ For a detailed normative discussion of objectivity and diversity see Denis McQuail. 1992. *Media Performance: Mass Communication and the Public Interest*. London: Sage.
- ²¹ Pippa Norris and David Sanders. 1998. 'Does Balance Matter? Experiments in TV News' (Paper prepared for Panel 38-12 'the ABC of Media Effects in British Elections: Agenda, Balance and Change' at the Annual Meeting of the American Political Science Association, Boston 3-6 September 1998).
- ²² William L. Miller, Neil Sonntag and David Broughton. 1989. 'Television in the 1987 British Election Campaign: Its Content and Influence.' *Political Studies* XXXVII (4): 630-650.
- ²³ Denis McQuail. 1992. *Media Performance*. London: Sage, pp. 224-226.
- ²⁴ Pippa Norris and David Sanders. 1998. 'Does Balance Matter? Experiments in TV News' (Paper prepared for Panel 38-12 'the ABC of Media Effects in British Elections: Agenda, Balance and Change' at the Annual Meeting of the American Political Science Association, Boston 3-6 September 1998).
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- ²⁶ Radenko Udovičić (ed.). 2007. 'Introduction' in *TV prime time domestic news - monitoring and analysis of TV news programs in 10 SEENPM countries – Indicator of public interest*. Sarajevo: Media Plan Institute, p. 14.
- ²⁷ Analyzing bias in the news carries a certain degree of subjectivity. Researching the directional balance includes analysis of the journalists' attitude and the stance they take in covering the report and at the same time analysis of the tone of the report.
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⁴⁷ Final report on the study commissioned to Mr D. Ward by the MC-S-MD "the assessment of content diversity in newspapers and television in the context of increasing trends towards concentration of media markets" (David WARD, Director, Centre for Media Policy and Development) Media Division, Directorate General of Human Rights, Strasbourg, 27 February 2006.

⁴⁸ Ward distinguishes between hard news, consisting of business and economy, consumer affairs, education, environment, health, home security and crime, international affairs, party political affairs, political affairs, public services, social issues; and soft news, consisting of arts and culture, celebrity, entertainment, human interest, lifestyle, religion, science, sports, women issues.

⁴⁹ Final report on the study commissioned to Mr D. Ward by the MC-S-MD "the assessment of content diversity in newspapers and television in the context of increasing trends towards concentration of media markets" (David WARD, Director, Centre for Media Policy and Development) Media Division, Directorate General of Human Rights, Strasbourg, 27 February 2006.