



CS1. Studies on national media research capability as a contextual domain of the sources of ROs

The aim of the **first case study** is to describe and analyse the **countries' monitoring capability**: the ability and possibilities of various agents to observe the developments of the media and the changes in society emanating from the media transformations, as well as related risks and opportunities for deliberative communication, and applying the obtained knowledge in making media political decisions.

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Note by the technical editor

The reports have been presented by case studies. Within it, a report per particular country.

The page numbering starts over again with CS2. As formatted in the PDF, the page numbering for CS1 runs as **1-1, 1-2, ...** and CS2 runs as **2-1, 2-2, ...** The introduction covering both case studies runs page numbers in the format of small Roman numbers, as **i, ii, iii, iv, ...**

Examples for reference:

For the CS1 as a whole:

Studies on national media research capability as a contextual domain of the sources of ROs (2022). In: *Approaching deliberative communication: Studies on monitoring capability and on critical junctures of media development in 14 EU countries*. CS1, D-2.1. Mediadelcom.

[+webpage of retrieval, e.g. <https://www.mediadelcom.eu/publications/>, etc., T.B.C.]

For a particular country report:

Kreutler, M. & Fengler, S. (2022). GERMANY. Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities. In: Studies on national media research capability as a contextual domain of the sources of ROs. *Approaching deliberative communication: Studies on monitoring capability and on critical junctures of media development in 14 EU countries*, CS1, D-2.1, pp. 161–189. Mediadelcom. [+webpage of retrieval, e.g. <https://www.mediadelcom.eu/publications/>, etc., T.B.C.]



AUSTRIA

Risks and opportunities related to media and journalism studies (2000–2020). Case study on the national research and monitoring capabilities

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Executive Summary

Even though the Austrian media system is comparably small, the number and the capacity of available sources for an analysis of risks and opportunities for deliberative communication in Austria are well advanced – at least in some of the relevant research domains. Particularly in the domains of journalism and media usage, a large variety of empirical sources is available and research initiatives have reached a high degree of specialization, while criticism of a lack of data for long-term observations remains. In the domain of legal regulation, the basis of available data also appears to be well advanced, although empirical research is underrepresented. By contrast, research on media ethics and media literacy is less differentiated, due to a relatively weak institutionalization and a lack of continuous funding, among other things. The description and analysis of available sources is used as a starting point for recommendations on future research initiatives in these fields – including, for example, a more systematic examination of the role of different media-external context factors for the quality of deliberative communication.

1. Introduction

The Austrian media system is characterized by the comparably small size of the country and a resulting number of typical features (e.g., Steinmaurer et al., 2002). These include a high concentration in almost all segments of the media market and a strikingly late deregulation of the broadcasting sector. Until today, Austrian media usage is strongly influenced by journalistic content produced in neighbouring countries, particularly in Germany, which shares the same language.

Similar spillover effects are also typical for the history of media and communication studies in Austria (e.g., Karmasin & Krainer, 2013; Melischek & Seethaler, 2017): As a comparatively young and still weakly institutionalized academic discipline with a limited financial basis, its national discourse has always been affected by international trends and developments. However, while a transnational diffusion of scientific knowledge *per se* is a laudable achievement, it also entails the danger of blurring national specifics and peculiarities. This case study report aims to highlight the typical Austrian research and monitoring capabilities of media and journalism studies with regard to risks and opportunities for deliberative communication. Still, the report also has to face the task of separating relevant data sources from an ever-growing corpus of German-language literature that mainly focuses on the situation in Germany (or the German-speaking part of Switzerland). This task is by no means a trivial one at a time when many of the chairs for media and communication studies at Austrian universities are held by international

scholars with little or no interest in researching the characteristics of the Austrian media system.

In the following main sections of this report, relevant publications and data sources for an analysis of risks and opportunities for deliberative communication are described separately for the four major domains that are covered by the Mediadelcom project: a) legal and ethical regulation, b) journalism, c) media usage patterns, and d) media-related competencies. The data collection followed a multi-step search strategy and includes the results of literature reviews in the four domains (using both general library databases such as the Central Catalogue by the Austrian Library Network and specialized databases in the respective research areas) as well as additional online searches of the websites of relevant research institutions.¹ The mainly descriptive overview of the results is followed by an analysis of the data quality in the four domains and some preliminary conclusions with regard to future research tasks. The evaluation will show that, despite the small size of the Austrian media system, the number and the capacity of available sources are certainly well advanced in at least some of the domains, even though they are not without deficiencies.

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

In the Austrian media system, regulatory policy has a high significance and is usually favoured over self-regulation (e.g., Berka, 2010). This is particularly relevant for the broadcasting sector, which – in accordance with a number of laws such as the Federal Act on the Austrian Broadcasting Corporation (ORF Act), the Federal Act on Audiovisual Media Services (Audiovisual Media Services Act), and the Federal Act enacting provisions for private radio broadcasting (Private Radio Broadcasting Act) – is tightly regulated by the state. Since 2001, in the course of the liberalization of the Austrian TV market, broadcasting media are supervised by the Austrian Communications Authority (KommAustria) – as required by the Federal Act on the establishment of an Austrian Communications Authority (KommAustria Act). As an independent collegial body, KommAustria is responsible for securing freedom and pluralism of opinion and fair competition in Austria's dual broadcasting system, for example by administering the broadcasting frequencies and supervising adherence to the provisions for advertising and the protection of minors. Operational support for realizing these tasks is provided by the "Rundfunk und Telekom Regulierungs-GmbH" (RTR). Both authorities publish regular reports, for example on the financial situation and the usage of audiovisual media, as well as other media-related studies (RTR, n.d.). While RTR administers several funds to increase the pluralism of broadcasting media and film productions, KommAustria also acts as a donor for Austrian print media – in line with the Press Promotion Act of 2004. Except for an annual subsidy for the support of self-control measures of the press, however, incentives for media self-regulation and accountability are rare.

The relevance of *legal regulation* for Austrian media is partly mirrored by the comparably high academic interest in media law and adjacent areas of jurisprudence. In fact, law is historically one of the areas of studies that attracts the highest numbers of students at Austrian universities

¹ The search process was guided by more than 60 keywords (in English and German) indicating relevant subtopics for each domain – as previously defined by the Mediadelcom consortium (Mediadelcom, 2022). Due to an overabundance of different findings, the authors applied a strict selection procedure. For example, German-language publications which predominantly analyse media-related risks and opportunities in Germany and Switzerland were mostly disregarded. Similarly, many popular and "grey" publications (particularly theses) were excluded, unless they cover an otherwise underresearched field of study. In total, the authors evaluated 237 different sources, most of which are also collected in the bibliographical database that will be made available on the Mediadelcom project website (<https://mediadelcom.eu>). The authors would like to thank Susanne Behrens for her assistance in the process of the literature review.

(Statistik Austria, 2021a). Traditional faculties of law, offering a basic qualification for the legal professions, exist at the universities of Graz, Innsbruck, Linz, Salzburg, and Vienna. By now, however, many other universities offer further specialized study programs, many of which integrate specialized knowledge about the legal regulation of media and information and communication technologies (ICTs). A number of scholars have influenced the Austrian discourse about media law in the past two decades: A key role can be ascribed to the recently deceased Walter Berka, formerly professor for constitutional and administrative law at the University of Salzburg. In addition to many other publications about media and broadcasting law, Berka was the lead author of *Mediengesetz Praxiskommentar* (Berka et al., 2019) – a practical commentary on the Austrian Media Act. He also co-founded the “Forschungsinstitut für das Recht der elektronischen Massenmedien” (REM – Research Institute for the Law of Electronic Mass Media), a non-profit association located in Vienna that organizes the annual Austrian Broadcasting Forum and publishes its own book series (most recently: Berka et al., 2021). Michael Holoubek, professor of public law at Vienna University of Economics and Business and also a member of REM, has co-authored a widely used textbook on mass media law (Holoubek et al., 2014). Helmut Koziol, professor emeritus for civil law at the University of Vienna and a former director of the Institute for European Tort Law of the Austrian Academy of Sciences and the University of Graz, co-edits the book series “Medienpolitik und Recht” (Media politics and law) with many contributions on the current challenges and transformations in the field of media regulation (most recently: Koziol, 2018). Nikolaus Forgó, professor of IT and IP law and head of the recently founded Department of Innovation and Digitalisation in Law at the University of Vienna, is a renowned expert for the legal challenges resulting from technological change. He not only directs the Postgraduate Program for Information and Media Law at the University of Vienna, but also has several podcast series with a high public visibility (e.g., *Ars Aequi*, *Ars Boni*) that discuss current issues in the context of law and technology. A transdisciplinary research approach to questions of media governance and media technology, including data protection, hate speech, and disinformation under the lens of human rights and civil liberties, is represented by Katharine Sarikakis, professor of communication science and head of the Media Governance and Industries Research Lab at the University of Vienna. Governance of emerging technologies is also one of the key research issues taken on by the interdisciplinary Institute for Technology Assessment of the Austrian Academy of Sciences. The Institute for Comparative Media and Communication Studies of the Austrian Academy of Sciences and the University of Klagenfurt regularly contributes to the international Media Pluralism Monitor which intends to identify potential risks to media pluralism by evaluating media regulation in Member States and Candidate Countries of the European Union from a comparative view (for the Austrian perspective: Seethaler & Beaufort, 2021).

As a complement to the diverse spectrum of academic research, various other non-state actors – both at the national and international level – also regularly comment on current issues in the field of media law and regulation. With regard to basic legal areas such as the protection of freedom of expression, for example, Reporters Without Borders highlight notable challenges in their annual World Press Freedom Index (RSF, 2021). With regard to issues like hate speech, the NGO Article 19 offers regular analyses of the current legal framework (e.g., Article 19, 2020). The anti-racism NGO ZARA also monitors hate speech on social media and publishes an annual report (e.g., ZARA, 2020). Specialized commentary in the field of digital law and internet security is offered by organizations such as the Austrian section of CERT (Computer Emergency Response Team) or the Chaos Computer Club (C3W) Vienna as well as individual experts such as the journalist and author Ingrid Brodnig (e.g., Brodnig, 2016, 2017, 2019).

An analysis of the legal regulation of communication and media in Austria can build on a comparatively broad basis of sources. All relevant laws as well as important cases and rulings can be researched online in the Legal Information System of the Republic of Austria that allows for nuanced search criteria. For many media-related laws, practical introductions and commen-

taries are available in book form (e.g., Berka et al., 2019; Feher et al., 2013; Frohner & Haller, 2016; Kogler et al., 2018; Rögglä et al., 2012; Vartian, 2002). Additional publications and rulings can be found with the help of specialized law databases such as RIDA (Rechts-Index-Datenbank). However, useful reports by relevant NGOs as well as other online sources are usually not included. One example of an academic journal with a specific focus on Austrian media and communication law is *Medien und Recht* (Media and law), edited by Heinz Wittmann. It is probably no surprise that empirical studies with a social science approach are rather an exception in this field of knowledge.

Nonetheless, the available sources and documents cover most of the key legal areas relevant for an assessment of the risks and opportunities for deliberative communication in Austria – and they do so in a most varied manner and sometimes also with conflicting intentions. Freedom of expression, for example, can be considered as well protected in Austria. It has been anchored in Austrian Basic Law since 1867 (StGG, Art. 13) and is discussed in various popular and academic publications (e.g., Seethaler, 2018). The NGO Reporters Without Borders lists Austria on rank 17 of its 2021 World Press Freedom Index, indicating a “fairly good” status quo (RSF, 2021). In the context of the Coronavirus pandemic, however, criticism arose when the government only allowed a limited number of journalists to participate in its press conferences (Siebenhaar, 2020). Even more recently, the system of state subsidies for the press became a matter of public debate in the course of the political crisis that forced Chancellor Kurz to resign (for background: Kaltenbrunner, 2021). The fact that the Criminal Code (StGB, § 111) allows for an increased prison sentence for defamation when it has been made accessible to a wider public by means of the mass media has also been considered a potential risk to freedom of expression (Seethaler & Beaufort, 2021, p. 10). With regard to access of information, the Austrian situation has been evaluated, among others, by Access Info Europe and the Centre for Law and Democracy (n.d.) who offer a global survey of right to information laws. Austria consistently trails at the bottom of their ranking, because the Duty to Grant Information Act of 1987 is described as “one of the weakest right to information laws in the world” (ibid.). Debates about a new Freedom of Information Act have been ongoing for years, but it remains unclear as to how far the draft law from February 2021 will consider persisting critiques (e.g., Access Info Europe, 2021). Austria does not have a specific law to protect whistleblowers, because the process to implement the European Whistleblower Directive is still ongoing (Transparency International Austria, 2020). At least, a new bundle of laws to combat hate speech and disinformation – consisting of a new Act on Measures to Protect Users on Communications Platforms (Communication Platforms Act) and amendments to existing legal provisions – has been in force since the beginning of 2021. Notwithstanding, criticism by civil society actors continues to be vociferous (e.g., Article 19, 2018, 2020; RSF, 2020). One of the biggest threats to the Austrian media system remains the particularly high degree of news media concentration, which can also be seen as a result of insufficient legal restraints. As Seethaler and Beaufort (2021, 12) point out for the Media Pluralism Monitor: “Austrian media and cartel law has been ineffective in preventing mergers of media companies – from the Mediaprint deal in 1988 (a joint venture of the owners of the two biggest newspapers at the time, *Kronen Zeitung* and *Kurier*) to the 2017 merger of the two biggest private TV stations, ATV and PULS 4, both of which are now owned by the German ProSiebenSat.1 group. Moreover, changes in the media landscape have not yet been significantly incorporated into competition law.” Both of the mentioned cases have received wide coverage – also in the mass media.

Unlike the legal domain, research on *media ethics*, *media self-regulation* and *media accountability* is by comparison weakly institutionalized in Austria. This imbalance is a direct result of the legal framework for media and journalism in a country which hardly claims or fosters self-regulation of media actors (Karmasin et al., 2011, p. 23). In fact, the main institution for journalistic self-regulation, the Austrian Press Council, was effectively disbanded in 2002 and only reconvened operations in 2010, after a hiatus of almost a decade, while other media accountabil-

ity instruments (MAIs) remain scarce until today (Karmasin et al., 2018). Consequently, systematic research initiatives with an exclusive focus on Austrian MAIs are limited in number and scope.

Among the chairs for communication science at Austrian universities, none has an official denomination for media ethics or media accountability. Still, however, several scholars are known as experts in this field of knowledge. At the University of Klagenfurt, for example, Matthias Karmasin, professor at the Department of Media and Communications, has been a pioneer for research into media ethics, among other things with projects such as “Self-regulation and self-organization in Austrian print media” (2005–2006, funded by KommAustria) or as the Austrian partner within the EU-funded project “Media Accountability and Transparency in Europe” (MediaAcT, 2010–2013). At the same department, Larissa Krainer has been establishing media and communication ethics as a research area since 1998, combining the development of theoretical models with empirical research, for example with a focus on an ethics of produsage and gender issues. In 2014, Tobias Eberwein became leader of a newly established research group “Media Accountability & Media Change” at the Institute for Comparative Media and Communication Studies (CMC), which is jointly operated by the Austrian Academy of Sciences and the University of Klagenfurt. This research group hosts a variety of ongoing projects both with a view on the comparative analysis of media accountability instruments (“Mapping media accountability: International trends and perspectives”) as well as new risks and challenges (e.g., “Into the unknown: Understanding digital media ethics”, “Triple A: Algorithms, automation, accountability”). At St. Pölten University of Applied Sciences, Michael Litschka has been organizing an annual “Symposium Media Ethics” since 2016. All of the aforementioned researchers collaborate within the Interdisciplinary Media Ethics Center (IMEC), a registered association funded by its members with the aim combining philosophically founded media ethics with practice-oriented knowledge transfer and consulting, operative since 2015. Other professors at Austrian universities, such as Alexander Filipović (Department of Systematic Theology and Ethics, University of Vienna) or Claudia Paganini (Department for Christian Philosophy, University of Innsbruck), represent a theological tradition of media ethics with only a minor interest in empirical research.

By contrast, several organizations and projects explicitly showcase a close cooperation between academic research and media practice. The Austrian Press Council, for example, is among the co-coordinators of the EU-funded research project “Media councils in the digital age” that intends to assess the challenges of digital developments for press and media councils in Europe, starting in 2019. The Austrian Broadcasting Corporation (ORF) has an internal Public Value Competence Center that realizes a continuous evaluation of the quality of public service broadcasting (e.g., through annual expert hearings) and also publishes regular reports. The “Initiative Qualität im Journalismus” (IQ – Initiative Quality in Journalism) is an association of media researchers and practitioners that organizes regular events with a focus on the quality and accountability of Austrian journalism. The private “Medienhaus Wien” (Media House Vienna), an independent research and education company financed by the funds of its shareholders, offers both practice-oriented research as well as educational concepts and consulting for journalists and media managers.

Besides, many actors from Germany and Switzerland also leave their mark on the discourse on media ethics and accountability in Austria, mostly due to the same language. Many of them are organized within the German Communication Association’s section for “Communication and media ethics”, the Munich-based “Netzwerk Medienethik” (Network Media Ethics), or the recently founded “Zentrum für Ethik der Medien und der digitalen Gesellschaft” (zem:dg – Center for the Ethics of Media and the Digital Society). However, only a small share of their activities delivers specific data on the risks and opportunities for media ethics in Austria. The tri-national “Verein zur Förderung der publizistischen Selbstkontrolle” (FPS – Association for the Advance-

ment Media Self-Control), established in 2004 as an academic watchdog for German-language institutions of media self-control, has recently been disbanded.

In contrast to the domain of legal regulation, the slow institutionalization of research on media ethics and media accountability is reflected in the fragmentary availability of data in this area. In 2011, Karmasin and his colleagues judged: “Austria lacks comprehensive research about media ethics and media accountability. The reflection of the status quo is incomplete and longitudinal analyses have never been made” (Karmasin et al., 2011, p. 26). This assessment is still largely true ten years later: There is only a little empirical research with a specific focus on Austrian MAIs, and, consequently, comprehensive academic databases that would enable continuous monitoring activities in this domain do not exist. The sole exception are several surveys among Austrian journalists that have repeatedly been questioned about their professional role conceptions, including their ethical dispositions (e.g., Karmasin, 1996, 2005; Kaltenbrunner et al., 2007, 2008, 2020; Fengler et al., 2014; Hanitzsch et al., 2019b), which are discussed in more detail in section 3 of this study. Besides, the Austrian Press Council offers a data collection with decisions on all negotiated complaints (including explanatory statements by the jury) on its website, which may be considered as a valuable resource for further research.

Even though the European Media Accountability Index by Eberwein et al. (2018b), which measures the diffusion of different MAIs in the various journalism cultures throughout Europe, lists Austria on rank 4 and points to a “highly developed media accountability infrastructure” (p. 296) in the country, the number of Austrian MAIs must be considered moderate at best. This is also reflected in the available research publications in this context, which are summarized by several state-of-the-art reports (Karmasin et al., 2011, 2018; Weder, 2010; from the perspective of the whole German-language region: Eberwein, 2020a). With regard to the Austrian Press Council, Gottwald et al. (2006) provide an in-depth analysis of possible success factors for an Austrian model press self-regulation. Comparative assessments of media councils in Europe highlight shortcomings of the Austrian Press Council in the time of its standstill before 2010 (Puppis, 2009b; Fengler et al., 2014). The phase of its re-establishment has been illuminated by accompanying research (e.g., Zimmermann & Kraus, 2007) as well as documentary reports by involved actors (e.g., Warzilek, 2013). Current challenges of the press council are monitored by the ongoing “Media councils in the digital age” project (e.g., Harder & Knapen, n.d.; Masip et al., n.d.). A comprehensive study by Paganini (2018) analyses the history and scope of different codes of ethics in Austria – as well as in Germany and Switzerland. Eberwein et al. (2016) as well as Porlezza and Eberwein (2022) point to conspicuous deficits of Austrian and other European ethics codes in the context of digitization. There is no systematic research about the role of ombudspersons and media journalism in Austria, although several trade publications as well as some Master theses have showcased an interest in this issue (e.g., Breuss, 2017; Förderl-Schmid & Ranftl, 2008; Trautner, 2008). However, several studies do stress the importance of media companies as stakeholders of media accountability by reference to the concept of corporate social responsibility (e.g., Weder & Karmasin, 2009; Koinig et al., 2019). Even though there are only few lasting examples of media watchblogs in Austria, this MAI has recurrently been scrutinized by empirical studies (e.g., Schönherr, 2008; Hutter, 2009; Bichler, 2012; Bichler et al., 2013). More recently, new ethical challenges for journalists in the digital media world, such as participation, hate speech, disinformation, or algorithmic selection, have triggered increasing attention by Austrian media researchers (e.g., Bichler, 2017; Eberwein, 2020b, 2022; Litschka, 2021; Saurwein, 2019; Saurwein & Spencer-Smith, 2020).

3. Publications, data sources and main monitoring actors of journalism domain

To capture the risks and opportunities of journalism for deliberative communication, the Mediadecom project focuses on democratic aspects of professional journalism and news media. Accordingly, economic and social dimensions of journalism are addressed extensively, including organizational as well as actor-centred factors, contexts, and relations. In Austria, academic research on journalism in this sense is anchored at three universities: the Department of Communication Science at the University of Salzburg, the Department of Communication Studies at the University of Klagenfurt, and the Department of Communication at the University of Vienna. The research area also has a home at the Institute for Comparative Media and Communication Studies (CMC) of the Austrian Academy of Sciences and the University of Klagenfurt and at “Medienhaus Wien”. Besides, the University of Krems offers a course of studies in Media and Communication, which, however, is associated with little to no empirical research – similar to the training and teaching programs offered by the universities of applied sciences.

Research on journalism at Salzburg’s Institute takes place primarily in the department “Journalistik” (Journalism Studies) and at the Center for Information and Communication Technologies & Society (ICT&S). The head of the Department of Communication Studies, Josef Trappel, is one of Austria’s most renowned researchers on media policy and media economics. Furthermore, research activities were and are mainly driven by Susanne Kirchhoff, Thomas Steinmaurer, Rudolf Renger, Dimitri Prandner (since 2016 at the Institute of Sociology, Department of Empirical Social Research at the University of Linz), and Roman Hummel (professor emeritus since 2016). Between 1997 and 2004, the Salzburg Institute published the annual “Berichte zur Lage des Journalismus in Österreich” (Reports on the state of journalism in Austria), addressing current challenges facing the profession. The University of Salzburg is also the seat of the “Österreichische Gesellschaft für Kommunikationswissenschaft” (Austrian Society of Communication). This association for media and communication science and practice is in charge of publishing the quarterly *Medien Journal* (Media Journal), which has been brought out since 1977, and the bi-annual conference “Kommunikationswissenschaftliche Tage” (Communication Science Days) – both platforms regularly feature contributions relevant to journalism research in Austria.

In recent years, the Department of Communication at the University Vienna has shifted its focus on international research. Studies on Austrian journalism, media or related national specifics are therefore only sporadically done. Fritz Hausjell must be mentioned as an expert on the Austrian media system as well as journalism, media history, and public broadcasting. He was also a co-founder of the journal *medien & zeit: Kommunikation in Vergangenheit und Gegenwart* (“Media & time: Communication in the past and present”), in which issues of communication studies are reflected in a contemporary historical context. Also, until his sudden death in 2014, the institute’s chairman Hannes Haas was considered an expert on the Austrian media landscape. In 2021, Folker Hanusch launched, in cooperation with CMC, a comparative country study on risks and uncertainties in a changing media environment including Austria as well as Germany and Switzerland. Hanusch is also a member of the Journalism Studies Center, located at the University of Vienna. The Center is concerned with the interdisciplinary study of journalism and its interaction with societal fields across different cultural contexts. So far, however, no systematic research has been done in the research group with regard to Austrian journalism.

The most comprehensive research on Austrian journalism is provided by “Medienhaus Wien”. Since 2007, a series of journalists’ surveys has been compiled and published (Kaltenbrunner et al., 2007, 2008, 2010, 2013, 2017, 2020). The results provide detailed insights into several areas of interest such as working conditions, demographic structure data, income, working practice, satisfaction, journalistic role understanding, and self-image. In addition, the reports provide an overview of media companies and media market data.

Since 2017, the “Verband Österreichischer Zeitungen” (VÖZ – Association of Austrian Newspapers) has published the *Medienhandbuch Österreich* (Media handbook Austria) every year as the successor to the *Pressehandbuch* (Press handbook), which had previously been published since 1985. It contains data on media use, media markets, media economics and the advertising market, developments in media law and media company law, including legal rulings, and an overview of media companies. In addition, a chronicle of the respective media year is printed, documenting key personnel, legal and corporate decisions relating to the media landscape. Market studies and surveys are recorded, as are media associations and institutions, news agencies, educational and training institutions, journalism professional associations and awards. Finally, an overview of the media landscape is given – a summary can be found online.

Austria is considered to be a country that stands out due to its high media concentration. For decades, research on the *market conditions* has discussed the risks of the high media concentration and foreign market share in the Austrian media system. Main research publications were written by Josef Trappel (Trappel, 2007, 2019; Trappel et al., 2002; Donk et al., 2012), Thomas Steinmaurer (Steinmaurer, 2002, 2009; Steinmaurer et al., 2002), Birgit Stark (Stark & Magin, 2009), Andy Kaltenbrunner (Kaltenbrunner, 2019) as well as Josef Seethaler and Gabriele Melischek (Seethaler, 2015; Seethaler & Beaufort, 2021; Hanitzsch et al., 2019b; Seethaler & Melischek, 2006; Seethaler, 2021). The ownership structures of the (daily) newspaper market in particular have been well researched (Melischek et al., 2005), including new phenomena such as free newspapers (Lohmann & Riedl, 2019). In 2020, results on the development of the local and regional press were published in a country comparison of Austria and Germany (Vonbun-Feldbauer et al., 2020). Specifically on the Austrian TV market, Wolfgang Seufert provided empirical findings on the national data situation and also reflected on the economic situation of the television industry in general (Seufert, 2012). Moreover, in 2016–2017, Rudolf Renger investigated market conditions focusing on the dynamics between print and social media products of local and regional newspaper companies (Renger et al., 2016). Besides academic efforts, the journalist Harald Fidler continuously publishes information and references regarding the ownership structures of Austrian publishing houses in his media encyclopaedia *Österreichs Medienwelt von A bis Z* (Austria’s world of media from A to Z) (Fidler, 2008) and on his website (Fidler, n.d.; for another useful encyclopaedia on the Austrian media landscape see Koschnick, 2004). Relevant sources with regard to audience reach in different media segments are discussed in the context of media usage patterns in section 4 of this report.

Surprisingly little academic research is committed exclusively to *public service broadcasting* and the Austrian Broadcasting Corporation ORF. An empirical comparison was developed in 2006, exploring the question of how the professional standards of ORF news are to be assessed in terms of journalistic and political plurality in a national and international context (Lengauer, 2006). Based on a structural analysis of media economic and constitutional framework conditions, Corinna Wenzel explores the question of whether state regulation concepts of public broadcasting are needed to ensure a public value (Wenzel, 2012). A more recent study was evaluating the funding model and exploring questions of transparency (Ganter & Sehl, 2018). However, under the Media Act, the ORF itself is legally required to release annual reports on financial statements and public value. These reports contain detailed data on reach, market shares, programming, the company’s financial data, but also concepts for corporate goals such as equality.

The literature on *production* is dominated by comparative country studies, mainly but not exclusively within the German-speaking countries, for example on digitization and media convergence (García Avilés et al., 2009; Menke et al., 2019), the situation of foreign correspondents (Brüggemann et al., 2017; Terzis, 2015), and the investigation of journalistic production under neoliberal conditions (Zwicky, 2012). During 2015, a research project discussed journalistic practices and infrastructures against the background of a possible creation of an information

centre for changing requirements in the professional field of journalism (“Durchführbarkeitsstudie: Beobachtungs-/Informationsstelle für den Wandel journalistischer Arbeitsbedingungen und Anforderungen”; Feasibility study: Observation/information centre for the change of journalistic working conditions and requirements, University of Salzburg). Furthermore, the research literature directs attention to the career entry of young journalists (Hummel et al., 2012) and economic pressures that weigh on journalists (Lauerer et al., 2017). An earlier research project from 1999–2001 already approached the topic of how economization affects journalistic work or journalistic quality (Neissl et al., 2001). Also worth mentioning are research efforts around investigative journalism, which consider legal aspects as well as economic feasibility and professional implementation (Seywald, 2020).

With regard to the subject of *working conditions*, as briefly mentioned earlier, the study “Journalismus unter Druck: Risiken und Unsicherheiten in einem sich wandelnden Medienumfeld” (Journalism under pressure: Risks and uncertainties in a changing media environment) started in 2021 as a cooperation between CMC (Josef Seethaler) and the University of Vienna (Folker Hanusch). This project is dedicated to risks and uncertainties faced by journalists in Germany, Austria, and Switzerland. The aim of the study is to gain a better understanding of how journalists in different political, socio-economic and cultural contexts perceive risks and uncertainties in each case, what coping strategies they develop, and how they adapt. In 2017–2018, journalistic decision-making and selection processes were in the spotlight of a study at the University of Salzburg (“Work in P(rog)ress – Neue Nachrichten- und Arbeitsprozesse im österreichischen Journalismus”; Current news and work processes in Austrian journalism). In general, the comprehensive studies by Medienhaus Wien mentioned above are thoroughly informative in this respect.

A considerable number of studies are committed to young journalists and journalistic training. The literature provides overviews of training paths and further education (Hooftacker & Meier, 2017) as well as field reports and critical discussions of journalistic education (Kaltenbrunner, 2001). Other research relates to changes in the journalistic field and career strategies. The emphasis is on self-perception, such as the perceived need for training and/or other profession-related practices such as network building (Kirchhoff et al., 2013), curricula of relevant education and training institutions (“Die österreichische Journalistenausbildung im Kontext einer veränderten Berufswelt”; Austrian journalism education in the context of a changing professional world, University of Salzburg, 2018), and entrepreneurial journalism, professional self-employment and business start-ups (University of Salzburg in cooperation with the Board of Trustees for Journalism Education, KFJ, 2021).

The professional situation of women in Austrian journalism was explored by Johanna Dorer at the beginning of the millennium (Dorer, 2002). Furthermore, in 2012–2013, Susanne Kirchhoff headed a Europe-wide research project named “Women and Media Industries in Europe”, examining company structures in the context of gender as well as the personal experiences of established female journalists. The results also shed light on working conditions of women in media organizations and the representation of women on television (Kirchhoff & Prandner, 2017).

One of the wider interests of Austrian journalism research relates to *professional culture*. Given the comparatively close relationship between journalists and politicians (Maurer & Pfetsch, 2014), only little research has been done on this topic. Moreover, conflicts between political interests and media actors are hardly ever discussed publicly (Maurer & Riedl, 2020; Plasser & Lengauer, 2010). Also, light was shed on political alliances and networks of politicians with journalists, and the use of intimidation as a strategy to control the interactions between political actors and journalists (Maurer & Beiler, 2018). Besides, media policies for the period 2000–2005 were examined, which were exercised by a government with right-wing populist participation (Kaltenbrunner, 2006). More recently, using press releases and a selection of media content, the interaction of media and EU politics in Austria over the last ten years was examined

(“Drahtseilakt EU-Krisenmanagement: Zur Wechselwirkung von Medien und Politik in Österreich”; Balancing act EU crisis management: On the interaction of media and politics in Austria, Hajo Boomgaarden, University of Vienna). Furthermore, the influence of the advertising industry on journalistic work was explored (Gadringer et al., 2012; Reimann & Schopf, 2012) as well as the connection of journalistic work, economic pressure, and social responsibility (Aichberger et al., 2017). Also of interest were job profiles, journalistic roles (Karmasin & Kraus, 2010; Kraus, 2009; Riedl, 2019), and the self-perception of journalists (Kirchhoff & Prandner, 2016) at free newspapers, private broadcasting and online media in Austria. Key research projects in this regard are “Journalismus im Wandel” (Journalism in transition, 2011–2012) and “Medienkarrieren im Umbruch” (Media careers in transition, 2010–2011), covering topics such as working conditions, self-image and role image, gratifications in professional life, motivation and career expectations. In addition, the extent to which initial job motivations and expectations were met or disappointed against the background of journalistic day-to-day work was examined (Nölleke et al., 2020). And finally, a comparative country study offered insights into sociodemographic characteristics, working environment, independence and journalistic autonomy, understanding of roles and digitization (Hanitzsch et al., 2019b).

There are several notable international studies with Austrian participation: As mentioned before, Austria has been part of the Media Pluralism Monitor since 2015 (Josef Seethaler, CMC). The research project assesses the risks for media pluralism in EU member states and candidate countries based on four pillars: basic protection, market plurality, political independence, and social inclusiveness (e.g., Seethaler & Beaufort, 2021). Austria is also part of the Worlds of Journalism Study, which was launched in 2007 to assess the state of journalism throughout the world. The study’s main objective is to help journalism researchers, media practitioners, and policy makers to better understand the worldviews and changes that are taking place in the professional views of journalists, the conditions and limitations under which journalists operate, and the social functions of journalism in a changing world (e.g., Hanitzsch et al., 2019a). The Austrian research team is also led by Josef Seethaler, CMC.

4. Publications, data sources and main monitoring actors of media usage patterns

Research into media usage patterns is often subdivided into applied audience research and academic usage research (e.g., Marr & Bonfadelli, 2010). In Austria, commercially oriented audience research is clearly the dominant branch. Most of the relevant key figures for an analysis of media usage patterns are collected by commercially oriented market research or contract research, although not all related studies are publicly available (VMÖ, 2007). In contrast, academic usage research is by comparison weakly institutionalized and mostly focuses on either secondary analyses of commercial usage data or varying current issues. However, there is not, as yet, a distinct and typically Austrian tradition of academic research into media usage and media effects (for an overview from the perspective of the German-speaking countries: Stark & Kist, 2020).

Availability of usage data from applied audience research varies for each media segment: For print media, the Media Analysis (“Media-Analyse”) is the biggest study for surveying the performance figures of newspapers and magazines distributed in Austria. The results are based on a survey (approx. 15,000 interviews per year) conducted by the market research institutes GfK Austria and IFES. However, their usage data slightly differ from those figures collected within Austrian Consumer Analysis (ÖVA – “Österreichische Verbraucheranalyse”). Additional data on the reach of print media are collected by the Austrian Circulation Control (ÖAK – “Öster-

reichische Auflagenkontrolle”) – an association of publishers and (media) agencies. Voluntary members report their data on print run, paid circulation, and distributed circulation.

The “Radiotest” is a measuring instrument for radio consumption in Austria, commissioned by the public broadcaster ORF and the private radio stations. Its results are based on around 13,000 computer-assisted telephone interviews (RMS Austria, n.d.). For television, two databases are relevant: The “Teletest” study provides data since 1991 on the (classic) TV market with time-shifted viewing up to six days after broadcast, initially without web-based use on PC or mobile. The market research institute GfK records the TV consumption of around 3,200 people aged 12 and over and around 340 children in 1,570 Teletest households, representative of the population (AGTT, n.d.). Besides, the Moving Image Study (“Bewegtbildstudie”), which has been carried out annually since 2016, uses surveys to provide results of daily reach and market shares for television and videos for TV linear, TV recorded, TV online, online video, DVD, and the like. The media authority KommAustria is responsible for conducting the study (RTR, n.d.). KommAustria is also legally obliged to publish an annual report on the daily reach and user numbers of all audiovisual media, based on self-assessments by the media houses (RTR, n.d.). The Austrian Broadcasting Corporation has its own research unit (ORF Medienforschung), which – besides analyses of the available data on audience reach – also conducts ad-hoc research on current issues as well as monitoring tasks.

The Austrian Web Analysis (ÖWA – “Österreichische Webanalyse”) has been providing a full survey of the use of participating offerings (web/apps) since 2003. Results include page impressions, visits, unique clients, use time, and the percentage of accesses from Austria. In addition, online surveys and telephone surveys on Internet usage are conducted. However, the results refer exclusively to Austrian websites. In 1996, the market research institute Integral started surveying participants about their online usage for the Austrian Internet Monitor (AIM) (Integral, n.d.).

In an attempt to synchronize some of the above-mentioned single-media studies and live up to the realities of cross-media usage in the present, the “Media Server” study has been developed as an all-media survey in Austria that covers the media genres of print, television, radio, Internet and outdoor advertising. The first survey was conducted in 2014/2015. The study was repeated in 2019. Interestingly, the results partly differ from the findings by studies such as Media Analysis and Teletest.

In addition to these sources, various private research institutions conduct regular studies on specific questions with regard to media usage. For example, Gallup Austria repeatedly analysed media usage habits by Austrians in the course of the Covid-19 pandemic (e.g., Gallup Institut, 2020). The “Institut für Strategieanalysen” (ISA – Institute for Strategic Analyses) recently published a study on media usage in the pandemic by people with a migration background, financed by the Austrian Integration Fund (Perlot & Filzmaier, 2021). MindTake Research identified “winners” and “losers” of the Covid shutdown among Austrian websites (MindTake Research, 2020). Broader examples of recent audience studies in the field of contract research are, to name just a few, SORA’s baseline study *Internet und Demokratie in Österreich* (Internet and democracy in Austria) (Mayerl et al., 2018), realized on behalf of the Austrian Federal Chancellery, the *Mediendiskursstudie Wien* (Media discourse study Vienna) on the information habits of citizens in Vienna (most recently: IFES, 2021), commissioned by the City of Vienna, the Consumer Studies by the Austrian Advertising Council (most recently: Österreichischer Werberat, 2018), as well as various studies about digital media usage by kids and adolescents (e.g., by saferinternet.at; see also section 5 below).

In the field of academic research on media usage, several actors and projects stand out, each of them representing very specific thematic foci: Since 2015, Josef Trappel and his team at the University of Salzburg have been partners of the “Digital News Project”, coordinated by the British

Reuters Institute for the Study of Journalism. For this project, that currently compares 46 countries and can thus be considered the largest international study on news media usage in the digital media world, detailed findings on media usage patterns in Austria are published in annual country reports, based on an online survey of 2,000 national participants (for the 2021 edition, see Gadringer et al., 2021). The University of Salzburg has a specialized Department for Media Usage and Digital Cultures, co-directed by Christine Lohmeier and Sascha Trültzsch-Wijnen, which, however, favours a Cultural Studies approach to researching the influence of new technologies on media appropriation (see also section 5).

At the University of Vienna, various departments and researchers showcase an interest into questions of media usage, although none of them has an official denomination for this research area. One example is the Advertising and Media Psychology (AdMe) Research Group, led by Jörg Matthes, which currently integrates projects such as “Social Media Use and Adolescents’ Well-Being”, financed with the help of the Austrian Science Fund (FWF), as well as many other media effects studies. Claudia Wilhelm, newly appointed professor for Media and Intersectionality, has an FWF project on “Time Allocation, Media Selection, and Displacement Effects”. Together with researchers from neighbouring disciplines, Hajo Boomgaarden, professor for Empirical Social Science Methods, launched the “Austrian Corona Panel Project” in March 2020 – a panel survey among 1,500 respondents that also includes questions about the information behaviour during the Covid-19 pandemic.

At the Austrian Academy of Sciences, Birgit Stark was, for many years, one of the few academic experts that paid attention to an analysis of long-term change processes in Austrian media usage (e.g., Stark, 2009a; Stark & Rußmann, 2009). More recently, the three-country study “Media Performance and Democracy” (Austrian partner: CMC) evaluated the relationship between content and usage-related criteria for an assessment of media quality in Austria, Germany, and Switzerland.

Scholars at other Austrian universities – such as Theo Hug at the University of Innsbruck or Margit Böck at the University of Klagenfurt – cultivate a broader interdisciplinary approach to media usage research and focus on aspects of media pedagogy and media literacy in their current studies (see section 5 for more details).

From an international perspective, media usage patterns in Austria have been discussed in several comparative studies that relied on secondary analyses of data from some of the sources mentioned above (e.g., Latzer et al., 2012; Grossenbacher et al., 2017).

Thus, the data basis for an analysis of risks and opportunities for deliberative communication in Austria can be described as thoroughly diverse in the media usage patterns domain. This is particularly notable at the structural level: Access to the media segments and diversity in the Austrian media system are displayed in a wide range of studies from applied audience research. Data from key sources such as Media Analysis, Radiotest, Teletest, or the Austrian Web Analysis are often subjected to secondary analyses by academic researchers with questions regarding, for example, usage patterns in selected media sectors or cross-media trends (e.g., Stark, 2009a, 2009b, 2010; Stark & Karmasin, 2009; Stark & Rußmann, 2009) – sometimes even from a comparative perspective (e.g., Grossenbacher et al., 2017; Hagenah et al., 2015; Latzer et al., 2012). Habits and trends of news media usage and the functionalities of the media are not only monitored by the Austrian country studies within the Digital News Project (most recently: Gadringer et al., 2021), but also by a number of studies with specialized approaches (e.g., Prandner & Glatz, 2021; Trilling & Schoenbach, 2013, 2015). The relevance of public service media from an audience perspective is discussed, for example, by Gonser and Reiter (2018) as well as Gonser et al. (2017). Developments of trust in Austrian media can be assessed from a comparative perspective with the help of Eurobarometer data as well as on the basis of the surveys for the Digital News Project (see above), with a few small-scale qualitative studies (e.g., Russmann & Hess,

2020) providing further insights. The most elaborate assessment of news media quality in Austria and the role of the audience has been developed in the Media Performance and Democracy project (e.g., Hasebrink et al., 2021; Beaufort, 2020). Besides, a systematic literature review reveals a large number of further studies on specialized research questions, for example with regard to motives for media usage by specific populations, for specific technologies, or in specific situations (e.g., Biruhs, 2015; Gallner-Holzmänn et al., 2020; Kaufmann, 2016; Perlot & Filzmaier, 2021; and many more).

5. Publications, data sources and main monitoring actors of media-related competencies domain

In Austria, media literacy and media education have for decades been essential in both research and teaching (Paus-Hasebrink & Hipfl, 2005). With the advent of digital media, however, they have developed into a core discipline with an interdisciplinary approach (Trültzsch-Wijnen & Brandhofer, 2020). Moreover, today, media education is increasingly restricted to digital competencies (Cwielong et al., 2021; Oppl et al., 2021; Swertz, 2021; Brandhofer et al., 2018). Of course, media-related competencies do not only concern media use, but also media production. Since we assign media production – despite phenomena such as produsage, platform journalism, and user-generated content – predominantly to (traditional) journalism, the corresponding explanations can be found in section 3.

Besides international data sources like the OECD and Eurobarometer or PISA, Statistics Austria, “responsible for performing scientific services in the area of federal statistics” (Statistics Austria, 2008), provides data on the educational attainment of the Austrian population. The Germany-based portal “Statista” provides data relevant for Austria as well. Moreover, Austria has been part of the Digital News Project since 2015. As a national partner, the Department of Communication Studies at the University of Salzburg is responsible for the Austrian sub-study (see section 4 above).

The most relevant legal sources for this domain are school curricula. In addition to many actions at the EU level, since the school year 2018/19, the mandatory exercise “Digital Basic Education” has been implemented nationwide at lower secondary level (Oppl et al., 2021). Moreover, regulations concerning cyber-criminality, user rights etc. must be considered. Since 2016, Austria has got its own law against cyberbullying (§107c StGB).

Research on media literacy is mainly carried out by public institutions such as universities and university colleges, where, however, different measures to improve media competencies are mostly realized by private initiatives usually supported by the federal ministry. The Department of Communication Studies at the University of Salzburg, for example, has developed into a centre for research on media education. Two projects by Ingrid Paus-Hasebrink are outstanding in this context: firstly, the multinational research network “EU Kids Online: Researching European children’s online opportunities, risks and safety” in which Paus-Hasebrink and her team has been participating for years; secondly, the long-term study (2005 to 2021) on the role of media in the socialization of socially disadvantaged adolescents (“Mediensozialisation 2005–2021”). Moreover, the Center for Information and Communication Technologies & Society (ICT&S) at the Department of Communication Studies at the University of Salzburg, directed by Thomas Steinmaurer, among other topics focuses on “Digital literacies / empowerment” and “Citizenship & participation”. At a regional level, at the Department of Media and Communications of the University of Klagenfurt (AAU), Caroline Roth-Ebner carried out two projects (2018, 2019) in cooperation with local schools to promote media literacy among pupils, parents, and teachers (“Schaut her! Ich zeig’s euch digital!” and “Flipped classroom”). Likewise at the AAU, the Department of Informatics Didactics, being part of the Faculty of Technical Sciences, “focuses on

didactical issues for educators at Universities as well as elementary, primary and secondary schools". At the University of Vienna, on the other hand, the Department of Education plays a vital role in this field. In addition to universities and universities of applied sciences, like for example the FH-Joanneum Graz that offers a postgraduate Master's course on "Media competence and digital literacy", there are in particular universities of teacher education ("Pädagogische Hochschulen") where research on media literacy and, of course, most notably on media education is carried out.

Regarding non-university activities and projects, there are many private institutions and organizations mostly financed by the Federal Ministry of Education, Science and Research, which are dedicated to promoting media literacy and competences in media use among young people and pupils. Therefore, many initiatives offer teachers documents, which they may use in the classroom, like for example *saferinternet.at*, *digi.komp – Digitale Kompetenzen für Lehrende*, or *digitalreport.at*. The latter, initiated by the journalist Ingrid Brodnig, is not limited to pupils, but also provides a wide range of information on digital media for citizens. In addition to financial support for private initiatives, the government has taken several measures to improve (digital) media literacy, as for instance the "8-point plan for digital learning" or the "Austrian youth strategy". Also, not just limited to digital education, the portal *erwachsenenbildung.at*, operated by the Federal Ministry of Education, Science and Research, "informs about education information systems, basic issues and current topics of Adult Education in Austria and the EU".

Organized as a long-term project and funded by the Federal Ministry, a team around Christian Swertz is responsible for the publication of the leading Austrian journal *Medienimpulse* (Media Impulses – Journal for Media Education). Accordingly, most of the articles with an Austrian focus have been published in this journal. Its multidisciplinary orientation comprises "education, communication science, media science, sociology, psychology, computer science, and philosophy". As the leading journal in this field, both renowned experts and young scholars contribute with their studies. Following the ongoing debate on the term "media literacy", for example, Böck and Kress (2010) discuss different approaches like "New Literacy Studies", "Multiliteracies", and "Multimodality". Referring to Trültzsch-Wijnen (2016), Roth-Ebner and Duller (2018) discuss how the concepts media literacy and media performance "can be related to each other in media pedagogical practice".

The journal *Medienpädagogik* (MediaEducation) is a joint project by researchers from Germany, Austria and Switzerland (DACH). In this context, the publication series *Jahrbuch Medienpädagogik* has been published annually since 2001 and provides studies with an interdisciplinary approach including Educational Sciences, Communication and Media Studies, and Psychology. Like Cwielong et al. (2021), a current article by scholars at the University of Innsbruck explores "DataPolitics" and the question how to deal with data in the digital era (Bachor et al., 2021).

6. Analysis of Research and Monitoring Capabilities and Quality

The description of Austrian publications and data sources in the four domains covered by the Mediadelcom project reveals notable discrepancies in the relevant fields of research. The following section intends to assess the quality of available data sources in the four domains and their capabilities as an instrument to monitor the risks and opportunities for deliberative communication in Austria. The focus is on the following dimensions: (a) availability of data, (b) recency and continuity of data, (c) complexity of data-gathering, (d) trust and reliability, and (e) availability of experts and/or specific research structures.

6.1. Legal and ethical regulation

In the domain of legal and ethical regulation, the availability and quality of research data is highly heterogeneous. The field of media law is traditionally considered significant in Austria and, consequently, key legal texts as well as critical commentary (both by academic actors and NGOs) are accessible on a continuous basis. The discourse on media ethics and media accountability, on the other hand, is considerably more fragmentary, due to a weaker institutionalization and a lack of continuous funding. Nevertheless, academic interest in these issues has been growing since the re-establishment of the Austrian Press Council. However, empirical research in both the legal and the ethical subdomains is still more of an exception than the rule. Interestingly, examples for international comparative research approaches have become more frequent in the recent past – also in the field of media ethics. Nonetheless, the continuing dominance of normative evaluations of the prevailing risks and opportunities in this domain arguably impact on the presumed reliability of the available data which are often guided by (open or concealed) political, economic, or ideological interests. As a measure of quality management, future assessments of legal and ethical measures within the Mediadelcom project should be substantiated by additional research interviews with independent experts. As the description in section 2 of this report has shown, the presence of experts and research structures is traditionally strong in the field of (media) law, and it has recently been improving in the area of media ethics and media accountability.

6.2. Journalism

A well-documented problem in the journalism domain is the lack of valid structural data for different market segments of (news) media and reporting, because there are no official media statistics. Although broadcasting companies are required to disclose their ownership structure, they are not published. The ownership structure can only be traced in extracts from the company register archived in the Commercial Court. However, complex ownership structures are hardly visible there. As the private television market is dominated primarily by German stations, only gross advertising figures are available for Austria. Possible changes in advertising market shares can hardly be recorded (Angerer et al., 2012). However, academic journalism research has certainly been flourishing in the recent past, not least thanks to several large-scale journalists' surveys that have been repeated and refined over the two decades covered by this report, thanks to financial support by the Austrian Science Fund (FWF). A notable trend can be identified in the growing importance of international comparative studies – see for example the Worlds of Journalism project. Whereas most academic research is easily findable through traditional literature and indexing databases, data collections and non-published results by private organizations such as “Medienhaus Wien” are only accessible to a limited extent, and some of its publications are not catalogued in either university libraries or on international search platforms, resulting in poor visibility. While the quality of most academic publications in this field is

usually secured by peer-review procedures, such mechanisms are lacking for structural data. Compared to the other domains evaluated by the Mediadelcom project, the availability of Austrian experts and research structures in the field of journalism studies can be considered as strong.

6.3. Media usage patterns

With regard to research about media usage patterns, it is necessary to differentiate between applied audience research and academic usage studies. Applied audience data are essentially available for all media segments – and since the introduction of the Media Server in 2014/2015 also for a cross-media analysis. However, the collection techniques of the relevant studies have not been coordinated for a long time and vary over the years. Therefore, Austria lacks a meaningful data basis for long-term observations and comparisons between media types (as in the German “Langzeitstudie Massenkommunikation”). In principle, the available studies are trusted as an established “currency” to assess audience reach, and thus the advertising value of Austrian media. However, there have also been incidents that cast doubt on their credibility. For example, the case of Radiotest: In April 2016, it was admitted by the commissioning market research institute GfK that the results were manipulated by employees in favour of the public broadcasting stations. As a consequence, an additional research institute has been appointed as a control body since 2018. Academic usage studies have long been highlighting the well-known deficits of commercial audience data (e.g., Stark, 2009a). At the same time, the state of research on media usage patterns driven by academic actors has remained sketchy, with some studies relying on secondary analyses of the available market data and others focusing on highly specialized research approaches with little capacities to highlight more general trends. Although the Austrian reports for the Digital News Project have become a benchmark to address questions of news usage and trust since 2015, the data basis for evaluating critical junctures in this domain is shallow. There are only few academic usage researchers with a profound interest in the specific characteristics of the Austrian media system – also because appointment committees at Austrian universities seem to have preferred international experts for the relevant posts in recent years.

6.4. Media-related competencies

At first glance, the availability of data regarding media-related competencies is good. There are a lot of recent studies, as well as some longitudinal studies. The data are trustworthy and, due to its digital access, gathering is usually convenient. The difficulty, however, lies in the nature of the domain itself. How do we define media literacy? Which research areas must be included? How broadly do we have to focus the domain? Depending on these questions, in particular the amount of complexity of data gathering is varying. Accordingly, the availability of experts and specific research structures is good, but depends on the multidisciplinary approach to this domain.

7. Conclusions

Despite a comparably late institutionalization of media and communication sciences in Austria, the case study report can build on a broad bandwidth of research publications and other data sources that are relevant for an analysis of risks and opportunities for deliberative communication in the country. Particularly in the domains of journalism and media usage, a large variety of empirical sources is available and research initiatives have reached a high degree of specialization. In recent years, the complexity of different data collection procedures seems to be growing and there is a discernible trend towards internationally comparative research settings, first and

foremost in the field of journalism research. Unfortunately, data quality in the area of media usage is still marred by the interests of commercial research institutions and their continuing struggle to synchronize the established “currencies” for measuring audience reach in different media sectors. In the domain of legal regulation, the basis of available data also appears to be well advanced, although empirical research is underrepresented. By contrast, research on media ethics and media literacy is less differentiated – presumably a result of either weak institutionalization or the typically interdisciplinary character of these (sub-)domains which makes it difficult to identify a clearly defined canon of literature.

The analysis presented in this report, thus, also highlights possible tasks for future research initiatives on the risks and opportunities for deliberative communication. These should include, among other things, more systematic inventories of the structures of Austrian news media in all market sectors as well as more comparative assessments in each of the relevant research domains, which must however pay attention to the special characteristics of the Austrian media system. Investigations into the ethical foundations of media actors should strive to collect more empirical data which can be used for evidence-based assessments beyond merely normative demands. An unsolved problem is the lack of data for long-term observations and processes of social change in the context of media and their usage, which would be a prerequisite to identify critical junctures in this field of knowledge. To increase the visibility and transparency of media and communication research in Austria, a broader discussion about scientific publication strategies and open access/open data concepts seems inevitable.

Last but not least, a systematic examination of the role of different media-external context factors for the quality of deliberative communication seems to be particularly relevant for the Mediadelcom project. The importance of such a contextual analysis has been highlighted by other large-scale comparative research projects in the past, for example with regard to journalism cultures (e.g., Hanitzsch et al., 2019a) or media accountability systems (e.g., Eberwein et al., 2018a; Fengler et al., 2014, 2022). These projects illustrate that possible context factors enabling or disabling deliberative communication can be identified at the most extreme levels, for example in the political system, the economic system, the scientific system, but also in society at large, in cultural history, in transnational influences etc. However, not all of these context factors can be distinctly allocated to the conceptual domains covered by Mediadelcom. Consider, for example, the case of research funding as a context factor with a clear and definite impact on the research agenda of media and communication studies: In Austria, a variety of sources are available to describe trends in public and private funding of the research sector. The Federal Ministry of Education, Science and Research publishes a “Bundesforschungsdatenbank” (BFDAT – Federal Research Database) with information on public funds in all academic disciplines. Specific projects on media and communication funded by the Austrian Science Fund (FWF) can be identified with the help of the FWF Project Finder. A similar project database is available for the Anniversary Fund of Oesterreichische Nationalbank (OeNB). Information on the funds administered by KommAustria and RTR are also published online (RTR, n.d.) and in the annual Communication Reports (e.g., RTR, 2021). These and similar sources make it possible to identify notable fluctuations both with regard to the amount of funds made available for media research and the preference for certain issues that are considered worthy of funding. A systematic evaluation of such trends – not only in the field of research funding, but also taking into account other extra-media context factors – would be a relevant task for an assessment of risks and opportunities for deliberative communication and could possibly help to identify critical junctures in the recent history of Austrian media. However, such a contextual analysis should be prepared systematically for all countries represented in the Mediadelcom project, in order to guarantee comparability of the generated insights.

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BULGARIA

Bulgaria: Risks and opportunities related to media and journalism studies (2000-2020). Case study on the national research and monitoring capabilities

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Executive summary

The text provides an overview of some of the major sources and datasets on deliberative communication in Bulgaria in four domains: legal and ethical regulation, journalism, media usage patterns, and media related competences. While in some of these domains research is well presented, in others it is not comprehensively developed. Comparatively well advanced is the analysis of media related legislation and regulation domain, although empirical practices are less explored. Reasoning on the media structure developments are more thoroughly approached in view of freedom of expression, freedom of information, and the ethical issues of media accountability. The journalism domain is addressed through market developments, public service media, content production, and working conditions. Media usage patterns are examined with the prevalence of issues regarding pluralism of viewpoints, relevance of news media, and trust in media. The domain of media related competences is of growing scholarly interest, especially in the area of media literacy initiatives and sustenance of professional standards. The exposition and the analysis of the collected sources may supplement tracking the critical junctions between the various elements of deliberative communication and to provide ground for outlining the risks and opportunities challenging the future of the media developments in the country.

1. Introduction

During the first two decades of the 21st century, the Bulgarian media ecosystem has experienced intensive processes of transformation, impacted by the vigorous developments of the information and communication technologies, which were supplemented by new economic models of production and consumption of media content.

That is why, in the considered 20-year period, the media research interest in the country has been focused primarily on the challenges of the political, economic, social and professional aspects of media developments, such as: legislative and regulatory; journalistic; media usage patterns; media related competences, all covered by the Mediadelcom project.

In particular, legal framework, regulatory practices and civil ethical initiatives are comparatively comprehensively studied at national and international level. Despite the academic publications related to the topic, data about the Bulgarian media regulation have been also collected through national reports submitted to CoE, EC, OSCE, UNESCO, ITU, and others. Materials related to compliance with international principles of freedom of expression and access to information as well as with aspects of the acceptable limits of these fundamental rights dominate.

The resulting changes in the nature of the journalistic profession, the role of the media and journalists in the digitalized socio-economic conditions are also comparatively well researched. Regarding the quality of the media content, the following main characteristics have been studied, although sporadically: timeliness of the news programs; public significance of the broadcast information; factual accuracy based on verification by independent sources of information; objectivity – disclosure of all facts in an unbiased way; presentation of plural points of view on the topic; publication of in-depth journalistic works on socially significant topics (investigations, reports, analyzes, comments); etc. Along with the many benefits and positive effects of the new media ecosystem, increasing trends to misinformation, manipulation and hate speech have also been examined.

The media usage by audiences is studied in light of several factors such as: access to media content; media diversity; functionality and quality of the media; public trust in the media; new media, etc. The most common research is related to public trust in the media and frequency of media consumption, broken down by different age groups, as well as divided into social and ethnic principles. The type of media preferences (TV, radio, press, internet, websites, social networks, social media) have been also studied, as well as variety of issues, regarding media consumption and quality of news content. What is absent also is the critical outlook of the media community itself about its behavior and missed opportunities during these years.

Research on media-related competencies is rather sporadic. Specific interest especially on media literacy issues has been growing lately, mainly due to the efforts of non-governmental organizations and academia.

Some of the entities engaged with the provision of documents and expert positions, relevant for all domains, are: The Union of Bulgarian Journalists; The Council for Electronic Media; The Communications Regulation Commission; The Ministry of Transport, Information Technologies and Communications; The Ministry of Culture; The Bulgarian Association of Communication Agencies; The Branch Association of Bulgarian Telecommunication Operators; Universities; The Bulgarian Academy of Sciences; The Bulgarian National Television (BNT); The Bulgarian National Radio (BNR); providers of media services; The Association of European Journalists in Bulgaria; The Konrad Adenauer Foundation (KAS); The Open Society Institute-Sofia; The Reuters Institute; Reporters without Borders; Freedom House; IREX; The National Council for Journalistic Ethics Foundation; The Coalition for Media Literacy; The Access to Information Program NGO, etc.

Significant academic journals dealing with media related issues are predominantly distributed online: (Rhetoric and Communications; Newmedia21; Media and Public Relations; Postmodernism Problems), etc.

The National Statistical Institute provides statistical data about some activities of the press organizations, the audiovisual media providers, and the Information Society.

Due to an overabundance of different sources, this case study is based on a selection of the 235 most complete and relevant ones which have been included in the bibliographical database, available on the Mediadelcom project website (<https://mediadelcom.eu>).

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

The examined sources can be divided into several groups: legislation acts, including the Constitution and relevant laws; international acts; national and international academic books and articles, including forthcoming publications; ECtHR cases and comments; decisions of the Media Ethics Commission; published academic dissertations on the topic with relevance for the scope of the analysis; questionnaires for various international organizations and fora on different issues related to freedom of expression and media; international projects including Bulgarian partners; information and expert opinions in the media (Veleva, 2022). The combination of these sources gives a relatively good picture of the legal and ethical regulation in Bulgaria (Zankova, 2021). They present the results of the research on media law and media regulation of radio and television environment and the main tendencies in self-regulation and media ethics throughout the studied research period (2000-2020). They also cover (since 2010) the legal framework of digitalisation of the electronic media and the main aspects of the new online media. In Bulgaria there is no special law on new media services and media platforms but the opportunities and challenges generated by new media services for media freedom and independence are also examined.

Lex.bg is the Bulgarian legal portal assuring free access to the consolidated versions of all Bulgarian pieces of legislation (in Bulgarian). It also offers news from the legal world at home and abroad (LEX.BG).

Ciela Norma AD has developed 15 information products, maintaining current and archive normative documents from the Bulgarian legislation, administrative procedures, European legislation, translations of the legislative framework in English language, as well as products specializing in different areas - accountancy, taxes, insurance, construction, customs and currency regulations, energy sector, education, etc. Upon an annual subscription, customers receive Internet access to the products of Ciela Norma AD and support for their update for the duration of the subscription (Ciela Norma).

APIS is another developer of legal and business information systems in Bulgaria. The module APIS Law is a part of legal information system APIS and is designed for helping the use and enforcement of the provisions of the Bulgarian legislation. APIS Law contains: the consolidated texts of the legislative instruments in force with all their amendments; an archive of amended and repealed provisions of the legislative instruments; decisions and rulings of the Constitutional Court; judgments and orders in civil and criminal cases of the Supreme Court of Republic of Bulgaria; case law of the Supreme Court of Cassation and the Supreme Administrative Court; judgments and orders of the Arbitration Court at the Bulgarian Chamber of Commerce and Industry; case law of the European Court of Human Rights, etc. The system operates by subscription (APIS).

Through both information systems articles and comments of specialised publications in the field of finance and law can also be accessed. These two main Bulgarian legal data systems are structured in a manner suitable for the needs of the judiciary and legal profession (number of case, names of plaintiffs and defendants but not according to the subject matter of the case). These peculiarities makes it difficult and time consuming to use these systems for other purposes.

The decisions of the Constitutional Court of Bulgaria are accessible at the website of the Court and publications and comments – in the Constitutional Court journal. A specific feature of the Bulgarian Constitutional Court is that it does not entertain individual petitions from citizens but gives obligatory interpretations of the Constitution and rules on a request for establishing the unconstitutionality of the laws and other acts of the National Assembly, as well as of acts of the

President together with other competences (art.12 para 1) (Constitutional Court of Bulgaria, Constitutional Court journal).

Respective laws and regulations are available at the websites of the relevant ministries and regulatory bodies, such as the Council for Electronic Media (CEM), the Commission for Regulation of Communications (CRC), and the Ministry of Culture in the regulation of media domain. In the media field relevant laws, regulations and translated acts of the Council of Europe are published at the website of the Ministry of Transport, IT and Communications. The acts of the audio-visual media regulator - the Council for Electronic Media such as decisions, standpoints, declarations, public consultations, etc. can be reached regularly at its website. The Ethical Code of Bulgarian Media, the regulations of the Ethical Commission, opinions and decisions are available at the website of the Foundation "National Council for Journalistic Ethics" (Foundation "National Council for Journalistic Ethics").

One of the frequently cited European projects is the MEDIADEM research project on media policies and regulation in 12 European Union (EU) member states and 2 candidate countries (1 April 2010-31 March 2013), funded by the EU's Seventh Framework Programme (MEDIADEM). The purpose of MEDIADEM has been to examine state media policies in the selected set of countries (Belgium, Bulgaria Croatia, Denmark, Estonia, Finland, Germany, Greece, Italy, Romania, Slovakia, Spain, Turkey and the UK) and to explore their effects for media freedom and independence.

Other important sources that have been checked are the reports and consultations of international organizations - OSCE on freedom of expression, EPRA on media diversity, pluralism and gender equality, ERGA – on notions of disinformation, UNESCO on Internet universality indicators, the Council of Europe on the protection of journalism and safety of journalists and other media actors, the Council of Europe on filtering, blocking and taking down of content, the European Audiovisual Observatory – on the regulation of cinematographic works, the amendments of the AVMSD and commercial communications in member-states, etc. It is to the decision of the international organizations which of these questionnaires will be published. The data, however, reveals how separate issues have been treated in Bulgaria but not the general trends.

In the studied corpus of relevant media legislation, academic research, and specialized sociological surveys most of the sources are not based on consistent empirical and statistical data in order to identify thoroughly the risks and opportunities for deliberative communication. The problems covered comprise mainly freedom of expression, pluralism and diversity of media, freedom and security of journalists, libel and defamation, access to information, confidentiality of journalistic sources, hate speech, the status of radio and television organizations, etc. International principles and case law dominate over domestic practice. The analysis of the legal framework prevails over publications on media ethics. Individual right to free speech and its aspects are more thoroughly explored than institutional right – freedom of the media (Tabakova, 2006, Drumeva, 2013, Tanchev, 2002, Veleva, 2020, Nikolova, 2010).

2.1. Freedom of expression

Freedom of expression is protected by the Bulgarian Constitution (1991), articles 39, 40 and 41. The right to privacy is protected by the Constitution art. 32. According to the Constitutional Court decision 6/ 1997 alongside the right to privacy, secrecy of correspondence and inviolability of home the right to private life represents a complex of interests which form the protected personal sphere of every man. The Law for the protection of personal data and the Radio and Television Act assure legal protection of the right to privacy including personal data protection. According to the practice of the high administrative court the right to personal life of public figures is not protected to the same level as the right of ordinary people (Nikolova, 2004). Copy-

right is also regulated through the Copyright and Related Rights Act. Copyright issues are also thoroughly discussed in legal literature including their practical aspects (Sarakinov, 2013).

The Republic of Bulgaria has become a member of the Council of Europe in 1992 and the ECtHR and the ECJ case law has contributed to the improvement of the legislation and court decisions including in the field of freedom of expression and media, however more efforts on the part of national decision-making bodies are necessary to turn improvements into consistent tendencies. Very few media organizations have introduced mechanisms supporting the level of actor transparency, including bylines, profiles of journalists, media blogs, or published mission statements. It is difficult to find initiatives directly related to Mediawatch activities in Bulgaria.

The audiovisual sector (radio and television) is regulated through the Radio and Television Act (1998) and the Electronic Communications Act (2007). No special regulation vis-à-vis press and online media is in force and to these types of media the general legal acts are applied. The Radio and Television Act (RTA) refers to strengthening self- and co-regulation in the new provisions transposing the amendments of the Audiovisual Media Services Directive (AVMS, 2018). Currently there is no established practice under these provisions.

As there is no special regulation of the Internet in Bulgaria and accordingly, there is not enough up-to-date and consolidated data about the quality of services, which is essential for the elaboration of a sound information society policy and regulation (Council of Europe).

The Council for Electronic Media (CEM) being an independent specialized body monitors broadcasting media services and video-sharing platforms. CEM maintains several registries to enhance transparency in the sector: Cable and Satellite Bulgarian Linear Services; Cable and Satellite Foreign Linear Services; Terrestrial Broadcasting Nonlinear Services on Demand Enterprises; Distribution Programs; Video Sharing Platforms (Council for Electronic Media).

Recently, SLAPP cases have seriously threatened freedom of speech at home and abroad. Such cases are on the rise and affect the media environment while in some circumstances lead to self-censorship. Reporters without Borders (RSF) condemns the judicial harassment of two Bulgarian investigative journalists at the beginning of 2022 and calls on the newly elected Bulgarian government to pass legislation that protects the media against gag suits (Reporters without Borders, SLAPP, 2022). There are no official statistics on these cases in Bulgaria, but according to unofficial data from the non-governmental sector, their number exceeds 300. Adequate legislative moves and decisions are still to be elaborated.

2.2. Freedom of information

The Non-Governmental Organization Access to Information Program provides assistance to citizens, media and journalists with respect to access to public information (Access to Information). With the adoption of the Law on Access to Public Information (2000) a special procedure for providing freedom of information by public institutions was created and a legal basis for going to court in cases of refusal of access or other forms of infringement of the citizens' right to know. Annotations of relevant cases are regularly published on the program website.

Valuable practices against discrimination and hate speech in the media based on self-regulatory mechanisms have been developed by special commission (Commission for the Protection against Discrimination). Another commission is a supervisory body responsible for the protection of the fundamental rights and freedoms in connection with the processing and facilitating of the free movement of personal data in the European Union (Commission for Personal Data Protection). Copyright and neighbouring rights matters as well as the transparency of media ownership registry of print and online media organizations are managed by the government (Ministry of Culture).

Whistle blowers are not regulated as such and research on their activities is missing.

2.3. Accountability system

Regarding accountability system, the Code of Ethics of the Bulgarian Media is not bound by sanctions (Union of Bulgarian Journalists, 2004). There is no Press Council in Bulgaria. A commission on media ethics at the Union of BG Journalists operates alongside the general Commission on Journalistic Ethics at the Council for Journalistic Ethics. Journalists should act in good faith and provide accurate and reliable information in compliance with journalistic ethics following the principles of the ECtHR and the case law of the ECtHR. The difficulties of self-regulation are related to the existence of a very strong media community with authority that can turn professional standards into everyday practice. It is hard to talk about such a community in Bulgaria. However, the adoption of an ethical code is a positive element of the media environment, as it provides guidelines for identifying responsible media.

The professional organizations of those working in the media field, such as the Union of Bulgarian Journalists and ABBRO protect the labour and professional interests of their members and represent the link between the media system and civil society. Their activity is related to the improvement of the media standards and the modernization of the journalistic profession, which in Bulgaria is not regulated by a special law.

Bulgaria has not yet introduced an ombudsman relevant to the overall media sector. However, both public service broadcasters – the Bulgarian National Radio (BNR) and the Bulgarian National television (BNT) have appointed institutional ombudsmen with the aim to pursue active dialogue and profound feedback from the public. These offices also provide valuable feedback on self-regulation (Bulgarian National Radio).

In order to provide relevant and up-to-date information the government collaborates with a number of stakeholders regarding media and information society services in Bulgaria (Ministry of Transport, Information Technology and Communications (MTITC).

Governmental offices of Bulgaria regularly review the information submitted on the online “Platform to promote the protection of journalism and safety of journalists” of the Council of Europe (Ministry of Foreign Affairs).

In this domain the sources reveal mainly the engagement of academic institutions, NGOs, some ministries and regulatory bodies. There are not special national configurations or multi-stakeholders’ synergies specifically set up for the purpose of research. Research projects gravitate around universities and non-governmental organizations.

3. Publications, data sources and main monitoring actors of journalism domain

The main source of information about the current changes and the state of the art of the journalistic profession are studies and publications of the academic and professional community in Bulgaria (books, academic articles, dissertations)². Among the most comprehensive studies are those published by researchers from the Faculty of Journalism and Mass Communication of the Sofia University (The St. Kliment Ohridski Sofia University). The authors mainly discuss the concepts and status of media professionals in Bulgaria, define the positions and functions that have arisen with the introduction of new technologies, analyze the processes in media production and distribution, and typologize the contemporary media. Valuable analyses on media economics and of the tendencies in media market and professional developments are conducted by researchers from the University of National and World Economy in Sofia. Researchers from New Bulgarian University of Sofia are also productive on various media issues. Media research has also been conducted by Universities with social sciences and humanities profiles and from institutes with similar profiles of the Bulgarian Academy of Sciences.

Additional sources of information on the state of the art and developments of media and journalism are professional associations and organizations (the Union of Bulgarian Journalists, the Association of the European Journalists-Bulgaria, the Investigative Journalists Association, the National Council for Journalistic Ethics Foundation), as well as the media industry organizations (the Association of Bulgarian Radio and Television Operators - ABBRO, the Union of Publishers in Bulgaria, the Audit Bureau for Circulation in Bulgaria, the Union of Journalists and Distributors of Printed Publications, the Bulgarian Web Association, the Branch Association of Bulgarian Telecommunication Operators).

The latest, an original and in-depth study on the subject, has been published in August 2021 (Angova et al, 2021). Through documentary and content analysis of advertisements in global sites of job offerings, the authors prove that in contemporary communication professions the differentiation between the different positions is eliminated, the professional expertise converges and competencies overflow - both within each of the professional groups and between the three groups (of journalists, PR experts and advertising specialists).

3.1. Market conditions

At the end of the second decade of the 21st century, in Bulgaria is witnessed an unprecedented merger of telecommunications, media and online industries. However, general rules in the competition law do not include specific provisions for the media market in particular. At the same time the actual level of concentration is impossible to track due to a deficit of precise data, which is considered as a risk itself. These concerns are regularly present in the annual reports of the European Commission for Bulgaria, Freedom House, Reporters without Borders, etc.)

² Publications of Todor Abazov, Eliezer Alfandari, Angel Angelov, Lilyana Andreeva, Vesislava Antonova, Iskra Baeva, Ventsislav Bondikov, Radomir Cholakov, Maria Deenichina, Greta Dermendzhieva, Mincho Draganov, Efrem Efremov, Andreana Evtimova, Petranka Fileva, Rosen Ginev, Galya Hristozova, Polya Ivanova, Hristo Kaftandjiev, Penka Karaivanova, Svetlozar Kirilov, Kiril Konov, Lulivera Krasteva, Georgi Lozanov, Manuela Manliherova, Rusi Marinov, Ivanka Mavrodieva, Mihail Meltev, Lora Metanova, Vladimir Mihailov, Nadezhda Miteva, Totka Monova, Raina Nikolova, Nelly Ognyanova, Filip Panayotov, Margarita Pesheva, Todor Petev, Milko Petrov, Teodora Petrova, Dobrinka Peycheva, Maria Popova, Lilia Raycheva, Ognyan Saparev, Marko Semov, Vladimir Simeonov, Orlin Spasov, Velin Stanev, Tolya Stoitseva, Lyubomir Stoykov, Vesela Tabakova, Petko Todorov, Mariyan Tomov, Veselina Valkanova, Simeon Vassilev, Neli Velinova, Emil Vladkov, Bissera Zankova, Ognyan Zlatev, Minka Zlateva, Ivaylo Znepolski, and others.

In the last few years, the issue of market conditions and media ownership and the interests they stand for has become increasingly acute for Bulgarian society. The efforts of state institutions, however, do not produce the expected results. Of particular importance is the information provided by professional associations (media, journalists, distributors, etc.), as it can be considered primary. In response to the public interest, property registers have been established at the broadcasting regulator for owners of electronic media (Council for electronic media) and at the responsible ministry of Culture for owners of printed publications (Ministry of Culture, Register). However, the real owners and their interests, especially of the mainstream influential media in Bulgaria, often remain hidden behind formally registered companies and individuals. Revealing the real owners to the public is usually the merit of the country's investigative journalists. (The investigations of journalists from the website *bivol.bg*, which shed light on the connection of the Bulgarian M.P. Delyan Peevsky with the ownership of print media and TV7 in the period 2013-2018, are only one of the multiple examples.)

Thus, the information in the maintained registers may seem abundant, but does not give an idea of the real state of ownership in the Bulgarian media and in a sense is useless. Information on the income and financial condition of the media in Bulgaria also has a certain deficit. As commercial companies, they enjoy the right to keep their financial health secret. However, most of the leading commercial media in Bulgaria are part of large international corporations, some of them are listed on the world stock market. Chances are to find data about media financial status in the annual reports of the corporations published by the stock exchanges. The Interactive Advertising Bureau since 2016 annually has been examining revenues from digital advertising in the media (Interactive Advertising Bureau).

Another source is TV & Digital Report - research by Publicis Groupe together with GARB and Nielsen Admosphere on media consumption, public preferences for different information channels, intensity of viewership, etc. in the period 2020-2021 (Publicis Groupe). The studies are on a monthly basis and each of them is focused on a separate media, program or news program. For several years in a row since 2008, research by the Nielsen Company has been available on the Internet, providing in-depth measurement and analysis of the Internet audience, advertising, video, and media with user-generated content (Nielsen Online, 2008, 2009, 2011). Among the best kept secrets in Bulgaria are the ratings, advertising tariffs and the revenues from sponsorship and advertising of the media. In terms of ratings, only the weekly report of one company is available free of charge (Nielsen Admosphere, 2022).

3.2. Public service media

The annual reports of the public service broadcasting media BNT and BNR are also publicly available. The shortage of these data creates obstacles for researchers of media, journalism and communications in Bulgaria.

Bulgarian National Radio and Bulgarian National Television are financed mainly through state subsidies and limited by legislation revenues from advertising, sponsorship and co-productions (Radio and Television Act, 1999). Directors-General of the two public service electronic media are elected for a term of 3 years by the members of a regulatory body (Council for Electronic Media/CEM). Directors-General report their work to the aforementioned regulatory body twice a year. The Bulgarian National Radio is among the most preferred news media in the country (BNR Report, 2021-2022), while the ratings of the Bulgarian National Television are traditionally far from those of the leading television stations NOVA and bTV (Nielsen Admosphere, 2022).

A consequence of the lack of institutionalized, comprehensive and up-to-date information is the scarce number of studies devoted to the state of the journalistic profession in Bulgaria. Since the beginning of the 21st century, there are only a few studies on this topic. The most extensive and academic among them dates back to 2010 (Fileva et al, 2010).

3.3. Production conditions

Production conditions, such as multiplatform journalism, digital resources, investigative resources, foreign correspondents are comparatively well researched (Vasilev, 2020). During the first decade of the 21st century the discrepancy between the expectations of employers and society towards journalists and the real competencies of media professionals acquired during their higher education and professional training has already been clearly noticeable and alarming (Spasov, 2006). Lecturers and researchers in academic institutions are beginning to consider the need for practical training of students and acting journalists to work in an online environment, and especially – in online versions of traditional media, in social media, in social networks, and in converged communication platforms (Konstantinova, 2011; Valchanov, 2012). Methodologies, new courses and master's programs are being developed, specifically aimed at the qualification of future staff in the new media (Konstantinova, 2012). Supplementary training programs for journalists also include NGOs with external funding, e.g. Center for Media Development, Open Society Foundation, Reuters Institute for the Study of Journalism, etc. The contribution of researchers to the study of the transformation of media and journalism in Bulgaria is serious (Raycheva, 2013; Pavlova, 2012).

3.4. Working conditions

3.4.1. Intra-organizational diversity (human resources and gender, age, class, education, cultural balance /autonomy among journalists)

Serious research on the state of the journalistic profession in Bulgaria (Slavcheva-Petkova, 2017; Spasov et al, 2017; Vulkov, 2020) contain detailed information on the education and training, the demographic profile of journalists in Bulgaria (predominantly age, gender, and education), working conditions, degree of autonomy and freedom of expression, journalistic roles and professional ethics. The scope of the sample of these studies, however, is limited and non-representative. There are no reliable and accurate data on the total number of employees in the Bulgarian media.

The above-mentioned research allows to draw several conclusions with a high degree of reliability: 1. women predominate among journalists in Bulgaria, the average age of journalists is between 30 and 45 years; 2. a large part of the journalists (over 60%) have a diploma for higher education, but the number of journalism graduates decreases; 3. the journalistic profession is not well positioned on the labour market (in terms of working conditions, social benefits and payment); 4. journalists in Bulgaria feel themselves working in the conditions of increasing pressure from various external players (business, political, institutional), growing self-censorship, physical assault and prosecution against them. The last two statements are two good reasons for the declining prestige of the profession.

The three major TV channels in Bulgaria as well as BNR maintain programs for investigative journalism and foreign correspondents abroad.

3.4.2. Journalistic competencies, education and training

At least ten universities in Bulgaria offer journalism higher education (BA, MA, and PhD programmes) - six of them are public, namely: The St. Kliment Ochridski Sofia University, The St. Cyril & Methodius Veliko Turnovo University, The St. Neophyte Rilsky Blagoevgrad University, The St. Paisiy Hilendarski Plovdiv University, The Konstantin Preslavsky University of Shumen, The University of National and World economy (with focus on business journalism, and four are private: New Bulgarian University, Varna Free University, Burgas Free University, American University in Bulgaria, Blagoevgrad. There is also program in Journalism, offered by the National sports academy, with focus on sports events coverage.

In the last five years, the number of students enrolled in Journalism and Mass Communication has been gradually decreasing. In the academic year 2017 2555 students enrolled to study this major (BA-2209, MA-346), while in 2021 their number decreased to 2226 (BA-1933, MA-293) (National Statistical Institute, Enrolled students, 2021).

4. Publications, data sources and main monitoring actors of media usage patterns domain

Media consumption is depending on factors such as access to media content, media diversity, functionality and quality of mass media, public trust in media, etc., which vary over the years. In turn, access to media content largely depends on the level of technological support of the Bulgarian audiences, on the characteristics of these audiences, their expectations, etc.

Studies of media consumption models and media-related competencies in Bulgaria (2000-2020) are not present in their full comprehensiveness. The main sources are publications of the academic and professional community. In general, research on media consumption over the years have been conducted mainly by the Media Program for Southeast Europe of the Konrad Adenauer Foundation, Trend Sociological Agency, Open Society Institute, UNICEF for Bulgaria, Media Democracy Foundation, Kantar, CMO Insider.bg, Edelman Trust Barometer, Market Links Agency, Reporters Without Borders, Freedom House, etc., as well as by independent researchers (Lyubenova, 2016, Spasov et al, 2016, Koleva, 2018, Daulova, 2021)

The top ten of the most visited Internet sites in Bulgaria traditionally include the search engine Google, YouTube, Facebook, e-mail abv.bg, Wikipedia, some trade sites and sales announcements. Nielsen Online. (2008). It is only after them that the sites of information, commentary or entertainment media, television, radio, etc. begin. The ranking of the media in the Bulgarian Internet is based on the data of the global counter alexa.com, owned by the company "Amazon". In addition to visits to the sites in the global network and by individual countries, the counter also registers data, such as the average time spent by a reader, the number of pages read and many more indicators, number of searches, keywords, etc. (E-vestnik team, 2021).

4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in media system

With regard to reflecting access to media and diversity of viewpoints researchers note that with the advent of Internet more and more often unreliable information is published, unverified by independent sources, and without additional points of view, without pluralism.

As the second decade of the new century progresses, the topic of pluralism and the lack of transparency in the ownership of the Bulgarian media stands out with particular sharpness and in recent years have dominated the content not only of scientific publications but also of various European Commission reports on Bulgaria, as well as of the annual reports of IREX (2001-2019), and by the annual ranking for media freedom of Reporters without Borders (IREX, Reporters without Borders). The most active in the long run are the Media Democracy Foundation with its annual reports on the state of media pluralism in Bulgaria from 2011 to 2021 (Media Democracy Foundation), the Media Program "Southeast Europe" of the Konrad Adenauer Foundation (Konrad Adenauer Foundation), Reuters Institute Digital News Reports - Bulgaria is included in the annual reports of the Institute from 2018 on (Reuters Institute).

4.2. Relevance of news media

Regarding relevance of news media it can be said that the changes that occurred in the technologically advanced media ecosystem are not only positive. The risk factors affecting the quality of journalism are increasing at the expense of higher speed. Fake news cause confusion in the audiences and grow mistrust in media content. The percentage of negative news prevails compared to positive ones. Less and less investigative materials, analyses, serious reports find their way to broader publics. Casual language, very often dotted with jargon replaces the literary Bulgarian speech. Reality and low-budget comedy shows as well as betting on emotions music formats are challenging the news media and this leads to a decline in freedom of speech, largely due to the concentration of media ownership closely linked to certain politicians and businesses. Attitudes and expectations of the audiences towards media are rapidly transforming. Recipients are becoming more impatient, fast readers, and more fickle. Long texts with serious titles turn out to be undesirable or impossible for the modern reader to perceive. Audiences increasingly prefer easily digestible video information.

Despite the greater public trust in TV as an information channel, albeit with some skepticism, other studies over the years indicate that a large proportions of recipients are learning the news first from social networks, and that they more often make their choices emotionally than rationally. Audiences are becoming increasingly passive and inert, making no effort to get quality information (Lyubenova, 2016). The Facebook already makes the choice for the audience on its own - with sponsored posts, with news shared by friends, with quotes and likes. The users and the journalists nowadays often perceive the events at the same time.

4.3. Trust in media

The most common research is related to public trust in the media and frequency of media consumption broken down by different age groups, as well as divided into social and ethnic principles. The types of media preferences (TV, radio, press, internet, websites, social networks, social media) have been also investigated, as well as variety of issues, regarding media consumption and quality of news content.

A study by the Konrad Adenauer Foundation together with the sociological agency Alpha Research shows that trust in the media remains weak and only 10 percent of Bulgarians believe in the independence of the media in the country. Television leads the rankings. 60 percent of Bulgarians trust TV news. Online news portals, social networks, print media and radio follow with a big difference. Among the social networks and social media most popular is the Facebook network, followed by YouTube, Viber and Instagram. The majority of respondents think that fake information is disseminated mainly through the print media (37 percent) and social networks (35 percent). The study shows that from 2019 to 2020, due to the COVID pandemic there is an increase in TV viewership of the entire population by 9%. The largest increase is in viewers with an average age of 35-44 years (17%), followed equally by two other age groups - from 15 to 24 years and from 25 to 34 years (14%). The time spent for watching TV of the adult population over 60 years of age has increased by 9% and of the children aged 4 to 14 - by 8% (Konrad Adenauer Foundation, 2018).

Research conducted in 2020 by the Media Program for Southeast Europe of the Konrad Adenauer Foundation and the sociological agency Trend reflects the change in the trust in media as a consequence of the anti-epidemiological measures against COVID-19. When asked how the events in 2020 changed their trust in journalistic work in Bulgaria, only 8% answered that they have higher level of trust in the media. The percentage of people whose trust in media has dropped is much higher - their share is 29%. When asked which media they trust the most, the largest percentage of respondents (54%) point out large commercial TV stations. 38% trust

public television BNT, 31% - social networks, 31% - Internet news portals, 17% - public radio BNR, 14% - commercial radio stations, and 10% - magazines and newspapers. Some of the questions covered by the study are related to how well the public feels informed about the current political situation in the country. To this question 4% answer they do not feel informed at all, 20% say they are rather uninformed, 51% - rather informed, and only 14% respond that they are well informed. 8 % can't judge (Konrad Adenauer Foundation, 2020).

Data from the regular AB Brand Tracking survey, which monitors consumer behavior and brand recognition, show that due to the corona virus pandemic, the media are enjoying increased interest. By the beginning of 2021, 57% of Bulgarians between the ages of 18 and 65 watch TV several times a day. Only 4% state that they do not watch TV. These results are not a surprise, given that this is the media that attracts the largest share of advertising investment. In recent years however, the consumption of audio content on the market has increased. According to the survey, nearly 55% of respondents listen to podcasts. In comparison, fewer people report reading newspapers and magazines (Penkova, 2021).

In general, the older generations (over 50 years of age) are still informed mainly by traditional electronic media - television and radio, while young users search and compare different sources of information - traditional and digital. New generations are also more critical of the presentation of news by the media and the coverage of issues important to society (Kirilova, 2019). It can be said with great confidence that 2020 digitized the elderly in Bulgaria due to COVID (redlink.bg, 2021).

A study conducted by Nieslen Atmosphere Bulgaria and LLS Bulgaria, published in January 2018, notes that the elderly population between 66 and 75 years old, the so-called "heavy users", watches the most television and reads newspapers and magazines compared to all other age categories. Only in radio listening does it competes with the 46- to 55-year-old listener group. According to the same study, "media multitasking" is to some extent characteristic of children and young people - they do not watch one program in a certain time period, but consume TV content flexibly, combining it with using the phone, laptop or tablet. Watching TV is often considered more of a 'background', secondary activity, undermining TV's position as an effective media channel for children and youth audiences (Nieslen Admosphere, 2021).

Compared to other age groups, the younger generation watches less TV and uses online media more. In terms of trust, TV leads the ranking. 60 percent of Bulgarians trust TV news. Online news portals, social networks, print media and radio follow by a wide margin. The spread of false information continues to play an important role. The majority of respondents think that it is distributed mainly through print media (37 percent) and social networks (35 percent). This research is from 2018 and can be used to track trends (Konrad Adenauer Foundation, 2018).

5. Publications, data sources and main monitoring actors of media related competences domain

Researchers' interest in media-related competencies has been growing since 2016, when most studies in this field date, mainly by NGOs, scientific institutes, and independent scientists. The highlights of most research are related to trust in the media and fake news. Among the most active NGOs are the Coalition for Media Literacy, the Open Society Institute, the Association of European Journalists in Bulgaria, the Reuters Institute, which publishes the Digital News Report for more than 46 countries each year, UNICEF-Bulgaria, and the Konrad Adenauer Foundation. Lately, research and initiatives related to media education for children and young people have increased. Studies and initiatives addressing media literacy are also on the rise. Most of the research can be found on the Internet with free access or free registration.

5.1. Normative sources

National policy on media literacy is still underdeveloped in normative terms. The first legal document related to media literacy is the Preschool and School Education Act (2015), but the law does not contain an official definition of media literacy, and media education is not explicitly linked to the allocation of resources. Media literacy is only implicit in this new law. Media literacy was introduced in the curriculum of formal education in Bulgaria in 2018 with the amendment of Ordinance №13 of 21.09.2016 on civic, health, environmental and intercultural education. However, for the development of media literacy and competence only ten school hours are provided for the twelve-year course of secondary education in Bulgaria. At the end of 2020, the requirements of the Audiovisual Media Services Directive were transposed into Bulgarian legislation for the introduction of measures to promote and develop media literacy of citizens of all ages and for all media (Article 32, para. 24 and Article 33a of the Radio and Television Act amends SG No. 109/2020, in force since 22 December 2020). Although civil society organizations, such as the Media Literacy Coalition, actively organize and conduct media literacy training, including for teachers and the elderly, such initiatives cannot offset the need. from systematic education.

5.2. Assessment of media related competences among citizens

A detailed analysis regarding the radio and television audiences in Bulgaria for the period 2001-2010 can be found in three books published within the project "Electronic Media Environment in the Republic of Bulgaria in the Conditions of Transition and Digitalization: 1999-2012", financed by the National Scientific Research Fund of the Ministry of Education and Science - "Radio and Television Environment 2001-2010" (Pesheva, 2011), "Radio Environment 2001-2010" (Pesheva et al, 2011), and „Television Environment 2001-2010" (Pesheva et al, 2011). These systematic studies are unique of their kind in Bulgaria and cover a 10-year period of time, which contributes to tracking the developmental trends. They also include the demographics of the audiences.

Data from the surveys related to media literacy and media competencies are mostly from the period 2016-2021 and they address mainly the topics of media pluralism, media consumption and media freedom. Research, publications and studies that address the domain of media competences usually take a complex approach - both qualitative and quantitative analysis. Researchers use variable methodologies. Some apply content analysis, others - sociological surveys, which are among the most commonly used tools. A national representative survey of the Bulgarian Center for Safe Internet from 2016 analyzes the digital media competence of Bulgarian children between 9 and 17 years of age on the basis of their behavior in Internet. Bulgarian children use the Internet often and in a more mobile way, which helps them develop their technical abilities, according to the Digital and Society Index (DESI). Most of them have digital identities and claim to be able to protect themselves from inappropriate content. A large percentage of children even claim to use programming languages. Among the identified shortcomings are: low motivation to meet educational needs through the Internet; insufficient skills to assess online information; and insufficient skills to ensure online safety among children (Center for Safe Internet, 2016).

A lot of research and initiatives in Bulgaria related to addressing media literacy are available on the Internet. The main emphasis is on the importance of media literacy in the modern world and the need to work to improve the skills and competencies of media content users. Most studies are not done systematically, but register the processes for a certain period of time, although there exist studies and analyzes in recent years, which are carried out annually. For example, the Reuters Institute survey has been conducted every year since 2012 among more than 30 countries, and since 2018 it has included Bulgaria. The analyses feature statistics on population

and internet consumption, top media brands, data on the ownership of the largest media as well as on media consumption and trust in the media, the use of social media and more.

It is noteworthy that much of the research finds low levels of trust in the media and concerns of fake news, but the focus is on the outcomes, not on the causes and preconditions that lead to declining public trust in the media. The fact that according to the Reuters Institute reports more than half of the people in Bulgaria rely on the social networks to receive news confirms the need for a more in-depth study of the level of media competencies and related skills of the Bulgarian audiences. In the 2021 report respondents say that they have, on average, experienced more false and misleading information about the coronavirus (54 percent) than about politics (43 percent). Other topics with false information are related to celebrities such as actors, musicians and sports stars (29 percent), products and services (22 percent) and climate change (20 percent) (Reuters Institute 2021). The research has been commissioned by the Reuters Institute for the Study of Journalism to understand how news is being consumed in a range of countries and conducted by YouGov and their partners (YouGov).

It remains unclear though by what criteria people determine that a piece of news is fake. This would be an adequate guideline for their media competences. One of the recent studies of the Coalition for Media Literacy “Media, Parents and Children Development” (2021), examines: parents' and children's perceptions of media and digital media literacy; trust in different types of media; frequency of media content usage; and time spent on the Internet (Coalition, 2021). Information about these issues is also provided by the annual Media Literacy Index, which has been compiled by the European Policy Initiative (EuPI) of the Open Society Institute - Sofia since 2017. Data are available on the Institute's website and are highly reliable. According to the latest edition of the 2021 index, Bulgaria ranks 30th in the ranking of 35 countries (Lesenski, 2021). However, this is currently one of the few studies that specifically registers the level of media literacy in the country, which is measured by certain indicators, while comparing Bulgaria with other countries.

6. Analysis of research and monitoring capabilities and quality

In the considered 20-year period, the media research interest in the country is focused primarily on the challenges of the processes of digitalization and the introduction of new technologies in various aspects of the media field: legislative and regulatory; journalistic; media usage patterns; media related competences, extensively analyzed in a number of academic research publications.

Following the aim to emphasize on the state-of-the-art of the existing research in the country with regard to risks and opportunities for deliberative communication, a large array of specialized publications has been identified and examined. This includes predominantly findings of transnational organizations that monitor media systems globally; datasets of national statistics and public bodies; legislative, policy and regulatory documents; institutional official papers and non-government reports; academic national and international research; major sociological surveys; research of non-governmental organizations; publications of professional associations media, etc., using keywords related to the four domains. Large comparative research projects that collect periodically data and produce comparative analysis over certain periods are relatively scarce and inconsistent, as well as thorough commentaries of the media industry. As a result of the research, media literacy initiatives that aim to improve digital literacy among both children and older users are increasing.

The assessment of the major Bulgarian datasets and publications with regard to their quality and capabilities of monitoring the risks and opportunities for deliberative communication in the

country is developed in five dimensions: availability of data, recency and continuity of data, complexity of data-gathering, trust and reliability, and availability of experts and/or specific research structures.

6.1. Comparative analytical overview on available research and access to the research

Data is important for evaluating the effectiveness of the national policies across the studied four domains while simultaneously supplying with comparative insights at regional and global levels.

6.1.1. Legal and ethical regulation domain

In the studied corpus of relevant academic research and specialized sociological surveys on media legislation and regulatory practices most of the sources are not based on consistent empirical and statistical data in order to identify thoroughly the risks and opportunities for deliberative communication. Besides, the sources regarding the analysis of the legal framework prevail over the publications on media ethics. The problems covered by the sources studied mainly comprise freedom of expression, pluralism and diversity of media, freedom and security of journalists, libel and defamation, access to information, confidentiality of journalistic sources, hate speech, the status of radio and television organizations, etc. Here treating international principles and case law dominate over the analysis of domestic practice.

The audiovisual sector (radio and television) is thoroughly regulated through the Radio and Television Act (1998). The Bulgarian press has no detailed legal basis that explicitly addresses the obligations and responsibilities, as well as the terms under which the freedom of the press could legitimately be regulated. The same is valid for online media. There is no special law either about press regulation or online media regulation. To these two types of media the general legal acts are applied.

The professional organizations of those working in the media field represent the link between the media system and civil society. Their activity is related to the development of self-regulation, co-regulation, improvement of media standards, and modernization of the journalistic profession, which in Bulgaria is not regulated by a special law.

The Radio and Television Act (RTA) refers to self-regulation and co-regulation in the new provisions introduced with a view to transposing the amendments of the Audiovisual Media Services Directive (AVMS). Art. 4b of the RTA stipulates the obligation to promote self-regulation and co-regulation through codes of conduct and standards, where appropriate. Also listed are some of the existing codes such as the Code of Ethics of the Bulgarian Media, developed by the National Council for Journalistic Ethics Foundation; the Unified Standard for the Regulation of Sound Levels in Advertising, adopted by the industry, and the National Ethical Rules for Advertising and Commercial Communication, developed by the Association "National Council for Self-Regulation". However, the law also emphasizes that professional organizations can adopt other rules and standards.

Peculiar is that the regulatory framework which is in force in Bulgaria in most of the cases does not take into account the specific features of the Internet. Publications point out that self-regulation should be strengthened through more consistency and transparency. It is a dynamic environment that requires efforts for modernization of the existing legislation bringing it in harmony with the specific nature of the ICT. A clear cut system of offences/crimes on the Internet, penalties and authorized bodies to take measures has to be in force. These bodies should work in greater cooperation with each other and exchange regularly data. Summarized data has to be available for the needs of research and policy activities.

Publications and debates on legal issues have not had a great impact on the improvement of media policy and regulation. Self- and co-regulation remain underdeveloped due to the passivity of media professional organizations and civil society (Zankova, 2021).

6.1.2. Journalism domain

In the last twenty years the academic and professional community in Bulgaria has created a large corpus of studies on media and journalism developments. The sources can be divided into several groups: academic research; research of professional and branch organizations; research of non-governmental organizations; and information from regulatory bodies and state institutions. The sources from the first three groups are predominant.

The annual reports of non-governmental organizations and foundations dedicated to the media environment in Bulgaria during the last decade have been characterized by topicality and continuity. This is because they prefer to use local professionals to collect the necessary data and commission/conduct their own research. However, the information they contain is often unrepresentative (for example, in the annual reports for Bulgaria of the Reuters Institute for the Study of Journalism it is explicitly mentioned that the recorded data are not representative of the country).

Topicality is most inherent in the data published by primary sources - these are the reports of professional and branch organizations, whose participants voluntarily provide information about their own activities (eg the Association of Bulgarian Radio and Television Operators, the Union of Publishers in Bulgaria, the Branch Association of Bulgarian Telecommunication Operators, etc.). However, this information is rather sporadic and lacks continuity.

The same can be said for sociological research on media issues. They are nationally representative and are usually held on the eve of elections. The most common subject of research is the preferences of voters for different sources of information and trust in the media. Conducting of such a survey is expensive, and the results are provided to the sponsor (most often a political party or NGO), at whose will, a selected part of the results is presented to the general public.

Since 2015, the National Statistical Institute publishes annual data on the state of the media, which can be considered reliable and trustworthy. They are of a general nature and are limited to several indicators - annual production of radio and television programs, annual circulation of newspapers and magazines, internet access of households, etc.

There is no detailed and up-to-date information about the realization of the graduates of journalism students in Bulgaria. The Faculty of Journalism and Mass Communication at the St. Kliment Ohridski Sofia University, which produces the largest number of graduates in mass communication in Bulgaria, does not publish information about the career developments of its graduates, as some other universities in the country do. The Ministry of Education and Science maintains an annual ranking of the country's universities in various fields, including the field of Public Communications and Information Sciences (Ministry of Education and Science). The methodology for calculating the ratings is based on 100 indicators, one of which is the realization of graduates on the labour market. The authors of the ranking report that they collect the necessary information through the National Statistical Institute (NSI) and through sociological surveys. A review of the NSI yearbooks shows that they lack information about the realization of graduates in Bulgaria (National Statistical Institute, 2020).

Publications, surveys and discussions on journalism issues have impacted to some extent the awareness of the media guild on sustaining professional standards.

6.1.3. Media usage patterns domain

In the studied period of 2000-2020 rhythmic research on media usage patterns in Bulgaria is comparatively extensive, although with not regular cyclicity.

Most of the research examines issues related to access to media content, media diversity, functionality and quality of the media, public trust in the media, new media, frequency of media consumption by different age and social groups. Research from 2000 to 2008 on the topic is less extensive than that research from 2009 to 2020. A richer database of research on media consumption from the beginning of the century is found in the period of 2020-2021.

Back in the years there are a number of studies in which there is certain cyclicity on an annual basis (Media Program for Southeast Europe of the Konrad Adenauer Foundation, Trend Sociological Agency, Open Society Institute, UNICEF for Bulgaria, Media Democracy Foundation, Kantar, CMO Insider.bg, Edelman Trust Barometer, Market Links Agency, Reporters without Borders, Freedom House, etc., as well as by independent academic researchers). Most of these studies (or reprints of them, or journalistic materials based on information from them) are freely available in the public space. However, a paid subscription for access is required to use some of the data.

Surveys conducted by sociological agencies are available online and published by media. Often they are commissioned and financed by media and therefore only part of them is published and complete data are difficult to find. Academic research mostly is accessible.

Data from reports of the Open Society Foundation for 2011 show the dynamics of the media usage, comparing the popularity of cable TV, satellite TV and IPTV (Open Society Institute, 2011). Although Bulgarians enjoy one of the fastest internet connections in the world, broadband access is generally unpopular. In Bulgaria as a whole, e-government and customized audio content services are not well developed. On the other hand, there is a widespread distribution of torrent trackers.

An Open Society Foundation study in 2009 found that among today's generation of 18-30 year olds, internal stratification among young people is a source of potential conflicts (Dichev et al, 2009). Perhaps the most significant factor that has led to many developments is that the center of gravity among young people has gradually shifted from the professional sphere to leisure. Consumption is often a more important identifier than career or status. The line between work and leisure has become problematic. In the same way, the public has been displaced by the private; communities – by networks. Against this background, a deep generational conflict has been going on for the last ten years (Ibid).

Young people see as their advantage adaptability, mobility, as well as shortcoming of biographies, knowledge or solid values. This makes them an ally of neoliberalism, while the old ones cling to the state, security, solidarity. Among the youth elites, however, social protest, discontent, and collective action are a stigma of the unsuccessful, the marginalized, those who cannot cope with their problems on their own, according to data from the analysis.

There is a high level of digital inclusion and connectivity among children and young people - nine out of ten respondents possess a personal smart phone to access the Internet. However, it is worrying to find out that many children and young people do not have their own device suitable for the optimal satisfaction of their educational needs and goals (such as a laptop, tablet or desktop computer). The risks and vulnerabilities in connectivity are disproportionately higher among children and young people from vulnerable groups, for whom access to the Internet can be the difference between social exclusion and equal opportunities. Providing access to digital devices and connectivity that meet all digital needs, including education, is still an unfinished endeavor in Bulgaria, according to this study.

Research on media consumption by older people is fragmentary. In most cases, the research is not specifically targeted at them, but rather is part of comprehensive audience surveys. People over the age of 55 watch TV more often than any other demographic groups: six-seven hours per day. The average age of social network users has been steadily increasing in recent years, according to a report by the Open Society Foundation (Antonova et al, 2013).

6.1.4. Media related competences domain

As for media related competences there is a tendency to growing of research and initiatives in Bulgaria related to addressing media literacy. After 2016, there has been an increase in interest in media competences, while before that research was rather isolated. Afterwards there are examples of systematic analyzes and studies being performed every year, for example, the Media Literacy Index, which the Open Society Institute has been conducting since 2017 using indicators of media freedom, education and trust between people.

This trend is also shown by the research of the Media Literacy Coalition's research on distance learning and media literacy skills among students and teachers in 2020, followed by a parent's survey in 2021 on „Media, Parents and Children Development“ and the first for Bulgaria National study to assess the digital-media competences of high school students in 2022.

A number of studies are consumption-oriented and are related to the so-called. people's media diet - what sources of information they use, how much of them watch TV, listen to radio, read newspapers and magazines. Many systematic studies focus on trust in the media.

A less researched area is the degree of media literacy among audiences, how people assess the authenticity of information and by what criteria, whether they have critical thinking about it and understand the context, how they distinguish between misinformation and fake news, etc. Issues related to pluralism, media consumption and media freedom are viewed as dimensions of media competences.

Insufficiently analyzed is also the question to what extent people's trust in the media is determined by their competences and whether there are other factors than the rational ones that make people lose trust in the media.

It is noteworthy that the attention of researchers is less often attracted by the characteristics of the media audience and by the deficit of comprehensive and systematic research for media users to cover demographic, educational, social characteristics, as well as their preferences. These characteristics directly affect media literacy and the obligation of the Council for electronic media is to outline a strategy on Media Literacy perspectives in the country.

6.2. Monitoring capabilities and quality of data and knowledge

Bulgarian monitoring capability has increased since the beginning of the 21st century, though with different pace across the four studied domains. Insufficient proper and stable state funding hinders the advance of large-scale regular research on important aspects of the media ecosystem and the communication environment. Focused research is financially supported by EU funding or private entrepreneurs, which can't lead to systematic and substantial conclusions about the trends of media and communication developments for long periods of time.

Regarding the legal and regulatory domain most of the sources carry trustworthy and reliable information, especially those of official institutions. The ECtHR cases and judgments provide also valuable data to consider by national courts in their media related practices. The ECtHR and the ECJ case law has contributed to the improvement of the legislation and court decisions including that in the field of freedom of expression and media, however more efforts on the part of decision-making bodies are necessary to turn improvements into consistent tendencies.

The sources reveal mainly the engagement of academic institutions, NGOs and some ministries. The sources do not reveal special national configurations or multi-stakeholders' synergies specifically set up for the purpose of research.

Scientific articles and monographs covering various aspects of freedom of speech and the level of legal research are of good quality. The individual right to free speech and its aspects are more thoroughly explored than the institutional right – freedom of the media.

The main difficulty in collecting data on the state of the art of the media and journalism in Bulgaria is related to the lack of comprehensive, systematized and regularly provided information from primary sources - the media organizations themselves and journalists. Most academic organizations have the expert capacity to collect the necessary information themselves, but they often lack the financial resources to conduct such research.

The information provided by the professional associations of media and journalists, the National Statistical Institute, as well as the sociological surveys of nationally representative nature deserve the trust of the researchers in Bulgaria. The lowest level of trust is connected with the sample data for the audiences, the rating and the market shares of the media. There is a tendency for people metric companies to provide distorted data by "inflating" the data about their customers at the expense of the media that are in the portfolio of a competing company. This tendency is clearly evident in the drastic discrepancies between the results of the same media in the bulletins of the two main people metric agencies in Bulgaria. In addition to confusing audiences and researchers, the distortion of information makes it very difficult for advertisers to choose the right medium and thus distorts the advertising market.

7. Conclusion

The case study of the The Bulgarian media system and the related risks and opportunities covers their developments and specific issues throughout a twenty years period of time.

Media and media related legislation complying with the international human rights standards is introduced and updated. Flaws and deficits in this respect relate to the quality of legislation as such, its systematic ordering, interpretation and implementation to create consistent practices. Synchronizing national with European legislation is a screen for lobbying amendments against the public interest is the conclusion of the authors of the report "10 years of Bulgaria in the EU" about the achievements of the Bulgarian media law and system (Center for liberal strategies, 2017). An illustration is the digitalization of terrestrial broadcasting, launched in 2009, with the synchronization of respective Bulgarian legislation with the European one, as the country's commitment was announced in 2012. Not only this commitment was not met, but criminal proceedings were instituted against the country, culminating in the imposition of sanctions. In order to serve "convenient" local participants, ad hoc changes were introduced. The amendments in the legislation related to digitalisation (the Electronic Communications Act and the Radio and Television Act) were lobbyist and the auctions for multiplexes (digital broadcasting platforms) were organized in such a manner as to favour some bidders at the expense of others (Zankova, 2021). This is an example how media legislation has been adopted against the public interest. The latest amendments in the Radio and Television Act comprise due to the transposition of AVMSD a new portion of changes together with others numerous ones done after the year of its adoption from 1998 until now are hard to implement systematically. Also, the latest incorporation of the provisions of the AVMSD additionally overburdens the legal text with complicated details that are mechanistically included.

While some topics are more or less comprehensively tackled in media related sources - mostly issues pertaining to the relationships between the media and politics, others as the economic factors or the impact of culture are less available. There are topics such as concerning the role of

the ombudsman in the media sector or whistleblowers and the media that should be clarified and profoundly dealt with in the future. Missing are also legal analyses beyond legal positivism or interdisciplinary ones. New media, platforms and services are not studied vigorously especially from a legal and ethical perspective though they occupy a substantial position within the media and attract most of the public's attention and particularly of the young audience.

Media ethics have not become an unalienable element of everyday media activities and have not been internalized as professional values by most of the media. A sociological survey from 2014 proved that compliance with basic ethical norms in journalism had become one of the taboo topics for Bulgarian online media (Institute for Modern Politics, 2014). Due to the fact that media ethics have been neglected during the years of transition and subordinated to political and corporate interests, the media in Bulgaria have been trapped by politicization and commercialization (Zankova, 2014).

Following from all these media accountability is most often one-sidedly studied from a journalistic point of view without taking stock of its regulatory aspects including procedural ones and the opportunities for trying and exploring novel accountability practices online. Media accountability cannot be understood outside the social and political structures or media ownership as well as regulatory framework defined at the national level (including self- and co-regulation). Lack of clear and stable ethical regulations can result in a complex relationship between the media and politicians and in the emergence of media groups with unclear origins and financial opacity.

During the first two decades of the 21st century, research on the media ecosystem in Bulgaria can be divided into two areas: research on the transformation of the journalistic profession and journalistic competencies, and research focusing on journalistic values and ethics in the digital, convergent society. The first type dominates the interest of researchers until 2013, with the mass digitalization of the media (the widespread penetration of the Internet and social networks, and the digitalization of radio and television broadcasting).

The surveys and analyzes of media consumption from 2000 to 2020 are not regular and they do not relate specifically to the choice of media by audiences and the reasons for this choice. Most of the research indirectly examines issues concerning the choice of media, such as public trust in the media, access to information, frequency of media consumption, divided by age, social criteria, etc. Research from 2000 to 2008 on the topic is less extensive than from 2009 to 2020. Most serious research has been done in the last 5-6 years. The attitudes and expectations of the audiences towards the transformed media have also been transformed. Surveys show that nowadays a small part of the population does not have the necessary equipment to access new sources of information.

As a result of all the changes that have taken place in the media space, there has been a decline in public trust in the media. The low trust is due both to their economic and political commitment to the powerful of the day, and to the compromises they make in their attempts to adapt to the economically and technologically changing media environment. Nevertheless, television remains the media with the greatest trust and the highest percentage of consumption by the audiences.

Research related to media competences clearly demonstrates the growing importance of media literacy, of critical thinking, of understanding the right context, and of teaching these skills in school so that users can be adequate and prepared for guidance in the huge flow of media and information in the modern world. The analysis outlines the need for more periodic and systematic studies of the level of media competences of the audiences in the context of characteristics such as education and social status and, accordingly, of criteria for assessing the quality of information. This could provide clarity on where to emphasize media literacy training.

7.1. Risks and opportunities to assessing media developments

The review of the existing publications on media topics in the period 2001-2021 allows to highlight the following *potential risks* for the media developments and research units in Bulgaria:

- ♦ lack or insufficient availability of comprehensive, reliable and publicly available information on the media developments and the journalistic profession, which should be offered rhythmically;
- ♦ lack of sufficient funding (or lack of interest in available funds) among the academic and professional community to collect data and conduct their own periodic and cyclical surveys;
- ♦ lack of a link between the academic educational institutions and the media business to help students achieve a balance between academic knowledge and practical skills. The research studies have been performed mainly by NGOs and independent researchers, and the involvement of the media themselves has been quite limited;
- ♦ unreliability of publicly available information about the audiences, the market shares of influential news media, which undermines the trust of society and business in the Bulgarian media as a whole;
- ♦ media market research is mainly commissioned by the media, which fund this type of research. Only parts of complete data are available, and these are the ones that certain media companies have decided to be public.
- ♦ passiveness of state institutions and regulatory bodies in conducting independent research on current phenomena in the media environment and the media market;
- ♦ complication of the whole picture and not finding out the relationships and interdependencies among related issues.

Potential opportunities to overcome the negative impact of the listed risks in data collection and publication of information might be outlined as follows:

- ♦ to urge state institutions, legislative and regulatory bodies to create a healthy media environment that deserves trust and serves society;
- ♦ to improve the methodology of collecting data by the national authorized bodies. One of the most important effects could be the changes in the collection of national statistical data about various media and their use;
- ♦ to encourage academic institutions and professional organizations in applying for financial support from the National Research Fund of the Ministry of Education and Science and from European programs for funding and conducting independent expert research on contemporary phenomena and developments in the media environment;
- ♦ to use modern information technologies and tools to facilitate the conduct and increase the value of research (including - online marketing research and public opinion polls, software for data processing, chatbots, etc.). To introduce a holistic approach towards the study of media consumption in the digital society;
- ♦ to establish a partnership between academic institutions and companies in the field of media, communications and advertising. Such a partnership would have the potential to positively impact both parties - by enriching academic activity and “grounding” it on the media reality, as well as by developing and introducing innovative approaches and practices in the media business.
- ♦ to orientate research towards the subject or the user which corresponds to the idea of building a human-centric information society;
- ♦ to stress the importance of the problems of media and their transformation and impact among the panoply of IT issues;

- ◆ to create systematic and rich datasets in the European countries in this field;
- ◆ to boost comparative research and cooperation through a network of scholars and researchers. There are many studies on media literacy in Bulgaria, but they are mainly conducted by non-governmental organizations or independent researchers;
- ◆ to collect data about: the news habits in the country and correct the statistics used so far; the PSB news spread in the digital environment across media and platforms from the perspective of the user; the news non-users and to study the reasons for that media abstention phenomenon;
- ◆ to collect data about alternative media;
- ◆ to transform data into stable knowledge on the media environment.

The assessment of these potential risks and opportunities may serve as a reliable basis for outlining the major critical junctions of the media transformation processes in four domains (legal and ethical regulation, journalism, media usage patterns, and media related competences).

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CROATIA

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive Summary

Croatian media and communication studies have a long history dating from the 1960s in socialist Yugoslavia. The growth and advances of the field started strongly after 2000. The analysis of the Croatian corpus of published research between 2000 and 2020 has identified more than 400 literature sources useful for further research of the ROs domains of Journalism, Legal and ethical domain, Media usage domain, and Media-related competencies domain. The largest corpus is in the Journalism domain, testifying to the origins of the Croatian media and communication discipline, followed by the Legal and ethical domain. Audience research started to be seriously developed after 2011, and the research on Media-related competencies domain was almost non-existent before 2011. While the number of publications in these two domains is smaller, a higher quality and international character of this research might offset its smaller number.

The aim of this case study is to give an overview of published literature and other data sources in Croatia in the four domains that are seen as presenting risks or opportunities for deliberative communication: *Legal and ethical domain*, *Journalism domain*, *Media usage domain*, and *Media-related competencies domain*. The report is based on published studies (national and international) and reports, and provides information on data collections and research methodologies. The report also includes an analysis of research resources: expertise, financing and position of research and data collecting units, with the aim of assessing the quality of research, the institutionalization of the academic discipline(s) necessary for their study, and the resulting national research capabilities to monitor the four domains with respect to the relevant time frame of 2000–2020.

1. Introduction

Croatia is among the rare CEE countries with previous research on intellectual history of communication and media studies (for histories of CEE, see Jiráček & Köpplová, 2008; Peruško & Vozab, 2016; Splichal, 2020). In addition to Croatia (Peruško & Vozab, 2013, 2014, 2016, 2017), such studies exist for Poland (Filas & Planeta, 2014), while the pioneer was Slavko Splichal with his analysis for socialist Yugoslavia (1989a, 1989b). Splichal's analysis of 32 Yugoslav social science journals between 1964 and 1986 shows that in socialist Yugoslavia the paradigmatic parentage of the discipline was firmly "western" (i.e., the so called soviet media theory was not known or used) and drew on different schools of thought: "Critical theory (Adorno, Habermas, Enzensberger, Bourdieu), Functionalism (Katz, Lasswell, Lazarsfeld, Merton, Schramm, Riley) and "productive inclusivism" (McLuhan, McQuail, Kayser, Cazeneuve, Weiss)" (Splichal, 2020, p. 355). Only 18,7 % of the articles in the Yugoslav pre-1990 sample were empirical, and only 7,1 % included statistics.

Peruško and Vozab (2014, 2017) analyzed Croatian articles in a 50-year sample (1961–2011) and show that 61 % of articles use social scientific approaches, while this amounts to over 70 % in the 1990–2011 period. Critical studies reappear after 2000 with cultural studies and feminist approaches instead of the pre-1990's Frankfurt school or the theory of the public sphere as theoretical frameworks. 54 % of the Croatian sample was published between 2000 and 2011, testifying to a strong growth of the discipline after 2000.

Political communication was the main research topic in 1990s and 2000s. After 2000 the focus shifted to investigation of how media messages were produced and of their content, PR and marketing communication, media industry and media regulation. The number of empirical articles in the Croatian sample rose to 46 % in 2011. 69 % of empirical articles in the 50-year sample used quantitative methods like survey and content analysis (Peruško & Vozab, 2017).

The start of the institutionalization of the communication discipline is related to the introduction of university subjects relating to journalism at the Faculty of Political Science of the University of Zagreb in 1969 (later than in Bulgaria, Czechoslovakia, or Hungary, where such programs were introduced already in the 1950s, Terzis, 2009). A minor in journalism was offered at the same faculty until 1985, when a full four-year bachelor's program was established. The first academic journal in the broader field in Croatia was *Informatologia Yugoslavica* established in 1969, although media and communication related topics were also published in sociological and political science journals. The development of empirical studies of public opinion started to be introduced in the Department of Sociology at the Faculty of Humanities and Social Sciences of the University of Zagreb, in early 1960s. Sociology remains a significant source of empirical and theoretical ideas for Croatian researchers of media and communication to date. Visual analysis of media forms, like cartoons, advertising, or film, was developed in the Department of History of Art and the Department of the English Language and Literature. The study of mass media forms of literature advanced at the Department of Comparative Literature, already from the 1960s. Although the Department of Linguistics offered courses on semiotics of communication already in the 1980s, this thread has not so far been integrated into the mainstream communication discipline.

The institutionalization of the communication sciences, or communication and media studies as a separate academic discipline, has not been completed to date. They are part of the branch of "Information and Communication Sciences" within the field of social sciences, and the humanities approaches have not been integrated. As communication and media studies share neither theoretical nor methodological approaches with information sciences, this ill-fitting grouping is evidence of the weakness of communication and media studies in Croatia, both in academic and institutional terms (Peruško & Vozab, 2016).

1.1. Actors: Academic Departments and Research Institutions

A growing number of academic departments, academic journals and academic societies engaged with the field (especially after 2000) (Peruško & Vozab, 2016). Academic departments that run programs in journalism, communication, and media at B.A. and M.A. level exist at five universities (University of Zagreb has two, and one each at the Universities of Rijeka, Zadar, Dubrovnik, and University Sjever). Doctoral studies in media and communication are offered at the Universities of Zagreb, University of Zadar (in cooperation with Zagreb), University of Dubrovnik together with University of Osijek, and University Sjever (all after 2005). Short international graduate courses are taught at the Inter-University Centre Dubrovnik (IUC) (<https://iuc.hr>) since the 1970s, and journalism and media topics were included already in the 1980s.

Two main research centers / groups exist at the academic level. The first was the Department for Culture and Communication at the Institute for Development and International Relations (IRMO) (<https://irmo.hr/>), which started with research in communication and media in the

mid-1980s in cooperation with UNESCO. Today their research is often from the perspective of critical theory, and involves issues of pluralism, cultural and digital economy and mediatization. Its researchers participate in international research projects and networks and have a strong international publishing record.

The Centre for Media and Communication Research (CIM) (<https://cim.fpzg.unizg.hr>) at the Faculty of Political Science of the University of Zagreb was established in 2007 and is today the only university centre that combines international comparative research with academic teaching and training. Its research focuses on media system transformations in CEE in a comparative perspective, including issues of democratization, pluralism, freedom of the media, developments in journalism in relation to digitalization, and mediatization transformations. Audience research is an area that has strongly developed in Croatia since 2010 thanks to research projects of the CIM research group. Its researchers are prominent in international research projects, networks, and professional academic associations, and have a strong international publishing record with significant impact.

The number of authors / academic staff in the discipline also grew with the establishment of new university departments and journals in the field, although there are probably only around 10–15 academics who are members in mainstream international academic associations like ECREA, ICA or IAMCR.

1.2. Actors: Academic Journals

Six academic journals are devoted to media and communication research: *Informatologia* (published by Croatian Communicology Association, from 1969 as *Informatologia Jugoslavica*; referenced in SCOPUS); the first post-socialist journal was *Medijska istraživanja* (published by *Naklada Medijska Istraživanja*, from 1995 – earlier than in most CEE countries where journals were mainly started after 2000; referenced in SCOPUS); *MediAnali* (published by University of Dubrovnik, from 2007 to 2018); *Medijske studije* (published by the Faculty of Political Science of the University of Zagreb, from 2010; referenced in SCOPUS and WOS); *In Medias Res* (published by Centre for Media Philosophy, from 2012); *Media, Culture and Public Relations* (published by Croatian Communication Association, from 2012;³ referenced in EBSCO); and *CM-Communication Management Review* (published by the Edward Bernays College, from 2016). All academic journals published in Croatia are, thanks to a mandatory policy, available in open access at <https://hrcak.srce.hr>.

1.3. Actors: NGOs with Media Research Capacity or Influence

The Citizens Organize to Monitor the Elections (GONG) (<https://gong.hr/en/>) is one of the most prominent progressive NGOs in Croatia, involved also in monitoring and studying the media. They have several ongoing research projects whose findings might be relevant for our analysis, relating to hate speech, fake news, and pressures on journalists.

The Centre for Investigative Journalism of the Croatian Journalists' Association (HND) (<https://www.hnd.hr>) engages in relevant international studies and assessments. The Association for Communication and Media Culture (DKMK) (<https://dkmk.hr/>) is mainly focused on media literacy activities, especially with children, and have initiated some media literacy and media education studies.

³ The Croatian Communication Association (<https://portfolioig.wordpress.com/o-nama/>) is in 2021 listed among scientific and professional associations funded by the Ministry of Science and Education (with 2 000 EUR), though information on its membership etc. is not available (see Peruško & Vozab, 2013). It appears that their only activity is the publication of the two journals.

The Centre for Democracy and Law Miko Tripalo (<https://tripalo.hr/en/home/>), a progressive think-tank, has organized debates on issues of media development and media and democracy.

The Croatian Law Centre (<https://www.hpc.hr>), established in the 1990s, also contributes to or funds, from time to time, research in the field of media, especially regarding media and its democratic performance.

1.4. Actors: Government and Related Bodies that Act on the Media System

The Agency for Electronic Media (AEM) primary purpose is regulation, licensing and oversight of electronic media (including online media), it commissions studies on specific topics related to the media market (<https://www.aem.hr/istrazivanje-i-analize/>). It is also active in promoting (and funding) activities relating to media literacy. In the past two decades, they have commissioned studies on television market and audiences, effects of media subsidies, digital media market, radio market and audiences, and gender equality in the media. The AEM also collects and regularly publishes on its website the data about owners of the electronic media with licenses to broadcast (television and radio) in Croatia, and the registry of electronic online media in Croatia.

The Croatian Chamber of Commerce (HGK) (<https://www.hgk.hr/>) collects data on the print media publishers and their editions, which are obliged to report circulation figures and revenues on a yearly basis. This institution does not publish the data in a systematic fashion, but in earlier years the data were available online in a user-friendly form. This practice has been discontinued (staff deficiency is cited as a reason), but researchers can receive data in a raw (not user-friendly) form on request.

The Croatian Competition Authority (AZTN) (<https://www.aztn.hr/>) is a source of some information on media concertation, which it is obliged to assess in case of mergers or acquisitions in the media sector (according to the Media Act (NN 59/04, 84/11, 81/13) and the Electronic Media Act (NN 111/21), the media sector is subject to specific thresholds based on audience shares). Relevant information on market shares is published in their judgments.

The Court Register (<https://sudreg.pravosudje.hr/registar/f?p=150:1>) includes information on owners of the media, and the information can be searched free of charge.

The Ministry of Culture and Media (<https://min-kulture.gov.hr>) (media was added to the title in the most recent government mandate in 2019, although media came under its jurisdiction already in the early 2000s) has also been directly involved in media system analyses and studies, especially in relation to failed attempts to adopt a media strategy. While such a strategy was never adopted as a political / policy document to date, an extensive document titled *"Draft Proposal for the Media Policy of the Republic of Croatia until 2020"* was published by the Ministry of Culture in 2015 (Ministry of Culture, 2015). This document included an analysis of the media landscape, including journalism, media market, position of journalists, etc. The next government announced a swift media policy / strategy of its own, but this has never materialized. The Ministry has throughout the two decades created ad-hoc expert groups in relation to media legislation under development, although the composition of the groups is not always made public, and their advice not necessarily taken. Public or expert discussions are also sometimes organized on issues under discussion, especially in relation to legislative proposals. The capacity of the ministry to engage with media research or create research informed policy is limited, as their media policy department does not include any staff. Media related laws and other regulations are available on their website (<https://min-kulture.gov.hr/propisi-543/mediji-16238/16238>).

The Croatian Bureau of Statistics (DZS) (<https://www.dzs.hr>) provides information about the availability of media technologies in households, number of people employed in publishing and audio-visual sector, average salaries in the sector, as well as the number of journalism students.

The Croatian Financial Agency (FINA) (<https://www.fina.hr>) publishes annual financial reports from private enterprises registered in Croatia. Information about sources of income is included in financial reports provided by media companies.

1.5. Actors: Media Industry and Market Research

Some market research agencies are more open to share their research on request. For example, IPSOS Puls agency for market research (<https://www.ipsos.com/hr-hr>) shared in the past collected data on audience shares of different media for research purposes. They have also been commissioned by the AEM for media market and audience studies, and these are publicly available at the AEM website.

The Croatian Association of Communications Agencies (HURA) (<https://hura.hr>) provides annual data on advertising expenditure across different media.

1.6. Foreign Actors and International Research Cooperation

Significant data and knowledge about the four ROs domains in Croatia also come from international institutions that work at media system comparisons at the international level.

Analyses of the political development and democratic consolidation can be tracked through various international sources, like the Economist Intelligence Unit Democracy Index. In 2020, their score for Croatia was 6,5 and it was categorized as a flawed democracy (EIU, 2021). The V-Dem Institute Democracy Index evaluates Croatia in 2020 as electoral democracy in the top 20–30 % tier (Lührmann & Lindberg, 2020). This is one of the most substantial and academically weighted comparative studies, based on several expert coders for different sub-areas of the index in each country, with their confidence levels reported for accuracy. The Freedom House Global Freedom Score 2021 gives Croatia a score of 85 and ranks her as free, with 36 points for political rights and 49 for civil liberties. In its Democracy Ratings, Croatia is evaluated as semi-consolidated democracy with the score of 54 (Freedom House, 2021). Freedom House Index of Internet freedom does not include Croatia, and their Freedom of the Press Index was discontinued in 2017.

The Reporters Without Borders (since 2013) World Press Freedom Index places Croatia in 2022 as the 48th country from the 150 it evaluates, an increase from its 56th place the previous year (RSF, 2022). Main problems with media freedom in Croatia include many SLAPP lawsuits also involving government and public officials, threats from subjects of investigative journalists (mainly online), and the ruling-party informed editorial policy of the public service broadcaster.

IREX Media Sustainability Index (2001–2019), funded by the USAID, places Croatia in 2019 at the 5th place among the SEE countries with 2,31 points (3 is sustainable, which Croatia was ranked as in 2005) lower than Kosovo (in the 1st place), Albania, Montenegro, and Romania.⁴ This placement and the underlying analysis are not seen as reliable by the authors of this study.

Information on media use is also collected by Eurobarometer⁵.

European Values Study (<https://europeanvaluesstudy.eu>) includes Croatian data in the 3rd (1999), 4th (2008), 5th (2017), and the 6th wave (2022).

European Media Systems Survey lead by Marina Popescu⁶ includes Croatian data in the 1st (2010), 2nd (2013), and 3rd wave (2017).

⁴ See <https://www.mediasustainabilityindex.org>

⁵ See <https://europa.eu/eurobarometer/screen/home>.

⁶ See <https://www.mediasystemsineurope.org/overview.htm>.

The Council of Europe Safety of Journalists Platform (<https://fom.coe.int/accueil>) includes information about threats to Croatia journalists (at the time of writing in February of 2022, there were no active or unresolved threats reported for Croatia).

The Regional Platform for Advocating Media Freedom and Journalists' Safety in Western Balkans (<https://safejournalists.net/>) is a project commissioned by the European Commission, in which professional journalist associations from Bosnia and Herzegovina, Croatia, Kosovo, Montenegro, North Macedonia and Serbia cooperate to monitor safety of journalists in the region.

Significant research and attention to the ROs domains also resulted from cooperation of Croatian researchers in the Council of Europe and UNESCO bodies. Cooperation with the Council of Europe first introduced the cultural policy project to Croatia (already in the 1990s), and the topic of media pluralism and diversity, when Croatia was included in a comparative study (Ward, 2006). The research attention to the topics of media pluralism and protection of journalists against impunity, also had a source in CoE cooperation. The participation in UNESCO IPDC contributed to the study of Media Development Indicators in Croatia (Peruško, 2011, 2012; Peruško et al., 2011), and as a regional comparative project.

Croatian researchers also take part in international academic comparative projects which shed light on certain domains. These include the Worlds of Journalism Study (WJS) (Croatia first participated in the 2nd wave 2012–2016 and is participating in the 3rd wave, with data collection expected in 2023). This study provides a wealth of information on journalism practice and values in Croatia, and in a comparative perspective, based on a national representative sample of journalists surveyed with an online questionnaire (Peruško et al., 2016). Professor Zrinjka Peruško (CIM, FPZG, University of Zagreb) is the project leader in Croatia, with participation of Antonija Čuvalo and Dina Vozab.

The Digital News Project of the Reuters Institute for the Study of Journalism of the University of Oxford (Croatia is included since 2017) provides information about news media usage, based on a national panel sample of online media users (Newman et al., 2022). Professor Peruško is the academic partner from Croatia.

The “EU Kids Online” project (<http://www.eukidsonline.net>) includes Croatia since its 3rd wave (2011–2014). Representative surveys are used to collect data on children's use of new media. Since 2014, the network has been directed by Professor Uwe Hasebrink (Leibniz-Institut für Medienforschung & Hans-Bredow-Institut, Germany). Lana Ciboci (Edward Bernays University College) is coordinating the Croatian team, with participation of Igor Kanižaj, Ivana Ćosić Pregrad, Dunja Potočnik, and Dejan Vinković.

Croatia also participates in the Media Pluralism Monitor led by the EUI Centre for Media Pluralism and Media Freedom (<https://cmpf.eui.eu/media-pluralism-monitor/>) since 2015. Researchers collect data about basic protection of the media sector, market plurality, political independence, social inclusiveness. Researchers evaluate risks by desk research and with the help of expert interviews. Paško Bilić (IRMO), Monika Valečić and Toni Prug, independent researchers, are the authors of the 2020 study.

The Open Society Institute undertook a European comparative project in 2000, “*Television Across Europe*”, in which the developments in television were analyzed in media policy and media system from the 1990s. The study included most western and eastern European countries, as well as Croatia (Peruško, 2005). An update was published several years later, but that did not include Croatia.

The next comparative project of the Open Society Institute was “*Mapping Digital Media*”, including Croatia. The project resulted in the publication about risks and opportunities of the digital transformation.

Another such topical researcher with local participation in comparative studies at the European level, was the *“Study on the Implementation of the New Provisions in the Revised Audio-visual Media Services Directive”* (Professor Peruško was the expert for Croatia, 2021), and the *“Comparative Study of Investigative Journalism”* (Peruško, 2016).

The *“Media Literacy Mapping”* project (<https://rm.coe.int/1680783500>), commissioned by the European Commission, has specifically contributed data on projects promoting media literacy, apart from official school curricula. Professor Igor Kanižaj (FPZG, University of Zagreb) has been one of the key experts involved in this research.

Research cooperation in EU funded research networks, especially the COST network, have also produced some significant research on the four ROs domains. The COST *“East of West”* resulted in Croatia with studies on media pluralism and diversity policy and the state of media concentration in Croatia and the CEE region (Peruško & Popović, 2008a; Peruško, 2010). *“The Audiences across Europe”* COST project (2010–2017) was instrumental in starting a significant research focus on audiences in Croatia. Croatian researcher participated in two comparative research projects within the scope of this COST network. One aimed to look at the type of media and information use based on national survey samples in 9 countries (Jensen & Helles, 2015; Peruško et al., 2015). The second project was qualitative and focused especially on news media use and employed the Q method to show news media repertoires across 10 countries (Adoni et al., 2017; Peruško et al., 2017).

An EU Framework program study *“Mediadem”* (2010–2013) also contributed to the comparative view of Croatian media policy. The study was led in Croatia by Nada Švob Đokić at IRMO, with participation of Paško Bilić.

Data about media use in election campaigns are collected by the Faculty of Political Science of the University of Zagreb, in representative surveys on political preferences conducted after each parliamentary election. The data are not publicly available, but several publications include the main findings (on media use and election expectations, see Vozab & Peruško, 2018).

The Institute for Social Research in Zagreb (IDIZ) (<https://www.idi.hr>) collects data about political literacy of high school students in Croatia (in 2010, 2015, and 2021). The questionnaire contains a battery of questions about media use. It also conducted research on youth values and practices, including ICT and media use.

1.7. Funding of Media and Communication Research

The number of publicly funded scientific research projects in the field of communication, journalism or media studies is rather small – in 2012 their share was 3,7 % and 3,4 % in the funded social sciences and humanities projects, respectively (Peruško & Vozab, 2014). The funding is administered in competitive fashion by the Croatian Science Foundation (HRZZ) (<https://hrzz.hr/en/>). There is only one communication related project funded at this time by HRZZ, focused on journalism experimentation with new genres, led by Professor Tena Perišin (CIM, FPZG, University of Zagreb). University of Zagreb funds research by its members on a yearly basis, and several communication and media related projects have been selected each year (although still on much smaller scale than other areas of science). Some research projects are funded by non-academic actors or NGOs, as described above.

After 2000, communication and media related research started to increase. This is related to the increase in the number of research units and university departments and specialized academic journals. In the following section we will focus on the analysis of published sources on which the following work of the *“Mediadelcom”* project will be based.

We focused on three types of published sources for the four ROs areas: 1) Articles published in international and Croatian academic journals; 2) Research reports published on the web pages

of various organizations; and 3) Books. We explored the lists of academic journals in domestic academic sites (<https://hrcak.srce.hr>) and international publisher databases (SAGE, Taylor & Francis, etc.) with key-words related to the operationalizations of the four key domains in the “Mediadelcom” project: the *legal framework of freedom of expression, journalism, media usage, and media competencies*. Online library catalogue of the National and University Library (NSK) (<https://www.nsk.hr>) was used to identify relevant academic books. Only the sources of satisfactory academic quality⁷ were used for the analysis.

The process of interviewing experts in specific fields of the four ROs is ongoing, and while some comments and suggestions have been already integrated in this draft, the final version will include a complete list of consulted experts and their possible comments.

2. Publications, Data Sources and Main Monitoring Actors of the Legal and Ethical Domain

Problems and issues in the Legal and ethical domain in Croatia were different in different decades, in relation to various critical junctures that preceded them. The year 2000 was a critical juncture in political terms when the change in government introduced a center-left coalition which announced a new media policy of media freedom and pluralism (Peruško Čulek, 1999b). The previous critical juncture in 1990 marked the first multi-party democratic elections in Croatia after almost 50 years, economic transformation, as well as independence from SFR Yugoslavia. Both had repercussions on the media system as well as on media research.

2.1. Freedom of Expression

The most prominent topics in both decades relate to freedom of expression, defamation, and the right to correction of published information (Prančić, 2008), and access to information.

Significant work related to the freedom of expression was produced in relation to civic and academic projects promoting media policy change, especially from the second part of the 1990s onwards. At that time the Croatian Law Centre was involved in supporting media policy research, resulting in a study “*New Media Agenda: For a European Media Policy in Croatia*” (Peruško Čulek, 1999b). The HND was also very prominent in this activity that included several academic researchers and journalists who identified the main problems facing different media fields in Croatia and proposed a necessary change to improve the field – in relation to freedom of expression, journalism, public service broadcasting, commercial radio and television, and print media.

Examining the situation in the 1990s, and the areas that need to change in order to enable a democratic role for the media, Alaburić (2000) sees the role of the legal system in the media system at three connected levels: “legislative, judicial protection, and in the aid to the self-regulation of the journalism profession” (p. 66). Alaburić further identifies the problems of media related legislation in 2000 as primarily stemming from the contradictory solutions for the same issue in the media law on public information and the Criminal Code. The possibility of the jail sentence for these speech related offences in the Criminal Code were also a problem at that time, as was the very strong protection of state and military secrets, without a balance in terms of the right of the public to be informed even in cases of information marked as secret (Alaburić, 2000).

⁷ We discarded publications without cited sources and those without or with insufficient description of research samples.

Authors see defamation in media legislature as a mixture of private and public law: in the first instance with the duty to protect personality rights of individuals, in the second the rights of the media to freedom of expression (Radolović, 2007). In the matter of the balance of the protection of personality rights and the freedom of expression of the media, Alaburić (2000) finds the judicial practice was in the decade of the 1990s more inclined to adjudicate in favor of personality rights and a remnant of previous authoritarian times (Alaburić, 1996, 2002), contrary to the standards of the European Court of Human Rights, although this was often corrected in secondary level courts, and improved in time to reach more or less acceptable European standards by 2000. With the changes in the media laws and the Criminal Code that followed the entry into government of the new center-left coalition in 2000, many of these problems were solved, but some inconsistencies remain.

Authors focused on the changes in media and related legislations and its effects on freedom of expression, although not all authors agreed on the outcomes. This included changes in the Criminal Code which started to favor more the freedom of expression and the public right to be informed, removed protection for high government officials, removed jail sentences for defamation and journalists, etc. (Badrov, 2007; Jakovljević, 2017; Maršavelski & Juras, 2019).

Among legal scholars, Alaburić (2002, 2003) also pioneered the investigation of hate speech from the legal standpoint. Authors examine hate speech and xenophobia as defined in the Criminal Code in the context of the Croatian EU accession and the European Convention on Human Rights and in terms international legal frameworks and the Croatian jurisprudence with that of the European Court on Human rights (Munivrana Vajda, 2013; Munivrana Vajda & Šurina Marton, 2016). The judicial practice in this area is not seen as fully effective. The authors also note the importance of the EU Framework decision on racism and xenophobia but evaluate all international frameworks as focusing only on some types of hate speech and discrimination, to the exclusion of others, i.e., based on sexuality or gender. More recently authors argue for a need to adopt specific legislation against hate speech on the social media, with the German example as the template (Roksandić Vidlička & Mamić, 2018).

Media scholars investigate the definition of hate speech (Vilović, 2011), media content and presence of hate speech (Labaš & Grmuša, 2011), and manifestations of hate speech in the Croatian context (Kulenović, 2016). Often, media scholars do not consider Croatian legal scholarship when discussing issues regarding freedom of expression and hate speech.

Disinformation and fake news are introduced as research topics in 2017 (Klauški, 2017; Nenadić, 2017; Vozab, 2017). Media literacy as a strategy to defend against fake news is one of the two main approaches to the topic in Croatia (Krpan Mofardin, 2018; *Media Studies* 2019 special theme issue, Vukić, 2020; Sivrić, 2020). Nenadić (2020) additionally discussed policy responses of platforms to misinformation and disinformation around the COVID-19 pandemic. The second approach to disinformation investigates new digital media affordances which allow fake news to appear (Peran & Raguž, 2019), or possible technological remedies (Grmuša & Prelog, 2020). The audience perspective is also present – how audiences recognize fake news and how this relates to trust in the media (Biloš, 2020; Krelja Kurelović et al., 2021; Peruško, 2021).

Legal scholars investigated the penal aspects of fake news in view of the COVID-19 pandemic (Pilić & Pilić, 2021).

2.2. Freedom of Information

Privacy and protection of personal data is mainly studied by media scholars in terms of media content which violates privacy, and how parents can protect children on social media (Brautović, 2007; Ciboci et al., 2013; Ciboci, 2014; Grmuša et al., 2019). Legal scholars analyze the

legal framework before and the transposition of the AVMSD, and in terms of self-regulatory measures adopted by Croatian media for the protection of minors (Lisičar & Jurić, 2014).

Legal scholars examine the access to public information and the special status of journalists but also in general terms of the constitutional guarantee of the right to information and the Act on the Right of Access to Information (NN 25/13, 85/15), but also the Data Secrecy Act (79/07, 86/12). Problems exist with the legal framework and its application there is a need to establish independent controls regards the Data Secrecy Act to prevent its misuse (Rajko, 2002, 2007, 2012). The number of complaints tripled between 2011 and 2014 based on the Act on the Right of Access to Information, while the number of solved cases dropped by a third (Vajda Halak et al., 2016). Journalistic complaints accounted for 8,53 % of all the cases.

Protection of journalistic sources is analyzed in only one article (Rajko, 2000), focusing on human sources and types of protection afforded in the legal framework. Whistleblowers figure as internal sources of information, as opposed to outside sources (witnesses, or those with information from insiders). Secrecy or protection of proprietary information are confronted with the public interest. The privilege that journalists have in protecting their sources of information (in the Media Act) stems from their obligation to inform the public in the public interest. He argues that journalists do not come under jeopardy of the Criminal Code for publishing secret information, because they are not obliged to disclose them. The article was written long before the Act for the Protection of Persons Reporting Irregularities (17/19) was passed. Only one article deals with the protection of whistleblowing, focusing on the protection in working-place law (Habazin, 2010).

Matanovac Vučković and Kanceljak (2018) show that copyright presents one of the limitations to the re-use of information of the public sector. The right to re-use public sector information is new in European and Croatian jurisprudence (EU directive from 2013, implemented in the Croatian Act on the Right of Access to Information 2013 and amended 2015). Research on copyright in relation to media use is almost non-existent in academic publications.

Rajko (2015) examines how the legal protection of trade secrets is used for restricting access to information. Media scholars in Croatia have not published on the topic of trade secrets as they affect journalistic freedoms.

2.3. Accountability System

Professional accountability of journalists and media organizations was studied regarding the practice and impact of the Ethics Council of the HND, or the public service (Croatian Radiotelevision) HRT (Nenadić, 2020). Skoko and Bajs (2007) show that 45 % of the resolved complaints to the Council were confirmed and published on the HND's website and in its journal (there are no other consequences). They mostly related to the published information not being truthful, balanced, or properly sourced, or to the publication of intimate and private details, especially in a sensational manner. Vilović (2009) analyzed the idea for the establishment of a Media Council in Croatia, as a media ethics self-regulatory body composed of journalists, editors, and members of the public, which had never materialized.

Authors analyze the effectiveness of the regulatory body for the audio-visual and electronic media, the Electronic Media Council, and propose changes to improve its autonomy, as well as self-regulation and co-regulation of media (Ivanuš, 2018; Lisičar, 2016; Lisičar & Jurić, 2014; Šola & Čičak, 2013; Bilić et al., 2017). These articles also reference journalistic codes of ethics.

Freedom of expression is included in the mandate of the ombudsperson for human rights and in their yearly reports include evaluations of the area (Ombudswoman, 2022). The ombudsman for children is also relevant in relation to the protection of children's rights in the media.

3. Publications, Data Sources and Main Monitoring Actors of Journalism

Journalism is the most analyzed of the four ROs domains, although not all the sub-domains are equally represented.

3.1. Market Conditions

Media pluralism and diversity are analyzed from several perspectives, both in terms of the international monitoring studies including Croatia (i.e., the Media Pluralism Monitor), and in research studies examining specific aspects of content or ownership diversity in Croatia and the CEE (Zgrabljic Rotar, 2003; Peruško & Popović, 2008a, Peruško, 2013). Research shows the opening of the media market, first in terms of press companies, then also in the audio-visual sector, with a high concentration of audiences and companies (Peruško & Popović, 2008a).

Promotion of media pluralism and limitation of media concentration in terms of policy and their implementation was a prominent research topic from the 1990s (Peruško, 2003, 2010, 2011, 2013; Peruško et al., 2011).

The issue of media market diversity in terms of ownership diversity is first discussed in terms of the role of foreign ownership of the traditional print media⁸ (Peruško, 2003), and later concerns were voiced about the reluctance of domestic regulatory bodies to enforce legal rules on media quality content in foreign owned media (Bilić & Švob-Đokić, 2012).

Later studies put a focus on the relationship of owner and media level / type diversity with content and genre diversity and pluralism of worldviews (Peruško, 2009; Roller, 2014; Bilić & Balabanić, 2016). Several studies were commissioned by arms-length actors in the media field to investigate the impact of media subsidies for content pluralism and diversity administered by the Fund for the Promotion of Pluralism and Diversity of Electronic Media (Čuvalo et al., 2013; Peruško et al., 2013b; Vozab et al., 2013; Burić et al., 2018), which also resulted in further research on audiences of non-profit media (Vozab et al., 2017).

In addition to domestic sources, valuable information about media market and media diversity is found in the Media Pluralism Monitor (Croatia is covered in yearly reports since 2015). An evaluation of media autonomy and sustainability is published annually in IREX Media Sustainability Index. Some of these studies also pay attention to ownership diversity, including news media income, and regional and local journalism. Market conditions for media and journalism are also analyzed in relation to production conditions and digitalization, as well as in relation to public service media conditions.

Detailed overview of digital media policy is analyzed in study by Peruško and Popović (2008b), and digital media market is analyzed in Bilić et al. (2017). Effects of digital advertising in Croatian media market were studied by Bilić and Primorac (2018).

External, internal, and received diversity at the structural and content level was analyzed by Peruško (2013) for the decade of the 2000. Received diversity was studied empirically in only one article (Peruško, 2009).

⁸ Media pluralism and diversity as a research and media policy topic after 2000 was also influenced by the membership of Professor Peruško in the Council of Europe Expert group on media diversity (AP-MD, 2000–2004), which resulted in two well cited studies (Bruck et al., 2002, 2004) and in the Group of Specialists on Media Diversity of the Council of Europe (MC-S-MD, 2004–2008, which she chaired in 2006 and 2007). Several conferences and workshops were organized in relation to this cooperation.

3.2. Public Service Media

The position of the PSB in relation to government / political field and the autonomy one of the key topics of academic and professional debate in Croatia since the early 1990s. The first legislative change in the media sector in the early 1990s was the PSB law (Peruško Čulek, 1998). Analyses of public service media conditions primarily deal with autonomy and financing (Car, 2019), or discuss the democratic aspects of public service media. The decade of the 1990s, while introducing changes to the legal framework of the PSB, retained the power of politics through the governing bodies of the HRT, and it was only after 2000 that MPs could no longer be members and were replaced by civil society representatives. An early study (Zgrabljic Rotar, 2003) reflects the hopeful times of the new media policy after 2000 and the democratic transformation of the PBS, although the transition of the HRT to public service did not go smoothly on any front.

Deputy-prime minister Željka Antunović announced as the aim of the new government pluralism and diversity of the media and “freedom and openness of the media to different ideas, and a critical role of the media in the political and social system” (Antunović, 2000, p. 45). Zgrabljic Rotar (2003) shows how the public opposition stopped the privatization of the third (cultural) public radio channel, while public support for the privatization of the third HRT channel enabled the opening of the market for television. Critique of the legislative changes relating to the PSB is the topic of many published papers (Popović, 2004; Peruško, 2011, 2012; Bilić & Švob-Đokić, 2016).

3.3. Production Conditions

Several articles point to different characteristics of journalism routines and practices, such as use of sources, criteria of news selection (see Grmuša et al., 2016; Perišin, 2004, 2008, 2016). Several articles discuss the impact of digitalization and social media on journalistic routines and practices (Nenadić, 2018, Osmančević, 2016; Volarević & Bebić, 2013). There is an emerging trend to evaluate the possibilities of innovative news production, such as constructive journalism (Kovačević & Perišin, 2018). The authors explain this by the “inclusiveness of the institutions as well as the nature of the relationship between the political and economic fields, since low inclusiveness and weak democracy do not provide sufficient checks and balances to preserve / maintain the autonomy of the journalistic field from the economic field” (Peruško et al., 2017, p. 18).

3.4. Working Conditions

Working conditions of journalists are usually evaluated as precarious, with lower wages and lower social protection compared to other European countries (Car, 2016; Popović, 2018). An increasing pressure in recent years was exerted through libel and “shaming” suits against journalists and media (Bilić et al., 2021; Peruško, 2020). A survey by the HND showed that there were 905 SLAPP procedures against journalists and media in 2020 (Kutri, 2020).

Comparative analysis places Croatia in a cluster of peripheral European countries based on the media system characteristics, where journalists perceive economic, organizational, professional, and other influences on their work as higher than in more developed European media systems (Peruško et al., 2017).

Commercialization of the journalism profession is usually analyzed through content analysis of media. Vozab and Majstorović (2021) show that media sensationalism has been one of the most researched topics in Croatian literature about journalism from 1990, and Worlds of journalism survey found that journalists perceive the pressure towards sensationalist news as strongest in the recent period (Peruško et al., 2016).

3.4.1. Intra-Organizational Diversity

Workforce diversity is almost exclusively analyzed in terms of gender (see Car et al., 2017; Peruško Čulek & Uzelac, 2000; Vozab & Zember, 2016). Questions of the labor market in cultural industries, including the media, are investigated in several publications of one researcher (Primorac, 2006, 2010, 2012).

The journalism profession in Croatia has gone through a process of feminization (Car & Bukvić, 2016; Vozab & Zember, 2016), probably due to the change in status of the profession which has become increasingly precarious, less prestigious, and less paid (Vozab & Zember, 2016). There is a noticed pay gap in the “information and communication sector” (which includes journalists), and hierarchical and sectorial segregation in Croatian media organizations (Car et al., 2017; Vozab & Zember, 2016).

Foreign media offices or correspondents’ production conditions were not studied in the Croatian literature.

3.4.2. Journalists’ Competencies, Education and Training

There are several overviews on journalism education in Croatia. Zgrabljic Rotar and Vrljević Šarić (2009) describe journalism education landscape in Croatia, Car and Bukvić (2014) place the development of journalism education in Croatia in the context of Southeast Europe, and Perišin and Mlačić (2014) analyse the potential for digital journalism education. There are now many media and journalism education programs at several public and private universities and faculties in Croatia, and the number of enrolled students is considered too high in comparison to market demands (Car & Bukvić, 2016). There is a variety of forms of journalism education: “high education scientific and specialist study program at public universities and private schools, as a study program for postsecondary education and in the form of vocational training for both young and professional journalists, organized by their employers or by professional associations” (Zgrabljic Rotar & Vrljević Šarić, 2009, p. 373). Although initial motivation for studies in media and journalism is high among students, it decreases with time, and more students prefer to choose a career of a public relation specialist, rather than journalist (Car & Bukvić, 2016; Majstorović & Vilović, 2012). The dissatisfaction with media and journalism studies is also driven by the student’s perception of a lack of practical training and skills acquired at such study programs (Car & Bukvić, 2016; Majstorović & Vilović, 2012). There is also a lack of post-university short courses and workshops for journalists that would aid them developing new digital journalism skills for the transition to the digital media age.⁹

3.4.3. Professional Culture and Role Perceptions

Several sources discuss historical development of journalism profession and evaluate general trends and characteristics of the profession (Car & Bukvić, 2016; Perišin, 2017; Peruško et al., 2016, 2017, 2021; Popović, 2018). There are also several articles on journalism professional culture and issues of ethics and autonomy. Journalism ethics is mostly analyzed through content analysis of media and evaluation of ethically dubious practices in media (Majstorović, 2013; Pavelin & Karamarko, 2015), although surveys with journalists also reveal adherence to different roles, norms, or ethics (Ivanuš, 2021; Peruško et al., 2016; Pjesivac & Imre, 2018). Recent study among journalism students found that the most valued journalism roles in Croatia are those of a detached observer and the watchdog role, which is perceived as more important than giving commentary and opinion (Pjesivac & Imre, 2018). The Worlds of Journalism study found that “reporting things as they are” is the highest appreciated value in Croatia (Andresen et al., 2017; Peruško et al., 2016).

⁹ The authors would like to thank Professor Nada Zgrabljic Rotar for this insight.

Normative issues are also analyzed in several text in the context of broader media policy, including the process of media policy transformation in terms of European integration (Peruško Čulek, 1999a, 1999b, 2003; Popović et al., 2010).

4. Publications, Data Sources and Main Monitoring Actors of Media Usage Patterns

Media audiences are relatively new as a research focus in media and communication studies in Croatia, and most articles about media audience research appeared after 2000 (Peruško & Vozab, 2017). Most of the media audience research in Croatia has been done by media industry and market research companies – in socialist period by large publishing houses and television research units, while after 1990 several market research agencies took over the measurement of audience size and ratings (e.g., IPSOS Puls and AGB Nielsen) (Peruško, 2011). Previous research found that only around 5 % of articles in media and communication research had audiences as a main topic (Peruško & Vozab, 2014). However, the same research found most of these articles contain empirical research and are in higher quality (Peruško & Vozab, 2014). In the last period, audience research moved from descriptive measurement of audience size to more nuanced analysis of media effects and repertoires. Moreover, it moved from exclusively quantitative analyses to diversity in methodological approaches, using qualitative and mixed methods analyses. COST Action “*Transforming Audiences, Transforming Societies*” in which many media and communication scholars from Croatia participated also helped to facilitate research of this topic.

The media usage research was rather scarce in the first decade after 2000, while interest in the topic and the number of sources rose especially after 2010. These are the topics predominantly analyzed in research of media use: traditional and digital media preferences, which is mostly presented through descriptive data; media use of specific socio-demographic groups, mostly young audiences; media generations; news media audiences; media effects related to media use; news consumption and its political ramifications, trust in media; and comparative analyses of media use.

4.1. Access to Media and Diversity of Viewpoints in the Media System

Several sources provide data which are useful for the assessment of audience access to media and channel preferences. Most recent and extensive data are included in the Reuters Institute Digital News Report published annually (Croatia is included since 2017). Traditional television still occupies the highest position as a news source in Croatia, followed by online editions of newspapers. Most popular television channels are those operated by commercial television companies, while public television is in the third place (Vozab & Peruško, 2021).

Croatian media regulatory agency (AEM) publishes reports on digital media use – this includes television (on television audiences, AEM, 2016) (digital switchover was in 2010), and monthly reports on people-meter shares and ratings of television channels and programs. Although traditional forms of media consumption are still most common, digital media use was rising already in the middle of our observed timeframe (AEM, 2013, 2016), together with the rise of Internet access in Croatia (in 2019, 81 % of households) (Eurostat, 2020). Media use is shaped also in relation to cultural capital and class (Krolo et al., 2020), and in relation to audience needs (Karuza Podgorelec, 2020).

Radio is prominent in Croatian media use (Peruško et al., 2017) but research is sparse (Mučalo, 2010; Mučalo & Knežević, 2014). Academic research on social media use is insufficient, apart from data on news choices. Several authors used the concept of media repertoires to assess me-

dia use in a high-choice media environment, in relation to media generations (Čuvalo & Peruško, 2017) and news repertoires (Peruško et al., 2017; Vozab, 2019a, 2019b). A mixed methods study (Peruško et al., 2017) found six news repertoires among Croatian audience: commercial traditionalist with national scope, local traditionalist with broadcast media in focus, internationally oriented news seeker, omnivore radio lovers and print avoiders, versatile online and print readers, and multiplatform local oriented light news snackers. Even among digital media users' popular television channels still hold an important position, but some digital outlets and Facebook also cut across different digital media repertoires (Vozab, 2019b). Education has an important role in distinguishing internationally oriented from locally oriented media users (Peruško et al., 2017; Vozab, 2019a).

Another stream of research deals with specific socio-demographic groups of audiences, mostly youth. Some of the reports and articles are based on the *"EU Kids Online"* research project (Potočnik, 2007; Ciboci et al., 2020) and there is an emerging strand of qualitative audience research in this area (Čuvalo, 2015, 2016). Newest report from the *"EU Kids Online"* shows that most children have Internet access, predominantly through mobile phones, and that preferred activities are entertainment, education, and communication with others (Ciboci et al., 2020). Excessive or unhealthy Internet use is not found in relation to most children, and they prefer face to face communication to computer mediated communication (Ciboci et al., 2020). Qualitative research on media use among young audiences analyses how media use is domesticated and embedded in certain type of habitus (Čuvalo, 2016).

Comparative analysis of media use find that Croatian media system belongs to the "southern" cluster of countries with generally lower media use (Peruško et al., 2013a). In relation to digital media environments, Croatia belongs to the "eastern" cluster of countries in which a higher preference towards Internet media sources (Peruško et al., 2015). Vesnić-Alujević and Simeunović Bajić (2013) analyze transnational television consumption focusing on audiences from post-Yugoslav states.

4.2. Relevance of News Media

There are also several sources of literature to draw upon in evaluation of relevance of news. Reuters Institute Digital News Report is also a valuable source in this aspect. There have been several articles published in recent period which emphasize news interest, news media use and news repertoires (Peruško et al., 2017; Plenković, 2020; Roller, 2014; Vozab, 2019a, 2019b; Vozab & Peruško, 2018, 2021).

Research in Croatia points out that the supply of media content in public interest (news and information program) does not match the audience demand, who seek more news and information program than it's offered on different television channels (Peruško, 2009; Roller, 2014).

Audiences in Croatia still dominantly inform themselves about political affairs from traditional media (Vozab & Peruško, 2018). Results from the Digital News Report (period from 2017 to 2021, as cited in Vozab & Peruško, 2021) show a gradual increase in Internet use, but not followed by an increase in digital news use, news interest or trust in news. However, there is a slight rise in trust in news audiences personally use, and concern over disinformation found on Internet. Analysis of news media repertoires found that "minimalist" users with low use of news sources are the most common group of users in Croatia, followed by traditional news users (Vozab, 2019a, 2019b). Younger generations are more often "minimalists" or "social and commercial media users" when it comes to news repertoires, while middle and older generations news repertoires consist of digital news media and traditional media (Vozab, 2019b). Around a quarter of the audiences follow community or civil society media – these audiences differ from the average media user by higher news interest, political engagement, and use a wider array of news sources (Vozab et al., 2017).

News media use in Croatia resembles the characteristics of the polarized pluralist media system (Peruško, 2012, 2013). Newspaper readers in Croatia differ from the average population – they are urban, have a higher socio-economic status and in general inform themselves more often (Čuvalo, 2010; Lamza Posavec & Rihtar, 2003). However, even among the newspaper readers there is a divide between older audiences with lower socio-economic status, with more rural background who usually vote for the right-wing parties; and younger, urban audiences with higher socioeconomic status, who usually vote for left-wing parties (Lamza Posavec & Rihtar, 2003). In the multimedia environment, the socio-economic divide shifted to distinguish between internationally oriented omnivore news users, who have a higher socio-economic status and political interest; and news avoiders, with poor news media diet, who are older, with lower socio-economic status and lower political interest (Vozab, 2019). Traditional news users are older, politically conservative, more educated and with higher interest in political news compared to “news minimalists”; while digital news users have higher socio-economic status, have higher interest in political news and are characterized by left-wing political leaning (Vozab, 2019b). Another analysis found a link between liberal values and online news use (Vozab & Peruško, 2018). Among young news media audiences, a trend is noted in which populist alignment determines use of digital news media outlets (Plenković, 2020). Young audiences who adhere to right-wing populism chose specific media brands and are also more religious and express less trust in media, while young audiences with left-wing populism characteristics express distrust to different social institutions, including media (Plenković, 2020).

4.3. Trust in the Media

Trust is regularly covered in the Reuters Institute Digital News Report. Audiences somewhat trust local and national media, while trust in journalists is not high (Čuvalo, 2010). Television use is positively correlated to trust in many of the political and social institutions, while Internet use is negatively correlated to trust in politics, government, and elites (Čuvalo, 2010, 2013). Qualitative analysis of trust in news media found that audiences in Croatia expressed distrust in news media as expert systems (Pjesivac et al., 2016, 2017). Significant predictors of trust in news are political orientation, access to news and interest in news. News use and interest in news are correlated to trust in news. Audiences closer to the political left have more trust in news, while those close to the political right are more concerned about disinformation (Vozab & Peruško, 2021).

5. Publications, Data sources and Main Monitoring Actors of Media-Related Competencies

5.1. Normative Sources

Structural analysis of media literacy education in Croatia is analyzed by Kanižaj and Car (2015) and Kanižaj (2016), who map media literacy practices in Croatia. Media literacy has not been a priority in education policy, and the term is for the first time only briefly mentioned in the education strategy in 2014 (Kanižaj & Car, 2015). Media literacy or media education is not defined in national legislation, and there is no official body responsible for planning, regulation and evaluation of activities connected to media education (Kanižaj & Car, 2015). Media literacy is being promoted and taught sporadically through engagement of various stakeholders with weak cooperation, stemming mostly from civil society (Kanižaj, 2016). In the last couple of years, most recent period the AEM in partnership with higher education institutions and NGOs, has been engaged more extensively in the promotion of media literacy. This included financial support for media literacy research and education projects, public campaigns, and development of different education materials. Media literacy projects in Croatia include skills like critical

thinking, media use, intercultural dialogue, creativity, participation, and interaction (Kanižaj, 2016).

Media literacy programs have so far been provided in formal education programs as part of media culture in curricula of Croatian Language and Culture, and some aspects of digital literacy are covered in computer classes. However, the formal media literacy education program has been evaluated as outdated (Ciboci, 2018; Ciboci & Labaš, 2019), and educators have not been equipped with competencies for media literacy teaching through their formal education (Ciboci & Osmančević, 2015). Media culture as a part of the Croatian Language and curricula does not encourage critical thinking, nor does it deal with digital media (Ciboci & Labaš, 2019). As a part of the experimental curriculum reform, the computer classes became more available and updated, so students now learn about “network security, data protection, electronic violence and concern for their digital reputation, personal data protection, inappropriate forms of behavior and seeking help for unwanted content or contacts” (Ciboci & Labaš, 2019, pp. 90–91). Usage of information and communication technology was introduced in 2019 in the curricula of elementary and high schools in Croatia as an inter-subject theme.

5.2. Assessment of Media-Related Competencies among Citizens

Croatia is ranked rather low on the media literacy index (24th place with 43 points) (Lessenski, 2021). Research on media-related competencies was rare in the first decade after 2000, and most of the research is published after 2010. Majority of sources which deal with competencies of media users focus on media literacy of children and youth. Media literacy of children and youth is analyzed through the evaluation of media literacy programs in the educational system, evaluation of informal media literacy education programs, testing media literacy among school-children or students, or thorough the analysis of the role of family and parenting styles for media literacy of children. It seems that most of the research focuses on media literacy in general, and less on digital or data literacy.

Some literature is available for the evaluation of media competencies of young media users. Early 2000s research found that although media consumption is one of the most common activities for the youth, there is less communication and discussion about this topic with parents (Ilišin, 2005). Recent analysis found that students have a rich media use but are weaker in critical thinking and production of media content (Ciboci, 2018). Research on critical thinking found that young students have difficulties in understanding stereotypical representation of women in the media (Bubalo & Jelić, 2015).

Media competencies of other socio-demographic groups are not researched at all. There is also a lack of research referring to users’ cognitive abilities (e.g., categories in the bibliography table referring to rational argumentation in public communication, critical consideration of information, authenticity of communication, etc.), users communication competencies, and some aspects of digital literacy. From the literature review, we can assess that the covered areas are those of user’s skills (students and young users) and social context of media related competencies.

6. Analysis of Research and Monitoring Capabilities and Quality

6.1. Comparative Analytical Overview of Data Processing Capabilities

Raw data on media systems / structures is available from different regulatory bodies (both media specific, like AEM, or broader, like the Croatian Competition Agency or the Chamber of Commerce), the Court Register, the Association of Communications Agencies, or the Croatian Bureau of Statistics. Some data are free and openly available, and some data are member only (people-meter TV audiences) although some of that data is regularly published either by the media themselves or by the AEM.

With a long tradition of communication and media social science research dating from the 1960s, and presently six academic journals for media and communication studies, the number of published research studies is high (over 500 were selected and analyzed for this case study). The availability of data varies by ROs domain.

Policymakers in the media field are not quick to use research evidence as basis for their policies. Even if they send representatives to different round tables or conferences, or invite academics to legal proposal working groups, their suggestions are rarely implemented.

6.1.1. Law and Ethics

The Legal and ethical domain includes an adequate number on sources regarding the freedom of expression area predominantly focusing on defamation, also including hate speech and to a lesser (or more recent) extent, disinformation. Protection of personal data is not that well covered by research, and copyright protection is almost non-existent topic in relation to media. Research on the protection of journalistic sources is also insufficient, with only one research article, and no research is available on whistleblowing and the media and trade secrets. Issues of media ownership and transparency are well covered and presented in the Journalism domain.

Research coverage of the area of accountability is also not sufficient, with only a few articles dealing with ethical issues, and several more investigate the accountability of regulatory bodies. General normative perspectives of the media and journalism are more numerous, especially in various articles or books dealing with media policy issues.

6.1.2. Journalism

Most fields of interest in the Journalism domain are adequately covered and allow further analysis in Case study 2. The Journalism domain includes several articles and raw data regarding shape of the media market and the level of its pluralism and diversity. Production conditions for journalism are mainly investigated in relation to digitalization changes, while other aspects (economic) are not as numerous. Although PSB as a topic has permeated the media-policy related debate since the 1990s, we would expect more academic studies on this issue. Working and organizational conditions for journalists were also a topics of research studies, and the area of professional culture and journalistic competencies is well covered. There is also a host of articles that in some way touch upon journalism, often in relation to the quality of its content or in relation to representation of various social groups, that can be used as supporting evidence for other domains (e.g., legal).

6.1.3. Media Usage

Media usage research is rather scarce before 2010, but later studies are adequate to answer many of the questions posed by our study. Sources exist for evaluating access to media, relevance of news media, trust in the media.

6.1.4. Media-Related Competencies

The media literacy area / media competencies domain is well covered in relation to children and young people, but the data is not available for older audiences. The research only started after 2010 so the first period of our study is not covered.

6.2. Monitoring Capabilities and the Quality of Data and Knowledge

6.2.1. Recency and Continuity of Data (for each of the domains)

The raw data required by law are gathered annually and some are also published annually – this includes the change of structure of ownership and change to ownership, press circulation, advertising, media, and genre usage, etc. More than two thirds of all academic and other published sources are dated after 2010, although some of these studies also pertain to the first decade, i.e., 2000–2010.

Media-related competencies and Media usage domains are deficient in data or information regarding the first decade. The Journalism domain has enough articles through, but not all the topics / key words are equally represented. For the Legal domain, we have enough data for both the first and the second decade, and it is possible to view it in a longitudinal fashion.

6.2.2. Complexity of Data-Gathering (for each of the domains)

Different data are collected by different institutions, there is no one-stop shop. Data (required by law) are gathered by institutions with the same methodology in all parts of Croatia, but they differ according to the type of media because they are gathered by different institutions and according to different legal requirements i.e., articles in various laws / or commercial interests.

6.2.3. Trust and Reliability (for each of the domains)

Most data are gathered according to transparent methodology. Accuracy is the same as with all statistics (i.e., the accuracy depends on the bodies that send the data, and sometimes those might not be really accurate). There are also data from various research projects that are useful, as described above. Not all the published literature includes reliable data, some articles do not cite data sources or provide information on how the data was collected. We made every effort to exclude such articles and publications from our analysis and the database.

One issue that especially stands out in the Legal and ethical domain is the importance to distinguish between the texts by legal and media scholars. Legal scholars have a thorough understanding of the law and its different implications, but often have no knowledge about the broader media context or any media and communication theory, and thus their broader statements are sometimes inaccurate or misleading. Media scholars are on the other hand much more invested in the freedom of the media and journalists over issues of personal rights (the exception are studies involving the rights of children in the media), and their analyses sometimes do not consider the interaction of different legislation. It was difficult to exclude all the articles that have a problem in one of these areas; we often used articles from legal scholars in relation to their legal analyses, but not in respect to their broader statements about the media system (there are exceptions, especially legal scholars who specialize in media). It would be useful to bring these two groups of scholars together to improve the interdisciplinarity of the research area.

In relation to articles by legal scholars, an additional issue is their often-inappropriate citation practice, where they do not use the standard international scientific norms of using quotation marks around direct quotations of texts by other authors but include only a footnote reference from which it is not clear if the text / which part of the text is a direct quotation. This practice is widely used in different legal reviews and legal publications that we consulted (attempts to challenge it in court in terms of plagiarism were not successful as this kind of citation was pronounced to be the standard in the field).

Legal publications and articles are often not published in open-source journals, so their availability is limited, although they are available in public libraries.

One significant problem with the quality of published work is that some authors make sweeping statements that are not factually correct, and without any citations to support them. This negatively influences the cumulative quality that science has in ideal situations, because newcomers to the discipline take these statements for a fact and continue to quote the source. This is certainly the result of a low quality of academic reviews before publication in some journals, and the examples are also found in disciplinary journals like law reviews with ignorant statements relating to social or historical circumstances of the media.

6.2.4. Availability of Experts and / or Specific Research Structures (for each of the domains)

Although communication and media studies are a small academic field in Croatia (although with a relatively large number of journalism / communication programs and academic journals), there are experts in all the four dimensions of ROs. The quality of their published work varies, as well as does its impact. As Croatia is very small country (the last census in 2022 showed a little less than 4 million), its experts are easily identifiable, and they are not too numerous. Although the number of published articles in media and communication is very large, the number of authors who can be seen as experts is not that large.

The key authors with competitive research projects have been named in the first part of the study.

7. Conclusion

The primary aim of this study was to assess the available of (primarily) academic knowledge and data in the four ROs domains in the past 20-year period. The presumption that academic and other research and monitoring of the state of the media system, or the political information environment (Esser et al., 2012) can make an impact, is that the decision-makers (the government and political actors) are willing and capable to learn from and consult with those who possess the knowledge. Thus, in addition to the analysis of the institutionalization of the academic discipline in terms of the establishment of academic programs, journals and empirical research (Löblich et al., 2011) and its intellectual history in terms of the topics under study, research quality and the predominant approaches (Splichal, 1989a, 1989b; Potter et al., 1993; Fink & Gantz, 1996; Bryant & Mirion, 2004) to the four key domains that are seen as influencing deliberative communication in the “*Mediadelcom*” project, it was necessary to include also an analysis of policy-making bodies and actors influencing the media system. Such an extended institutional analysis identified the network of actors with relevance for the four risk and opportunity areas. In extending the institutional analysis of the field of the academic discipline with the field of the media and media system, other important actors, and their capacity to use research-based evidence were identified. This approach similarly to Splendore and Grandusi (2021, Italian Case study 1 in this project) and employs Bourdieu’s (1993, 1996) field theory to link the academic and pragmatic fields of media and communication. A full analysis of the impact of the political

field on the academic field of media studies and the field of media practice, and vice versa, needs further analysis.

The field of communication and media studies started to develop in the 1960s Croatia in relation to western academic thought and this can be seen as an advantage over CEE countries where this only started after 1990 (with a few exceptions). The quality of research, in terms of theoretically designed empirical research, still leaves a lot to be desired. Earlier studies show that with each decade after 2000 (the decade of the 1990s being a retrograde decade when the quality of published media and communication research was lower than in the 1980s) the number of such articles is increasing, to reach 46 % in 2011 (Peruško & Vozab, 2017). For some of the ROs dimensions (Media-related competencies and Media usage), it will be difficult to show trends or turning points in the subject areas, as relevant publications only appear after 2011.

Along with the growth in the volume of research and academic production after 2010 – some two thirds of relevant research was published in the second decade of our interest – there is an increase in research in all four domains. The largest number of sources are found in the domain of Journalism, followed by the Legal and ethical domain. The least numerous sources are in the Media related competencies domain, especially pertaining to journalist competencies. The period from 2011 to 2016 was the most productive in research of most of the domains, while the greatest number of research in the Media usage / Audiences' domain is published in the latest period from 2017 to 2021. Research on Media usage published before 2010 is very scarce, and while the second decade has many studies, there are still substantial knowledge gaps, especially in relation to media trust and social media use.

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CZECHIA

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive Summary

The Country Case Study focused on the nation's potential to monitor the four domains. Given the small size of both the Czech academic field and the media industry, and the expected small number of resources, our team decided to gather the data in an “everything we can find” manner. We focused on published academic texts, student theses, and media industry data.

In general, the analysed texts are uneven in terms of:

- 1. Saturation of time periods** – Until 2010, academic publications were sporadic, and authors were initially foreign academics; later, industry data were gradually systematised and slowly became inaccessible and monetised;
- 2. Thematic density** – Focus on individual topics was more a reflection of authors' and media organisations' individual interests than a systematic strategy of the field and industry;
- 3. Thematic breadth** – The small size of the academic field and the limited number of associated academics and students did not allow for coverage of even the core disciplinary topics over a longer period; the limited size of the media system has not created a sufficiently competitive environment for data to be accessible or for a relevant professional association to emerge; and
- 4. Quality** – Scholarly texts tended to be theoretical or descriptive, and only in later years did they build on empirical data, plus relevant industry data became inaccessible.

This list is a set of risks that concern our monitoring capabilities and the quality of the sources.

1. Introduction

Our Country Case Study of the media system of Czechia focused on the national potential to monitor four domains: 1. Legal and Ethical Regulation; 2. Journalism; 3. Media Usage Patterns; and 4. Media-Related Competencies. Therefore, we proceeded from the collecting and processing of “data points” to the evaluation of data and sources. Data was gathered in an “everything we can find” manner, due to the small size of the related Czech academic field, the small media industry, and the expected dearth of resources. We focused on the following: 1. Published academic texts (i.e., articles, books, book chapters, reports); 2. Student theses; 3. Media industry data; and 4. Data from Non-governmental Organizations (NGOs). The four sources of data reflect the main bodies of research (and media education) in Czechia, which are conducted at universities (e.g., mainly Charles University, Masaryk University, and Palacký University), research centres (e.g., the Czech statistical office), NGOs (e.g., One World at Schools), and the media industry (e.g., statistics from the public service media, private holdings). The connection among individual bodies

is insufficient because the communication and the sharing of the data is non-transparent and often non-existent.

1.1. The main traditions and turns in the 21st century and current situation of the media research and monitoring system

In general, the analysed texts are uneven for several reasons. First, the saturation of time periods – until 2010, scholarly research publications were produced rather sporadically (e.g., Jiráček, 1997; Kaplan & Šmíd, 1995) and the authors were initially foreign academics (e.g., Jakubowicz, 2007; Gross, 2002; Gulyás, 2001; Wachtel, 1996); on the other hand, the industry data were slowly systematised and gradually became inaccessible and monetised. Second, thematic density – the concentrated focus on individual topics was more of a reflection of the authors' and media organisations' individual interests than a systematic strategy of the field and industry; Third, thematic breadth – the small size of the academic field and the limited number of academics and students did not allow for coverage of even the core disciplinary topics, nor for a long time period, and the limited size of media system has not created a sufficiently competitive environment for data to be accessible or for a relevant professional association to emerge; and, fourth, quality – scholarly texts tended to be theoretical or descriptive, only in later years did they build on empirical data and, on the contrary, relevant industry data got largely inaccessible. Criticism of the academic field, where authors are not especially research-oriented and texts do not reach the necessary quality, did emerge, albeit to a small extent: the editors of the only domestic professional journal, *Media Studies*, pointed out in 2008, two years after the journal was founded, that they were facing the lack of potentially publishable articles (Macek & Reifová, 2008).

1.2. Explanations of any other structural peculiarities that may be important for the report

On a more general level, this reality corresponds to the main shifts in the 21st century and the current media situation in Czechia, including: the gradual establishment of university departments since the early 1990s; the establishment of grant support for research (i.e., the Grant Agency of Czechia was established in 1993 and the Technology Agency of Czechia started to provide grants for social sciences in 2017); the gradual development of research about the media (i.e., the establishment of the Publishers' Union in 1991, the beginning of the verification of the amount of copies sold of the press in 1993, the launch of research on readership, listenership, and viewership in 1994); the changes in media laws (i.e., new laws from the early 1990s, an amendment to the broadcasting laws in 2001, an amendment to the press law in 2013); the development of grant support for the media; and the establishment of the Foundation for Independent Journalism in 2016. A more comprehensive overview of the development of the media system can be found in national Case Study 2, which is specifically focused on the contextualising aspect of the national cases.

We analysed a total of 709 texts. We searched for them in university databases and online (i.e., Google, Google Scholar, library databases), using keywords and the names of experts and the names of organisations (e.g., professional, non-profit). We assessed the relevance by analysing their content and assessing their relationship to the project domains.

The academic publications, by virtue of their topics and time of creation, all reveal the above-mentioned specificities of the media studies field in Czechia between 2000 and 2020. We found 370 relevant texts¹⁰ that focused mainly on the general analysis of the media system, journalism education, journalists, and journalistic work.

¹⁰ There were 172 texts among the scholarly publications in the *Journalism* domain; 158 in the *Media Usage Patterns and Media-Related Competencies* domain; and 40 in *Legal and Ethical Regulation* domain. There were

Even the student theses show that the tradition of Czech media science research has been building in a more concentrated way since 2010, because, in the first decade of the 21st century, there were only isolated examples of Bachelor's, Master's, or Doctoral theses. Later, the topics of the theses logically followed the most represented themes of academic texts, as they correspond to the priorities of their supervisors. Moreover, most doctoral theses in the Czech academic tradition are translated into some type of academic output, most often into continuous articles and a final book. However, there are not many such research-oriented theses in the Czech field; there were just 256 in our sample.¹¹

The fewest traceable and publicly available topics are in the data produced by the media industry itself and by the NGOs that focused on media analysis, with only 8312 in the Czech context in the analysed sample.

1.3. The main institutions/bodies and actors of media/ communication/ journalism research, monitoring and education

With focus on the agency of different actors in propelling certain risks and opportunities at the outlined critical junctures, these are the groups with either specific knowledge of the Czech media development or with a long professional history: (1) media industry representatives (e.g., media owners, media managers, journalists, journalists' professional unions); (2) communication researchers and lecturers; (3) media analysts and analytical companies; and (4) NGOs. In this sense, we also selected our communicative partners for expert interviews.

Continuously researched data according to a consistent method are sporadic – either they are part of international projects (e.g., *The Reuters Institute for the Study of Journalism*; *Worlds of Journalism*; *Monitoring Media Pluralism*) or they are part of industry data, such as readership and viewership.

While looking at the data, it is obvious that the sources often originate in one of the three¹³ main departments of media studies and journalism in Czechia. Each department has a slightly different set of sources, which is influenced by the topical specialisation of each individual department. For example, the *Institute of Communication Studies and Journalism at Charles University* in Prague (<https://iksz.fsv.cuni.cz>) has the longest tradition. The first publications, which were rather descriptive and theoretical, were produced there and focused on the general transformation of the media landscape, media history, and the post-socialist transformation of the media. Later, researchers began to focus on media and politics, political communication, journalists, media literacy, and television series. By contrast, in the last 10 years, the *Department of Media Studies and Journalism at Masaryk University* in Brno (<https://medzur.fss.muni.cz>) has established itself with studies of audience research, especially in relation to the internet and new media (besides the department's researchers, there are also researchers in the *Interdisciplinary Research Team on Internet and Society* (www.irtis.muni.cz)). Researchers also work on history, journalistic professional roles, local journalism, and cultural research. The emphasis is mainly on empirical research based on sociology and psychology. The *Department of Media and Cultural Studies and Journalism at Palacký University* in Olomouc (www.kmksz.upol.cz) is more theoretical at its core.

dozens of other texts focused on outlier topics, like content analysis; textbooks; historical analysis; texts focused on PR and marketing, IT development, games, zines, and literature.

¹¹ Among the students' theses were 100 in the *Journalism Domain*; 105 in the *Media Usage Patterns and Media-Related Competencies Domain*; and 51 in the *Legal and Ethical Regulation Domain*. There were other dozens of research theses focused on outlier topics – content analyses.

¹² Among media industry data were 20 in the *Journalism Domain*; 31 in the *Media Usage Patterns and Media-Related Competencies Domain*; and 32 in the *Legal and Ethical Regulation Domain*.

¹³ There is also one department at a private university, *Department of Media Studies, Metropolitan University Prague*, which continues the tradition of the Charles University Institute in terms of staff and themes. However, it has not yet been very prolific in the production of research-oriented projects or texts.

Only a few examples of empirical research can be found. There is a strong branch that conducts historical research, but the audience research is lacking.

1.4. The funding system of media research and monitoring (public, private, project-based etc.)

This is tightly connected to the financing and “human resources” of media research. Czechia (due to its small size) lacks the “human resources”, which is only enhanced by the “non-permeability” of different bodies of research (e.g., industry and academia). The situation is exacerbated by financing. Academics are dependent on institutional financing for their research, which can cover only a small amount of their needs (especially in large studies). In addition, there are two main grant agencies. The *Grant Agency of Czechia*, established in 1993, awards grants in the social sciences, among other things, for primary media research. The *Technology Agency of Czechia*, founded in 2009, also offered a new grant programme for social sciences in 2017, but it is oriented towards applied research. Researchers can apply for grants offered by both groups; however, the success rate is generally quite low for projects in the social studies and humanities (i.e., around 20-30 %, Hladík, 2021). Additionally, one can apply for international grants, such as *Horizon2020*, *Proof of Concept*, and others, which are only rarely won in our field of study. This situation is unfortunate and poses a risk for future media research that might be very limited due to the lack of financial opportunities.

1.5. The national research database and most important journals

The gathered data shows that the most relevant national research journals in the field (and connected to the field) are *Mediální studia* (Media Studies), *Sociologický časopis* (Journal of Sociology), and *Sociální studia* (Social Studies).

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

Research on media ethics and media law is still rudimentary in the Czech academy. So far, there is no original theoretical work or empirical monograph that summarises the basic problems within the Czech environment. The closest is Václav Moravec's *Proměny novinářské etiky* (The Transformations of Journalistic Ethics, 2020), which is more of an eclectic collection of various topics than a systematic survey.

Research in the field of media law in Czechia is fragmented and concentrated mainly in the law faculties of large universities. Significant space is devoted to new information technologies (Moravec, 2013), *copyright* in the digital environment (Myška, 2020; Polčák et al., 2018), and the issue of personal data (Míšek, 2020). At the *Institute of Law and Technology of the Faculty of Law of Masaryk University* in Brno, there is a team (<https://cyber.law.muni.cz/en>) that is researching the legal context of new technologies and the digital environment; they also publish a specialized journal, the *Masaryk University Journal of Law and Technology*.

2.1. Freedom of expression

Moravec (2020) presents the key theoretical issues of the normative perspective — journalism ethics (e.g., objectivity) — and provides specific examples from the Czech news media. The book widely employs a legal perspective rather than in-depth ethical discussion. It serves more as a textbook than a monograph. However, it concludes with a chapter about the history of Czech media ethics (including *codes of ethics*, *media councils*, *ombudspersons*, and the *freedom of ex-*

pression), which is highly informative. The core of the recent scholarly research lies in the historical perspective (e.g., *media ownership, media councils, freedom of expression*), especially the development of self-regulation (Moravec et al., 2003; Osvaldová, 2011; Waschková Čísařová, 2015), but also the general perspective (Končelík et al., 2010; Pouperová, 2013).

International organisations, such as *Reporters Without Borders* and the *Ethical Journalism Network*, have reported about Czechia. A 2021 report by the Ethical Journalism Network found that there has been a significant erosion of press freedom over the past five years in Czechia, mainly due to the concentration of media ownership and its link to politics (i.e., *freedom of expression*).

2.2. Freedom of information

Media law is also significantly represented (Sokol, 2001; Rozehnal, 2015) as an informative compendium that presents the main principles of Czech media law in the form of textbook (including *defamation, the protection of sources, access to information/sources, copyright protection, and normative perspective*).

2.3. Accountability system

In media ethics, there are mainly partial theoretical contributions, which are often based either on a very general perspective or on an attempt to bring to the Czech environment a topic that has not been fully treated academically, but also smaller empirical studies or commentaries focused mainly on the issues of diversity, stereotyping, or sexism (Urbáníková, 2020; Hanych & Andreska, 2020; Motal, 2015; Štětka, 2007). In general, it can be stated that academic interest in media ethics in Czechia after 2000 is marginal, unsystematic, and eclectic, and often reflecting only general problems and taking an exploratory form. New topics related to the online environment or emotional labour are also emerging (Kotíšová, 2019).

A much larger amount of empirical material has been provided by student theses (i.e., Bachelor's, Master's, and Doctoral theses – see e.g., Metyková, 2006), which provide case studies and address the theoretical problems of selected and topical issues (i.e., terrorism, war photography) on the surface of expert interviews (i.e., normative perspective, media accountability). This fact shows both the students' interest in ethical issues and the lack of willingness of academics to conduct research within their existing projects. It can, thus, be assumed that the exploratory material is provided by the students through their theses, rather than coming from organic and systematic study in an academic setting.

In Czechia, media ethics are dealt with either by regulators (e.g., *Broadcasting Council, Czech Television Council, Czech Radio Council, Czech Press Agency Council*), by professional organisations (e.g., *Syndicate of Journalists, Association of Regional Journalists, International Press Institute, Union of Publishers, Advertising Council*), and, marginally, by academic institutions. Recently, in 2021, the first academic team that was directly focused on media ethics was established at *Masaryk University – Centre for Media Ethics and Dialogue* (CEMETIK, www.cemetik.cz/en), which is led by Jan Motal. Another highly respected theorist of media ethics is Václav Moravec, a long-time journalist, who works at the *Department of Journalism, Charles University*. The *Faculty of Social Sciences, Charles University*, cooperates with the *European Journalism Observatory* (<https://cz.ejo-online.eu>), occasionally publishing reports or articles on media ethics. In 2020, a new ethically oriented media studies programme was established at *Sts Cyril and Methodius Faculty of Theology, Palacký University*. Other academics and professionals engage in partial analyses or public commentary on media ethics, but this is not systematic (e.g., researchers from the *Faculty of Medicine, Charles University*, published a report on the representation of people with mental illness in the Czech media, Nawková, et al., 2010).

As data, from an institutional perspective, the decisions of *the media councils* and the *Ethics Committee* of the *Syndicate of Journalists of Czechia* (a member of the *International Federation of Journalists*) are available (as a normative perspective, including the code of ethics). The documents of the media councils have an administrative character (i.e., they have a special legal status and cannot be considered, strictly speaking, as analyses that reflect an empirical state of reality and they are rather normative statements that are meant to regulate this state). In this sense, they should be treated with caution and taken as material for analysis rather than the results of the analysis itself.

The reports of the Ethics Committee do not usually manifest as an analysis, but as an assessment of the compliance of the case submissions with the *Syndicate's Code of Ethics* (*Stanoviska Komise pro etiku Syndikátu novinářů ČR*). It should be noted that this is often a formal approach. The decisions do not present independent arguments, but mainly refer to the norms, with very little recourse for new or expanding interpretations (e.g., in the case of a journalist using the recording of a phone call without the knowledge of the respondent, the commission only states that the journalist should always introduce themselves on the phone – this can be considered as basically missing the point, see *Stanoviska Komise pro etiku Syndikátu novinářů ČR*, report from 12/9/2007). The reports often describe technical and organisational matters (i.e., that a given submission was made, the editorial office was contacted, the case was solved or adjourned), but usually they do not provide any plausible generalisation and provide only apodictic statements of legal wording. It is noteworthy that the materials often contain a simple transcript of the editorial office's statement on the complaint about the journalists' actions, with a note that the commission "takes note of the statement and sends it to the complainant". In such a case, the Ethics Committee is merely acting as a mediator for communication with the media and has, essentially, resigned from its original role.

Moreover, the Ethics Committee is selective in its assessment of media ethics (e.g., it refuses to deal with tabloid cases). It usually advises complainants to go to court (e.g., breach of contract by employers). This is also notable because here the Ethics Committee is completely resigned to the union nature of the syndicate, and it does not actively fight for the rights of journalists in the workplace. At the same time, excluding tabloids from their evaluation creates a double standard in the application of ethical criteria (as though ethics did not apply to them). The Ethics Committee is also very cautious in commenting on opinion journalism, as though it does not apply to the criteria of ethical journalism (e.g., conflict of interest, fair criticism). In the cases that have resonated very strongly with civil society and media professionals (e.g., the xenophobic articles in the newspaper *Prostějovský večerník* or the manipulative coverage of refugees by TV Prima in 2016), the Commission limited itself to very brief statements, without giving the cases the importance that they deserved and without being able to take a nuanced and informed position about them. In this sense the Ethics Committee's materials are not representative and do not reflect the real debate on ethics in the public and among journalists themselves. Their value for assessing the state of the media in Czechia is, therefore, low. Thus, these materials should be understood to be evidence of the very limited and legalistic approach of the Syndicate of Journalists of Czechia to ethical issues, rather than a truly normative and reality-reflective analysis. It is extremely difficult to abstract from the corpus of data any general principles that define the behaviour of journalists and editorial offices beyond what is already in the Code of Ethics or the law. At the same time, the relatively low level of engagement and independence in the judgement of the Ethics Committee, which relies either on the norms or the explanations given, is remarkable.

Other analyses by Czech NGOs (e.g., *People in Need*) are also available, especially on the topics of migration and the representation of ethnicity (i.e., *media responsibility*). The *Foundation for Independent Journalism* produces a media rating, which is an important indicator of media quality in relation to ethical and legal issues. Since 2006, the non-profit organisation *Oživení* (Revival)

has been systematically working on the issue of municipal media and, in 2013, based on its activities, the law was changed to regulate the rules for the activities of these media. In 2014, the organisation published a major analysis of municipal media (Kameník & Kužílek, 2014). This analysis concluded that the law had only a minimal impact on reality.

3. Publications, data sources and main monitoring actors of journalism domain

Describing the state and transformation of the media system was a key topic of scholarly studies around 2000 (e.g., Jiráček, 2000). It was conceived as an account of recent history and follows the tradition of Czech media and journalism studies as a field oriented towards historical essays (e.g., Šmíd, 2004; Moravec, 2003; Köpplová & Jiráček, 2001). At the same time, however, these texts are difficult to access because they are mostly part of conference proceedings or chapters in domestic or foreign scholarly books, both of which are hard to find as online resources and, paradoxically, even more difficult to find in libraries. On the other hand, foreign authors have paid concentrated attention to the Czech media, mostly from the broader perspective of the transforming media systems of Central and Eastern Europe, since about the mid-1990s (e.g., Jakubowicz, 2007; Gross, 2002; Gulyás, 2001; Wachtel, 1996; Kettle, 1996).

Unsurprisingly, Czech student theses focus on the analysis of changes in the media system (e.g., Červenková, 2011); the analysis of different types of journalism, including investigative, citizen, and online forms (e.g., Nedomová, 2018); the transformation of journalistic work (e.g., Ďuričková, 2016; Ježková, 2019); and new trends in journalism (e.g., Vilímcová, 2017).

3.1. Market conditions

More sophisticated texts written by Czech authors on the transformation of the media system have appeared with the passage of time, like with the approaching anniversary of the Velvet Revolution (Waschková Císařová & Metyková, 2015; Volek, 2009; 2011; Škop & Ondrášek, 2011; Foret et al., 2008), although some of these texts are mainly descriptive (e.g., Jiráček & Köpplová, 2008a; 2012; 2020).

The general theme of Czech media and journalism is also reflected in more narrowly focused texts: *local media and journalism* (e.g., Waschková Císařová, 2013; Metyková & Waschková Císařová, 2020; Fleissner & Müller, 2016); photojournalism (Šimůnek, 2011; Lábová & Láb, 2009); computer games (Švelch, 2008); radio and television (Hanáčková et al., 2016; Lapčík, 2012); cinematography (Szczepanik et al., 2015); creative industries (Szczepanik & Vonderau, 2013); and book production (Kirkosová, 2015). Some of these were results of international comparative projects (e.g., Šmíd, 2007).

More specifically, publications on the relationship between the qualities of democracy and the qualities of media, particularly *media ownership* and its consequences, have been based on the European Research Council (ERC) project *MDCEE – Media and Democracy in Central and Eastern Europe*, which is based at the University of Oxford (see Štětka, 2011). These covered the development of the Czech media system (e.g., *market conditions*) through analyses based on empirical data and longer-term attention, and offered comparisons with other CEE countries in terms of ownership (e.g., Štětka, 2010) through the lenses of the status of media in democratic societies (e.g., Štětka, 2011; Jebril et al., 2013; 2015; Štětka & Örnebring, 2013) and the mapping of the functioning of public service media (Bajomi-Lazar et al., 2012).

In the last five years, authors have also emphasised topics related to the relationship between media and democracy (e.g., Hannah, 2019; Kim, 2016), which are key to our theme of deliberative communication, including: the analyses of media development in illiberal democracies of

CEE countries (Surowiec & Stetka, 2020); disinformation (Stetka & Mazák & Vochocová, 2021); and political participation (Vochocová et al., 2016; Švelch & Vochocová, 2015). Since 2016, long-term data on the plurality of Czechia's media system have been based on the international comparative project *Monitoring Media Pluralism* (Štětka & Hájek, 2017; 2020; 2021; Štětka et al., 2016).

The industry has, in recent years, produced descriptions of the *market conditions* or analyses of *media ownership* (e.g., Mediaguru, 2020; Czech Statistical Office, 2014), but it offers a more focused analysis of the media primarily through the lens of audience measurement only (see the *Media Usage Patterns and Media-Related Competencies* section below).

Other producers of more focused industry analyses are industry and professional associations. Unfortunately, the *Syndicate of Journalists of Czechia* does not play this expected role (for criticism see e.g., *Legal and Ethical Regulation Domain*). Some partial analyses (e.g., *Nadační fond nezávislé žurnalistiky*, 2018) are produced by the *Nadační fond nezávislé žurnalistiky* (Foundation for Independent Journalism), which also repeatedly assesses the quality of Czech media (*Nadační fond nezávislé žurnalistiky. Rating médií*). A critical reflection on the Czech media market, thus, remains primarily the responsibility of foreign organisations (e.g., Reporters Without Borders 2020; 2016; the European Federation of Journalists, 2019; the Reuters Institute for the Study of Journalism).

3.2. Public service media

Only partial information is available for *public service media conditions*, like in the analyses for councils or annual reports (e.g., Czech Radio Online Activity Statistics, 2018; 2019; Czech Television Broadcasting Data 2013-2021; Czech Radio Council Annual Reports; Czech Television Council Annual Reports). Unsurprisingly, this is not available for private media, with exceptions such as *Economia's Editorial Independence Council* (see Economia 2020).

3.3. Production conditions

Production conditions is a scarcely covered topic in our realm. We can find some sources reflecting on investigative journalism and its autonomy (Stetka & Örnebring, 2013), and more studies on foreign correspondents (Kotissova, 2019; Nečas & Vochocová, 2010; Láb, 2014).

3.4. Working conditions

More focused and relevant research attention has been paid to journalists themselves (e.g., their *working conditions, organisational conditions, professional culture and competencies*), the transformation of their work (Jirků, 2020; Szczepanik, 2015; Metyková & Waschková Císařová, 2009), and the extent of their professionalisation. This topic was addressed by a research project in 2003 that focused on Czech journalists (e.g., Volek & Jiráček, 2006; Volek, 2007) and later continued by another developing project (e.g., Volek & Urbániková, 2017; Urbániková & Volek, 2018; Moravec et al., 2015).

3.4.1. Intra-organizational diversity

Other authors have then focused on either a specific group of journalists, such as: members of a particular newsroom (Gillárová et al., 2014; Čuřík, 2014a; 2014b); women (Urbániková, 2020; Vajbarová, 2017; Jiráček et al., 2011); the different generations of journalists (Moravec et al., 2015); specialised journalists (e.g., camera reporters; Waschková Císařová & Metyková, 2020); foreign correspondents (Kotissova, 2019; Láb, 2014); and cultural journalists (Kotissova, 2021). They also focused on the implications of ownership transformation for journalistic work (Kotissova & Waschková Císařová, 2021; Hájek et al., 2015; Němcová Tejkalová et al., 2015) and pho-

to journalists' work and practices (e.g., Štefaníková & Láb, 2018; Láb et al., 2016). Recently, the focus has been mainly on new trends in journalism (e.g., "the robotic reporter", Macková & Moravec, 2020). In 2012, the *Worlds of Journalism* project (<https://worldsofjournalism.org>) started to map concentrated and long-term data on Czech journalists, which has resulted in research reports (e.g., Rupar et al., 2021; Němcová Tejkalová & Láb, 2016) and scholarly articles (e.g., Němcová Tejkalová & Láb, 2019; Němcová Tejkalová et al., 2017).

3.4.2. Journalistic competencies, education, and training

Authors also took a descriptive approach to the topic of *journalism education and training* in Czechia. Starting with texts that describe the establishment of disciplines at individual universities (e.g., Pavelka, 2003) or summarising the topic historically and for a foreign audience (Jiráček & Köpplová, 2009; 2011), the authors have come to reflect on the development of a university education for journalists (Motal, 2012; Jiráček & Köpplová, 2013; Končelík, 2013). Jakub Končelík (2013) summarises the topic in the most detailed way, although it is based on a historical perspective. He provides information about the university departments that were current at the time, the number of students studying at each, and the basic differences. However, a more analytical reflection on this topic in the Czech context is lacking.

3.4.3. Professional culture and role perception

The topic of professional culture and the perception of individual roles of participating actors has been discussed in relation to a trust towards journalists (Moravec, Urbáníková & Volek, 2016) or professional identity of Czech journalists (Jirků, 2020). The professional identity was also a subject for comparison with foreign knowledge (Urbáníková & Volek, 2018). An important angle taken by some of the researchers, highlights the self-perception of journalists and their role/position (Jiráček & Köpplová, 2008b; Volek, 2010).

4. Publications, data sources and main monitoring actors of media usage patterns

The topics of media usage pattern appear on many different levels and in various shapes in Czech academia. The research is highly fragmented, and the academic works cover a large range of topics, some of them influenced by interdisciplinary perspectives (e.g., cultural studies, psychology, fan studies, game studies).

4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in media system

Contrary to the previous themes, Czech media audiences are well-researched topics with several teams from different universities "chipping in". Both qualitative and quantitative research provide a substantial number of highly specialised but also representative data about Czech audiences. Czechia is part of the multinational research network EU Kids Online IV (2014-21), which generates a substantial number of articles and reports about audiences. There are also rich veins of research about audience participation (i.e., *media usage conditions and structure*) in various internet communities (e.g., Štětka & Šmahel, 2008; Macek et al., 2015; Macková et al., 2014; Macháčková & Šerek, 2017). The media practices of audiences, such as piracy and many others, in the context of entertainment media (e.g., movies) also reflect *media user preferences* and *the state of access to media*, *diversity in the media system*, and *the functionalities of media* (e.g., Baslarová, 2014; Macek, 2015; Macek & Zahrádka, 2016; Karger & Jansová, 2021). The media practices of foreign audiences of Czech media (Kim 2020) or the newest topic of media practices during the COVID-19 pandemic (Van Aelst et al., 2021) are also well-researched. More

theoretical works about audiences (Reifová & Pavlíčková, 2013) are supplemented by research into the audiences of television series and movies; however, these mainly include textual analyses (Reifová, 2020). A recurring topic in this context reflects the socialist past and the socialist-based nostalgia connected to the re-runs of classic productions (Reifová & Hladík, 2013). This research highlights the specific socio-political and cultural backgrounds of media production and, consequently, media audiences that are important to include in any related inquiry.

Beyond academic discourse, several projects and efforts gather and publish data about *media users* and *media usage*, in general. While listing the sources, we offer only the names of the projects because they are easily accessible on the internet. Citing individual reports would be redundant. Readership and radio audiences are researched in the national research of *Media Project*. The *Foundation for Independent Journalism* often publishes various reports about media performances, journalistic performances, and other similar events. The public service broadcaster *Czech Television* annually publishes different reports about viewership and the popularity of its content, and reports on the quality of the content evaluated by external agencies. Weekly reports of the viewership from the major broadcasters in Czechia are available from *Nielsen Admosphere*. More specific research on media literacy, sexist advertisements, and other categories is accessible at *CVVM*, *RRTV*, and private companies, such as *Focus* and *Media Tenor*. The question of the accessibility of such data and its consequences is discussed in the text below.

4.2. Relevance of news media

As is apparent, the question of what audiences do with their media is recurrent and relevant. This is also true when we look at more specific research that is highly influenced by its core interdisciplinarity. A strong position holds that the study of audiences is connected to the psychological angle through which the research investigates *user's skills* (e.g., *privacy and data protection skills, use of media, media technology*) in the context of the following: the excessive use of the internet (e.g., Mikuška et al., 2020; Faltýnková et al., 2020); eating disorders related to media use (Šmahelová, 2020; Drtilová, 2021); cyberbullying and digital safety (Dědková et al., 2021); sexuality online (Ševčíková et al., 2019); and the influence of using (health) applications (Elavsky et al., 2017). Political science is another angle through which audiences are analysed (Vochocová, 2018; Castro et al., 2021).

The last of the more visible perspectives that concern audiences, and their media usage is reflected in the research into active, convergent media users who partly become producers of the media content that they were assumed to only consume. That current research touches upon the following: YouTube influencers/celebrities (Sedláček, 2016); media fans (Macháčková & Blinka, 2009; Jansová, 2020); and gamers (Buchtová et al., 2012). While the investigation into fans and gamers is often connected to international psychological perspectives, this is true only for the gamers so far (Blinka et al., 2016). Similar research brings attention to the changes in the make up of the audience, in general, which fittingly reflects the changing media environment and the accessibility of different media content (e.g., from on-demand services).

Produserism is closely connected to graduate work that deals with journalists who use qualitative interviews to preserve the journalists' perspectives. In this context, students cover the following: changes in the journalistic profession in the digitised environment (Hilbertová, 2016); the influence of AI on journalism, in general (Kubín, 2020); civic journalism in the context of ethics (Firbacherová, 2012); the objectivity of journalists (Cajthamlová, 2017); work-life balance (Kuzmová, 2016); and entertainment journalism (Jínová, 2020).

4.3. Trust in media

Trust in media (and, consequently, often the *relevance of news and public service media*) is a strong “branch” in the academic research (e.g., Volek & Urbániková, 2017; Macek et al., 2018; Macháčková & Tkaczyk, 2020). Shifting our focus to the student theses, we see quite a distinct (and unsurprising) tendency to follow the dominant research areas of the respective universities and departments from which they originate. Generally, graduate work often deals with new media practices and audiences that are defined both as consumers and producers of media content. This is apparent in the interest in civic journalism (Minařík, 2015); broader “prosumer” topics (Fraj, 2018); and the interest in fans and their creative practices (Paraiová, 2021). The influence of media on its audiences is also one of the recurring themes that are addressed through a rich array of different angles (Loušová, 2019), like with specific topics about the influence of advertisements on the consumer (Vrbicová, 2013). Other common issues are the consumption and *trust in media* (Procházková, 2020) and media practices that are connected to entertainment media (Maca, 2019).

5. Publications, data sources and main monitoring actors of media-related competencies domain

The most relevant data sources and the umbrella topics of *media literacy and media education* (representing *users’ cognitive and communication abilities/competencies*) are mainly theoretical works that provide an introduction to the problem, instructions on how to understand media, and related themes. Jan Jiráček, Radim Wolák, and Markéta Zezulková stand out with several works (e.g., Jiráček & Wolák, 2008; 2010; Jiráček & Zezulková, 2019).

Czech authors, however, also participate in more extensive international reports that present opportunities for actual research and comparisons of different media landscapes (e.g., McDougall et al., 2018). *Media education* is also analysed regarding other topics, such as political communication (Křeček, 2007) or family participation in this type of education (Sloboda, 2013). While dealing with media literacy more particularly, Czech authors manifest a tendency to focus on different age groups (and socio-demographic groups, in general) with higher risks for underdeveloped media skills, such as among seniors (e.g., Jirků, 2006; Reifová & Fišerová, 2012; Lipková et al., 2017); generation Z (Koudelková, 2019); or children (Moravec, 2010; Ševčíková et al., 2014; Slussareff, 2019).

Only a small number of the mentioned works that deal with literacy stem from the actual research of audiences. More often, the conceptualization of the topic is based on the literature review of existing work or document analysis. This tells us little about the actual state of *media literacy* in Czechia; fortunately, industry sources partly supplement such research (see below).

5.1. Normative sources

Various NGOs also offer additional data, including about activities related to *media usage*. For example, *One World in the Schools* (Jeden svět na školách) is known for organising workshops in *media literacy*. They also offer audio-visual content for these purposes. Focusing on the research, they offer various analyses, such as the media literacy of high schoolers and the state of media education in schools (e.g., JSNS 2018b, 2021a).

5.2. Assessment of media related competencies among citizens

The previous text suggest that the question of media literacy has been addressed mainly with a help of NGOs and their activities. However, in the current digital world a question of digital literacy inevitably arises too. The inequity of the access to a technology seems to be one of the pressing topics in this context (Lupač, 2015; Helsper & Šmahel, 2020). The international perspective is being employed here as the topical importance is recognized internationally (Biggins, Holley & Zezulková, 2017). Cognitive abilities and various approaches to skill assessments, same as the impact on individuals (e.g., from a health point of view) are dealt with mainly in the interdisciplinary research of media studies and psychology (e.g., Černíková, Šmahel & Wright, 2018).

6. Analysis of Research and Monitoring Capabilities and Quality

The accessibility of scholarly material (in all of the considered domains) varies throughout Czech academia and it can be considered a risk. While peer-reviewed and indexed articles are available in general, books, book chapters, and other sources are different. This is worsened by the fact that each university has a different system for showcasing (and, consequently, making available/researchable) the publications. The accessibility of industry/business materials is potentially the hardest issue because a lot of material is behind pay walls. The visible and accessible documents vary in their quality. One has to wonder how many documents exist, such that it is hard to establish how successful the collection of relatable data sources for our purposes would be.

While assessing the accessible scholarly data, we can pinpoint several teams from various departments and universities. For example, media literacy topics has a strong tradition at *Charles University* and research into audiences with interdisciplinary backgrounds has been established mainly at the *Masaryk University* (see above). Considering the publications and their quality, it must be said that they do not provide a sufficient picture for the ethical problems of the Czech media and their validity is low, also because they are methodologically biased towards legal issues. Bachelor's and Master's student theses should be treated with caution, as they are not standard academic papers that have undergone a peer-reviewed process and they have not been published; these theses should be seen as open to further testing. Media council documents should be seen as material for further analysis; they are of a normative regulatory nature.

There is enough material to frame the development of self-regulation in Czechia and to compare it to foreign countries in basic outlines; however, based on academic literature, it is not possible to make any authoritative judgement on the state of media ethics in Czechia.

Scholarly texts tended to be theoretical or descriptive. Later years built more relevantly on empirical data, both qualitative and quantitative. On the contrary, the more the industry research has developed, the more closed the industry data became to the public. Nevertheless, there is a relative abundance of credible and reliable texts to work with for further analysis, although thematic and knowledge gaps remain.

6.1. Comparative analytical overview on other sources and access to these sources

The concentrated focus on individual topics was more a reflection of the authors' and media organisations' individual interests than a more systematic strategy within the field and industry, which can also be considered as a risk. The small size of the academic field and the limited num-

ber of academics and students did not allow for coverage of the core disciplinary topics nor over a longer period. The limited size of the media system has not created a sufficiently competitive environment for data to be accessible or for a relevant professional association to emerge.

There are enough experts for our selected domains, so it is relevant for the Czech media system to complement the lack of academic and industry data coverage with expert interviews. After this literature review, we can identify the key experts from academia and industry who have long-standing knowledge and experience in the development of the field.

6.2. Monitoring capabilities and the quality of data and knowledge

In terms of the recency and continuity of data, until 2000 and in the first years of the 21st century, scholarly research publications were produced sporadically or by foreign authors. On the other hand, the industry data were gradually systematised and became inaccessible and monetised. Both trends can be understood as challenges.

Continuously researched data according to a consistent method are sporadic – either they are part of international projects (e.g., *The Reuters Institute for the Study of Journalism*; *Worlds of Journalism*; *Monitoring Media Pluralism*) or they are part of industry data, such as readership and viewership.

7. Conclusions

Our literature review allowed us to map the national potential to monitor our project's four domains and to point out the main risks and opportunities for the monitoring capabilities and its quality.

The following aspects are opportunities:

1. We are able to gain the basic data about the media system, individual agents, and specific problems of media development in Czechia;
2. The number of sources is increasing;
3. The quality of sources is increasing; and
4. The number of reflexive content producers is growing.

The risks are that the analysed texts are problematic in terms of quantity and quality:

1. **The saturation of time periods** – Until 2000 and the following several years, academic publications were sporadic, and the authors were initially foreign academics; later, industry data were gradually systematised and slowly became inaccessible and monetised;
2. **Thematic density** – Focus on individual topics was more a reflection of the authors' and media organisations' individual interests than a systematic strategy of the field and industry;
3. **Thematic breadth** – The small size of the academic field and the limited number of associated academics and students did not allow for coverage of even the core disciplinary topics over a longer period; the limited size of the media system has not created a sufficiently competitive environment for data to be accessible or for a relevant professional association to emerge; and
4. **Quality** – Scholarly texts tended to be theoretical or descriptive, and only in later years did they build on empirical data, plus relevant industry data became inaccessible.

The data from the media academia and industry, in our view, makes it possible to highlight specific gaps in the research landscape in Czechia. We are, thus, able to give recommendations for future research initiatives. In the limited space of the Czech academia and industry, and with the limited number of people involved in the generation of reflections upon media development, the following are crucial to consider and implement:

1. The mutual cooperation of all actors (i.e., academia, industry, NGOs) with additional emphasis on interdisciplinary research;
2. The systematisation of topics and methods used, including for the long-term perspective;
3. The long-term perspective could lead to a gradual "densification" of the topics and a more systematic support (i.e., institutional and financial) for elaboration; and
4. There is a lack of deeper reflection on the ethical and legal aspects of media development, the working and organisational conditions of journalists, and journalistic competencies.

These results and consequential recommendations will be even more clear in the contextualization of the second case study.

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ESTONIA

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Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

Executive Summary

Estonian media research was institutionalized in the 1970s and until the first decade of the 21st century media and journalism research was steadily improving. In 2013 communication and media studies at University of Tartu was ranked between 51 and 100 (QS World University Rankings 2021), in 2020 between 201–220. After 2014/2015 the media monitoring capabilities have signs of degradation. Above all, the decrease in research and monitoring resources is caused by the worsening of the financing situation of Estonian science and higher education. Secondly, Estonian policy makers' interest in media usage and media developments has been small and random. Therefore, the media usage data is mainly collected by commercial monitoring organizations, the data is not accessible for public institutions. In the 21st century, journalism and communication research has been carried out, to a large extent, under the umbrella of various European research projects, in which Estonian researchers have successfully participated.

Journalism, media accountability and media usage domains are relatively well covered with studies and data, while in case of legal regulation and media competencies domains the RO analysis can only lean on fragmentary case studies. Key actors concerning data collection and knowledge producers are individual researchers, courts, Data Protection Inspectorate, Statistics Estonia, media monitoring companies, and media organizations.

1. Introduction

1.1. Main traditions and turns in the 21st century and current situation of the media research and monitoring system

While assessing the monitoring ability of Estonian journalism, media usage, media related competencies and the normative environment affecting the media, it is important to consider that research and higher education on journalism and media are related economically and in terms of expertise. Academic research is carried out at the University of Tartu and, since the 21st century, at the University of Tallinn. Public Broadcasting had its own research group, but it was closed in 2017. Audience monitoring is carried out by private companies and media houses (editorial metrics).

The tradition of critical media and communication research in Estonia goes back to Prof. Juhan Peegel, the founder of Estonian academic journalism education in 1954 (at University of Tartu), who started the research on Estonian press history. The academic study of the history of Estonian journalism allowed students to deal with national cultural memory and provided access to

the press of the pre-war Republic of Estonia, which, in general, was banned by the Soviet authorities. Although knowledge of the history of Estonian journalism has been important in shaping the identity of Estonian journalists, studies of the history of journalism have faded since the second decade of the 21st century due to lack of funding. Currently, five researchers study the history of Estonian journalism, but this is no one's main course of action or research.

In the mid-1960s, sociological media studies emerged, which laid ground to the larger analyses of the news media's role in societal processes today. In 1965, a readership survey by the Tartu local newspaper *Edasi* was conducted. This was one of the first representative surveys of the media audience in the whole Soviet Union. During the late 1960s, sociological media research was carried out by the Laboratory of Sociology at the University of Tartu. In 1975 the Laboratory was closed by the Soviet authorities, but the audience research tradition remained. In 1970s-1980s, these research groups conducted regular monitoring of broadcasting audience structure, interests, and expectations at Estonian Radio and Television. In the late 1970s, and early 1980s, also regular content analysis of radio and television broadcasts was done (Vihalemm 2001, 65). During the same period, the first journalists' survey (in 1988) and several surveys of newspaper readership and content analysis were carried out by Tartu University researchers. However, "the empirical results of surveys could not be published at all, as they were considered to be "for official use only" (Ibid.). Sociological media research continued and flourished in the 1990s, when societal and media transition in the Baltic countries became the focus of the research.

In 1976, a separate journalism department was established at the University of Tartu, where 15 journalism students were admitted every year (study lasted 5 years). Based on this department (teachers and students), a community of journalists with a very strong identity and clear professional values as well as critical attitude towards Soviet power and propaganda was established by the early 1990s. The alumni of the journalism department contributed to independence in the early 1990s. According to Professor Emeritus Peeter Vihalemm (2019, 54): "By the end of 2019, the total number of students who received at least three years of bachelor's education in journalism and/or communication during 63 years (1957-2019) was 1572."

In 2012, the journalism program on BA level was opened also at Tallinn University. On MA level there are two programs: communication and contemporary media. The research staff is 3-4 persons. Currently the research focuses on Audiovisual Arts and Media Research – this is also the name of the doctoral study program at Tallinn University. At the University of Tartu, the doctoral program is named Media and Communication with the admission of three doctoral students annually.

The research and higher education policy of the 21st century in Estonia is characterized by the merger of small units, and later also by the merger of specialty programs (incl journalism and communication). The research capacity of the press and media depended on the research grants received. A lot of support for the growth of young journalism researchers was the opportunity to belong to the Centre of Excellence in Cultural Theories in 2010–2014.

The Institute of Social Sciences was formed by the merger of the Institute of Journalism and Communication, the Institute of Sociology and Social Policy of the University of Tartu and the Faculty of Library Sciences of the Viljandi Academy of Culture in 2014.

1.2. Explanations of any other structural peculiarities that may be important for the report

In the 1990s Estonian research and higher education policy created some major changes: **(1)** The Estonian scientific community was decreased by about a half. In 1999 the share of people involved in research and development in the Estonian labor market was 0.89%, while only Portugal and Luxemburg remained behind Estonia in Europe at the time. (Sürje, Küttner 2001, 35).

(2) Competition-based research funding was set up. (3) Structure reform of research institutions started. (4) A high-level research commitment was written into the career model of professors and other teaching staff at the universities. (5) Evaluating the research reforms, scientists pointed out (Sürje, Küttner, 2001, 35) that “competition-based allocation of public budget research funds has a number of positive aspects – it increases the responsibility of researchers, teaches them how to use money more efficiently and supports the ability to write project applications”. In the beginning of the 21st century the main criticism of the research system established in the 1990s was related to the arguments that the Estonian research system was expanding (e.g., cf. Schiermeier 2019). The evaluation system for researchers favored expanding the number of researchers, but not requiring quality. All scientific reforms in Estonia have been carried out primarily from the perspective of natural, medical and technological sciences. This is illustrated, for example, by the above-mentioned Science Reform Conference: only one of the 27 speakers represented social sciences, more specifically political science and sociology. The field of social sciences includes law, economics, public administration, information sciences, journalism, media, communication.

The 21st-century Estonian science and higher education policy is also characterized by several reforms. In 2002, Estonia's transition to the Bologna 3+2 system took place in a very short time. Switching to the 3+2 system for journalism education meant a compressed BA studies, while very few students continue with their master's studies in journalism. In the Master's degree, journalism studies became one of the possible field of studies in general communication program. The reasons for such a decline in journalistic education were purely economic ones. Pressure from the University of Tartu to concentrate, reduce and cheapen curricula started in the years of structural reform in 2014/2015. Similar changes took place also at Tallinn University.

The economic higher education reform, which started in the autumn of 2013, enabled higher education free of charge for all students, but left higher education institutions in an ever-increasing lack of money. The growing lack of money led to the closure of several study programs and steady cheapening of the content of curricula. The abolition of paid studies had also a strong impact on social sciences and social scientists as the salaries of social scientists were combined as the sum of state funding, tuition fees and various small-scale grants. As a result of different reforms, the job security decreased and academic career became less attractive to young people.

Example of reform without prior in-depth analysis is the reform of research funding in 2008-2012. The principles of funding were not discussed in public and in the first year, the researchers applying for grants were informed about the applications' assessment criteria only after the deadline for submission of applications. The main idea was to increase the size of the grants and decrease the number of grants. The reform created a situation where in the field of media and communication funding was less likely to be received, even if the reviews for the application for money were positive. The field of social sciences, which includes journalism and media studies, has never been a priority in Estonia. However, the science policy of the 1990s enabled the preparation of a number of journalism and media researchers who have proved to be competitive in the 21st century in order to obtain research grants mainly from the EU funding system which became accessible in 2004.

1.3. Main institutions / bodies and actors of media / communication / journalism research, monitoring and education

Urmas Loit (2018) mapped the main actors (and their activity) concerning media governance (state represented by several institutions, courts, media organizations, organizations representing different stakeholders related to media, universities). The list of organizations that collect data about media and media usage is even longer. Therefore, we shall point out only the main

monitoring agents in this sub-chapter and will mention other Corporate Agents in chapters that are related to the four domains.

Currently in Estonia, the main data and knowledge collecting actors (concerning the four domains of ROs) are academic research groups and single researchers of University of Tartu and Tallinn University. The number of persons involved in journalism and media research is about 30.

Outside academia, some analytical experts are working for different research companies (PRAXIS, socio-economic research center in Estonia conducted the international Survey of Adult Skills /PIAAC, 2012-2015) and the labor market monitoring and future skills forecasting system OSKA: 2019 involved media and journalism sector) or at Statistics Estonia (Eesti Statistikaamet, a state office), collects data and provides analysis on television, radio and broadcasting). However, the academic research agenda is dependent on EU funded research projects to a large extent since 2004 (see Appendix 1).

Consumer Protection and Technical Regulatory Authority collects data on media market conditions concerning broadcasting and broadcasting licenses; Data Protection Inspectorate (concerning the freedom of information) is collecting cases but provides limited amount of analysis – the Inspectorate is chronically overwhelmed of different tasks; Statistics Estonia and commercial research enterprises (audience studies, Kantar EMOR is the largest one) as well as media organizations gather data about media usage (editorial metrics), but the information is either paid or not available to the public or the researchers. The research unit of the public service broadcasting ERR was closed in 2017. Monitoring platform - www.palgad.ee - that provides overview on salaries in different professional sectors also includes salaries of media sector (and journalists) since last year, the quality of data has improved since 2012. The Development Monitoring Institute published an important report on Estonia's freedom of information in August 2022.¹⁴

International Monitoring projects are Press Freedom Index, Media Pluralism Monitoring; European Social Survey (media questions). The Ministry of Culture has been collecting data on broadcasting (within last few years): the number of employees and employment contract; the financing of different channels; the content, type and number of programs.

In 2019 Estonian Ministry of Culture ordered an overview on media situation. More than ten researchers and practitioners were included in reporting and the paper was designed for media policy but has never been used. The research was financed by the Cultural Endowment of Estonia (*Eesti Kultuurkapital*) and this is the only one in the 21st century. In 18.11.2021 Estonia accepted the Development Plan for "Culture 2021-2030" ([kehtivad valdkonna arengukavad | Eesti Vabariigi Valitsus](#)). In the Appendix 5 states that "9. Media policy-making is knowledge- and data-driven. The state continuously monitors the media sector, reducing duplication and developing a common data reporting system. Programme and content analyses are regularly commissioned, which also allows to promote media self-reflection and media criticism" (page 33).

1.4. The funding system of media research and monitoring

Although the possibilities for funding science have been discussed very much in recent years, including in the Parliament, good decisions have not been reached. Currently, the largest Estonian funding instruments are institutional research funding and personal research funding, which is allocated from the state budget through the budget of the Ministry of Education and Research in the organization and responsibility of the Estonian Research Council (ETAG, established in 2012). Research grants for individual researchers and research teams are competitive.

¹⁴ Cf. <https://www.err.ee/1608691183/arenguseire-ametnike-ebakindlus-pidurdab-avaliku-teabe-laiemat-avaldamist>

Basic funding for research institutions (operational support) is distributed within universities, there is little money left for social sciences.

This data should be interpreted in the general context of public funding of higher education. According to the Public Funding Observatory 2020/2021 of the European University Association "Estonian universities continue operating with considerably fewer resources than in 2008 despite two significant funding efforts in 2011 and more recently in 2017". The funding decrease in 2008-2017 was - 23% - that is the highest in Europe.

The support of private funding for science in Estonia is minimal and private capital does not support research and media research at all. The sectoral distribution ratios as well as the evaluation methodology for applications have been changing since 2012 annually. For example, in 2019 – the success rate was only 11% (out of 66 applications 7 received the grant, 5% from the whole money was for social sciences; the success rate and the money was the lowest in comparison to other disciplines). The success rate increased in 2020: 21% (10 grants and the percentage from the whole money was 8%).

National research database (ETIS) provides current information about all researchers, their publications, grants, supervised students and expert activities. The limitation of the database is that it does not allow for a search based on keywords. Researcher profiles provide the best opportunity to find information about publications and research projects.

1.4. Publications, data sources and main monitoring actors of legal and ethical regulation domain

There are six types of sources concerning legal and ethical regulation:

1. Estonian laws on freedom of expression and freedom of information, and the comments of the laws. Ethical regulation: codes of ethics.
2. Case laws: cases of the Supreme Court (*Riigikohus*) www.nc.ee and cases of the district courts; cases solved by the *Data Protection Inspectorate*; accountability cases handled by *Pressinõukogu* (PN), *Avaliku Sõna Nõukogu* (ASN), and ombudsman of the Estonian Public Broadcasting.
3. Case law analyses (hereinafter CLA¹⁵); systematic overviews of the court cases (their reports are descriptive by nature); systematic analysis of ASN and PC cases. In case of Estonia there is no case law analysis.
4. Academic research. Topic focused articles or other academic works on Estonian laws and implementation practices (academic articles; MA thesis of students, PhD thesis). Analysis on Estonian media policy that covers legal regulation of the media.
5. Cases covered by media concerning freedom of expression and/or freedom of information.
6. International indexes and/or research on freedom of expression and freedom of information.

Generally, the case law concerns the freedom of speech available but there are no systematic and analytical reports on tendencies that are reflected in case law.

¹⁵ CLA is a process of studying judgments (and if necessary, other court documents as well) in all of its aspects in order to identify problems in the uniform application of law by the courts. In the course of such a research an analyst ascertains the scope of problems that exist in the field of application of material and/or procedural norms. CLA also differs from academic research carried out at universities because CLA is a more practical research tool than academic research and it is directly derived from the needs of the judiciary and the legal practice. The object of a particular research is usually wider, the materials are large-scale and the research questions are more of a practical nature. (<https://www.riigikohus.ee/en/case-law-analysis>)

The bibliographical database (124 publications) includes 11 publications that are related to the legal regulation of media in Estonia, 10 of these are about media accountability and journalism ethics (see Appendix 2). The first textbook in the Estonian language on freedom of expression and freedom of information was published by Harro-Loit in 1996; the next textbook on information law was published by Nõmper and Tikk in 2007. However, these textbooks did not focus on the analysis of the current legal situation in Estonia concerning freedom of expression and freedom of information (and were not included into the database).

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

2.1. Freedom of Expression

In Estonia, as in other democracies, freedom of expression is guaranteed by the Constitution. Defamation was decriminalized in Estonia in 2002 when the new Penal Code entered into force. Since then, defamation is mainly regulated by the *Law of Obligations Act (Võlaõiguse seadus, LOA)*. According to the subsection 1046 (1) of the LOA, it is unlawful to defame the honor of a person, inter alia, by an inappropriate value assessment, unjustifiable use of the name or image of a person, violation of privacy or other personal right. Article 2 of the same provision also contains exceptions (other statutory benefits and the interests of third parties or the public). Paragraph 1047 of the LOA provides for the unlawfulness of disclosure of inaccurate information: Compensation for patrimonial and non-patrimonial damage are regulated by (Article 131, Article 134(2) and Article 1043 of the LOA).

There are no legal differences between real-life and online defamation. However, Estonian Information Society Services Act (*Infoühiskonna teenuse seadus, ISSA*) (Articles 8-10) states that the service provider shall not be considered liable for online publications, if its role is merely technical, automatic and passive; the service providers are not obliged to monitor the information that they transmit or store. These are the main legal sources that regulate defamation and disinformation.

Laws are well accessible online, comments on the laws appear in *Juridica* magazine, the only legal journal in Estonia, but we found only four publications partly related to the freedom of expression.

The most relevant legal act concerning personal data is the Protection of Personal Information Act (directly related to the GDPR). Article 156 of the Penal Code provides that violation of confidentiality of messages is a criminal offense, article 157 regulates the illegal disclosure of personal data, illegal disclosure of sensitive personal data and illegal use of another person's identity. These are the main legal sources that regulate defamation, disinformation, and personal information/privacy.

The main opportunity to assess how freedom of speech is balanced against defamation, disinformation and privacy is to carry out close reading of **key cases** of the Supreme Court (nc.www.ee). However, the cases of the Supreme Court reflect only partly the ROs concerning the freedom of speech. The number of media-related cases solved by the District Court and National Court is rather small: we could count about 20 cases in 2000-2021 that are related to the freedom of speech and media. Two key cases solved by the ECHR (*Tammer v Estonia & Delfi v Estonia*).

There are no systematic reviews on court cases concerning the freedom of expression. There is a systematic analysis on *moral damages*, these CLAs include the analysis of the cases related to the media. The reports cover the several years between 2005–2019 (e.g., Lillsaar & Vutt 2009, Vutt 2017; Piho & Kalev 2020). This analysis is relevant as it demonstrates that moral damages

in Estonia are mainly small and modest and do not have a chilling effect regarding the freedom of expression.

Few Master's thesis handle specific problems that are related to the freedom of expression: defamation, criminalization and decriminalization of defamation, moral damage etc. (Luide 2003, Einla 2016, Vissak 2018). While the students' analysis includes analytical references to the National Court decisions, none of these theses include systematic analysis of court decisions.

The main international source that provides continuous and comparative assessment of freedom of expression is the Press Freedom Index published every year since 2002 by Reporters Without Borders (RSF). International comparative research on freedom of expression and freedom of speech has been carried out also by the Media Pluralism Monitoring (2014-2021, four reports) and MEDIADDEM (EU Framework 7) projects (e.g., Harro-Loit & Loit 2011). The latter puts more focus on the legal framework of the rights and less onto the implementation.

The teachers and students of the University of Tartu have collected the cases that reflect the implementation of the freedom of expression and have been published in the media since 2015. The number of cases that deal with the restrictions on the freedom of expression of experts working at some institutions and lay members of society have been increasing since then. Our private collection of cases also includes SLAPP cases. This is increasing problem for journalists as well as people who publish their opinion in social media. There is no possibility to get overview on the number of lawsuits against media, journalists and people who have been sued because of expressing their opinion in the media.

2.2. Freedom of information

The right to information is explicitly recognized in the Constitution, in the Public Information Act and in the Personal Data Protection Act. However, as it is written in the "Rule of Law report" 2021, 10) *"The right of access to information finds legal and formal protection in the Constitution, yet its practical implementation may vary. As was the case last year, stakeholders indicated that the public administration in certain cases tends to deny and/or delay access to public information. Some ministries, reportedly, interpret the defined exceptions regarding the disclosure requirements, such as data protection, broadly. This leads to a divergence in practice regarding access to information. This finding is corroborated by the MPM (Media Pluralism Monitor – authors' remark) 2021, which maintains a medium risk with regard to the protection of right to information"* (European Commission 2021).

Neither the Stakeholder interviews nor the MPM methodology allow for more detailed monitoring of the mechanisms and dynamics of disclosure restrictions. Only systematic collection and analysis of cases is suitable for this purpose. However, such monitoring is not carried out in Estonia. Cases collected by UT researchers and students within the media regulation courses show a tendency of decreasing transparency in the Estonian state.

There is one supreme court key case concerning the journalists' access to public information (2021, court decision upon Pärnapuu – journalistic access to court records and solved by the Supreme Court).

The most powerful agent concerning the **implementation of the freedom of information** is **Estonian Data Protection Inspectorate** (EDPI). The EDPI is processing cases (complaints, decisions are not accessible) and is producing guidelines and educational material in order to increase the knowledge on personal data protection (especially since 2018). The cases handled by Estonian Data Protection Inspectorate upon access to public data and personal data protection is publicly available, analysis is provided in yearbooks (2017, 2018, 2019, 2020).

There are also a number of student theses that have studied document access in different public organizations (e.g. Rohtoja 2011; Adamson 2013; Kuhi, 2014; Aitsam, 2015) The aim of the

works by Adamson and Kuhi was to scrutinize how the city governments of Kohtla-Järve, Võru, Tallinn and Pärnu do follow the regulations on accessing public documents. Aitsam focused her work on the routine 13 ministries of the Republic of Estonia follow setting restrictions onto accessing the public documents. The study concluded that the approach when setting access restrictions was very different. Regards to monitoring, the students' works are limited to a narrow research focus and different timeframes of the empirical data collection.

There are no studies on the protection of whistleblowers in Estonia. In 2016-2021 researchers from the University of Tartu have collected four cases published in the media, which show that there is no protection for whistle-blowers.

There are currently no specific legal provisions requiring the disclosure of ownership information. Nonetheless, general information related to entrepreneurship is electronically available in the Business Register. The current draft act transposing the AVMSD includes a new provision regulating publicly available data on structure and transparency of media ownership, based on the relevant provision in the AVMSD. Currently, ultimate ownership of media companies is not available to the public in all cases. (<https://eur-lex.europa.eu/legal>)

2.3. Accountability system

One of the most topical issues since Estonia's independence and abolishing censorship was media accountability and self-regulation. Along with the establishment of self-regulatory mechanisms (ASN as a Press Council in 1991, Code of Ethics of Estonian Journalists in 1997 and another Press Council in 2002), the academic scholarship has been critically analyzing their performance and impact (Harro-Loit & Lauk 2003; Harro-Loit & Balčytienė, 2005; Loit, Lauk, Harro-Loit, 2011; Lauk & Denton 2011; Harro-Loit, Lang, Himma-Kadakas 2012; Loit & Harro-Loit 2013; Loit, Lauk & Harro-Loit 2018). Due to the participation of Tartu University researchers in international projects (MediaAct and MEDIADEM), media accountability issues have also been investigated in comparison with other countries (e.g., Lauk 2008; Lauk & Jufereva 2010; Lauk, Harro-Loit, Väliveronen, 2014; Harro-Loit, 2015). The cases have been collected by the two press councils, *Pressinõukogu* and *Avaliku Sõna Nõukogu* (ASN), as well as there are systematic overviews on the nature of complaints as well as the academic research development of the media accountability instruments since 2010. In a comparison of Estonian self-regulation system with the Finnish one (Lauk, 2014), it was demonstrated how much the prestige and impact of the accountability mechanisms depend on the advancement of civic culture in a society. BA thesis by Eva Kübar (2006) studies the interaction between the two press councils, media organizations and complainants. This qualitative analysis of documents opened very well the agents-related risks of the Estonian accountability system in the beginning of the century.

The awareness of professional ethics among Estonian journalists has been studied also by the students. Four theses (Kangur 2009; Kasenõmm 2011, Karu 2013; Koemets 2017) focus on the moral awareness and moral reasoning skill of Estonian journalists (BA theses were not included into the database). The thesis by Marko Paloveer (2012) was a self-ethnography about solving moral dilemmas concerning reality shows (also not included into database as not related to news journalism). Five BA theses focus on ethics issues concerning one program or media organization (Volmer 2009, Sükijainen 2014; Rebane 2015) or a very specific issue (Kuulpak 2019; Puhm 2021). These qualitative studies provide knowledge on existing risks and opportunities but not about the tendencies.

3. Publications, data sources and main monitoring actors of journalism domain

The main sources of the data and research on Estonian journalists and journalism are:

1. International comparative surveys (such as WJS)
2. National surveys
3. Data gathered by the National statistical office, Ministry of Culture, Consumer Protection and Technical Regulatory Authority (*Tarbijakaitse ja Tehnilise Järevalve Amet*); commercial companies (e.g. Kantar Emor); media organizations (editorial metrics) and Union of Estonian Journalists (Ajakirjanike Liit)
4. Academic studies (articles, books, book chapters, conference presentations, doctoral dissertations;) published internationally
5. Academic studies (articles, books, book chapters, research reports, biographical lexicon.
6. The Annual Books of Estonian Academic Journalism Association), published nationally.
7. Non-academic publications (memoirs, autobiographies, articles in the media, anniversary articles, jubilee articles and obituaries, journalists' blogs, etc.)
8. Other sources (graduate and postgraduate theses; presentations at conferences and seminars, correspondence, e-correspondence etc.)
9. News in media (newsworthy events concerning media market, working conditions, key persons in media etc.).

Journalism domain is well covered with publications - academic research papers and book chapters, (graduate) student papers, doctoral thesis and books aimed at the general readership. The bibliographical database contains 60 publications (out of 124) belonging to the journalism domain. Steady increase of the publications started in 2017 (see appendix 2) – the increase is partly related to two young scholars (Signe Ivask and Marju Himma-Kadakas) who defended their doctoral theses in 2018 and 2019 respectively. However, out of these 60 publications 18 provide information and analysis on market conditions. This bias is related to the traditional direction of research, which focuses on monitoring the development of the media system and the media market. Most of the articles describe the current situation in the media market but do not offer the analysis of diachronic changes. Public broadcasting and working conditions are represented by 8 publications and professional competencies by 5 articles. In addition to the research issues that are defined by the grants, the research agenda comes from scientists and not from the initiative of the Estonian state.

Although the domain is well covered by publications and is thematically rich, the journalism domain is characterized by a lack of consistency of the data. The publications cover different periods of time, and therefore it is complicated to draw conclusions of trends on the basis of these publications. **Surveys** on journalists' role perceptions, ethical principles, workload and working conditions have been also conducted irregularly, depending on funding, researchers' interest and other conditions. The first face-to-face survey was done by journalism researchers of Tartu University even before independence, in 1988 with 362 respondents from all media organizations. The second survey, conducted in 1995, was largely the follow-up to the first survey, partly using similar questions to detect differences before and after independence. Another similar survey of somewhat smaller scale (227 respondents), but nevertheless representative, was carried out by a freelance editor and writer Scott Abel (under the auspices of Tallinn University) in 2006 (Abel, 2006). In the same year, a MA student Maria Jufereva conducted the first survey of Estonian Russophone journalists (including all 110 journalists). This survey used the same questions as the 1995 survey. Another survey, focused on Russophone journalists, was

conducted in 2011 again by Maria Jufereva and analyzed in her doctoral study (Jufereva-Skuratovski, 2021).

The next surveys are related to the international comparative surveys. In 2009, Henrik Örnebring, then fellow of the Reuters Institute for the Study of Journalism coordinated a survey and interviews with journalists in seven European countries (the UK, Sweden, Germany, Italy, Poland, Latvia and Estonia). Journalists were asked how they understood and interpreted what they were doing as journalists, how their work life had been changing and what factors shaped their everyday practice. The online survey received 277 responses. In 2009, Estonia joined a global survey project, *Worlds of Journalism Study (WJS)*, focused on comparative study of journalism cultures in 67 countries all over the world. The survey in Estonia (274 respondents) was conducted within the framework of the above-mentioned project. The WJS continues its third wave of surveys in 110 countries (incl. Estonia) during 2021–2023 with a thematic focus on journalism, risk, and uncertainty.

Since 2010 the comparative approach has become dominant (e.g. Harro-Loit, 2015; Kõuts-Klemm, Rožukalne, Jastramskis, 2021). International comparative research covers topics that are focused by WJS survey time and intensity of the work of journalists, role perceptions (Harro-Loit, Josephi 2019; Ramaprasad et al. 2019); ethics and accountability instruments (MediaAct; MEDADEM; GLOHOMA), autonomy.

More than before, attention has been paid to the research on editorial practices (Ivask et al., 2017; Ivask, 2019; Himma-Kadakas, Möttus, 2021), journalists perceptions about their professional ideology (Jufereva, 2016), skills and competencies (Harro-Loit & Ugur 2018; Himma-Kadakas, 2019; Himma-Kadakas, Palmiste, 2018), psychological issues like stress, burnout, feeling bullied or harassed (Ivask, 2017; Ivask, Siil, Laak, 2017; Ivask, 2020).

While the field of journalism in general is relatively well studied, there are areas (especially in relation to the research in newsroom practices, working atmosphere and conditions, including gender issues) where the empirical data are either absent or are covered only by students' thesis. One doctoral dissertation (Piltre 2011) was focused on the representation of women in media.

The Estonian- language publication that systematically publishes short overviews on Estonian journalism studies is *Eesti Akadeemilise Ajakirjandusseltsi aastaraamat* – Yearbook of Estonian Academic Journalism Society (this is published annually since 2009). This yearbook publishes problem articles, summaries of student research papers, as well as presentations of community meetings and summaries of discussions that followed the presentations. We did not include single articles in the bibliographical database, but this yearbook is important source presenting views of different actors of Estonian journalism.

An overview on journalism education and graduates have been documented in two anniversary albums published by the unit of journalism, University of Tartu (Kurvits et al. 1994 and Loit 2014, in two volumes).

3.1. Market conditions

Changes in the media market are one of the few areas where **data** has been collected continuously. For example, Kantar Emor has been describing changes in advertising volumes by channel for years. Media Health Check (2017–2018) has described changes in ownership and overall business performance. Information on corporations is available in the Business Register. Ownership relations have been monitored by the Media Pluralism Monitoring project, but there is inevitably an oligopoly in Estonia due to the small market that does not change. EU financed Media Pluralism Monitoring has been carried out for four times (2014, 2016, 2020, 2021). The

country report points out risks concerning press freedom, market pluralism, political autonomy and inclusiveness.

The ownership has been also analysed by academic researchers in articles that mostly focus on public broadcasting (Jastramskis, Rožukalne & Jõesaar 2017) and in Policy report (Kõuts-Klemm, et al. 2019) in what the market conditions were precisely among the aspects analysed. Some analyses of market development have been published in the early 2000s (Lauk 2004; Lauk & Šein 2009).

As it was mentioned in the beginning of this sub-chapter, academic articles on market conditions describe mainly macro-level situation and changes: distribution of advertising turnover between channels, channels and publications owned by larger corporations etc. The costs concerning the production of journalistic content is not distinguishable. Information about the economic situation and economic problems of media organizations can be found in the news, sometimes in the presentations of media executives at conferences or seminars. For example, the CEO of the Äripäev media company (since 2007) Igor Rõtov has explained how the Estonian business paper “Äripäev” came over the economic slump of 2010 by 2016 (Rõtov 2019). Often, the presentations on conferences also provide insights to the media industry, which media organizations seldom publish.

One of the key persons in Estonian media Mart Kadastik (long-time editor-in-Chief of the daily *Postimees* and later representative of the owners) published a book (2016) where he describes the changes of owners and power games concerning the Estonian media market in the 1990s and until 2015. Kadastik provides a subjective viewpoint, but the book enables to understand what roles were played by different media owners and the commercialization of the Estonian media. Kadastik also opens up the background of decisions made in the media business.

Urmas Loit has been collecting and analyzing data on broadcasting (2005) and, wider, the overall (digital) media (Loit, Siibak 2013, Loit 2018) (regulation, ownership, policy; changes concerning the local media (2016), incl. radio (e.g., in Kõuts-Klemm et al. 2019)) and he also was one of the country analyst in first Media Pluralism Monitoring reports on Estonia (for 2014, 2016). In his PhD thesis (2018), he, inter alia, introduced the methodology for monitoring radio programming output (Addendum 2) based on what, in several occasions, the Ministry of Culture (the then surveillance authority for the broadcasting) had earlier carried out supervision upon radio stations' performance.

One approach concerning the risks of journalistic autonomy in relation to economic changes was related to the diminishing border between journalism and marketing communication (Saks and Harro-Loit 2006; Harro-Loit and Bærug, 2011; PhD thesis by Bærug 2017).

The most recent and biggest risk – the influence of global media corporations to the local advertising market – has not been studied, although Kantar Emor has been watching the tendencies. Public data can be found in the news. For example, in 2017, a research expert at Kantar EMOR said that at least 6.6 million euros moved out of Estonia in 2016, primarily to Google and Facebook, through the largest media and digital agencies in Estonia. A year earlier, this amount was 5.1 million. The expert explained that the data were obtained from 16 major media and digital agencies operating in Estonia by adding up their net advertising contributions to Google and Facebook (Oja, S. 2017). Five years later, another news story (Oja, B. 2021) reveals several problems evoking difficulties in estimating the market shares of Google and Facebook and the concurring changes for Estonian media business models. The interviewees of this news story were CEO-s of Media House, Ekspress Grupp and Äripäev. Thus, the data appearing in the news streams, including interviews with the media managers, can be found with the help of search engines in the news archives to analyse changes in the media economy.

3.2. Public service media

The development and dynamics concerning the public broadcasting has been a topic for many public discussions at various conferences and in news.

Andres Jõesaar is the Estonian scholar who has extensively published on the impact of the EU audiovisual policy on Estonian public broadcasting in English as well as about the Estonian TV channel ETV+, oriented to the Russian speaking minority (Jõesaar, 2011a, 2011b, 2014, 2015b, 2015c; 2015d; 2017b, 2017c, 2022). Jõesaar, an Associate Professor of Media Policy of the Baltic Film and Media School at Tallinn University is the leading expert on public broadcasting policy in Estonia. He has been the chairman of the Estonian National Broadcasting Council and the head of the media research department, as well as the director of corporate clients and media services at Tele2 and the chairman of the board of TV3. As of 2022, Andres Jõesaar started working as a media advisor to the Ministry of Culture.

In 2021, a former television journalist and teacher at Tartu and Tallinn Universities Hagi Šein launched a comprehensive volume on the development of Estonian television in the digital era, during 2000-2020 (Šein, 2021). This book is a landmark both in Estonian audiovisual scholarship and among the studies on the Estonian television sector. Doctoral dissertation by A. Nani (2018) focuses on the audiences of the public broadcasting.

3.3. Production conditions

In Estonia, the conditions of journalistic production have been studied in a number of projects, but Marju Himma Kadakas, whose research interest has been primarily related to online journalism, has focused most on this topic. Quite a lot of empirical data has been collected by students' BA and MA thesis (Allik 2019). Himma-Kadakas has published several scientific articles together with her students.

Some of the students' graduation papers have recorded media reforms about which other data can no longer be found. For example, Rebane (2007) collected and analysed the online reform of Estonian news journalism; Kase (2011) carried out observation and interviews concerning the working practices of Estonian online news journalists. There are also unique documentation of the changes concerning production conditions at different news organizations (e.g. Korv, 2000; Teder 2005). One student work has been done about foreign correspondents (Aunapuu 2012). There is no studies on the resources of investigative journalism.

3.4. Working conditions

The research on working conditions is currently led by Signe Ivask, who has published several articles on risks related to journalistic work: burnout, feedback and harassment. Ivask has coached many of the students' graduation papers that open different aspects of working conditions (Puuraid 2014; Siil 2017; Külaots 2017 – burnout and distress of journalists; Tismus 2020 – feedback).

The MA thesis of Tali (2009) brought together different surveys. This is a special study because it analyses the change in journalist work over a longer period of time (1988-2009). Some students' studies have opened topics that allow to study the risks and opportunities concerning the work from atypical angles. For example, Tammeorg (2012) used recorded observations and carried out research on editorial meetings at one Estonian media organization. Laak (2014) tested how to support young journalists with supervision; Mugra (2016) investigated how the work and communication of journalists is affected by the open office; Janson (2017) investigated the perception of job tasks among regional newspapers; (Sommer (2021) focused her research on cases when journalists do not publish news-worthy stories. In two graduation papers,

students have studied the harassment of female (Palgi 2020) and male journalists (Riives 2019).

Relatively less is known about the different aspect of **employment conditions** (MediaAct collected data on income, the results were published in the Yearbook of Estonian Academic Journalism Association) and actual salaries as the managers and owners regard this as a business secret. (The data provided by <https://www.palgad.ee> provides data on average level of journalists' salaries. Two student thesis have been focusing on the working conditions, risks and opportunities of freelancers (Karro 2015; Nutov 2019). The MA thesis of Nikkolo (2010) conducted and analysed survey on **job satisfaction** among journalists.

Journalism researchers also participated at the Centre of Excellence in Cultural Theory (2008-2015). The risk-related approach was focused on **temporal aspects** of journalism and **journalistic work** and was also empirically studied by a student, who used observations and in-depth interviews in order to map the rhythms of journalists' working time (Kivi 2016). A comparative analysis (based on the theoretical knowledge of acceleration, and the database of WJS) on the temporal aspects of journalistic work was published by Halliki Harro-Loit & Beate Josephi (2020, online 2019).

This review shows that empirical studies on employment conditions and specific work conditions have been carried out on almost all variations. The limitation of studies, as stated above, is the very different timing of their conduct, the absence of repeated studies and, in some cases, a very small sample size. On the other hand, journalism students (some of whom have been familiar with the organizations or even working at the media organization they are collecting data about) have been able to use methods that could not have been used by a researcher coming outside of the journalistic community: observations, in-depth interviews. Thirdly, many different works of journalism students make it possible to study one problem (for example, working conditions) from a wide range of different aspects.

Journalism **competencies, education and training** has been handled from two perspectives: from the point of actual competences journalists' perceive and from educational (training) point of view.

The research on actual competencies have been led by Marju Himma-Kadakas, who also defended her PhD thesis on journalistic skills and competencies in contemporary online environment. She has been guiding also several students' theses on this topic.

Journalism as one of the market sectors is researched and evaluated by the Estonian Professions Chamber every seven years as OSKA (skills and competencies study) reports, initiated by the Estonian Government. The reports try to forecast the future trends of the job market and society. Study consists of original data collection and secondary research (economic and market data complemented with interviews with experts). According to the latest evaluation 65% of approximately 1500 journalists in Estonia have university degrees (Kutsekoda, 2019: 85), but the number of journalists with journalism degrees is not known. There are different calculation concerning the number of journalists in Estonia (1000- 1500).

The development of **academic journalism education** up to 2008 is described by Epp Lauk in the volume of European Journalism Education (Ed. by G. Terzis) (Lauk, 2009); Harro-Loit analyzed the financing of journalism education in 2009. Nevertheless, a broader and deeper academic analysis of the quality and scope of journalism teaching is missing. Journalism curricula have been evaluated only in the framework of quality assessment of higher education on the regular basis by the Estonian HE Quality Agency. The last assessment by international experts was carried out in 2017 and the most burning problem in the whole report has been raised as the insufficient financing of teaching (Estonian Quality Agency 2017). The quality assurance

system has been changed and now the institutional internal assessment will be used instead of the international one.

Journalistic competences has been also developed in conjunction with the curriculum development via international cooperation (University of Tartu was active in EJTA/European Journalism Training Association, the Tartu Declaration 2006 revised 2013 and 2020 ([Tartu Declaration 2020 | European Journalism Training Association \(ejta.eu\)](https://ejta.eu)) is one source that reflects the international dimension of the curriculum development). University of Tartu withdrew its membership four years ago because the scarcity of financial resources (no money for the membership fee).

3.4.1. Intra-organizational diversity (human resources and gender, age, class, education, cultural balance /autonomy among journalists)

Gender, age and education distribution among journalists has been studied to some extent through the WJS survey, and female and male journalists have been studied separately only in the above mentioned two works in the context of aggressive feedback and harassment.

The autonomy of journalists is an area that is reflected in a great many studies. However, the work of Niinepuu (2012) studied for the first time how Estonian journalists perceive their autonomy and restrictions on autonomy, is of significant importance, along with journalistic competencies, education and training.

3.4.2. Professional culture and role perception

The studies of the professional culture of journalism in Estonia focus on the diachronic development of journalism culture (e.g. Harro-Loit 2000, 2014; Lauk 2008; Lauk&Hoyer 2008; Lauk 2009, 2017; Lauk & Harro-Loit 2016) as well as the personal development of journalists (studies of biographical data and life stories), journalists' role perception and values. (In this report, we have placed studies concerning the values under a chapter of accountability.)

Lots of effort has been put into biographical data gathering and interviewing journalists of older generations. Three volumes of journalists' memoirs were published by Tartu University in the 2000s (Pallas, A. ed. 2004; Pallas, A., Tammar, H., Uus, S. eds., 2006; and Pallas, A., Uus, S. eds., 2009). The first remarkable result of biographical data gathering was published in 2014 by Tartu University Press: *Brendekenist Peeglini. Eesti ajakirjanduse biograafiline lühileksikon* (R. Kurvits and A. Pallas). This book contains short biographies of 348 journalists, editors, contributors and correspondents who were active in journalism (Estonian, Baltic-German, Estonian Russian press and diaspora press) from its beginning in Estonia in the 18th century up to 1940.

The research project (Tartu University) *Changing Journalism Cultures: A Comparative Perspective* (2008-2012) established several new research directions for Estonian journalism for the future years. The 1990s, the years of the democratic transition in Estonia had brought forward the questions of particularities of the development of journalism culture in the post-soviet/post-communist countries in comparison with the 'liberal' model generally adopted by the established Western democracies. New questions were formulated: What are the comparable elements that express the quality of journalism cultures? What factors influence the development of journalism cultures in different countries? Departing from these questions, the project laid foundation to following directions in Estonian journalism research: 1) journalistic practices: journalistic work process, working environment, work culture (Tali, 2011), 2) professionalization of Estonian journalism: professional ideologies and values, ethics, professional roles and autonomy (Örnebring, Lauk, 2010; Einmann, 2011). An important dimension in this research were contextual factors (historical and cultural backgrounds, development of journalistic education, economic factors and their influence, technologies, commercialization, etc. The critical-analytic approach advanced in the publications the project produced (Lauk, 2008; 2009)

The research on Estonia's Russophone journalism started along with the transition studies, since the sociological research had disclosed the existence of two different information spaces in the Estonian society, separated along the linguistic lines: Estonian and Russian ones. As the state's integration efforts have not been able to close this gap, it continues to impede the integration of the Russophone population into Estonian society. The early 2000s were the most active years of academic research on the Russophone media (Jakobson & Iljina, 2002, Jakobson 2002; Lauk & Jakobson 2009). In the more recent years, this research has been mostly related to the state's attempts to advance Russian language public broadcasting (Jõesaar, Jufereva, Rannu, 2014; Jõesaar, 2015a; Jõesaar, 2017a; 2021). The gradual shrinking process of the Russophone media in Estonia is well described by Jõesaar and his co-authors in the *Media Transformations* journal in 2013 (Jõesaar, Rannu, Jufereva, 2013). Some studies also focus on Russophone journalists in Estonia (Jufereva & Lauk, 2015).

After the end of the project of *Changing Journalism Cultures*, not a single project focused primarily on journalism has received funding from the Estonian Science Agency. Although good prerequisites were created for further research, and several articles (e.g., Harro-Loit 2014) and book chapters published (also internationally), the funding was not continued. See Appendix 2.

4. Publications, data sources and main monitoring actors of media usage patterns

4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in media system

There has been a clear distinction between academic and commercial research in audience studies – in aims, methods and scope of research. **Academic research** has been carried out mainly by the University of Tartu, in recent years by the University of Tallinn as well (since the 2010s). Academic research from **Tartu University** is grounding strongly on the sociological tradition where media usage has been interpreted in the broader societal context (Salovaara-Moring, Kallas 2007; Opermann, Vihalemm 2017). There are less risks or opportunities in the focus, rather the studies attempt to explain the media usage patterns and their relations to social practices, life-worlds of individuals, and general changes in society.

4.2. Relevance of news media

Two biggest longitudinal studies carried out in the research tradition of media sociology at the University of Tartu in the 21st century are:

1) Thematically exhaustive study “Mina. Maailm. Meedia (Me. The World. The Media)” that use original data collected by the representative surveys in years 2002, 2005, 2008, 2011, and 2014, but limited to the Estonian scope only (PI-s Marju Lauristin, Peeter Vihalemm, Veronika Kalmus, Triin Vihalemm). It has been greatly a transformation-study with explanatory character – looking back and trying to explain the changes in post-communist Estonia and looking less into the future (Masso et al., 2020). The importance of the study lays on the trends the researchers have found that can explain the future developments of Estonian society. The risks and opportunities have been rather side-effects in some articles with narrower topics (political participation and media usage, digitalization, fragmentation of audiences). The research group has been dealing with the media usage from the perspective of risks and opportunities from two angles: how is the diverse media use by an individual related to the higher social and political participation; and how the growing usage of digital media causes changes (partly verbalised as risks) to social cohesion. Since media was perceived as having a significant role in social and political transition (Vihalemm, Lauk, Lauristin, 1997), the public financing was granted for several projects with

the slightly different focus of the same research team. Recent years the researchers from the research group are using data collected in other research projects and the exhaustive and regular monitoring does not take place anymore. Smaller scale qualitative studies deal with definition of news among audiences (Kõuts-Klemm, Opermann), media repertoires (Kõuts-Klemm), online audiences of micro-celebrities (Murumaa-Mengel), social media audiences (Siibak, Murumaa-Mengel). The most important projects by the researchers:

2020-2021 Prospects of Estonian and German local independent media in the era of global platformization, disinformation campaigns and political populism (PI Ragne Kõuts-Klemm)

2019-2021 What is news? News perceptions and practices among young adults in times of transition (PI Signe Opermann)

2015-2018 H2020: CATCH-EyoU – Constructing Active Citizenship with European Youth: Policies, Practices, Challenges and Solutions (PI Veronika Kalmus)

2014-2016 Content and audience of the Estonian cultural media (PI Peeter Vihalemm)

2) International study “EU Kids Online” 2006-2009, 2009-2011, 2018-2019 (PI-s Andra Siibak, Veronika Kalmus). The EU Kids Online has employed a rather critical view analysing online risks for the youngest generation. Since the international consortium doesn't finance the study, the data collection has been carried out in every wave based on the different financing sources (by the personal grants, in the framework of EU financing, by the ministries and state offices).

Based on the research tradition of media sociology the members of the research group of Tartu University have been participating in analysing the media usage as a subtopic of “Integration monitoring” (initiated by the Culture Ministry and Integration Foundation, and lead mainly by Tallinn University or by think-tanks and NGO's). The focus has been on media usage among the Russian-speaking population in Estonia. Most clearly the risks have been conceptualised in the integration framework - two separate media spheres where Estonians and Russian-speaking population are living are risks for social cohesion and safety of society. The data have been collected as representative surveys in 2008, 2011, 2015, 2017, 2020 as a part of the state program on integration of ethnic minorities. The financing has been stable, following the state programs. The data about media usage has been only a minor part of the broader survey (Researchers from Tartu: Triin Vihalemm, Külliki Seppel, Ragne Kõuts-Klemm). Currently, a PhD Thesis about Russian-language audiences will be compiled (by Mihhail Kremez).

In **Tallinn University** the focus of academic media usage research has been mainly on the television, but original data collection has been rare up to recent years. The contribution of academic researchers has been to collect the available statistics and to interpret it in the framework of development tendencies in television.

In recent years (2019, 2020) Tallinn University has been financing original data collection about media usage. The data were collected in the form of representative surveys with the help of commercial research agencies (PI Andres Jõesaar). Jõesaar deals mainly with two topics: trends in public service broadcasting and usage patterns among Russian-speaking audiences. The other direction in Tallinn University is led by Katrin Tiidenberg, who analyses social media usage from the perspectives of agency and self-realization of users.

Estonia does not participate in the Reuters' Digital News Reports that is currently the most comprehensive and up to date comparative research about the media usage trends in Europe.

The **commercial research** about media usage is carried out by several research agencies. However, compared to the 2000s, the number of agencies that carry out audience research has been diminishing (compare e.g. Salovaara-Moring and Kallas 2007), indicating the concentration trends in the media market research. The commercial research is descriptive, the interpretation of tendencies especially in the broader societal context is missing. The former tendency that media themselves ask for more complicated research about their audiences from research

agencies is fading (e.g. there is no Research Centre as a part of the Estonian Public Broadcasting anymore, the Estonian Association of Media Enterprises do not order readership surveys anymore).

The media usage data are currently the interest of different media planning and advertising agencies. The collection of data takes place slightly differently by different agencies, the biggest research data providers in Estonia are:

Kantar Emor started their media usage surveys from 1990s as separate databases about (1) readership data on newspapers and magazines (as omnibus surveys), (2) TV-viewing data (telemetry); (3) radio listening data (as diary data), (4) internet usage data (initially as survey data, later as the combination tracking and web questionnaires); (5) survey on a media day is the latest product (combination of omnibus and web questionnaire). Kantar Emor analyzes the collected data mainly in the interests of data purchasers.

International market research company Norstat entered the Estonian market in 2007, but is currently providing very precise data about audiences, based on the wide-range international methodology they use in all countries.

The market share of other private research companies (Turu-Uuringute AS, OÜ Saar-Poll, Faktum AS) has been gradually decreasing.

The state-initiated data collection about the media usage by the Estonian Statistical Office is sporadic. The cultural institutions (incl. radio and TV-stations) provide their operating data quarterly (data about their program provision and economic data). Special surveys about the audience behaviour have been complementing the regular statistics collected about the cultural production and consumption - nevertheless, this kind of research is quite sporadic as well. The aggregate data from the open access statistics database by Statistical Office is usable for everyone. The data don't enable detailed or longitudinal analyses about the risks in the media usage domain.

"When collecting media data, Emor relies on a methodology that has long justified itself; we make changes in data collection very tenaciously. It would be best to keep parallel data collection methods going then - e.g. by switching from a TV diary to a measurement survey, we were able to do this for a while. But most of the time, change has to be done quickly, and two parallel studies cannot be allowed by the company. In addition to the direct commercial benefits Emor has also assumed an internal obligation to inform the public about the main issues - e.g. the monthly data of television viewing, radio listening. The direction is that all customers who need media usage data use them on a software-based basis. They will not be prepared analysis reports, but will have access to the current database of the data collector and will be able to carry out the necessary analyses themselves. There is no other company or agency collecting media data on the Estonian market on this basis. Statistics Estonia collects a little bit in its activity diary, but it's a little bit. If the client is prepared an analytical report, he or she will receive the right to use the data, but this does not include the right to publish the data. For example, even if the Ministry orders the data, it may use it only within its own authority - there is no possibility to publish the data. It is possible to draw conclusions from them, and these conclusions can be public. The interest in media data has remained stable - no customers have fallen away or increased. Even in the case of internet data, Emor's advantage is that Emor brings usage data into contact with the user, i.e. the person - not counting devices or accounts. But, for example, Gemius, which also collects internet data - it is a black box in its methodology. No one knows how they collect their statistics or what it means. Norstat' is an intermediary, they don't have their data. Media agencies have their

own panels. These panels are made by polling companies hired by the media agency to collect data (e.g. Norstat). (*Expert interview 25.10.2022*)¹⁶

4.3. Trust in media

In the framework of the Standard Eurobarometer the data about media usage will be regularly collected on a very general level (number of users and **trust** in media).

5. Publications, data sources and main monitoring actors of media related competencies domain

The media -related competencies of the lay members of society is a complicated issue as the discourse has changed over time. In the beginning of the 21st century the very broad term was media literacy (MIL), currently the dominant concept in teacher education is labelled as digital competencies. Research and development of media-related competencies in Estonia has been biased towards the younger generation from the beginning. During the first decade of the 21st century the research focused on development of Estonian national curricula (Ugur & Harro-Loit 2010). During the first decade of the 21 century Ugur was the leading researcher who developed critical analysis on **didactics of general media literacy**.

In 2012-2015 **teachers'** digital competencies and the influence on students' abilities were studied via the research grant led by Pille Pruulmann-Vengerfeldt. In 2018 the Baltic grant focused on media literacy development **in the higher education curricula**.

Digital competencies and education have received special attention and special financial support from Estonian State since 2014/2015. Digital competences are well described as well as there are different assessment tools.

The bibliographical database includes 31 (out of 139) publication on media related competencies, however, the publications that are focused on assessment are related to the latest EO project and the results are published only in 2021, 2022 (see Appendix 2).

The projects about media related competencies:

- 2020-2023 H2020: Youth Skills (PI Veronika Kalmus) (University of Tartu)
- 2020-2022 H2020: CORE - Children Online: Research and Evidence. A knowledge base on children and youth in the digital world (PI Veronika Kalmus) (University of Tartu)
- 2019-2022 H2020: The impact of technological transformations on the digital generation (PI Merike Sisask) (University of Tallinn)
- 2014-2018 The Digital Literacy and Multimodal Practices of Young Children (PI Sirje Virkus) (University of Tallinn)
- 2013-2018 Conceptualisations and experiences with public and private in technologically saturated society (PI Andra Siibak) (University of Tartu)
- 2011-2015 Generations and inter-generational relationships in the emerging information society (PI Veronika Kalmus) (University of Tartu)

5.1. Normative sources

The Estonian DigiEfekt project re-conceptualizes digital competence through 10 dimensions and focuses on the question of how different approaches to applying digital devices, environ-

¹⁶ An expert from a media research company explained methodologies and access to data (interviewed by Ragne Kõuts-Klemm, 24 Oct 2022, 50 min, Zoom).

ments and content in learning will have an effect on digital competence and several other cognitive and non-cognitive learning outcomes (Pedaste et. Al 2022).

(MIL) has been stressed in state programs and development plans of school curriculum. The topic gets a lot of attention from the ministries, nevertheless it has remained uncoordinated. The White Paper (2021) about the stand of MIL in Estonia states that the field is characterized by the conceptual vagueness, fragmentation and lack of cooperation between different agents, insufficient preparation to teach MIL topics in schools, and sporadic financing (*Meediapädevuse valge raamat/White Paper on Media Skills*, 2021).

5.2. Assessment of media related competencies among citizens

In 2004 Epp Lauk published the first assessment study about media competences of Estonian schoolchildren. Later research on actual media-related competencies has been mostly related to the EU Kids Online research project, CORE and Youth Skills (Estonian teams led by Veronika Kalmus). Most important projects about the media competencies among the younger generation provide information about risks and opportunities with the perspective to the future. In 2019 Estonian Digital Competence Test was carried out among Estonian 9th grade pupils. On the basis of the Estonian Digital Competence Test, it is possible to distinguish eight digital competence factors: (1) operational knowledge and skills, (2) content creation factor 1, (3) content creation factor 2, (4) attitudes towards technology, (5) self-assessment of digital skills factor 1, (6) self-assessment of digital skills factor 2, (7) safety-related behaviour in the digital world, and (8) problem-solving related behaviour in the digital world (Pedaste, Kalmus, Vainonen 2021). From this list one can see that MIL and digital competencies concept overlap only partly. Moral awareness concerning media and communication is missing from both concepts. Nevertheless, the research about other age or socio-demographic groups is almost missing.

The Media Literacy Index, compiled by the Open Society Institute in Sofia calculates the media literacy score for Estonia as well. Whereas Estonia is ranked among the top five in several years (2017, 2019, 2021), the index is rather an estimation about the resilience to disinformation. It is an aggregate indicator characterizing the media environment in great extent and less the actual skills of citizens.

Digital Economy and Society Index (DESI) compares digital skills of citizens in the EU, dividing skills as low, basic and above basic skills. The index composes data from PIAAC studies, thus interpreting the internet usage skills mainly.

The growing body of public finances is not dedicated to research but to intervention, like IREX Media Literacy in the Baltics Program (Maria Murumaa-Mengel).

Concurrently, there is no data about the actual “levels” on media related competencies of middle-aged and elderly population.

6. Analysis of Research and Monitoring Capabilities and Quality

6.1. Comparative analytical overview on available research and access to the research

The Estonian monitoring capability across the four domains is different concerning the temporal, methodological viewpoint, as well as coverage of various aspects of ROs. Temporal dimension means, in particular, whether and to what extent it is possible to monitor diachronic changes on a data-driven basis concerning categories related to risks and opportunities. There is also a difference in the availability of raw data, analyses and knowledge.

There is a lot of **data** concerning the **domain of legal and ethical regulation**, but little **knowledge** on the actual situation concerning implementation of freedom of expression and freedom of information. The lack of monitoring capacity is partly methodological: there is no capacity to collect and analyse cases that reflect the interpretation and implementation of laws and norms. Case studies enable to ask who is acting against whom and what indicates the pressure on journalists or opinion makers. In other words, the case-study method - if applied systematically - would, in particular in the regulatory domain, allow monitoring of power relations and balance between different parties.

In Estonian the court cases are spread, and one should know the case law in order to find the relevant cases. However, the focus of analysis as well as the “sample” of the cases is limited.

Many important cases that actually reflect the risks concerning the freedom of information are published by professional journalists. An opportunity is the analytical work of cases done by the Data Protection Inspectorate. Monitoring of the development of media accountability instruments is easy due to the research projects. The data (methodology has been partly using case study approach) is systematically processed into knowledge and published in various articles since 2010.

Human resources are important for monitoring capabilities. In a small country like Estonia, where the number of **researchers** in the media field is small, the research work of students is also important, enabling the collection of empirical data over the years that individual researchers, especially without funding, would not be able to collect. Due to the relatively long tradition of academic journalism education, the **journalism domain** is well represented by many methodologically and theoretically diverse small-scale research papers. However, monitoring agency depends on single researchers and journalism students. In addition, Estonian journalism researchers have been successful in participating in international and EU-financed research projects and international networks.

During the first decade of the 21st century also **journalism education and training** was methodologically developed – concerning curriculum as well as didactics. This approach does not have any comparative dimension, which is a risk by itself.

Estonian Academic Journalism Society with its yearbook is important corporate agent concerning journalism discourse that brings together academia and practitioners. Consistency of the yearbook is particularly important.

The monitoring of the processes in the **media usage domain** in Estonia has been mainly descriptive (when we classify research as exploratory, descriptive and explanatory). Explanatory research has been carried out by the academic institutions in the framework of more established research traditions (like “Me. The World. Media” and EU Kids Online) and there the risk discourse has been visible. The monitoring capability has been decreasing due to the lack of national research funding in the field since 2014. Nevertheless, Estonian media and audience researchers have been successful in participating in international and EU-financed research projects. In sum the main risk concerning the media usage domain is: who’s interest is served by the studies and what is the methodology that enables to find answers that are most important to the society?

The focus on media **related competencies concerning lay members of society** is put on children (and adults in the role of parents of these children) and teachers. Awareness and literacy on communication ethics is entirely missing in research agenda. It might be possible that this topic might get more attention via character education programs led by the Ethics Centre at the University of Tartu. Concurrently, media literacy is declared important in different policy documents. In sum, there is a gap between the declared importance of media literacy and actual media literacy of people who belong in different age, social and ethnic groups.

6.2. Monitoring capabilities and the quality of data and knowledge

Estonian information systems have limits concerning the “find” functions, but a lot of data is digitally archived. ETIS enables to find key researchers, their publications and grants (together with the sum of money and the financing body); students’ thesis are publicly accessible via DSpace system. The database is completed by the researchers themselves and, as it forms the basis for the evaluation of research, the researchers are interested in its accuracy and timeliness.

One of the risks concerning the monitoring capabilities is lacking cooperation between private and public sector, research community and policy makers. The state’s contribution to the studies and use of the research has been criticized. Already in 2015 the National Audit Office concluded that:

Although the state strives to make decisions on the best possible evidence, the National Audit Office is of the opinion that the use of studies in knowledge-based policymaking is not significant. Studies are mainly used as background information. The capacity of state agencies to commission studies is not equal, the commissioning of studies is inadequately coordinated and not all of the studies that have been commissioned are easily accessible to the general public. (National Audit Office, 2015)

An expert with a long experience in media (former official of the Ministry of Culture) explains why so little available wisdom has been used for media policy making:

Estonian monitoring capability increased during the first decade of the 21st century. The reason was that in the 1990s the academic research financing model encouraged researchers to do a lot of work with little money, the competition was tough, but the success rate was high and the career model in academia motivated researchers and educators to work hard. Therefore, in the „There is little knowledge about the media sector. Unfortunately. Partly because of the lack of ability to formulate questions that would support decision making. But partly because policy makers have not had any desire to receive information.

The media study, conducted in collaboration between the two universities, was a very good start. But that was just the beginning. There was no similar study. The desire to create some kind of analytical basis on which to make informed decisions in the first place has existed for years, but there seems to be a lack of a sufficient understanding of what we want to know.

These pieces of information that are needed by the Technical Surveillance Authority (TSA) and those that are necessary for policy making are different in nature. The ideal is that TSA collects this information itself, monitors it constantly and has an understanding of what is happening in the media (e.g. what is harmful content) and can react quickly. Policy making must include, for example, understanding how the media market works, what processes take place there. How cash flow is generated and when it may fall away. (Expert interview, 24 Oct 2022)¹⁷

Estonian monitoring capability increased during the first decade of the 21st century. The reason was that in the 1990s the academic research financing model encouraged researchers to do a lot of work with little money, the competition was tough, but the success rate was high and the career model in academia motivated researchers and educators to work hard. Therefore, in the first decade of the 21st century, many researchers qualified for international grants and consor-

¹⁷ An expert with long experience in media (former official of the Ministry of Culture), interviewed by Ragne Kõuts-Klemm, 24 Oct 2022 (23 min, Zoom).

tiums, and doctoral programs in journalism and media and communication attracted talented young people.

Journalism and media studies were better financed in 2000-2015 (see appendix 2). Until 2013-2015 the competition-based financing was 80-82% of the whole financing by the Estonian Research Agency. Since 2016 the science financing system has increased competition (the success rate for Estonian research grants in social sciences and culture [MP7] has been 11,1 in 2014; 18,8 in 2015; 13,1 in 2016; 20,6 in 2017 and 8,9 in 2018 https://www.etag.ee/wp-content/uploads/2019/03/Eesti_teadus_2019_veeb.pdf) and journalism studies have not received any research money. Audience studies got the last grant in 2014 and later there has been only EU based financing. This situation explains the nature of databases, data collection and knowledge acquisition (Appendix 2).

In 2000-2021 we could count altogether 26 researchers who have been or are involved in the research on the four domains of ROs. A critical question concerning human capital is related to the training of young researchers. Five young researchers and teachers were offered a teaching position along with doctoral studies in 2010-2012. Two out of three researchers are now holding postdoc positions, three are finishing their doctoral studies, their expert knowledge has been highly evaluated. A generational shift is taking place at the end of the second decade of the 21st century

In addition to the researchers there are a few organizations where the employers are expected to carry out analytical work (Praxis, Estonian Statistics and few other smaller organizations). The Estonian Data Protection Inspectorate is understaffed in comparison to the other two Baltic states (https://edpb.europa.eu/our-work-tools/our-documents/other-guidance/overview-resources-made-available-member-states-data_en). The analytical department of the National Court has many other focuses than freedom of speech and freedom of information.

7. Conclusions

Estonian monitoring capability is controversial. On the one hand it is efficient – the small number of people is used as efficiently as possible. Motivation system forces academic staff to be internationally competitive. On the other hand, in the second decade of the 21st century, the potential of monitoring media and journalism has been significantly reduced by reforms in higher education and science.

During COVID, the weakness in the communication between the public, the Estonian government and the Health Board was fully revealed. In other words, Estonia is an example of a country where, over the decades, a good and multi-faceted culture of journalism, media and communication research and monitoring has been built, but this expertise is not used.

However, the small size of the Estonian state also offers opportunities, in particular it is possible to test different methods, approaches, since the volumes of studies, in order to make generalizations, do not have to be too large. Secondly, a small community allows researchers and experts to well know each other's work and collaborate in common projects. The key question is whether the career system motivates enough cooperation.

The lack of resources has led to scientists being forced to actively search for research tools outside Estonia - this has helped to integrate research in the field of journalism and media with international community and international standards allowing to increase the competitiveness of Estonian scientists.

International funding for research has been significant compared to public funding. Part of the reason for the small size of the state's contribution is the absence of a negotiated and meaning-

ful knowledge of the importance of the media sector in the development of democracy. The state has not been a “smart subscriber”.

Inconsistency in funding has also led to inconsistency in monitoring – the focus of research has changed significantly over time. It also means that longitude knowledge cannot be formed.

Appendix 1

Table 1. Media related research grants and financing

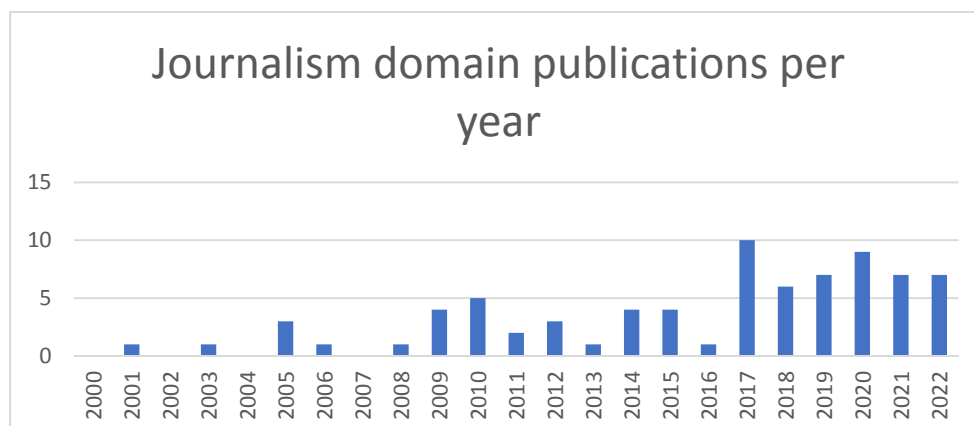
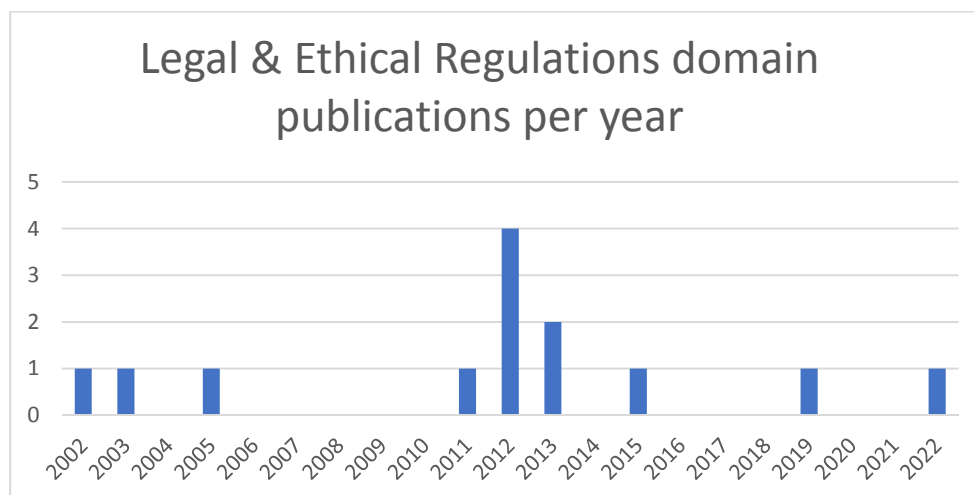
Name of the project	duration	Finance/ financing institution	keywords	Researchers in- volved
Critical Explorations of Media Related Risks and Opportunities for Deliberative Communication: Development Scenarios of the European Media Landscape MEDIADCOM	2021-2024	EU	All domains	Halliki Harro-Loit Epp Lauk Ragne Kõuts-Klemm Mari-Liisa Parder Kuldar Taveter Urmas Loit
ySKILLS - Youth Skills	2020-2023	EU 104 700	Media related competencies	Veronika Kalmus, Signe Opermann, Mari-Liis Tikerperi, Marit Sukk
CORE - Children Online: Research and Evidence. A knowledge base on children and youth in the digital world	2020-2022	EU 89 000	Media competencies	Veronika Kalmus, Signe Opermann, Maria Murumaa-Mengel, Marit Sukk
EU Kids Online Survey Estonia	2018-2019	EST 25 000 + 20 000 + 20 000 + 20 000	Media usage, media related competencies	Veronika Kalmus, Andra Siibak, Marit Sukk
Acceleration of Social and Personal Time in the Information Society: Practices and Effects of Mediated Communication	2014-2019	EST 574 800	Media usage	Veronika Kalmus, Ragne Kõuts-Klemm, Triin Viha- lemm, Marju Lauristin, Peeter Viha- lemm, Halliki Harro-Loit
LSHUH14157 "Meediasotsioloogilise uuringu „Kultuuriajakirjanduse sisu ja kasutajaskond“ läbiviimine" Content and audience of the Estonian cultural media	2014- 2016	EST (Min- istry of Culture) 58 155	Journalism	Peeter Vihalemm

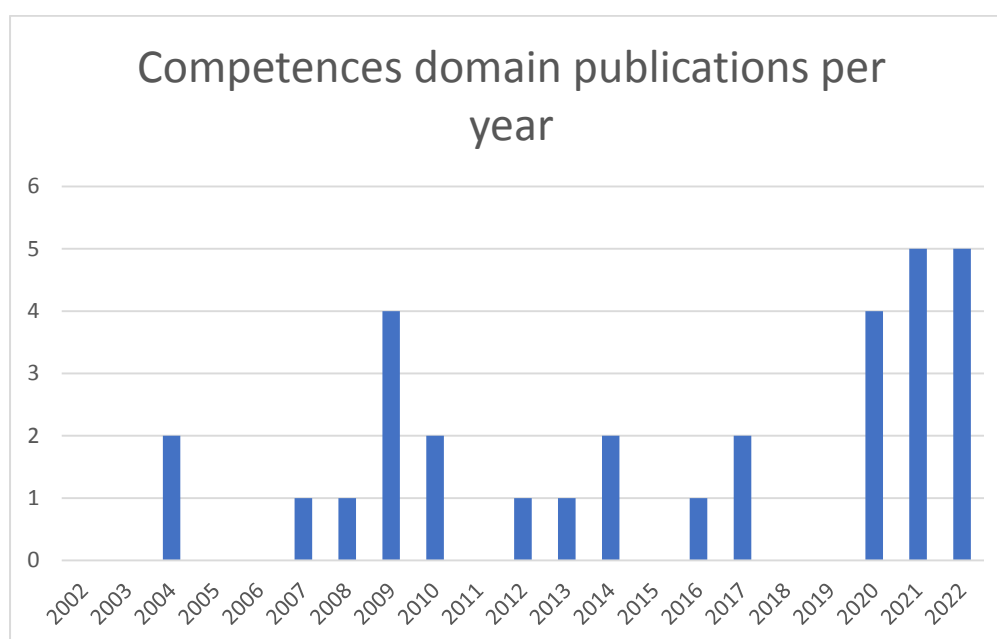
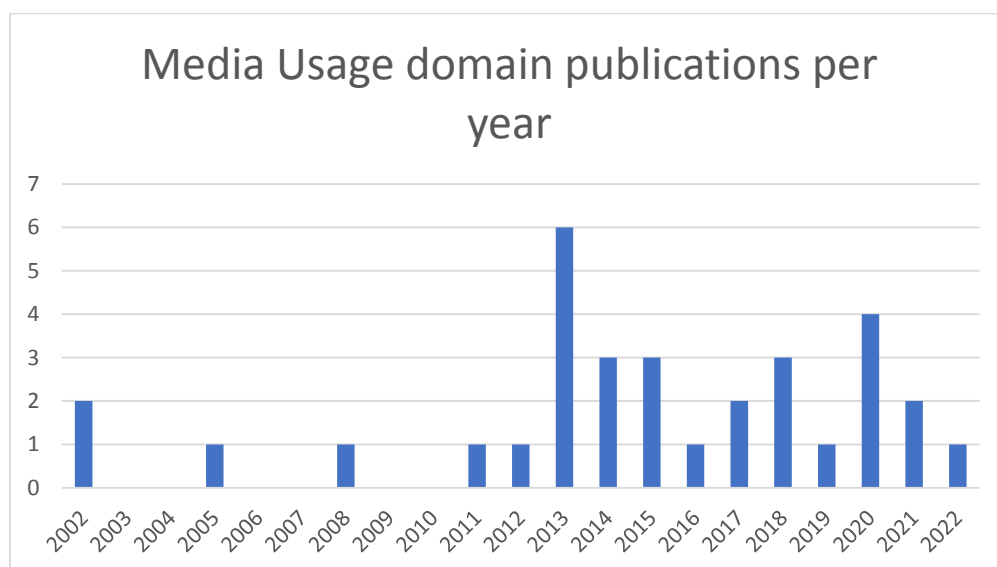
Survey of the Situation and Trends of Estonian Media Policy	2019	EST 20 150	Media (policy)	Ragne Kõuts-Klemm, Halliki Harro-Loit, Signe Ivask, Marten Juurik, Urmas Loit, Andres Jõesaar, Indrek Ibrus, Väino Koorberg, et al.
Digital era complexities for audiovisual industries of small countries in the European Union	2017-2021	EST 201 600	Media (industry)	Ulrike Rohn, Andres Jõesaar, Sten Kauber
TU Center of Excellence in Media Innovation and Digital Culture	2015-2021	EST 138 000	Media (industry), digital culture	Indrek Ibrus
CATCH-EyoU – Constructing Active Citizenship with European Youth: Policies, Practices, Challenges and Solutions	2015-2018	EU 157 500	Media usage, media related competencies	Veronika Kalmus, Ragne Kõuts-Klemm, Signe Opermann, Mari-Liis Tikerperi, Andu Rämmer
"Assessing the risk for media pluralism in EU and beyond: application of the Media Pluralism Monitor tool (MPM2015116) in 30 European countries	2016			Halliki Harro-Loit Urmas Loit ; Andres Kõnno
Analüüsi teostamine Eestis kehtiva meediateenuse regulaatorasutuse regulatsiooni vastavuse kohta audiovisuaalmeedia direktiivi ettepanekule/ Examination of the compliance of the regulation of the media service regulator in Estonia with the proposal for an Audiovisual Media Directive	2016	EST 1200	Media regulation	Andres Jõesaar
Centre of Excellence in Cultural Theory	1.02.2008–3 1.08.2015	300 000 for the research group		Halliki Harro-Loit Anu Masso Katrin Kello Marten Juurik
Update and the Pilot Test Implementation of the Media Pluralism Monitor	2014	12 500		Halliki Harro-loit Urmas Loit
WJS	2010- 2014(+)	No financing	Journalism survey	Epp Lauk, Halliki Harro-Loit, Ragne Kõuts-Klemm, Marju Himma-Kadakas
Promoting efficient co-operation network of film and media schools and media industry	2013-2014	Norway 30 000	Media education	Andres Jõesaar
"MediaAct - Media Accountability and Transparency in Europe	1.02.2010– 31.07.2013	EU 54 990	Media accountability	Epp Lauk Halliki Harro-Loit Urmas Loit
"MEDIADDEM European Media Policies Revisited: Valuing and Reclaiming Free and Independent Media in Con-	1.04.2010– 31.03.2013	EU 118 600,02 EUR	Media policy	Halliki Harro-Loit, Epp Lauk, Urmas Loit

temporary Democratic Systems				
"Õpetajate IKT kasutusaktiivsuse mõju õpilaste tehnoloogia teadlikule kasutuskusele Impact of the ICT activity of teachers on the knowledgeable use of student technology	13.12.2010–20.12.2013	36 164,47 EUR	Teachers digital competencies Media related competencies	Pille Pruulmann-Vengerfeldt Kadri Ugur
Actual complexity of cultural communication and methodological challenges of cultural research	1.01.2007–31.12.2012	EST Research 319 294,75	Journalism history, journalism cult com	Epp Lauk /Halliki Harro-Loit
"Changing Journalism Cultures: A Comparative Perspective	1.01.2008–31.12.2012		journalism	Epp Lauk
"Formation of the 21st Century Media Society in Estonia	2001-2005 2014			Marju Lauristin, Peeter Vihalemm, Ragne Kõuts-Klemm Halliki Harro-Loit

Appendix 2

Bibliographical data in 4 domains. Publications per year.





Appendix 3

List of researchers

Marju Lauristin; Peeter Vihalemm (Baltic media systems; media usage); Epp Lauk (journalism profession, education, policy, accountability, Estonian press history) Ragne Kõuts-Klemm (sociology of journalism and media usage); Halliki Harro-Loit (Journalism studies, media policy and regulation, interviewing, media history), Kadri Ugur, Urmas Loit, Signe Ivask, Marju Himma-Kadakas (skills of journalists), Pille Pruulmann-Vengerfeldt (one period, media literacy); Veronika Kalmus (children usage), Signe Opermann (children usage); Andres Jõesaar (public service media, Russian-speaking audiences); Indrek Ibrus (media industry, media innovation), Ulrike Rohn; (media pluralism); Katrin Tiidenberg (social media audiences), Alessandro Nani (media innovation); Triin Vihalemm (Russian-speaking audiences); Maarja Lõhmus (public service media); Hagi Šein (television market and audiences), Salme Rannu (media usage), Andres Kõnno (media pluralism monitoring), Valeria Jakobson (Russian-language media), Maria Jufereva-Skuratovski (thesis on russophone journalists 2021). Indrek Treufeldt, Mari-Liisa Parder, Marten Juurik (journalism and media ethics, information law), BritLaak, Viivika Eljand Viivika Eljand-Kärp (journalistic interviewing), Liis Auväärt, Eleri Lõhmus, Marit Sukk (media usage), Mihhail Kremez (Russian-language audience)

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GERMANY

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive Summary

As the largest country and media market in the MEDIAcom project, Germany features both a rich and highly differentiated research environment and an added level of complexity due to the decentralized organization of the federal state. Regional differences between federal states are especially relevant with regards to the journalism domain and the domain of legal and ethical regulation. In addition to scholarly research and literature, a system of commercial research into media usage supplements continuous availability of data on market developments. A multitude of monitoring and research institutions is active in the field, and several journals both for communication studies in general and more specific subject matters exist. Compared to the monitoring capabilities of the media sector, statistical data on the research environment is comparably hard to come by: There is no centralized database of researchers and their output as found in some other countries, and even statistics on funding rarely differentiate communication studies from neighboring fields.

1. Introduction

The German media system we see today has been shaped by two critical junctures during the 20th century: First, the period after World War II saw not only the foundation of two separate German states, but also a complete reconfiguration of all types of media activities. And second, German reunification brought another reconfiguration of the media system – and monitoring systems – in the “new” federal states (*Bundesländer* or short *Länder*) in Eastern Germany. At the end of our time frame of interest, Germany has just above 83 million inhabitants, more than 80 per cent of which live in the ten “old” federal states of Western Germany. The most populous *Land* of North Rhine-Westphalia alone has 17.9 million inhabitants – more than 21 of the 27 member states of the EU (figures from 2018, Bundeszentrale für politische Bildung, 2020).

Eastern Germany has seen a decline in population already during the second half of the 20th century, but most of the “new” federal states in the East experienced an accelerated loss especially of the younger and well-educated after reunification; the population of Saxony-Anhalt dropped by almost one fourth from 2.9 to 2.2 million between 1990 and 2018, with obvious effects on society, economy, and consequently media markets. After the short-lived first attempt of a German democracy between 1918 and 1933 and the installation of a sustainable liberal democracy only after 1949 (in the West) and 1990 (in today’s Germany), the country’s political system is now considered one of the more established and functional, resulting in relatively high ranks in comparisons of democracy and freedom of expression: Germany is evaluated as

“free” with a score of 94 out of 100 in Freedom House’s Freedom in the World index (Freedom House, 2021), and considered one out of 23 full democracies in the Economist’s democracy index (ranking 14th, Economist Intelligence Unit, 2021). The country ranks 8th overall in V-Dem’s liberal democracy index (Varieties of Democracy Institute, 2021) and a bit lower in the specific freedom of expression index (23rd in Varieties of Democracy Institute, 2019).

The following chapters of this case study often follow a two-step procedure, first giving a short overview of relevant conditions and structures of the German case and then analyzing the monitoring potential through literature, databases, etc.. A more detailed analysis of many aspects of the German media environment with special focus on developments in the 2000–2020 time frame can be found in the second case study.¹⁸

1.1. The Media Research and Monitoring System

The systematic study of media and communication in Germany has a long and turbulent history. After some decades of scattered academic efforts to research the field and offer academic education for future journalists, it was first established as an institute for “Newspaper Studies” (*Institut für Zeitungskunde*)¹⁹ at Leipzig University in 1916 – a date widely perceived today as the birth of the discipline.²⁰ While a number of further institutes were founded throughout the 1920s, a debate about the media content of interest (beyond newspapers, including radio, tv, etc.) resulted in the creation of the term *Publizistik* for this kind of scholarly activity – a term that became widely used for newly founded or re-established institutes in the field after the second world war in Western Germany. With its direct influence on (future) media makers, the discipline was faced with destructive phases of political pressure and ideological influence twice throughout its history: First under the National Socialist regime, and a second time in Eastern Germany (Pürer, 2014, pp. 31-41). In the “German Democratic Republic”, the Faculty/Section of Journalism at Leipzig University, nicknamed “the red monastery”, was the central education facility for journalists and its activities were clearly following socialist ideology. It was closed down during the reunification phase and only re-established in 1993 (Beiler & Bigl, 2017b, pp. 22-23).

In the Federal Republic, the re-established *Publizistik* saw yet another re-orientation beginning in the 1960s: A turn towards understanding the discipline as an empirically oriented social science, more frequently labelled and identified as *Kommunikationswissenschaft* (Communication Studies), although *Publizistik* is still in use in institutes’ designations and publications (Pürer, 2014, pp. 41-49). While there is still an ongoing debate about identity, reach, theoretical and methodological orientation (Beiler & Bigl, 2017a, particularly part two), the discipline has grown and diversified significantly. Pürer (2014, p. 51) exemplifies this trend with an increase of university professorships: a total of seven existed in 1970, 54 in 1990, 85 in 2002, 103 in 2007 and about 115 to 120 in 2012, teaching at more than 30 main academic institutions throughout the country. As Klaus Meier pointed out in an interview for this project, chairs are a good indicator for the development of the subject, but funding structures such as research networks or the foundation of the *Weizenbaum Institute for the Networked Society - The German*

¹⁸ Three expert interviews were conducted mostly for validating and improving findings of the second case study. As far as research structures in the respective fields are concerned, these interviews can also be relevant for this case study report. The interviewed experts were: Klaus Meier, professor of journalism at KU Eichstätt-Ingolstadt and chair of the German Communication Association DGPK; Tobias Gostomzyk, professor of media law at TU Dortmund University; and Thomas Rathgeb, head of Baden-Württemberg’s media authority’s section of media competency, youth protection and research, who is also one of the two directors of the mpfs (media-pedagogical research network of South-Western Germany, www.mpfs.de).

¹⁹ Some scholars understood the term as „news studies“, following an older meaning of the German word „Zeitung“ (Pürer, 2014, p. 38).

²⁰ Consequently, the German Communication Association celebrated a century of communication studies in 2016 (Beiler & Bigl, 2017b).

Internet Institute in 2017 also brought new forms of collaboration for a growing number of mid-career researchers not occupying professor positions. However, data on the total number of such positions is not available.

Beyond research-oriented courses, programs that combine theory and practical training for future journalists started in the middle of the 1970s, an effort that built on a broad debate by stakeholders such as publishers and broadcasters, journalists and their associations, and researchers (Pürer, 2014, p. 49). After a period of growth and diversification at the beginning of this century, study opportunities today are varied: The course database offered by German weekly *Die Zeit* (<https://studiengaenge.zeit.de>) lists a total of 235 study programs in the subject area: 73 in journalism, 168 in communication studies, 34 in online media, and 21 labelled *Publizistik*. This includes both Bachelor's (115) and Master's (119) degree programs (and one miscellaneous degree) offered by universities (121), art schools (7), and universities of applied science (107), both public and private.

1.2. Structural Peculiarities

To understand today's situation of the media system, it is imperative to take the historical juncture of the collapse of the National Socialist regime after World War II into account. In the direct aftermath of the German capitulation in 1945, the occupying powers prohibited any kind of publication, printed or broadcast. After a short period of newspapers and broadcasts produced by the occupying military itself, broadcasters were founded by the occupying powers and Germans could receive licenses to publish newspapers if they could prove their non-involvement with the old regime. Each of the four powers – the United Kingdom in the North and West, France in the South-West, the USA in the South and the center, and the Soviet Union in the East of Germany – had different priorities for both early broadcasting and licenses for newspapers. These differences persisted and had an effect on the further differentiation of the media system (Pürer, 2015). Both broadcasting and the press belong to the key legal competencies of the 16 German federal states, with only minor exceptions of federal competency in questions of broadcast technology and Germany's foreign broadcaster Deutsche Welle (Zippelius & Würtenberger, 2008, p. 366). After reunification, newspapers in Eastern Germany were sold to Western investors, with formerly party-owned district newspapers seeing most economic success, and new structures for public broadcasting were founded in the new *Bundesländer* of Eastern Germany.

Because of this specific development, Germany's media system and many of its institutions are fragmented: Today, there are 16 press laws (one in each *Bundesland*), 14 supervising bodies for broadcasting (*Landesmedienanstalten*, usually one in each *Bundesland*, with two cases of two *Bundesländer* that agreed on common structures), nine regional public broadcasters (TV and radio, pooled in the common cooperation ARD running nationwide programs) as well as nationwide television (ZDF) and radio (Deutschlandradio) programs which are again legally based on a treaty between the 16 *Bundesländer*. Similarly, changes to the public broadcasting system – even adaptations of the broadcast license fee – have to be agreed upon by the *Bundesländer* in the form of common treaties.

The negative historical experience of strict political control over the media has led to a particularly cautious architecture of the media system, with a focus on safeguards against direct state influence (Beck, 2018). The federal structure can also be seen in other areas such as formal education, an almost exclusive *Länder* competency, and it also translates to associations: For example, the DJV (Deutscher Journalisten Verband), one of two main professional associations for journalists, has subdivisions in each of the 16 federal states. This structure has to be taken into account in any research or data collection for Germany. While the federal and decentralized character of the country is also visible in the research and archives landscapes, and even the National Library operates from two sites in Frankfurt/Main and Leipzig, digital catalogues and

databases covering publications from all of Germany or combining information from regionally dispersed archives (such as the different university libraries) are available.

As a final structural remark, the German language still plays an important role as the language of research projects and publications, especially when purely domestic media matters are concerned.

1.3. Institutions and Actors

A peculiarity of the German research tradition is the differentiation between communication studies (*Kommunikationswissenschaft*, also *Publizistik*, see chapter 1.1) and media studies (*Medienwissenschaft*), where the latter describes a more philological approach to media messages usually placed within the Humanities, while the former today has a strong orientation towards concepts and methods of social science. While there is exchange between the two fields, the German research funding organization DFG treats them as separate subjects, and the differentiation is also manifested in separate research associations (Beck, 2013; Bentele, 2013).²¹ As the field of communication studies covers most of the journalism, media usage, and regulations domains – the latter amended by legal and ethical-philosophical discourse –, media-related competencies particularly in an educational-pedagogic context are also a subject of media studies.

The DGPK (*Deutsche Gesellschaft für Publizistik und Kommunikationswissenschaft* / German Communication Association) with a total of 19 thematic divisions is a major factor to networking and exchange. After a constant increase in recent years, it now has around 1300 members. While this figure may include inactive researchers as well as exclude researchers that have opted not to become a member of the association, it provides an estimate of the size of the German communication studies community.

As the EU's largest country by population as well as the largest media market, Germany is commonly included in internationally comparative research designs, covering Europe or beyond. For example, Germany was included as one of 21 countries already in the first wave of the Worlds of Journalism Study, as well as in both consecutive waves. An instructive example is a meta-analysis of publications based on content analysis of EU coverage, which showed Germany to be the most analyzed country case, included in 15 of the 17 studies (Machill et al., 2006). As described in more detail in chapter 3, considerable monitoring capabilities especially of the audience market and market concentration are in place in order to both inform business decisions and allow for regulation of concentration, with an array of commercial monitoring mechanisms delivering data to companies and regulators, in addition to academic and institutional monitoring contributions. In effect, the statutory commission tasked with monitoring concentration in the media sector (KEK) can base its reports on a number of different data sources (KEK, 2018, pp. 460-476).

In professional discourse in the media field, the two journalists' unions (DJV and dju as a part of ver.di) and private publishers' associations (BDZV, VDZ, Vaunet for mostly newspapers, magazines and audiovisual media, respectively) are especially visible and relevant. More specialized NGOs or associations are relevant in their specific fields of action, some of which will be discussed in more detail in the respective sections of this report; they include a diverse array of initiatives ranging from the Press Council to the German section of Reporters without Borders, from Neue Deutsche Medienmacher*innen (an association focusing on culturally diverse journalism) to a number of foundations that finance and communicate in and on the media sector.

²¹ *Kommunikationswissenschaft* is categorized as a social science in the DFG framework, whereas *Medienwissenschaft* is categorized as part of the humanities (https://www.dfg.de/download/pdf/dfg_im_profil/gremien/fachkollegien/amtsperiode_2020_2024/fachsystematik_2020-2024_de_grafik.pdf). DFG's project database GEPRIS, including data since the beginning of the 2000s, contains a total of 276 projects with DFG (co-)funding in *Kommunikationswissenschaft*.

1.4. Funding

While the Federal Statistical Office produces statistics on German universities' finances and spending that allow for some differentiation by subject area, statistics for communication and journalism studies in Germany are inconclusive due to both aggregation in larger subject areas and the separation of humanities- and social science-based approaches described above: The latest edition on 2020 data (Statistisches Bundesamt, 2022a) is the first to explicitly list *Kommunikationswissenschaft / Publizistik* as a part of the larger subject area of "law, economics, and social science". There is a second *Publizistik* entry together with library and documentary studies among the Humanities (which also existed in earlier editions, Statistisches Bundesamt, 2022b).

Third-party research funding is a crucial source of funding and distributed by a variety of organizations: The DFG has a central role of evaluating research proposals and allocating funds provided mainly by the federal government and the *Länder*. Overall, DFG with its annual budget of 3.3 billion Euros distributed almost one third of third-party research funds to German universities in 2019 (Statistisches Bundesamt, 2021), followed by direct project funding from federal institutions (29 per cent), economic actors (17 per cent), the European Union (10 per cent), foundations (6.5 per cent) and direct *Länder* funding (1.5 per cent, excluding their structural funding for universities). Again, a detailed analysis for the comparably small subject of communication studies based on DFG data is difficult since it is frequently only available for larger subject areas such as communication studies, sociology and political studies combined.²² At least for DFG-funded collaborative research projects, it has been shown that communication studies have performed worse than those neighboring subjects both in terms of proposals and allocated funding for cooperative research proposals (Vowe & Meißner, 2020).

In lack of official statistics, research based on a survey among members of the German Communication Association indicates a total of 832 research projects for the 2005-2009 time frame, 455 of which with dedicated financial support amounting to a total of 17.3 million euros, and a positive trend over this time span. Based on these results, main sponsors were the EU (19.5 per cent) and DFG's main funding line (18.3 per cent), followed by a total of 13 funding categories of less than 10 per cent, including federal level and federal states' research funding, third party funds from economic actors, foundations, and media authorities (Altmeyden et al., 2011). Again, these figures refer to communication studies (*Kommunikationswissenschaften / Publizistik*) and do not include media studies.

While some large foundations such as Volkswagen or Bosch foundation finance a wide variety of research initiatives, there are also smaller foundations that aim their activities specifically at the area of media and communication. For example, Otto Brenner Foundation – associated to the metalworkers' union – funds research into socially relevant topics in media policy, communication, democracy and effects of German reunification, as well as the distribution of results in a form that is accessible to the general public.

Besides academic research conducted at universities, a variety of institutions is active in the field; one of the most popular examples is the Marl-based Grimme Institute, well-known publicly for its annual television awards and in the field for a number of research, monitoring and publishing activities. Likewise, relevant archival activities are not limited to university or national libraries, but amended by institutions such as the German Broadcasting Archive (*Deutsches Rundfunkarchiv / DRA*), run by public broadcasters ARD and Deutschlandradio, or the decentralized microfilm archives of the German press. Public broadcasters as well as media authorities also run considerable research and monitoring projects, conducted by either their own staff or by commissioning institutes; details on some of these activities can be found in chapter 2.

²² For the subject classification systems of DFG and Statistical Office see DFG (2021, pp. 145-146).

1.5. Infrastructures: Research Database and journals

There are two main peer-reviewed journals for communication studies, *Publizistik* and *Medien & Kommunikationswissenschaft*, content of which has also been subject of further analysis in an attempt to map topical and citation practices in the field (Potthoff & Kopp, 2013; Brosius & Haas, 2009). The German edition of *Global Media Journal* is also peer-reviewed, and open access, as is the open access journal of DGPK, *SCM (Studies in Communication and Media)*. *Media Perspektiven* is associated with public broadcaster ARD's research and marketing unit and publishes research and data on the media market, concentration, programming, media usership, often based on periodically repeated data-gathering. A number of legal journals are relevant to the field of media law, especially *AfP* (Archiv für Presserecht [Archive of Press Law]), *ZUM* (Zeitschrift für Urheber- und Medienrecht [Journal of Copyright and Media Law]), *K&R* (Kommunikation & Recht [Communication & the Law]), and *MMR* (Multimedia und Recht [Multimedia and the Law]).

Additional journals cover specific fields within communication studies, such as broadcasting history (*Rundfunk und Geschichte*) and media ethics (*Communicatio Socialis*). *MedienWirtschaft* combines perspectives on the media market from the positions of economics and the relevant aspects of communication studies, engineering, and law. In addition, there are a number of trade magazines and special news agency services, including *epd Medien*, *Medienkorrespondenz* (discontinued at the end of 2021), *Medium Magazin*, and *Kress Pro*, as well as trade magazines published by the journalists' unions (the national ones being ver.di's *Menschen machen Medien* and DJV's *Journalist*). *Medienkorrespondenz* and *epd Medien* were / are products by the news agencies of the catholic and protestant churches (KNA / epd), representing the involvement of key societal actors in the media system in general and in professional discourse.

While a centralised database of researchers and their publications does not exist in Germany, existence and availability of literature is well documented in literature databases, albeit again reflecting the complex structure of the research and publication environment. While the database of the national library includes authors' and institutional listings to link different publications, these entries do not necessarily represent full or up to date lists of publications. For actual access to the literature, databases of university and other libraries play a key role; these can be accessed either per institution or through joint catalogues that allow for availability assessment either locally, regionally or nationally, the latter through the catalogue of the *Karlsruher Virtueller Katalog*, a meta-index combining libraries' listings and additional catalogues of print and digital publications.²³

2. Publications, data sources and main monitoring actors of legal and ethical regulation

Systematic descriptions of the legal framework are available by different authors, targeting either journalistic or legal practitioners (e.g. Branahl, 2019; Dörr & Schwartzmann, 2019; Fechner, 2021; Ricker & Weberling, 2021; von Lewinski, 2020) and often covering both freedom of expression and freedom of information as two crucial elements to the legal interpretation of public discourse and the media. These works usually include references to the relevant European legal environment, and some see regularly updated editions. Fechner (2017) has also published a similar overview in English. Recent developments and decisive cases are being described and

²³ In addition to local and joint catalogues and because of specific advanced search and access options, some publishers' databases were also used in the preparation of the case studies, most notably SpringerLink (i.a. publisher of *Publizistik*), Nomos eLibrary (i.a. publisher of *Medien & Kommunikationswissenschaft*), and Beck Online for legal publications.

discussed in the general legal and communication literature, but also in specialized legal journals – again relevant to both questions of freedom of expression and freedom of information.

The applicable laws themselves are usually accessible online via services by the different federal or *Länder*-institutions, but the plurality of regulations may require a more complex research compared to more centralized countries; in addition to official services, specialized web databases such as *dejure.org* not only offer central access to the most commonly researched laws, but also links to relevant court rulings. While *dejure* is financed through advertisements, specialists will often resort to paid-for databases *Juris* and *Beck-Online*, both offering access to edited publications as well as court rulings, albeit rulings of lower levels of jurisdiction are not fully covered. The Federal Constitutional Court (*Bundesverfassungsgericht*) had and has a key role in developing the principles of legal regulation and development of the media sector, particularly with regards to broadcasting (Brodocz & Schäller, 2006; Beck, 2018, pp. 237-250), but offers direct online access to its rulings only from 1998 onwards.

A large part of research in the area is conducted within faculties of law, with the research institutions database GERIT listing a total number of 21 institutes, chairs or other research facilities that include media law in their designation, often together with neighboring fields such as public law or communication law. Some university-based institutes of journalism education also have dedicated chairs for media law and its application from a journalistic point of view. German lawyers can qualify for an official designation of specialization in copyright and media law, a title that requires annual proof of continuous qualification through either course participation or scientific publications in the field – an incentive for publications by legal practitioners. As of 2022, 435 lawyers in Germany were registered as holding this qualification (Bundesrechtsanwaltskammer, 2022).

2.1. Freedom of Expression

A major risk regarding the legal framework that was discussed in recent years is the debate on the introduction of a Network Enforcement Law (NetzDG, sometimes labeled “Facebook Law”) regulating problematic content such as hate speech in social networks, which was criticized as a potential threat to freedom of speech (Eifert, 2018; Liesching et al., 2021), and a discussion on the pending implementation of the EU’s directive on whistleblower protection (Tinnefeld, 2020). Concerning rulings of the European Court of Human Rights, the Federal Ministry of Justice has published annual reports of proceedings against Germany as well as selections of additional important rulings against other countries since 2004 (Bundesministerium der Justiz, 2022).²⁴ While these reports include all areas of ECtHR rulings, they are organized along the different elements of the convention and include specific sections on freedom of expression. Beyond legal and institutional sources, actors such as the German section of Reporters without Borders regularly comment legal debates in the area of freedom of expression (e.g., with a political positioning during the discussion on NetzDG legislation, see Reporter ohne Grenzen, 2017).

2.2. Freedom of Information

While both general descriptions as well as recent debates in the field can be found in the sources described in the introduction to this chapter, some specific discourses deserve a special discussion. As in other countries, the implementation of the GDPR and possible effects on media freedom and particularly the legal situation of photojournalistic work (Fricke, 2019; Lauber-Rönsberg, 2018) have been discussed from a legal point of view. While the details of the new regulation are present in the specialists’ debate, practitioners have pointed out that the effect on

²⁴ The collection anonymizes the petitioner while indicating the application number, allowing for easy access to the (non-anonymized) judgement through the ECtHR’s own database.

journalistic work is relatively limited compared to the previous situation, a result of the implementation of specific journalistic privileges in data gathering and processing (DJV, 2018).

While a long-standing journalistic privilege to receive answers from public authorities is codified in the 16 press laws of the federal states, the rules do not differ significantly and are thus largely perceived as a nationwide regulation. The situation is considerably more diverse with regards to Freedom of Information Acts, which grant certain rights to all citizens which can also be helpful in journalistic research: Not all federal states have these acts, and some go further than others. The research-focused journalists network “Netzwerk Recherche” has both campaigned for the implementation of such regulation and offers comprehensive guidelines for journalists searching for the ideal research tool in a given federal state (Netzwerk Recherche, 2021). A comprehensive overview of legal provisions for journalistic information gathering can also be found in textbooks on media law (e.g., Branahl, 2019, pp. 10-38); the indicated overview includes specific provisions such as access to documents of the Stasi Records Agency, the public body that administered the archives of the German Democratic Republic’s secret service/police.

2.3. Accountability System

The system of media accountability in Germany has repeatedly been described as multi-faceted and diversified in comparison to other European countries, but with some limitations regarding the impact of these infrastructures of media accountability on both media conduct and a broader public discourse (Eberwein, 2011; Eberwein et al., 2018). While Eberwein and Brinkmann (2022, p. 127) find that the impact of media accountability instruments has been “stagnating in the past decade at a comparatively high level”, they also highlight that such instruments are working in a political, social and media environment that is highly favorable for, but also demanding accountable journalism.

The larger subject area of media ethics has received considerable interest in research and professional debate throughout the time frame of interest, resulting for example in handbooks on media self-regulation (Baum et al., 2005) and media ethics (Schicha & Brosda, 2010), a specific text book (Schicha, 2019) as well as a prominent place in general text books on journalism (e.g., Ruß-Mohl, 2016, pp. 252-272). Institutionalized forums of debate include the DGPK’s division on communication and media ethics²⁵ and the network on media ethics (<https://www.netzwerk-medienethik.de>) – the latter focusing not only on Germany, but also Austria and German-speaking Switzerland. The association for media self-regulation, founded in 2004, has recently been dissolved.²⁶ A topical overview for the first 15 years of the 2000–2020 time frame can be found in an edited volume from 2015 that attempts to review topics and challenges for the German-language debate on media ethics (Prinzing et al., 2015). Based on a bibliographical analysis of book publications and three scientific journals, Krainer (2015, p. 42) concludes that this debate is mainly happening in “(few) monographs, (many) anthologies and largely outside of the pertinent scientific journals”. While few dedicated professorships exist (Munich School of Philosophy, Friedrich-Alexander University Erlangen-Nürnberg), the field is multifaceted both in terms of thematic and methodological focus and organizational integration (Prinzing, 2015). Teaching offerings may also help to map the field: In 141 analyzed courses in communication and media studies in Germany, Krainer et al. (2020) identified 63 with dedicated lectures on media ethics.

The German Press Council as the most visible instrument of institutionalized professional media accountability was founded in 1956, at least in part as an attempt to stop plans for further legal

²⁵ <https://www.dgpuk.de/de/kommunikations-und-medienethik.html>

²⁶ The website is not available anymore, but can be found in archive.org: <https://web.archive.org/web/20210923123856/http://www.publizistische-selbstkontrolle.de/der-verein/kurzcharakteristik/>

regulation of press conduct (Baum, 2010; Deutscher Presserat, 2021a). The institution is run by journalists' and publishers' association, excluding media-external groups of social actors, and its activities are limited to print and some online publications. It is frequently criticized both as a "toothless tiger" for its limited options of sanctioning media (Pöttker, 2003) and for the content, structure and wording of its code of ethics (Pöttker, 2013; Wunden, 2003). Previous decisions of the press council since 1985 are accessible via an online database (Deutscher Presserat, 2021b), and yearbooks include some statistical data on the council's work.

Broadcasting media are not covered by the activities of the press council, but by statutory commissions that have additional administrative roles and whose members – although with more diverse backgrounds than in the press council – are also appointed by political actors (Stapf, 2010). The structure is diverse with a total of 11 councils for public broadcasters (nationwide TV, nationwide radio and nine regional public broadcasters) and 14 bodies for private broadcasting. Resolutions can be obtained via databases or reports by some of these bodies, the media authorities also run a central database with very basic information on decisions (Die Medienanstalten, 2021). Empirical research such as Brosius et al.'s (2000) survey of regulators in public and private broadcasting is comparably scarce.

While journalism as a meta-topic in both mass and specialized media have a long tradition and have also been in focus of some empirical research (Linke & Pickl, 2000), these activities face criticism for self-referentiality at least in media beats of mass media where publishers' interests may be involved (Eberwein et al., 2018, p. 94). Other, more formalized instruments such as organizational codes of conduct and ombudspersons have gained popularity in recent years, but are still limited to few media companies and outlets (Sahlender, 2019) with a consequent lack of central monitoring. Increased relevance can also be attested to public accountability instruments such as watch blogs: The most notable example, Bild-Blog, has developed from a site that exclusively monitored the coverage of the tabloid Bild to a thematically more open platform that also criticizes other media (Eberwein & Müller, 2010; Mayer et al., 2008), with some reach both in the field and the general public.

3. Publications, data sources and main monitoring actors of journalism domain

The focus on avoiding excessive influence of single political or economic actors on news media is backed by a rather refined array of supervision and monitoring capacities. Supervising structures include an independent commission tasked to monitor concentration in the media sector (KEK), with the aim of limiting the viewers' share of any private company. The necessary data is delivered by different data collectors that are also key to evaluate advertisement value: Viewer figures for television and streaming are generated continuously through household panels run by a cooperation of AGF and GfK (AGF, 2021). *Arbeitsgemeinschaft Media-Analyse* (agma, 2021) delivers important interview-based data on different media types, including radio listeners, as does the *Allensbacher Markt- und Werbeträgeranalyse* (AWA, 2021) – these two methods allow for usage figures as opposed to circulation measurement based solely on sold copies. Finally, *Arbeitsgemeinschaft Online-Forschung* (AGOF, 2021) delivers data on usership of online media. The term *Arbeitsgemeinschaft* (working group) in several of these organizations refers to the idea of joining different actors that ask and offer advertisement capacities, a system of "Joint Industry Committees" (Hofsäss et al., 2020) that is aimed at finding reliable and widely accepted measurements.

While the KEK is primarily tasked to evaluate the influence of news companies in broadcasting, it does take cross-media ownership into account, evaluating companies' activities in related markets such as print and online journalism (KEK, 2018). In spite of this broader approach,

there is a debate if a primarily broadcasting-oriented approach is still viable in times of media convergence and media companies with investments in different media types (Just, 2020). Based on a project by the Bavarian media authority BLM from 2012, the media authorities have established a joint media diversity monitor in 2014. This approach combines audience reach data in television (AGF/GfK), radio (ma audio), print (ma press media) and internet (Nielsen) with data on ownership from the KEK media database and additional survey results on news consumption habits and opinion-making impact of different media. The result is a quantitative measurement of individual companies' influence on the total "market for opinions" (Berghofer, 2021), available through an interactive web interface.

3.1. Market Conditions

As a consequence of Germany's comparably large population, its media market is the largest one in Europe both totally and in most media sectors. Historically, as long as the public broadcaster's monopoly in broadcasting lasted, research in media economy has been mostly limited to the press market. A comprehensive view of the media as a market has only developed in and after the 1980s (Mühl-Benninghaus, 2020), together with a general appreciation of the sector as an economic factor, prominently described by Seufert (1994, 2013).

Concerning journalistic production, Steindl et al. (2017) found 3782 editorial offices in all media types that reach at least 10.000 users and have at least three journalists. Although the newspaper market has seen declining revenues, circulation figures and plurality during the past two decades and particularly in recent years (Röper, 2020), it is still the largest and one of the most stable markets in Europe with high reach of newspapers in the general population (WAN-IFRA, 2016). It is characterised by a traditionally strong position of the regional press and the fact that subscriptions are still by far the most relevant channel of distribution (BDZV, 2021). Concentration has led to a sharp decline in the number of titles and editorial boards, with an especially devastating impact on the market of regional newspapers – while there are still more than 200 dailies published, the majority of German counties now has only one regional newspaper (Mündges & Lobigs, 2020). General descriptions of market developments are collected and reported by the respective associations of newspaper and digital publishers (BDZV, e.g. Keller & Stavenhagen, 2020) and magazine publishers (VDZ, 2021), although economic interests may have an effect on what data is actually published.

Circulation figures for newspapers and larger general interest magazines are measured and made freely available by the auditing body *Informationsgemeinschaft zur Feststellung der Verbreitung von Werbeträgern* (IVW, 2021), but official statistics by the federal bureau of statistics have been phased out already in 1994, leading to a lack of reliable data particularly with regards to smaller magazine publications (Lüthy, 2020). The magazine market has seen tendencies of decline and concentration comparable to the newspaper market, but there are still more than 1500 journalistic magazine titles, published by more than 700 publishers – although the market share of the five biggest publishers is almost 65 percent (Vogel, 2020). While printed media have seen losses in circulation, the online media sector is characterised by rising usership, but many companies still searching for a functioning way to monetarize their online services. Major players are the online spinoffs of established print and broadcasting media, including public broadcasters (Spiller et al., 2020). The broadcasting sector itself is heavily shaped by the dual system of public and private broadcasters in both radio and television.

The advertisement market has generated a total net value of about 24 billion in 2020, and data on market development and the split between different media types can be obtained from the German Advertising Federation (ZAW, 2021).

Overall, market developments can be traced continually through databases, scientific publications, commission reports and periodic studies on the different media types. A risk the field is

facing is the loss of two main experts who shaped press concentration statistics for decades: Walter J. Schütz and Horst Röper with his Dortmund-based FORMATT institute. Schütz, who died in 2013, introduced a commonly used framework of differentiating fully independent newspapers from those that receive content from other editorial offices. Over the course of almost 60 years, he conducted numerous studies analyzing all newspapers published in predefined weeks in order to map the entirety of the newspaper landscape (Schütz, 2012). Röper, already cited above and officially retired since 2020, kept track over economic interrelations of publishers, showing the actual influence of publishers and publishing houses on published opinion.

3.2. Public Service Media

Broadcasting fees of more than 8 billion euros per year (ARD ZDF Deutschlandradio Beitragsservice, 2020) are not only distributed between the public broadcasters that are members of ARD, the nationwide public television ZDF and the nationwide public radio (Deutschlandradio), but also finance the media authorities (*Landesmedienanstalten*) that supervise private broadcasting. The media authorities run a number of monitoring and research efforts, including the continuous work of the KEK and reporting activities on media diversity. These efforts often combine data on the dual broadcasting system as a whole, including both public service and private media: For instance, a study series on the economic situation of private broadcasters (*Wirtschaftliche Lage des Rundfunks*, short *WiLa Rundfunk*) was conducted nine times between 2001 and 2020 with its last edition referring to 2018/19 (Wila Rundfunk, 2020). While focusing on private broadcasters and based on data gathered with these companies, it also provides extensive data on public broadcasting for comparison. Since this study was financed by only some media authorities – eight in the 2018/19 edition, including the two-state supervisor of Berlin and Brandenburg – a general section on the situation in Germany is followed by more detailed chapters for the nine funding federal states.

In an attempt to guarantee adherence to programming rules and contribute to further analysis of TV programming in Germany, the media authorities have also jointly financed a long-term monitoring of the eight most widely used television channels between 1998 and 2018, resulting in detailed annual reports on tv content in the most relevant stations. However, it was decided to terminate this effort with the data of 2018, the last edition of the reports contains a longitudinal overview (Die Medienanstalten, 2019). Apart from the media authorities, the public broadcasters of ARD and ZDF also have a joined commission to fund program and audience research (also see chapter 4). The research commissioned by these bodies is often conducted by commercial institutes for empirical media research which also publish selected findings or methodological considerations in journals as well as their own websites. However, there is another long-term effort in this realm that has recently been discontinued: The Info-Monitor (conducted by Cologne-based IFEM from 2005 through 2018) and the consecutive Nachrichten-Monitor (conducted by Potsdam-based Göfak in 2019 and 2020) studies provided content-analytical data for the full annual programs of the six most relevant television news broadcasts (Maurer et al., 2021).

3.3. Production Conditions

Technological innovation and the rise of online and multimedia have been a major area of publications for years, both from a research and methodological perspective (e.g., Hooffacker & Wolf, 2017; Nuernbergk & Neuberger, 2018) and as a more practically oriented topic for textbooks oriented towards future journalists and educators (e.g., Haarkötter, 2019; Hooffacker, 2020), with earlier works already dating back to the late 1990s (Meier, 1998). Investigative journalism, despite economic pressure, has seen rising interest in media houses and professional discourse

and education, reflected also in new projects such as the non-profit investigative platform *Correctiv* founded in 2014 (Lilienthal, 2017), the exchange network “Netzwerk Recherche”, or the rise of cooperative investigative teams from different media, most notably a cooperation of public broadcasters *NDR* and *WDR* and daily newspaper *Süddeutsche Zeitung*. New possibilities of data analysis and use also play a role, and data journalism is now established in both editorial routines and training curricula (Weinacht & Spiller, 2014).

While under increased economic pressure particularly in private media (Engelhardt, 2022), foreign correspondence as a theoretical field (notably Hafez, 2002) as well as the professional perspectives of German correspondents have been a recurring research topic both for general foreign coverage (Hahn et al., 2008; Junghanns & Hanitzsch, 2006; Offerhaus, 2012) and with regards to specific world regions (e.g., Mücke, 2009, on coverage of Africa).

3.4. Working Conditions

While there is a wealth of studies into journalists as communicators, representative surveys have only been conducted twice in the past 20 years (Dietrich-Gsenger & Seethaler, 2019; Steindl et al., 2017; Weischenberg et al., 2006), the more recent study being related to the second wave of the *Worlds of Journalism* study. Due to unrestricted access to the profession and problems of definition, there are no official figures on the number of journalists in Germany, but estimates from these two projects see a decline from 48 000 to 41 250 professionals mainly working in journalism. Both studies also present sociodemographic and additional data such as age, income, political orientation, media type they work for, and employment type, thus allowing for comparisons of the situation in the middle of the 2000s and the 2010s. It has to be noted that Weischenberg, Malik and Scholl’s study was itself a repetition of their earlier survey from 1993: While outside the 2000–2020 timeframe, this earlier work enlarges the timeframe for comparisons by an additional decade: For example, the 1993 wave had still found a number of about 54 000 professional journalists, mostly due to a higher number of freelancers (Weischenberg et al., 2006, p. 36).

3.4.1. Intra-organizational diversity

The survey studies mentioned under 3.4 (Weischenberg et al. and the *Worlds of Journalism* results) cover data on gender balance, age groups and social background (only in the study by Weischenberg et al.). More specific research into gender issues is available (for an overview, see Dorer, 2017; Keil & Dorer, 2019), also from an internationally comparative perspective (Byverly, 2011). In contrast, research into ethnic diversity is still scarce and representative figures are not available, although the question has received more attention lately (Horn, 2012; Horz & Boytchev, 2020; Pöttker et al., 2016). This is also reflected politically in the national strategy for integration that envisages specific action for increased diversity in media and public communication.²⁷

Public broadcasters in particular have identified diversity with regards to gender, cultural or social background, and physical abilities, as a relevant topic for further development (Mohr & Schiller, 2020). While some broadcasters such as ZDF (2022) already report higher representation of women overall (50 per cent) and also in executive editorial roles (40 per cent) compared to the media sector as such, there is still no parity in the latter area.

3.4.2. Journalistic competencies, education and training

Since access to the journalistic profession is free and unregulated, there is no obligatory educational path to follow for future journalists. Nevertheless, Weischenberg et al. (2006) and Die-

²⁷ <https://www.nationaler-aktionsplan-integration.de/napi-de/aktionsplan>

trich-Gsenger & Seethaler (2019) show a share of academic education in German journalists that has grown from 66 per cent in 2005 to 75 per cent in 2014/15. Also, according to the more recent data, 44 per cent of journalists had studied a specific subject such as journalism or communication, compared to 31 per cent in the earlier study. This trend challenges older notions of a tradition of underrating journalism-specific basic and continuing education (Kopper, 2003). Looking at current journalism students and early career journalists, studies have analyzed role perceptions and evaluations of career opportunities in journalism, as well as the perceptions of journalism training curricula (Gossel, 2019; Hanitzsch et al., 2016).

3.4.3. Professional culture and role perception

Regarding journalist's competencies and roles, data on Germany is available both in comparative and country-specific research, with sometimes contradicting results especially concerning role perceptions. While Donsbach and Patterson's (2003; Donsbach, 2008) study into journalistic roles found German journalists to be more likely to defend certain ideas and values than Swedish, British or American journalists, other works have found neutral and precise information of the public as a main role orientation (Hanitzsch et al., 2019; Weischenberg et al., 2006). Specific analysis of German, Swiss and Austrian data gathered in the framework of the Worlds of Journalism study can be found in an edited volume by Hanitzsch et al. (2019). In one of the contributions to this book, Hanitzsch and Lauerer (2019) see a decline of the advocator role over time. In terms of ethical orientations, and in spite of doubts in the assertiveness of accountability instruments discussed above, data indicates that German journalists support ethical rules relatively strongly (Ramaprasad et al., 2019; Wyss & Dingerkus, 2019).

These communicator-focused results are increasingly contextualized with audience expectations in "relationship studies" (for a timely overview and an explorative analysis see Sprengelmeyer et al., 2022). Based on the dimensions of journalistic roles used in the Worlds of Journalism study, Loosen et al. (2020) found journalists and audience to agree largely on what journalists should do, including the defense of tolerance and cultural plurality.

4. Publications, data sources and main monitoring actors of media usage patterns

Many of the questions raised about media usage are covered by the *ARD-ZDF-Massenkommunikation Langzeitstudie*, a long-term study into general media usage (not only in the realm of public broadcasting, despite ARD and ZDF financing the research) that has been conducted for the first time in 1964/1965 and regularly every five years since 1980. An additional annual study on internet use (*ARD-ZDF-Onlinestudie*) has been added in 1997, and since 2017 a smaller set of items from the *Langzeitstudie* is updated annually and published under a common title with the *Onlinestudie* and other data (Engel & Holtmannspötter, 2017). The longitudinal character of these studies allows us to monitor developments and changes in usership patterns of traditional media over more than 50 years, and specifically for online media over almost 25 years. In addition, many of the mechanisms of measuring audience (and ultimately advertisement) reach described under section 3 also allow for conclusions with regards to media usage of different groups.

Private and public service media as well as advertisers and advertisement marketers run intensive efforts to measure the reach and success of media products, but also to understand preferences of the audience in general and in specific target groups. The results are used to evaluate the commercial value of advertisement in specific publications or programs, but also to optimize programming, marketing and development of media formats (Frey-Vor et al., 2008; Hofsäss et al., 2020).

4.1. Access to media and diversity of viewpoints

The data of the latest *Langzeitstudie* shows that almost all German-speaking citizens older than 14 years use media on a daily basis and quite extensively with an average combined usage time of more than 7 hours – sometimes two types of media in parallel –, mostly moving image and radio. Text media are less popular, with 47 per cent of the population using them on a daily basis. The data allows for detailed differentiations by media type (Kupferschmitt & Müller, 2020), age group and generations of users (Egger et al., 2021), region with the comparison of former territories of the Federal Republic of Germany to those of the German Democratic Republic (Frey-Vor et al., 2021) and in comparison to previous editions of the longitudinal study (Breunig et al., 2020a), as well as combinations of the above categories.²⁸

Data from the latest *Onlinestudie* shows that 94 per cent of the population use the internet at least sometimes, and only people aged above 70 years had a value below 90 per cent (at 75 per cent), but with the sharpest increase of all age groups. While messengers like WhatsApp were used at least weekly by 80 per cent of the population and over 98 per cent among respondents younger than 30, social media communities like facebook, instagram or twitter see only 36 per cent in the general population and 80 per cent with teenagers and people in their twenties (Beisch & Schäfer, 2020). Data from the Reuters Digital News Report varies in exact numbers, but confirms these trends and allows for cross-country comparisons. It also adds a differentiation between general news and other use that shows that messengers are mostly perceived as personal communication tools, not news apps (Hölig & Hasebrink, 2021). For Germany, Austria, and Switzerland, the Media Performance and Democracy project has also developed a methodology that explicitly includes plurality of viewpoints in public discourse (Hasebrink & Hölig, 2020).

Studies into media usage of specific groups are available with varying degrees of representativity and availability of longitudinal analysis. A central actor for monitoring different groups' usage is the "Medienpädagogischer Forschungsverbund Südwest" (www.mpfs.de), a cooperation of the media authorities of Baden-Württemberg and Rheinland-Pfalz and the public broadcaster for the same region (SWR), which produces data with country-wide relevance despite its regional organization. Among other activities, the mpfs publishes study series based on nationwide surveys of five different groups: Small children aged two to four (miniKIM studies 2012, 2014, and 2020), children aged six to 13 (KIM study, 13 editions since 1999), adolescents aged 12 to 16 (JIM study, published annually since 1998), elderly people aged over 60 (SIM study, first edition 2021), and media use in family contexts (FIM study, 2011 and 2016).

Specific research into media usage of all or specific ethnic minorities has been fragmented and often focused on groups with a specific cultural background (Müller, 2005; Trebbe, 2009), but is now also based on a representative sample (Tonassi et al., 2020). Also, media usage of people with disabilities is a more recent research topic (Bosse & Haasebrink, 2016; Haage, 2021).

4.2. Relevance of news media

General data on usage of different media types, specific brands and user motivations can be found in the aforementioned study series (e.g., Breunig et al., 2020b; Hölig & Hasebrink, 2021; Kupferschmitt & Müller, 2020). Beyond these data collections, there is visible normative and empirical discourse on both social relevance of news media in general and possible risks of fragmentation through social media use (e.g., Geiß et al., 2018; Magin et al., 2021).

²⁸ A close longitudinal comparison will require to take previous publications in the aforementioned study series into account. These publications can be accessed in the *Media Perspektiven* online archive. For the sake of brevity, only the most recent publications in each series are mentioned here.

4.3. Trust in media

Motivations for media usage, evaluations of media content and trust in the news media form a specific focus of analysis of the aforementioned data, with trustworthiness ascribed mainly to printed newspapers and magazines (80 per cent believe they are trustworthy) and public broadcasters (78 per cent for television, 84 per cent for radio), while private tv stations (35 per cent), social media (27 per cent) and, to a lesser degree, private radio stations (60 per cent) have lower trust values (Breunig et al., 2020b). Blöbaum et al. (2020) present data specifically on citizens who are skeptical about the media. Comparative data on trust in the German case can also be found in repeated Eurobarometer publications (European Commission, 2016, 2018, 2022). For some Western European countries, including Germany, a survey by the PEW research center has analyzed trust with particular attention to public service media (Matsa, 2018).

5. Publications, data sources and main monitoring actors of media-related competencies domain

Media-related competencies of media users have been a buzzword in different discourses of past years, especially since digital media required new skill sets and brought about new challenges for young as well as adult media users. Gapski (2001) identified no less than eleven elements of discourse on the topic, including technical, psychological, legal and ethical perspectives on media competencies. A broader differentiation separates questions of teaching and learning such competencies, mainly with a focus on (school) children, and a general discourse on such competencies in adults that includes basic communicative competencies, technical skills concerning digital media use and interpretational skills often discussed in light of the debate on fake news.

5.1. Normative Sources

While the question of improving media education at schools has generated a vast inventory of specific literature on concepts and methods with several handbooks and specialized journals (MedienPädagogik; Merz – Zeitschrift für Medienpädagogik), the institutional standards for schools lie within the competency of the *Bundesländer* and can thus vary in different regions. To partly harmonize these efforts, the standing conference of ministers of education and cultural affairs of the *Länder* have agreed on a common strategy (KMK, 2012, 2017). Formal offers at schools are amended by different programs on both federal and regional level (an overview can be found in Puffer, 2019). The Federal Agency for Civic Education has created a database to ease access to the multitude of training offerings for both children and adults.²⁹

5.2. Assessment of media related competencies

Data on media-related competencies in adults has been collected in a recent survey study that included tests to check different areas of skills and competencies in digital news media use (Meßmer et al., 2021): Many users were unable to differentiate different types of publications (information, opinion, advertisement, disinformation), labels such as “advertoiral” on news sites or fact checking information on social media platforms were often not recognized. A share of 46 per cent of respondents received low or very low scores, with differences based on age, formal education and political beliefs. This study aimed at consequences of different levels of competencies for the interpretation of digital news usage, probably as a reaction to the rise of populist political parties and the more recent debates on fake news and a new debate on the “the lying

²⁹ <https://www.bpb.de/lernen/digitale-bildung/medienpaedagogik/medienkompetenz-datenbank/>

press” – an old term that became visible again during the debate on migration (Denner & Peter, 2017; Hagen, 2015). In an earlier study into adults’ media competencies, the term was mostly understood in a technical sense, analyzing abilities and openness concerning digital media (Treumann et al., 2002). For assessment of media-critical competencies in school children, and beyond international efforts such as ICILS, Sowka et al. (2015) have developed and tested another test procedure (cf. Herzig & Martin, 2017).

6. Analysis of research and monitoring capabilities and quality

6.1. Comparative analytical overview on available research and access to the research

In line with the size of the country, its media system and media market, a relative wealth of data and research is available on the German case. Especially with regards to the media market, data from audience and marketing research institutions can be added to scholarly literature, aided also by monitoring structures of the public broadcasters and the media authorities. Structures to control concentration in the media market, although sometimes criticized for not being strict enough, fund, collect, order and finally use these monitoring results as basis for their policies.

Many of the data collections associated with these monitoring activities are available for the general public either completely or at least with key findings, and academic and commercial research institutions are in mutual exchange of both methods and results (Hofsäss et al., 2020). While recent publications are often available and searchable as online resources, historical publications and data for longitudinal comparisons may only be available through paper archives, yearbooks, etc.. One risk for international research can be seen in a relatively strong focus on German-language publications whenever research is purely directed at domestic matters. Also, key data on financing and resources of communication research itself is comparably hard to find and incomplete, partly because of blurred borders of the field.

6.2. Comparative analytical overview on other sources

The federal system and the size of the country and its media structures lead to a multitude of sources depending on the area of research, especially since crucial political fields such as culture, the media and education are predominantly *Bundesländer* competencies with little influence of the federal level. In some areas of interest, this structure can lead to situations where “the German case” splits up into up to 16 individual cases with differences in legal situations, media structures, practices, and also data sources. However, there are coordinative efforts between the different *Länder* and the situation is at least compatible, so experts in the respective fields can navigate the differences.

6.3. Monitoring capabilities and the quality of data and knowledge

While there is a high degree of personal and institutional differentiation leading to a number of experts for most fields of interest, a centralized database of researchers in the German academic system does not exist. More generally speaking, research infrastructures and archival institutions are more evenly distributed across the country than in more centralized systems: The DFG’s database of research institutions GERIT lists a total of 98 academic institutions active in

Kommunikationswissenschaft – mostly university institutes and subdivisions –, between one and 22 in 13 federal states.³⁰

While recent data is generally available and a number of key analyses are conducted regularly, not all of these are conducted annually. Representative surveys of journalists are only available twice during the 20-year timeframe of this study, but they also address a less dynamic subject matter compared to market developments. Partly as a consequence of the complexity of data gathering in a huge and segmented market, but also because of shifting media usage patterns and new media offerings, methodological comparability of consecutive publications on the same topic has to be critically evaluated. Research processes both in academic and commercial media research are generally designed to ensure a high level of trustworthiness and reliability, and the methodological exchange between the two fields ensures reflection and further development of data gathering methods. A risk is the interpretation of data for the whole country as valid in different regional and social settings, where more specific research can be necessary – the most notable example being the younger *Bundesländer* in Eastern Germany (Mükke, 2021).

7. Conclusions

As the overview of different domains analyzed within the scope of the MEDIAdelcom project has shown, research and monitoring structures in Germany are comparably well-established, but sometimes regionally diverse. Data as well as industry and academic interpretation are often easily accessible, and data collection particularly in the journalism and media usage domain is conducted regularly, by the same institutions, and following established methodologies – a situation that also enables longitudinal analysis on a variety of topics.

But the complex political, social and, consequently, media structures in Germany also require a suitable monitoring framework, and it still shows its limits in certain fields: For research areas such as statutory media accountability instruments in broadcasting, the private radio sector or the details of press law provisions, the federal system makes it impossible to come to descriptions and analysis that are both concise and complete. And while data collections for the country as such can regularly be considered impressively complete and are often well-accessible, this is not necessarily the case if one wants to dig into the regional differences. In addition, the size differences particularly in the broadcasting structure are significant: The smallest *Land* with a distinct public broadcaster and media authority, the city-state of Bremen, has 680 000 inhabitants. By comparison, the largest one is North Rhine-Westphalia with almost 18 million. And size does seem to play a role for the allocation of research capacities: Germany is not only in a comparably favorable position in terms of domestic monitoring capabilities, but it is also included in many comparative efforts on a European or even global level, even when only few European countries are included in a particular research project.

Data has been shown to be relatively thin when it comes to the meta-analysis of academic research and monitoring structures, where Germany does not possess a central database that would allow for comparisons of individual researchers or institutions. Even general figures on financing are hard to procure and assess when the borders of the field are blurry and statistics are only available for larger research areas. On the other hand, academic research in the field is long established and has been strengthened over the last decades, just with different mechanisms of personal competition than in other countries.

³⁰ Only Saarland, Schleswig-Holstein and Brandenburg have no institution in the field – and the latter is fully surrounding Berlin with its 12 institutions. For *Medienwissenschaft*, the database lists another 135 institutions in 14 federal states (<https://www.gerit.org/de>).

Risks beyond the added complexity of the decentralized and federal system can often be found in the details, for example when only a rather limited share of the available literature on media accountability offers empirical evidence in an otherwise normative discourse. Also, the end of several long-term monitoring efforts in recent years poses a risk for longitudinal analysis. This is true for the tv news monitoring financed by ARD and ZDF from 2005 to 2016 and ZDF alone in 2017 and 2018, as well as for the media authorities' 20-year effort of continuous program monitoring of important television channels. While the media authorities declared they were restructuring their research efforts to better reflect digital media offers (Grimberg, 2019) – a strategy that can be seen in the innovative media diversity monitor –, a possible successor project in the area of program monitoring has not been set up.

Perhaps most importantly, a significant risk could emerge from a lack of continuity in monitoring of the print market: Many companies do not publish details on their economic performance – mandatory only for those organized as joint-stock companies –, making it difficult to evaluate publishers' distress calls for economic assistance; growing numbers of new, smaller publications are not registered with IVW for circulation auditing (Vogel, 2016). And the abolition of official press statistics in 1994 only shows its dramatic effect after the death of Walter J. Schütz in 2013, who had conducted his arduous but insightful reference week analysis voluntarily until the eighth and last edition of 2012. While adaptations of his methodology to account for new forms of editorial cooperation are being discussed (Dogruel et al., 2019), a solution for an actual future data gathering process is still missing (Simon, 2018). When the other leading figure of print concentration statistics, Horst Röper, declared his retirement at the end of 2019, a column on daily *taz's* media page appeared almost desperate: "Not possible, Horst. We need you!" (Grimberg, 2020)

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GREECE

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive summary

Research and data sources for the analysis of risks affecting, and opportunities for, deliberative communication in Greece reveal significant differences across the four Mediadelcom domains under study. Academic research is well advanced in the domain of law, but not particularly developed in the sphere of media ethics. Academic research in the domain of journalism is well-established and expanding, but data and statistics on journalism are scarce. In the domain of media usage, academic research is insufficiently institutionalized, while data collection is dispersed across commercial research bodies. The domain of media-related competences is the least developed of all in terms of the research and data available. The heterogeneity of the research and data sources available in the four domains reviewed undermines the potential for monitoring and assessing risks and opportunities for deliberative communication.

1. Introduction

Greece represents a small media market and a media system whose development has been thoroughly shaped by strong state intervention marked by politicized procedures and the instrumentalization of commercial media (Hallin and Papathanassopoulos, 2002). Falling under Hallin and Mancini's 'Mediterranean or Polarized Pluralist' model (2004), it has experienced fundamental changes in recent years as a result of technological advancements and the profound financial crisis the country underwent. These developments entail new risks and opportunities for the media's ability to support deliberative communication.

Greece was a latecomer as regards the institutionalization of media and communication studies. It was only in the 1990s, with the advent of commercial broadcasting, that university departments specifically focused on media, communication and journalism were established. That these were often staffed by scholars who had studied abroad meant the field manifested an international orientation from early on. Greek media and communication scholars are embedded within international networks, publish in international journals, and in many cases conduct research within the framework of international and European projects. The latter have been particularly important in a domestic context characterized by inadequate opportunities for funding. Up until 2016, when the Greek Research and Innovation Institute (ELIDEK) was established, there was no regular research grant scheme for the social sciences. Nowadays, funding for research in media and communications studies mostly stems from the European institutions, on a project basis, in response to specific calls. At the national level, there is no public funding mechanism specifically addressing media and communications studies while private research

grants, mostly from civil society organizations, are not provided on a regular basis. As a result, much of the academic research conducted is small-scale, though efforts to establish academic journals addressing media-related issues have proved successful (e.g. *Law of Technology and Communication*). The National Documentation Centre offers online access to research produced by the Greek academic community in the field. It also hosts journals of interest.

Next to academic research, public bodies and independent authorities collect media-related data on aspects coming under their remit. Professional associations and market research bodies also engage in data collection activities. Aspects of the state of the media are regularly reviewed by international non-profit organisations (e.g. Freedom House, Reporters without Borders, etc.), and European and international surveys also cover Greece (e.g. Eurobarometer, Pisa).

The aim of this report is to review Greece's research, data and monitoring capabilities vis-à-vis risks to, and opportunities for, deliberative communication across the four domains covered by the Mediadelcom project over the period 2000-2020: law and ethics, journalism, media usage, and media-related competences. Relevant publications and data sources have been identified through university libraries, databases maintained by public bodies, media regulatory authorities and commercial media research agencies, as well as online journal searches using a list of keywords which relate to key aspects of the four domains. The opinion of influential media scholars on relevant publications and data sources has also been sought. On this basis, 136 relevant scholarly publications and research reports have been selected and compiled into a bibliographical database. This database is by no means exhaustive but it nonetheless provides an organized collection of available research and data sources for the analysis of risks affecting, and opportunities for, deliberative communication in Greece.

2. Publications, data sources and main monitoring actors of the legal and ethical domain

The sources in the legal and ethical domain related to the media field pertain to both primary and secondary sources. Legal texts are available through domestic databases and the official gazette whilst preparatory documents and consultations preceding regulation are also accessible to the public. Regulatory authorities with a remit in the media also inform on their activities and their decisions can be found online. Over the past years, the EU institutions and especially the European Commission have developed a key interest in issues concerning freedom of expression and information, funding monitoring of media policy and regulation in the Member States. Greece has been covered by the Media Pluralism Monitor (MPM) since 2014, when the project started on a pilot basis. It is also reviewed in the context of the rule of law mechanism of the EU, with the relevant MPM country reports feeding the assessment.

The literature on freedom of expression and information is well developed. Our bibliographical database features sixty-nine (69) publications dealing with these issues published over the period of reference. These are authored by both academics and legal practitioners and appear mostly in Greek language books and specialized legal journals. For the most part, these publications provide a systematic, long-term analysis of the domestic legal framework and the scope of protection granted to freedom of expression and information. Legal developments and cases of interest covering higher and lower courts are also discussed. Naturally, in terms of the specific topics covered, the literature follows legal developments and the evolution of the jurisprudence, which means that certain topics might gain attention at specific points in time whilst others are more recurrent. For instance, the interaction of free speech with the right to freely develop one's personality or with the right to respect for private life are discussed in the literature throughout the period covered while issues related to the dissemination of 'false news' attract scholarly attention in 2019 in response to steps taken at the EU level to reach a better under-

standing of and curb disinformation,³¹ alongside changes brought to the Greek criminal code modifying relevant provisions. Research on media accountability has been less developed. Relevant sources are limited to just six (6) scholarly publications. At the same time, the bodies involved in media accountability do not all report on their action.

2.1. Freedom of expression

Literature on freedom of expression and the right to information reveals a steady interest in the relevant constitutional provisions, mainly Article 14(1) of the Hellenic Constitution (Const.) on the right to free speech and freedom of the press and Article 5A Const. on the right to information and the right to participate in the information society (see, indicatively, Chrysogonos and Vlachopoulos, 2017; Contiades, 2001; Dagtoglou, 2012; Karakostas 2010; Kiki, 2013; Papa-christou *et al.*, 2006; Vlachopoulos, 2017). Scholars have discussed the nature and scope of the protection deriving from relevant provisions, giving increased consideration to new technologies and digitalization (see, for instance, Igglezakis, 2011; Karakostas, 2009; Mantzoufas, 2010; Tassis, 2006). They have also worked towards a better understanding of Article 15 Const.: this declares that ‘radio and television shall be under the direct control of the State’, aiming *inter alia* at the ‘objective and on equal terms transmission of information and news reports’ and ‘at ensuring the quality level of programs’.³² Scholars have noted that direct control of this sort is inextricably linked to the activities of the National Council for Radio and Television (NCRT), which enjoys constitutional protection as an independent administrative authority (Contiades, 2016; Dimitropoulos, 2017; Tsevas, 2009). However, the NCRT has been criticized down the years for its inability to effectively discharge its duties (Contiades, 2016; Kamtsidou, 2005; Mavroumoustakou, 2006; Oikonomou, 2004, 2017; Psychogiopoulou, Casarosa and Kandyla, 2014; Tsevas, 2009).

Regarding the balancing of freedom of expression with other rights and freedoms, the literature has mostly focused on the interaction of free speech with the right to freely develop one’s personality, the right to private life, and the right to the protection of personal data. Concerning the right to free development of one’s personality, legal experts have examined the civil law provisions upon which claims for injuries to one’s honour and reputation can be based, and the criminal law concerning insult, defamation and slanderous defamation. Studies on domestic case law have revealed deficiencies in judicial reasoning (Akrivopoulou, 2015; Mitsiou, 2012; Tsakyrakis, 2011), some of which have led to seminal rulings of the European Court of Human Rights (Anagnostopoulos, 2009; Psychogiopoulou and Kandyla, 2020). Regarding the standards guiding the balancing of freedom of expression and the right to respect for private life, scholars have explored issues including the protection of the private life of public figures (Alivizatos, 2010; 2018; Vrettou, 2013) and the publication of information obtained via illegal means (Alivizatos, 2010; 2018; Tsevas, 2013). Turning to the protection of personal data, the relevant legal framework, both before and after the adoption of the General Data Protection Regulation (GDPR),³³ has been a centrepiece in the literature (Vlachopoulos, 2018c). Studies engaging with data protection legislation prior to the GDPR have, overall, shown balanced decision-making by the Data Protection Authority (Lytras, 2013) in line with ECtHR standards - and this despite the fact that national legislation afforded outright precedence to data protection vis-à-vis freedom of the press (Akrivopoulou, 2017; Panagopoulou-Koutnatzi, 2016; Tsevas, 2013; Vrettou, 2020). In the

³¹ See in particular the report of the independent High-Level Group on fake news and online disinformation, ‘A multi-dimensional approach to disinformation’ (2018), <https://digital-strategy.ec.europa.eu/en/library/final-report-high-level-expert-group-fake-news-and-online-disinformation>.

³² See Art. 15(2) Const.

³³ Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation) [2016] OJ L 119/1.

wake of the GDPR, attention has shifted to steps taken by the Greek legislator to restore the balance between the protection of personal data and freedom of expression and information (Panagopoulou-Koutnatzi, 2019; Skondra, 2020; Vrettou, 2020). Abusive court proceedings against journalists, known as SLAPPs (*strategic lawsuits against public participation*), have also started to gather attention (Media Freedom Rapid Response, 2021).

Regarding disinformation, scholars have mostly debated whether untrue information falls within the scope of the constitutional protection granted to freedom of expression and information (Contiades, 2020; Vlachopoulos, 2018b). The constitutionality of domestic provisions penalizing the spreading of false news has also been explored (Spiropoulos, 2019); while the Greek judiciary has not as yet had the opportunity to pronounce on this, judges have widely referred to the media's 'duty of truth' (Karakostas, 2010; Karakostas and Vrettou, 2011) alongside the duties of 'good faith' and 'due diligence' (Sotiropoulos, 2009) which require journalists to check the accuracy of information prior to publication. Scholars have also examined the conditions under which a journalistic work can be protected under intellectual property legislation (Deliyanni, 2009; Kallinikou, 2002; Synodinou, 2007), probing the ways in which copyright legislation has sought to adjust to the specificities of journalism through the introduction of certain exceptions from copyright protection (Stamatoudi, 2005; Synodinou, 2007).

Over the last years, research has also focused on the broader array of factors - legal and non-legal - that affect free speech and press freedom in Greece (Maniou, 2022; Papadopoulou and Maniou, 2021; Psychogiopoulou and Kandyla, 2021; Serafeim, 2012).³⁴

2.2. Freedom of information

Scholars have also delved into the implications of data protection legislation for access to information. Here, the focus has been on the legal framework governing access to documents held by public authorities (Andrikaki, 2010; Detsaridis, 2006; Lazarakos, 2006) and its combined reading with data protection rules (Grivokostopoulos, 2021; Igglezakis, 2020; Veneris, 2017; Vlachopoulos 2018a). Studies on the confidentiality of journalistic sources have noted that the protection of journalistic sources stems more from case law than legislation (Kargopoulos, 2008). Studies on whistleblowing have pointed to the absence of a targeted whistleblower law (OECD, 2018a; Psychogiopoulou and Kandyla, 2021; Transparency International, 2013). No studies appear to have explicitly explored trade secrets legislation and its effects on freedom of information.

According to studies on media ownership transparency, domestic legislation does not include clear and comprehensive provisions on the disclosure of news media ownership structures (Psychogiopoulou and Kandyla, 2021). Whilst older studies have pointed to the difficulties encountered by the NCRT when it seeks to ensure compliance with domestic rules (see, indicatively, Kamtsidou, 2005; Mavromoustakou, 2006), more recent research suggests that news media ownership is not disclosed directly to the public in a systematic way (European Commission, 2021a).

2.3. Accountability system

Turning to ethics, media self-regulation's potential for protecting free journalistic speech in line with the ethical responsibilities inherent in it has received relatively little scholarly attention. Some efforts have been made to map the existence and reach of certain accountability instruments: scholars have, for instance, reviewed the principles of the Ethics Code, which constitutes

³⁴ We would like to thank Lambrini Papadopoulou, Assistant Professor, Department of Communication and Media Studies, National and Kapodistrian University of Athens, for bringing some of these sources to our attention.

the main instrument of self-regulation at the professional level (Kiki, 2003). They have also examined the principles contained in the Code of Conduct for News and Other Political Programmes, which was drafted by the NCRT and later adopted as a statute applicable to broadcast media. More recent studies report the lack of both traditional accountability tools (such as press councils, ombudspersons, etc.) and formalized public accountability practices, such as media-critical initiatives (Psychogiopoulou and Kandyla, 2017).

Studies evaluating the effectiveness of existing media accountability instruments are also few in number and paint a bleak picture of the status quo. Research suggests that the NCRT has not succeeded in ensuring respect for the ethical standards enshrined in the Code of Conduct for broadcast media (Rigou, 2017). Scholars have also highlighted the limited effectiveness of the Ethics Code as a defining element of the practice of journalism (Deliyanni, 2004; Psychogiopoulou, Kandyla, and Anagnostou, 2014; Komninou, 2017).

3. Publications, data sources and main monitoring actors of journalism

Research in the journalistic domain is well developed, stemming mostly from the academia. Our database features forty-seven (48) publications addressing aspects that are relevant for assessing risks affecting, and opportunities for, deliberative communication in Greece. Notably, the majority of works has been published in international publishing houses and journals. Issues related to the economic sustainability of Greek journalism have consistently attracted scholarly attention over the past 20 years. Yet, the volume of relevant publications has increased since 2008 when the economic crisis put the economic sustainability of the Greek media under strain. Research on aspects concerning the social sustainability of journalism, i.e., the socio-cultural conditions that enable journalists to produce content that is accordance with normative journalistic values, on the other hand, is relatively less developed and more recent. Data collection carried out by some public bodies covers the most important aspects of the media market and its evolution. However, there is no general comprehensive survey on the status and exercise of the journalistic profession.

3.1. Market conditions

The economic sustainability of journalism in Greece and its ability to keep pace with technological innovation (Giomelakis and Veglis, 2016; Spyridou *et al.*, 2013) and socio-economic challenges (Papathanassopoulos, 2001; Touri, Kostarella and Theodosiadou, 2017) has been one of the central themes in the literature over the past 20 years.³⁵ Much of the extant research adopts a media-systems approach, situating relevant issues within the context of the clientelistic relations that exist between the political system, the state and the media. For instance, studies have discussed the state of the market for journalism at the turn of the 20th century with reference to the haphazard advent of private broadcasting, when publishers and a handful of business owners who had entered publishing in the mid-1980s took advantage of a domestic politico-economic crisis to 'occupy the airwaves' (Papathanassopoulos, 2011; Psychogiopoulou, Kandyla and Anagnostou, 2012; Skamnakis, 2006). Successive governments revealed inertia in concluding the licensing process, which they generally delayed in order to keep the media hostage to political influence (Katsirea, 2017) in the hope of positive coverage. The end result was an overcrowded commercial audiovisual media market, in which several media outlets were preserved so their owners could exert pressure on the political arena, often for the benefit of other business interests.

³⁵ We would like to thank Prof. Stylianos Papathanassopoulos, Department of Communication and Media Studies, National and Kapodistrian University of Athens for bringing these sources to our attention.

This over-crowded market persisted until 2010 when the financial crisis hit the sector. Over the period 2010-2017, there was a vast decline in advertising revenues across traditional media types as the budgets of both the private and public sectors shrank in Greece. Many newspaper titles, radio and TV channels ceased to operate as a result, while some ‘historic’ media groups went bankrupt (Karadimitriou, 2020; Papathanassopoulos, 2020). However, online advertising revenues seem to have increased over this same period (Papathanassopoulos, 2020), with several new digital native news media appearing in the market (Skamnakis, 2018).

Media concentration and media ownership structures are also quite well researched, at least as far as traditional media is concerned. Studies emphasize that the clientelistic relations that characterize the Greek media system have prevented the establishment of an effective framework for regulating media ownership, leading to a high degree of concentration in the national newspaper and television markets (Leandros, 2000; Leandros, 2010; Veneti and Karadimitriou, 2013). The economic crisis is shown to have affected media ownership structures, as some leading media outlets ceased operation or changed hands and some new, mainly digital, media entered the market (Papathanassopoulos, 2020). However, the extent to which the crisis has affected media concentration patterns has not been explicitly addressed in the literature.

3.2. Public service media

Research on public service media has focused mainly on independence-related questions. Here again, relevant studies tend to adopt a longer-term perspective and a media-systems approach, acknowledging that the transition to the dual broadcasting system was not accompanied by changes that could have enabled the Greek public service broadcaster, ERT, to function independently (Papathanassopoulos, 2010; Psychogiopoulou and Kandyla, 2013). It is noted that, despite successive efforts to restructure ERT, governments have been unwilling to release it from their control: the responsibility for appointing ERT’s managing board has always rested with the government, while changes of government, even with the same political party in power, have always been accompanied by changes in the composition of the board (Iosifidis and Papathanassopoulos, 2019; Papathanassopoulos, 2014; Psychogiopoulou and Kandyla, 2021). The government’s abrupt decision to shut down ERT in June 2013 has also been addressed in the literature (Fouskas, 2013; Fraszczyk, 2015; Iosifidis and Katsirea, 2014; Papadopoulou and Gazi 2021).³⁶

3.3. Production conditions

Production conditions have gained attention in scholarly research over the last decade. For instance, scholars have examined multiplatform journalism and the impact of digital resources. Studies on the use and impact of algorithms and audience metrics find that online news media outlets have embraced the use of search engine optimization techniques and that journalists often resort to web analytics to gain insights into the online visibility of their stories (Giomelakis and Veglis, 2020; Giomelakis *et al.*, 2019). At the same time, however, data-traffic-driven news decisions are perceived as an emerging problem in so far as they change the way editors select and create news content (Giomelakis *et al.*, 2019). The potential of investigative journalism has also gained salience in recent years in connection with the emergence of ‘alternative’ media outlets set up by networks of journalists and other media professionals during the crisis (Boucas and Iosifidis, 2020; Papadopoulou, 2020; Siapera and Papadopoulou, 2016; Siapera, Papadopoulou and Archontakis, 2015; Touri *et al.*, 2016). These media - most of which are digital-native - vow to abide by the principle that journalism should be critical and practiced inde-

³⁶ Both Prof. Papathanassopoulos and Assistant Prof. Papadopoulou noted that the closure of ERT is a research area that should be further explored.

pendent of ownership. They prioritize giving voice to the marginalized and offering an alternative to mainstream media narratives (Aslan-Ogzul and Veneti, 2021).

3.4. Working conditions

3.4.1. Employment conditions

Employment conditions have attracted quite some attention because of the financial crisis. Related studies rely on available statistics, interviews with journalists or both. They point at the mass redundancies that took place during this period, sending the unemployment rate for journalists rocketing to 50% in 2017 (Skamnakis, 2018: 12). At the same time, those journalists that managed to keep their jobs had to accept pay cuts and irregular payments (Skamnakis, 2018: 12; Papathanassopoulos, 2020: 133-134). Short-term contracts and the use of freelancers have become much of a norm (Papathanassopoulos *et al.*, 2021: 219). The crisis is also credited for increasing job insecurity and making journalists more vulnerable to ownership interventions, thereby limiting journalistic autonomy (Iordanidou *et al.*, 2020).

3.4.2. Intra-organizational diversity

Research on intra-organizational diversity is very much lacking. There are, nonetheless, a couple of studies addressing gender-related aspects. Studying the professional situation of women journalists, Kyriazi *et al.* (2008), for instance, note the existence of a “glass ceiling” in Greek journalism. More recently, the Media for Democracy Monitor report for Greece finds that inequalities in salary and promotion do exist, but they tend not to be acknowledged as such by management (Papathanassopoulos *et al.*, 2021: 188, 195). This then translates to the absence of measures to support gender diversity in the newsroom and ensure pay equality and equal access to senior positions. Some data on gender diversity in PSM and leading news media is also collected by the MPM (see, for instance, Psychogiopoulou and Kandyla, 2021).

3.4.3. Journalists’ competences, education and training

Issues related to journalists’ competences, education and training have been explored to some extent. As regards journalism education, for instance, there are studies which narrate the development of journalism education in universities in the early 1990s (Siomos, 2009; Skamnakis, 2012). Digital literacy and the ability of professional journalists and journalism students to use information and communication technologies (ICT) are also examined (Spyridou *et al.*, 2013; Veglis, 2013; Veglis and Pomportsis, 2014). Still, data sources for assessing journalists’ competences are quite limited. With the exception of the Worlds of Journalism Study (Dimitrakopoulou, 2017), data on the competences of professional journalists in Greece has not been systematically collected.

3.4.4. Professional culture and role perceptions

Research into aspects of professional culture and role perceptions has developed over the last twenty years. Relevant studies tend to tap the issue from either a systemic- or individual-level perspective. Systemic-level approaches generally adopt a more historical approach, discussing how the instrumentalization that characterizes the Greek media system has impacted on the development of a culture of journalistic professionalism (Hallin and Papathanassopoulos, 2002; Skamnakis, 2006; Papathanassopoulos, 2011; 2001). Studies focusing on the individual level qualitatively investigate journalists’ role perceptions and how these are changing in response to the networked, new media environment and in the context of the austerity that accompanied the financial crisis (Karadimitriou, 2020; Siapera, Papadopoulou and Archontakis, 2015; Touri *et al.*, 2016). Their findings suggest that Greek journalism is experiencing some sort of an ‘identity crisis’, with journalists recognizing that a change of paradigm is needed.

4. Publications, data sources and main monitoring actors of media usage patterns

Sources identifying the domain of media usage in Greece are mainly sources based on quantitative data. Commercial research entities mostly collect survey data on different aspects concerning media usage on a regular basis. Relevant data is disclosed to the media which occasionally highlight and report on key trends. Data is also collected by public authorities, the statistical bodies and the media regulator. Academic research on media usage has been lately expanding. We identified nine (9) research publications dealing with aspects of media usage in Greece, most of which were published in the late 2010s. An important part of relevant research stems from foreign research institutes with Greek scholars affiliated to them.

4.1. Access to media and diversity of viewpoints in the media system

Concerning access to media, Greece lacks a comprehensive media usage study that is conducted regularly and covers all the different media segments. Audience and readership data is mostly compiled by market research bodies. With regard to digital media metrics, no single agency covers the entire field. The *Reuters Institute Digital News Report* (DNR) offers data on issues such as news media consumption, the reach of top brand offline/online news content, and Internet penetration. Digital economy statistics are also provided by Eurostat, the Hellenic Statistical Authority, and the National Centre for Social Research (NCSR) - the latter for the purposes of the *World Internet Project*. NCSR data also provides information on the key characteristics of Greek Internet users and avoiders (Tsekeris *et al.*, 2020).

Drawing on data from its registry, the NCRT sheds light on media diversity by providing data on the number of operational TV (national and regional) and radio undertakings, pay-TV providers, broadband content operators, etc. through its annual activity reports. Data on newspapers is gathered by the Registry of the Regional and Local Press, which is maintained by the General Secretariat of Information and Communication along with a Registry of Online News Media. ERT supports structural plurality by offering services on different media platforms (TV, radio, online), and its digital presence has grown significantly in the past years (Reuters Institute, 2021). Media diversity data is also collected by the MPM. Social inclusiveness data - in particular with reference to media access for women, people with disabilities and others - attests to the difficulties encountered in addressing stereotypes and implementing equality policies in the Greek news media (Psychogiopoulou and Kandyla, 2021). The NCRT also gathers statistical information regarding the time allocated to political parties and candidates in news reports and other news programmes during elections by national broadcasters.

4.2. Relevance of news media

Regarding the relevance of news media, a broad range of data is provided by Eurobarometer. Studies on how Greeks navigate the news testify to high rates of alternative digital news consumption (Karoogeropoulos, Rori, Dimitrakopoulou, 2021). Online news users appear to embrace digital-born outlets and social media for news at significantly higher rates than online news users in other Western democracies. Scholars have also shown a keen interest in young people's media use (Demertzis and Armenakis, 2000; Spyridou and Veglis, 2008). The evidence here suggests that the Internet is the medium which attracts young people to news most successfully. As for studies relating to active news avoidance, these show that both individual (demographics, political attitudes and news genre preferences) and contextual factors (press freedom and political freedom and stability) matter (Toff and Kalogeropoulos, 2020).

4.3. Trust in the media

Concerning trust in news media, the DNR data depicts high levels of media distrust (Reuters Institute, 2021). Eurobarometer data (2021), Pew Research Center data (2018) and EBU data (EBU, 2020) confirm the trend. Research findings show that alternative news consumption is associated with lower levels of trust in news (Kalogeropoulos *et al.*, 2019; Kalogeropoulos, Rori and Dimitrakopoulou, 2021).

5. Publications, data sources and main monitoring actors of media related competences

Relevant sources for the domain of media related competences mainly address aspects of media literacy. The most important primary sources include policy documents produced by EU institutions as these have a profound influence in shaping the domestic media literacy policy discourse and developments. The main domestic actors in the field are the General Secretariat of Communication and Information, with the National Centre of Audiovisual Media and Communication (EKOME) under its auspices, as well as the Ministry of Digital Governance. Responsibility for media literacy education in formal schooling and teacher training is assigned to the Ministry of Education. Data and research on media literacy and the competences of media users at the national level is limited. Our bibliographical database includes fourteen (14) publications, most of which are research reports conducted within the framework of EU-funded projects.

5.1. Normative sources

The importance of users' competences in today's networked digital media environment is increasingly being recognized in both the communication and education studies literature. The extant research is mainly focused on media literacy and media education. A number of studies have reviewed the state of media/digital literacy and media education policies, most of them conducted within the framework of EU-funded projects and European research and policy networks (Andriopoulou, Papadimitriou and Kourti, 2014; European Audiovisual Observatory, 2016; Papadimitriou, 2015; Voros, 2015). The analyses note that media literacy was added to the policy agenda in the early 2000s, partly in response to EU-level policy developments in the field. Yet, it is noted, Greece still lacks a concrete public policy on media literacy. As regards media literacy in formal education, studies point out that it has developed as a cross-curricular, interdisciplinary subject that is not fully integrated into the compulsory education curriculum.

5.2. Assessment of media related competences among citizens

Apart from the above, research on users' competences is highly fragmented, comprising some studies of students' and school teachers' attitudes towards media education (Diamantaki *et al.*, 2001; Marantos, 2001) and evaluations of the implementation of specific media literacy initiatives and training activities (Nika and Davou, 2008; Papadimitriou, 2015a, 2015b; Papadimitriou and Sofos, 2019). As such, the research basis for an analysis of risks affecting and opportunities for deliberative communication with respect to the competences of media users is quite limited. Further, data that taps into relevant aspects is not regularly collected at the national level; indeed, it is international and European sources that collect most of the data on users' competences in Greece (e.g. Eurobarometer, Eurostat and PISA surveys).

6. Analysis of Research and Monitoring Capabilities and Quality

Research and data sources for the analysis of risks affecting, and opportunities for, deliberative in Greece display significant differences across the four domains under study. The following sections discuss the degree of attention given to distinct research areas, the implications of research gaps for knowledge imbalances and the capacity in each domain examined to monitor risks affecting and opportunities for deliberative communication in Greece.

6.1. Comparative analytical overview of data processing capabilities

In the legal domain, academic research is well advanced and covers a broad array of relevant areas. In contrast, research on media ethics is not particularly well developed, which can be attributed inter alia to the lack of conventional accountability instruments in Greece. In the domain of journalism, academic research is well-established and expanding, but journalism-related data and statistics are scarce and often not accessible to the public when available. In the domain of media usage, academic research is insufficiently institutionalized and data collection is dispersed across commercial research bodies. The domain of media-related competences is the least developed in terms of the research and data available. Whilst issues concerning the competences of both professional journalists and media users have been receiving increasing scholarly attention, empirical data is still limited. On the positive side, at the European level especially, an increasing number of researchers are accessing collaborative research settings across all four domains examined.

The fact that the breadth of data collection and research is different across the four domains under review entails significant knowledge gaps in certain domains. Knowledge imbalances are combined with a broad range of actors engaging in fragmented data collection and the absence, overall, of a longitudinal approach: longer or shorter periods of time may be covered, depending on the interests of the researchers and bodies involved. Relevant factors, coupled with the fact that research and data collection is rarely framed as research and data collection specifically on risks affecting and opportunities for deliberative communication, make the processing of the data and information gathered challenging and ultimately, unequal across the four domains under study.

6.2. Monitoring capabilities and the quality of data and knowledge

In light of the considerable differences characterising research and data sources across the four domains under study, the following section assesses the capacity in each domain to monitor risks affecting and opportunities for deliberative communication in Greece by focusing on the following dimensions: a) the availability of data, b) the recency and continuity of data, c) the complexity of data-gathering, d) trustworthiness of the data, and e) the availability of experts and/or specific research structures.

Law and Ethics

The legal literature suggests that most of the areas germane to the identification of risks affecting and opportunities for deliberative communication receive thorough consideration. At the same time, databases held by various institutions and bodies (i.e. parliament, lawyers' associations, courts, private undertakings, etc.) offer a wealth of information on national laws and jurisprudence. As for information on the decision-making practices of independent authorities which are relevant to the field, this is provided by the Diavgeia portal and the authorities' websites. Access to amendments to existing laws can still be subject to a fee, whilst disclosure of the

text of court decisions (mostly the rulings of supreme courts and those rulings by lower courts which are of particular legal interest) tends to be offered on subscription.

Important interventions in the field of media law, in terms of legislation enacted, case law, and the decision-making practice of independent authorities, are regularly reviewed in specialized journals including *Law of Technology and Communication* (*Dikaio Technologias and Epikoinwnias*, *DITE*; formerly *Dikaio Meswn Enimerwsis kai Epikoinwnias*, *DiMEE*). The latter brings prominent scholars and experts together on its scientific and editorial board.³⁷ Indeed, the presence of experts in media law is strong and has been increasing in recent years. This is not only due to the impact of new technologies and digitalization, which has diversified scholarship and expertise; it is also due to increased participation in international and EU-funded research projects. Moreover, various university faculties, alongside the law faculties at the National and Kapodistrian University of Athens, the Aristotle University of Thessaloniki, and the Democritus University of Thrace, offer undergraduate and postgraduate courses in media law, information law, communication technologies, and human rights, thus helping to create well-qualified experts. It should be noted, nonetheless, that research in the field, though reliable and trustworthy, is not conducted through the lens of risks affecting and opportunities for deliberative communication. It mostly takes place within an analytical framework that is focused on fundamental rights, media regulation, and the values and objectives that underpin it.

Unlike legal regulation, research into the ethical regulation of the media is far less developed. While the scant scholarly attention certainly reflects the weak institutionalization and limited development of media self-regulation in Greece, existing studies do provide insights into the emergence, structure and performance of professional accountability instruments which can be used to evaluate risks in this domain. Still, the availability of data relevant for assessing and monitoring the field is quite heterogeneous. As journalists' unions are regionally organized, information on the ethics cases handled by each is scattered and not readily available. In fact, the Union of Journalists of the Athens Daily Newspapers is the only body that maintains, through its website, a section dedicated to those cases in which breaches of the Ethics Code are dealt with by its disciplinary councils. Broadcasters' breaches of the Code of Conduct for News and Other Political Programmes are examined by the NCRT, and comprehensive summaries of the cases are published on the authority's website and in its annual reports.

Journalism

Overall, academic research in the sphere of journalism is well developed in Greece. Much of it is conducted in four university departments: the Department of Communication, Media and Culture at the Panteion University, the first of its kind in Greece; the School of Journalism and Mass Communication at the Aristotle University of Thessaloniki; the Department of Communication and Media Studies at the National and Kapodistrian University of Athens; and the newest, the Department of Communication and Digital Media at the University of Western Macedonia. The University of Athens hosted *Zitimata Epikoinwnias*, the only academic journal specifically focused on communication and journalism, though it ceased publication in 2015. A notable trend can be identified in the growing importance of international journals for the publication of relevant research; this attests to the high quality of the research in this field.

Whereas the extant research is not conducted from the perspective of risks affecting and opportunities for deliberative communication, it does cover several aspects that are important for this perspective. Research into the market conditions of journalism has been relatively extensive, with studies offering insights into the consequences of the interplay between media and politics, the financial crisis and digitalization. Public service media and their independence from the government of the day is also quite extensively covered. Studies regarding the production con-

³⁷ <http://www.nbonline.gr/journals/8>.

ditions for journalism are also available, focusing primarily on the impact of algorithms and audience metrics. There is quite some academic research on journalists' working conditions, although it is fragmented and does not cover all relevant issues. For instance, the issue of organizational diversity in terms of the socio-cultural diversity among the staff in journalistic organizations has not entered the academic discussion around journalism in Greece yet. Nevertheless, a growing number of media research conducted by doctoral candidates might be the future of research on organizational diversity in Greece.³⁸

Despite the lively academic interest in journalism, the data available for assessing risks and opportunities in this field remains piecemeal. Official media market statistics are lacking. Most market data (such as, for instance, audience and advertising figures) is collected by private market research companies and thus comes with a fee; in addition, this data almost exclusively covers national media. The NCRT and the General Secretariat of Information and Communication collect and publish information on the ownership structures of broadcast and print media respectively. Data relating to digital-native media are collected by the General Secretariat, but are not made publicly available. Official figures on the number, profile and employment types/titles of journalists in Greece do not exist, and there is an absence of large-scale comprehensive surveys with journalists. The limited availability of data inevitably weakens the potential for monitoring developments in the field of journalism.

Media Usage

Two distinct research components can be identified in this domain: applied audience research and academic media usage research. Applied audience research is mostly in the hands of market research companies and private undertakings. Both address distinct media markets, with traditional media markets generally well-covered; however, different methodologies are applied, which creates difficulties for cross-media analysis. More broadly, Greece lacks the sort of long-term, all-embracing database that would enable an analysis of the *longue durée* and sensible comparisons across media sectors. The absence of media usage-related tasks entrusted to bodies such as the NCRT or the public service broadcaster, ERT, compound this problem.

Academic media usage research cannot rectify the absence of a common dataset, as it is fragmented and scattered across domestic and foreign universities. Any monitoring potential in the domain of media usage in Greece can thus only be haphazard and disjointed. Individual university departments and research centres in the country may conduct research into aspects of media usage, but this mostly originates in personal interest and relies on data from other sources. Some international and EU-funded projects shed light on particular dimensions of media usage but, because of their thematic focus and chosen methodologies, they do not facilitate the identification of broader trends as regards the co-existence, reach and appeal of traditional and digital media. The upsurge in the latter has brought new research directions to the table, with scholars increasingly embracing digital-native outlets, social media and alternative news consumption in their work.

Media-related Competences

Research and data-availability limitations are particularly pronounced when it comes to the competences of media users. Certainly, research into media literacy and education policies is considerable and includes a comparative perspective, and Greek experts from the field of communication and education are embedded in relevant European networks. At the same time European surveys (such as Eurobarometer and PISA) do collect some relevant data for Greece. Yet, the gradual institutionalization of media literacy has not been accompanied by any significant effort to map or assess the levels of media user competences in Greece.

³⁸ We would like to thank Prof. Papathanassopoulos for this point.

7. Conclusion

The heterogeneity of the research and data sources available in the domains under review undermines the potential for monitoring and assessing with equal rigour the risks affecting, and opportunities for, deliberative communication across the four. Contextual factors pertaining to the conducting and funding of research play an important role here. Domestic channels for funding research are limited and therefore unable to address the exigencies of what has become an extremely rich media and communications research agenda. Empirical data sources, on the other hand, provide only a partial picture, because there is no comprehensive and cohesive approach to data collection across public and private bodies. Our study underscores the need both to work towards more institutionalized and adequately-supported research structures, and to strengthen and systematize data collection efforts in areas as diverse as the media market, media usage, journalism demographics, journalists' working conditions and their competences, and media ethics on the ground. Ensuring the sustainability of research and data collection processes can also support continuity in analysis, and thus a more robust assessment which could make a meaningful contribution to evidence-based domestic media policy-making.

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List of expert interviews

Telephone interview with Dr. Sofia Papadimitriou, Head of Educational Radiotelevision and Digital Media, Ministry of Education and Religious Affairs; Tutor - Counselor, Hellenic Open University. 26 October 2022.

Skype Interview with Lambrini Papadopoulou, Assistant Professor, Department of Communication and Media Studies, National and Kapodistrian University of Athens. 27 October 2022.

Telephone Interview with Christina Akrivopoulou, Doctor in Constitutional Law (Aristotle University of Thessaloniki). 2 November 2022.





HUNGARY

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive Summary

The Hungarian media market is relatively small, but the media policies of the 2010s have drawn attention to media regulation and market issues, so there are a large number of resources available for studying the conditions for deliberative communication in Hungary. After mapping the relevant literature from the period between 2000 and 2020, the Hungarian bibliographical database contains 650 records. Data and research are rather fragmented, there are limited, but not unprecedented longitudinal monitorings. For the study of the four domains defined in the theoretical background of the Mediadelcom project, we have information for almost every variable – some of it from quantitative, some from qualitative approaches.

A decent quantity and high quality of data are available from the academic and NGO sectors, but we can also rely on useful materials from state and industry actors. There is also a strong international research focus on Hungary, with European Union bodies, international NGOs, and academic research projects regularly dealing with the Hungarian media situation. However, this does not mean that Hungary's media monitoring potential could be considered as ideal. This case study has also identified serious risks, but some of them can be counterbalanced or mitigated by some actors through good practices and by creating opportunities for monitoring the media in Hungary.

1. Introduction

The aim of the case study is to map Hungary's media monitoring potential for the study of deliberative communication through the variables defined in the Mediadelcom project and to identify the risks and opportunities related to media and journalism research in the country. After a brief introduction to the Hungarian context, we first review the main actors involved in the production of relevant data, information and knowledge. This is followed by the four domains of ROs, where we discuss the different sources available to assess the specific variables of the domains.

The evaluation relies heavily on the compiled bibliographical database with its 650 records, which also allows to draw on some quantitative data about the relevant research in Hungary during the last two decades. When creating the bibliographic database, our team followed the principle of "everything we can find". This was reasonable, considering, that we had to use several different search options and methods in order to get a more comprehensive picture of the relevant literature. We first started the search by using the keywords related to the variables given in the theoretical chapters, in both English and Hungarian. The official scientific database

in Hungary is the Hungarian Scientific Works Repository³⁹, where Hungarian scientists record their own studies. Unfortunately, its database proved to be unsuitable for keyword-based content search, as the search engine can only look in the titles of the publications. Therefore, further queries were carried out using EBSCO Discovery Science database provided by the University of Pécs, which gives free or institutional access to almost 200 national and international literature databases. We also conducted targeted searches on platforms of Hungarian and international journals and publishers, such as Médiakutató, Jel-Kép, SAGE or Springer. In the later stages, an important part of the research was to discover other related material based on the reference list of relevant literature already found.

The researchers of the Hungarian team have expertise in the fields of media law, media market (journalism) and media usage, and because we have sufficient quantity and quality of data to assess the domains' variables, we conducted expert interviews in the field of media related competences⁴⁰, where we are less competent, and to assess the state of media studies in Hungary with the help of an experienced academic, who has an insight into the domestic situation of the discipline from its beginnings⁴¹.

1.1. About Hungary

After the fall of communism, democratic institutions in Hungary, including the media, began to develop. Several foreign investors entered to the media market, the first media law was passed in 1996 and the former state media was transformed into public service media. For almost all the areas studied in the Mediadelcom project, general structural differences can be defined in the period before and after 2010, which is the beginning of the Fidesz-KDNP government's two-thirds constitutional majority. Major changes have taken place since 2010 in the (media)legislation, in the education system, in the media market, and even in the field of journalism. The same is true for media research: although the government has taken strong steps to put domestic media research communities and academic departments in a difficult position, the changes that have taken place have given a boost to professional debate, research, and the emergence of critical voices. National and international human rights and media policy organisations have focused on Hungary and ever since have been addressing the problems of the rule of law in Hungary. As the Hungarian partner of Mediadelcom, Mertek Media Monitor was also established during the conflictual period surrounding the 2010 press and media laws, which also generated strong international responses.

1.2. State of the media – Divides in the public and academia

Already during the first Orbán government (1998-2002), Fidesz thematized the oppression of conservative ideas, particularly with regard to what they call the "left-liberal predominance" of the press. Over the past decade, the government has sought to balance this unproved inequality: there were huge changes in the media market in terms of ownership and political orientation of media products. On the same basis, pro-government research institutes have been established to analyse, for example, the domestic media system from the perspective favoured by the Fidesz.

The communication emphasising oppression and victimhood and the warrior attitude which builds on the constant confrontation and enemy-seeking, contribute to the increasing polarisation of the society. The split into two camps is a phenomenon also in journalism and academia/research in today's Hungary. Journalists who are working at media outlets close to the gov-

³⁹ For more information in Hungarian see: <https://www.mtmt.hu/>

⁴⁰ Expert interviews with Krisztina Nagy, founder of the Idea Foundation and president of the Televele Media Education Association (2021-10-29; 2022-10-25)

⁴¹ Expert interview with Zsolt Szijártó, professor at the University of Pécs (2022-10-26)

ernment are seen as propagandists, mouthpieces or microphone stands by the government critical media, while the other way around they are seen as left-liberal, Soros-mercenaries who are serving Western interests (second case study, section 3.5). The same fracture can be observed in the media-consuming public, with pro-government voters distrusting media critical of the government and opposition people distrusting pro-government media. The country's intellectuals, experts, and researchers are also divided.

The transformation of the academic and higher education system started in 2012, with the introduction of the chancellorship at the universities. The Chancellor (appointed by the prime minister) is responsible for the management of the institution and its financial administration.⁴² In 2019, the government deprived the Hungarian Academy of Sciences (MTA) of its network of research institutes and reorganised it into a new institution, the Eötvös Lóránd Research Network (ELKH). In 2021, most universities in the country were taken over by foundations run by boards of trustees made up of government party delegates. Thousandbillions HUF of public wealth was extracted. The so-called "public interest foundations" can only be created and abolished by a supermajority in parliament, according to an amendment of the constitution. Many say, academic independence and freedom of ideas are under threat, others argue that this new funding model will give universities greater financial autonomy (Szent-Iványi & Tétényi, 2022).

The government also launched a legal war against domestic NGOs in 2017. Although the problematic law has since been repealed in 2021 following a decision by the European Court of Justice, NGOs critical to the government and primarily concerned with human rights issues have seen their reputations damaged in the smear campaign against them. They are still subject to differentiated rules, their management is under the supervision of the State Audit Office and they are often facing administrative procedures from public authorities.⁴³ Several research centres close to the government have also been strengthened or newly established over the past decade to provide a counter-pole to critical voices, their experts regularly appear in the pro-government media and participate in the centralised government communication, conveying the Christian conservative perspective, the national identity and values, and a narrative against or in contrast to the "Western ideologies".

1.3. Sources and capacity of media research

In Hungary, media research is rather fragmented, relevant actors for the Mediadelcom project can be found in the public sector, academia, and also among NGOs, and media market companies.

1.3.1. Academic field

An important precursor to the institutionalisation of the discipline of communication and media studies was the Mass Communication Research Centre, which operated between 1969 and 1991. Over the decades, the internationally acknowledged research centre has carried out public opinion research, audience research, empirical studies in social psychology, and various publishing activities (Révész, 2020). They worked with a wide range of methodologies, such as large sample panel surveys, in-depth interviews, content analysis and social psychological experiments (Terestyéni, 2010). In the expert interview with Zsolt Szijártó, he said that the Mass Communication Research Centre did very good and currant research in the 1980s. And although there was no direct correspondence between the closure of the institution after the regime

⁴² On the impact of the Chancellor system see: Veres, P. & Golovics, J. (2015). Kancellári rendszer a magyar felsőoktatásban. Célok, funkciók és szerepek [Chancellorship in Hungarian higher education. Objectives, functions and roles]. *Polgári Szemle*, 11(1-3), 209-221.

⁴³ Source: <https://www.amnesty.org/en/latest/press-release/2021/05/hungary-lexngo-finally-repealed-but-a-new-threat-is-on-the-horizon/>

change and the creation of communication departments, and the emerging discipline did not directly reach back to the heritage of the research centre, its decade-long operation showed a pattern for the institutionalisation of the new discipline.

Departments of communication and media studies were launched in Hungary in the 1990s, the first one at the University of Pécs in 1991. The 1993 Higher Education Act also created a universal institutional framework, so the larger universities could establish their departments. The first doctoral programmes were launched in 1997. Since its beginnings, the field has been interdisciplinary, with each department approaching the relevant issues of communication and media research from the original disciplines of the founders. As Weyer et. al (2015a) say: *“for historical reasons, communication departments in higher education have been created as so-called spin-offs from aesthetics, film theory, sociology or other disciplines”* (p. 12). The intertwining of communication and media also characterises both the discourse and the institutional infrastructure - it would be difficult to separate these two disciplines, and so the domestic departments and the education they provide address these two areas together. Some professional units approach the subject primarily from the perspective of communication studies, others from a media studies perspective, but ultimately reflect on the same phenomena.

As a consequence of the introduction of the Bologna education system in 2005, the five-year course was replaced by a three-cycle course, in the form of a three-year BA, a two-year MA, and a three-year (later four-year) PhD program.

Communication departments have been negatively affected by several events in the post-2010 period. According to Szijártó (expert interview, October 26, 2022), the closure of the five regional studios of public service media in 2011 and the relocation of media companies to the capital in the early 2010s resulted in the disappearance of local public arenas in the countryside, which served as practical basis and output opportunity in the labour market for communication and media studies graduate students. A critical juncture in the life of media studies occurred in 2013 when an advanced level of maturity exam was made as a requirement for enrolment, and also the number of state-funded places was significantly reduced (see Supplement 1 in the Appendix) – some departments did not receive a single funded quota for a period of time. The course remained popular even in its self-financed form, but the media studies landscape has been completely rearranged: far fewer students enrolled in media departments in rural universities than in those in the capital, so today some departments have a few tens of students in some classes, while others have hundreds of them. In 2015 it was also considered at the level of education policy that several bachelor's degrees, including the BA in Communication and Media Studies, would be discontinued. This caused a huge reaction from both the professional and the research and teaching communities. A professional debate has been launched on the prestige of communication and media studies, the value of the knowledge acquired in these disciplines, and the role of this knowledge in today's society. Stakeholders have organised conferences, formulated position papers and recommendations, and published articles on the subject. The departments were saved from being closed down.

Communication and media studies does not appear as a separate discipline in the structure of the Hungarian Academy of Sciences. In 2018, the Scientific Committee on Communication and Media Studies was established to provide a platform for coordination between communication and media studies and its related disciplines, such as sociology, political science, anthropology, and psychology (Szabó, 2021). This also opened up the possibility of a professorial appointment in this discipline at the university. There are currently four doctoral programs in media studies in the country, located at the Eötvös Lóránd University⁴⁴, the Corvinus University of Budapest⁴⁵,

⁴⁴ Film, Media and Cultural Theory Doctoral Programme: <http://mmi.elte.hu/phd/felvetelizoknek/film-media-es-kulturaelmelet-phd/>

the University of Pécs⁴⁶ and the University of Debrecen⁴⁷. According to Szijártó (expert interview, October 26, 2022), the academic recognition of the discipline is also strengthened by the increasing number of students from the field of communication and media studies who apply to the National Scientific Students' Associations Conference every year.

The Institute for Political Science of the Centre for Social Sciences⁴⁸, which was formerly a part of the Hungarian Academy of Sciences, now operates under the Eötvös Loránd Research Network, contributes significantly to the study of news media and public information through research focusing on political communication and the relationship between media and politics.

In general, media research projects (especially those related to journalism research) are rare, both in national grants and in large EU research grants as well, but of course, there are some exceptions. Some examples of nationally-funded research projects whose results are useful for the Mediadelcom project: *"ICT in knowledge and learning"*⁴⁹ at the Eszterházy Károly Catholic University, the *"Generations' use of media"*⁵⁰ project at the University of Pécs, *"Layers of the political public sphere in Hungary (2001-2020)"*⁵¹ at the Eötvös Loránd University, the *"Regulatory issues for Internet traffic management services"*⁵² project at the University of Pécs and the Research Centre for Social Sciences, the *"Hungarian Comparative Agendas Project"*⁵³ at the Research Centre for Social Sciences. Among the international research projects: *"Journalistic Role Performance Around the Globe"*⁵⁴ hosted by the Pontifical Catholic University of Valparaíso, *"Worlds of Journalism Study"*⁵⁵ based at the Ludwig-Maximilians-University München, the *"Digital News Project"*⁵⁶ by the Reuters Institute and University of Oxford, *"EU Kids Online"*⁵⁷ at the London School of Economics. Research projects with European Union funds: *"Media and Democracy in Central and Eastern Europe"*⁵⁸ managed by the University of Oxford, the London School of Economics and Reuters Institute, the *"Newsreel I and II"*⁵⁹ projects hosted by the University of Pécs, *"Anticorruption Policies Revisited: Global Trends and European Responses to the Challenge of Corruption"*⁶⁰ led by the University of Gothenburg. Horizon2020 projects, *"POPREBEL – Populist rebellion against modernity in 21st-century Eastern Europe"*⁶¹ and *"DEMOS*

⁴⁵ Communication Studies Doctoral Programme: <https://www.uni-corvinus.hu/fooldal/egyetemunkrol/corvinus-doktori-iskolak/szociologia-es-kommunikaciotudomany-doktori-iskola/kommunikaciotudomany-doktori-iskola/>

⁴⁶ Communication, Media and Culture Doctoral Programme: <https://commonline.hu/kepzesek/kommunikacio-media-es-kultura-doktori-program/>

⁴⁷ Medial Cultural Studies Sub-programme: <https://deidi.unideb.hu/hu/alprogramok>

⁴⁸ For more information see: <https://politikatudomany.tk.hu/en>

⁴⁹ For more information in Hungarian see: <http://p2014-18.palyazat.ektf.hu/>

⁵⁰ For more information in Hungarian see: <https://ktk.pte.hu/hu/generaciokutatas>

⁵¹ For more information in Hungarian see: <https://rc2s2.elte.hu/project/a-politikai-nyilvanossag-retegei-magyarorszagon-2001-2020/>

⁵² For more information in Hungarian see: <https://jog.tk.hu/az-internetes-forgalomiranyito-szolgaltatasok>

⁵³ For more information see: <https://politikatudomany.tk.hu/en/policy-agendas-hungary>

⁵⁴ For more information see: <https://www.journalisticperformance.org/>

⁵⁵ For more information see: <https://worldsofjournalism.org/>

⁵⁶ For more information see: <https://reutersinstitute.politics.ox.ac.uk/digital-news-project>

⁵⁷ For more information see: <https://www.lse.ac.uk/media-and-communications/research/research-projects/eu-kids-online>

⁵⁸ For more information see: <https://www.rcmediafreedom.eu/Publications/Reports/Media-and-Democracy-in-Central-Eastern-Europe-MDCEE>

⁵⁹ For more information see: <https://newsreel.pte.hu/>

⁶⁰ For more information see: <https://anticorrrp.eu/>

⁶¹ For more information see: <https://populism-europe.com/poprebel/>

– *Democratic Efficacy and the Varieties of Populism in Europe*⁶² also produced some useful evaluations about media issues.

In Hungary, there is no institutionalised journalism research nor self-reflexive research on media and journalism education. In the last years, a few studies have been published which have mapped the field of media and journalism education. In their 2015 study, Weyer et al. identified 37 institutions providing media and journalism education, including university departments (21) and trainings run by professional organisations and market players (16). But their research found that in many cases the institutions are no longer providing education or are only teaching outgoing classes. Apart from the traditional, well-established departments, the future of training is uncertain in many places. Communication courses in higher education usually do not distinguish between disciplines within the media industry, they offer a mix of knowledge in business communication, communication research, journalism, media management, advertising, and applied communication. There is no specific training for journalism apart from a few special courses in the general media studies education, and it is almost impossible to study journalism at the MA level today. The faculties are predominantly made up of teachers with degrees in other disciplines (mainly social sciences) or media practitioners without degrees, due to a lack of sufficient numbers of teachers with degrees in the field (Weyer et al., 2015b). All these circumstances contributed to the launch of the Erasmus+ project *Newsreel* in 2018, led by the University of Pécs, which, in cooperation with Hungarian, German, Portuguese and Romanian partners, examined journalism education and different journalism competences in these countries with the aim of developing teaching materials that can be used in journalism education. In the research phase of the project, in a report published by Bettels-Schwabbauer et al. (2018), the Hungarian researchers of the project also examined the journalism education provided in Hungary. They found that the main problems are *“the lack of teaching staff who have practical journalism experience as well as academic experience, the lack of adequate handbooks and other relevant literature in Hungarian, and the lack of an effective internship system that enables students to gain practical experience in parallel to their studies”* (p. 12). According to the report, the journalism trainings provided by the professional sector are much more practice-oriented (Bettels-Schwabbauer et al., 2018). For 2019, a further decrease in the number of journalism courses offered has been identified by Mester and Torbó (2019): from the 16 communication and media studies programmes started by higher education institutions only 10 offered some kind of specialization in journalism.

Pelle (2019) lists the following universities, which have media programmes: Budapest Business School, Budapest Metropolitan University, Budapest University of Technology and Economics, Corvinus University of Budapest, Eötvös Loránd University, Eszterházy Károly University, Károli Gáspár University of the Reformed Church in Hungary, Kodolányi János University, Milton Friedman University, Pázmány Péter Catholic University, Szent István University, University of Debrecen, University of Dunaújváros, University of Pannonia, University of Pécs and University of Szeged. (See Supplement 2. for additional information). Some universities have special institutes and research groups with a focus on media and communication, such as the Institute of the Information Society at the University of Public Service⁶³, the Centre for Empirical Social Research at the Corvinus University⁶⁴, the Center for Media, Data and Society⁶⁵ on the Central European University⁶⁶ or the Metropolitan Media Research Group⁶⁷.

⁶² For more information see: <https://demos-h2020.eu/en>

⁶³ For more information in English see: <https://iis.uni-nke.hu/about-the-institute>

⁶⁴ For more information in English see: <https://www.uni-corvinus.hu/main-page/research/research-centres/centre-for-empirical-social-research/?lang=en>

⁶⁵ For more information in English see: <https://cmds.ceu.edu/>

⁶⁶ In 2017, a legislative amendment (Act XXV of 2017. amending Act CCIV of 2011 on National Higher Education) made the operation of the CEU in Hungary illicit. After unsuccessful negotiations with the

1.3.2. Public authorities

The Hungarian media authority, the Media Council of the National Media and Infocommunications Authority (NMHH) operates the Institute for Media Studies⁶⁸, which provides support for the Media Council by analysing among others the media regulation, the history of journalism, and the phenomena of new media. The authority is constantly under fire from the professional as well as the academic field, mainly because of its dependence on the government parties and the resulting problematic procedures (as explained in the second case study, section 2.1). The Institute for Media Studies publishes useful and professionally validated scientific research mostly in the fields of comparative media regulation and media consumption. The institute also provides book publishing services with books on media studies, media law, and media literacy – both from Hungarian and international authors.

The Hungarian Central Statistical Office provides the official statistical service in Hungary. Various themes are covered for the data needed for the Mediadelcom project, such as data about infocommunication technologies, R&D and education data, and culture (media usage). Hungary last held an official census in 2011, the next one takes place in autumn 2022.

1.3.3. Measurement companies, professional organisations

Audience measurement for television, print, and online media is carried out by private companies, while audience measurement for radio is provided by the National Media and Infocommunications Authority. Nielsen measures television viewing figures⁶⁹, Gemius-DKT Hungary monitors the use of online platforms⁷⁰, MATESZ covers newspaper circulation⁷¹ and Kantar Hoffmann-M-Meter measures radio listening on behalf of the NMHH⁷². These companies are introduced in more detail in the introductory part of chapter 4 about the media usage. In the case of online and print media and radio some basic data are available for the public. Concerning print media, stakeholders do not use the MATESZ's circulation audit, but rather the *National Readership Survey* conducted by Kantar Hoffmann and M-Meter consortium.⁷³ This source provides almost no public data. In the case of television just some sporadic data are available publicly. The measurement companies typically sell the data to market players, and if social science research institutes buy it, they are not allowed to publish them. Other national or international media market measurement companies also provide services and analyses to stakeholders, but these are also paid options. Examples include Kantar Media, Ipsos, White Media, GfK Hungary, PwC Hungary, and ScoresGroup.

Organisations that bring media market players together, such as self-regulatory organisations and various associations, also carry out surveys and research that provide useful information about the media market. Not comprehensively: the Hungarian Advertising Association, Advertising Self-Regulatory Board, Association of Hungarian Content Providers, Association of Hungarian Electronic Broadcasters, Hungarian Publishers' Association. These organisations are described in more detail in the second case study (at professional and market accountability in section 2.4.2).

Hungarian government, the university moved its headquarters to Vienna in September 2019. An infringement proceeding was launched against Hungary, and although the European Court of Justice ruled that the law was contrary to fundamental rights and should be repealed, CEU will not move back to Hungary.

⁶⁷ For more information in English see: <https://www.metubudapest.hu/metropolitan-media-research-group>

⁶⁸ For more information in English see: <https://english.nmhh.hu/mtmi/>

⁶⁹ For more information in English see: <https://www.nielsen.com/hu/hu/solutions/measurement/television/>

⁷⁰ For more information in Hungarian see: <https://dkt.hu/>

⁷¹ For more information in Hungarian see: <https://matesz.hu/>

⁷² For more information in Hungarian see: <https://nmhh.hu/kutatasok>

⁷³ For more information in Hungarian see: <https://www.kantar-hoffmann.hu/tgi>

We should mention the press products as well, that regularly publish their own research and data on the domestic media, most notably the data analysis team of the investigative news portal Átlátszó, called Atlo⁷⁴, who have produced some excellent data visualizations on the Hungarian media⁷⁵ in recent years.

1.3.4. NGOs

A number of national non-profit organisations, primarily concerned with human rights, are also working on media issues relevant to the Mediadelcom project. The largest non-governmental media research NGO, Mertek Media Monitor⁷⁶, which is also the Hungarian partner of Mediadelcom project, provides media law and media market analysis, engages with the industry through journalism research and content analyses of the different media outlets, and also regularly conducts media consumption surveys. The Foundation for Transparent Journalism⁷⁷ is the Hungarian affiliate of the French Observatoire du journalisme, whose objectives include increasing transparency in journalism, countering biased reporting, and raising media awareness among readers. The pro-government media frequently features experts from the Médianéző Centre⁷⁸ on media-related topics, but their analyses are rarely published. The Megafon Centre⁷⁹ aims to counterbalance the so-called dominance of liberal opinion by amplifying right-wing, conservative voices in the public sphere. The Hungarian Civil Liberties Union⁸⁰ (HCLU, TASZ in Hungarian) also deals with media rights issues both from the perspective of professionals and consumers. Political Capital⁸¹, Transparency International Hungary⁸², Amnesty International Hungary⁸³ and Hungarian Helsinki Committee⁸⁴ also cover media issues in the contexts of press freedom, funding, political communication and human rights. In Hungary, NGOs play an important role in the field of media literacy, such as the Idea Foundation⁸⁵, the Televele Association⁸⁶ or MediaSmart Hungary⁸⁷ (see in second case study, section 5.4).

1.4. Funding system of media research and monitoring

The funding of media research in the academic sphere is problematic, the available domestic resources are very scarce. Almost the only possibility for funding large, basic research projects is through the National Research, Development and Innovation Office. Since 2015 it has also been managing the OTKA (*National Scientific Research Funding Programmes*) proposals, which previously operated as an independent institution. The new law about the centralised distribution of funding has reduced the guarantees of institutional independence, which also increased the risk that the institution, which manages both centralised national and EU funding money, may not be independent in its funding decisions as well (Körtvélyesi, 2015). Individual researchers can also apply for other smaller grants, such as the *National Excellence Programme*, or

⁷⁴ For more information in English see: <https://atlo.team/atlo-team-english/>

⁷⁵ “The past ten years of the Hungarian media” project (bilingual): <https://atlo.team/media2020/>

⁷⁶ For more information in English see: <https://mertek.eu/en/>

⁷⁷ For more information in Hungarian see: <https://ojim.hu/>

⁷⁸ Do not have their own website. More information about the Nézőpont Group, of which it is a member: <https://nezopont.hu/en/>

⁷⁹ For more information in Hungarian see: <https://megafon.hu/>

⁸⁰ For more information in English see: <https://hclu.hu/en>

⁸¹ For more information in English see: <https://www.politicalcapital.hu/>

⁸² For more information in English see: <https://transparency.hu/en/>

⁸³ For more information in Hungarian see: <https://www.amnesty.hu/>

⁸⁴ For more information in English see: <https://helsinki.hu/en/>

⁸⁵ For more information in Hungarian see: <https://ideaalapitvany.hu/>

⁸⁶ For more information in English see: <https://televele.hu/english/>

⁸⁷ For more information in Hungarian see: <https://www.mediatudor.hu/>

apply at the National Cultural Fund (NKA) in connection with conference organisation or publishing. There is no easy-to-use, searchable database of previously funded projects, the data could be extracted manually from the reports to see how many media research projects have been funded in the period under review. Statistics are available for the whole R&D sector,⁸⁸ including total numbers of the whole higher education system, but it is not possible to know what resources are used in the individual scientific fields of universities. According to Szijártó (expert interview, October 26, 2022), it is difficult to apply successfully from the field of communication and media studies. Due to its lack of academic recognition, the discipline does not have its own scientific committee, so applications have to be submitted under other scientific fields, with their criteria that are difficult to meet.

1.5. The national research database and most important journals

The Hungarian Scientific Works Repository⁸⁹ (MTMT in Hungarian) operated by the Hungarian Academy of Sciences is the official research database, where every Hungarian scientist, who works in the higher education is legally obliged to record his/her studies. MTMT measures the scientific impact of individual researchers and institutions. In its public database, academic publications are also searchable. The limitations of this feature have already been discussed in the introduction. The Repository of the Hungarian Academy of Sciences⁹⁰ has also to be mentioned, where more than 137 thousand items of scientific articles, books and chapters are available, 79% of them open access.⁹¹

There are three main communication and media studies journals in Hungary: Médiakutató⁹², Jel-Kép⁹³, and KOME⁹⁴. And two more in the field of media law: Infokommunikáció és Jog [Information and Law]⁹⁵, and In Medias Res⁹⁶.

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

To examine the two conceptual variables in the legal domain, freedom of expression and freedom of information, we can map the legislative texts that provide the structural regulatory guarantees, and on the other hand, the Hungarian legal community is actively engaged also in the interpretation of these legal sources, as well as in the analysis of the practice of national and EU judicial bodies. The published studies in the Hungarian media law scholarly discourse are generally written with a holistic approach: the authors analyse and interpret the relevant legal sources, which are explained through the case law of different court levels. These case studies allow us to assess whether the implementation of these legal sources facilitates or hinders the conditions for deliberative communication in Hungary. The Hungarian bibliographical database contains 230 references in the legal domain.

The Act II of 1986 on the Press⁹⁷ was in force until 2011 when it was repealed by the second Orbán government and replaced by the Act CIV of 2010 on Freedom of the Press and the Fun-

⁸⁸ In Hungarian see: <https://www.ksh.hu/docs/hun/xftp/idoszaki/tudkut/2019/index.html>

⁸⁹ Access: <https://www.mtmt.hu/>

⁹⁰ Access: <http://real.mtak.hu/>

⁹¹ Data retrieved on 2022-11-03.

⁹² Access: <https://www.mediakutato.hu/>

⁹³ Access: <http://communicatio.hu/jelkep/>

⁹⁴ Access: <https://komejournal.com/>

⁹⁵ Access: <https://infojog.hu/>

⁹⁶ Access: <https://media-tudomany.hu/>

damental Rules of Media Content⁹⁸ (Press Act). At the same time, the Act I of 1996 on Radio and Television Broadcasting⁹⁹ was also replaced by the Act CLXXXV of 2010 on Media Services and Mass Media¹⁰⁰ (Media Act). In the following year, the Act LXIII of 1992 on the Protection of Personal Data and the Publicity of Data of Public Interest¹⁰¹ and the Act XC of 2005 on Freedom of Information by Electronic Means¹⁰² were replaced by the Act CXII of 2011 on the Right to Informational Self-Determination and Freedom of Information¹⁰³ (Information Act). These are the three sources of law that regulate the majority of media law issues in the Hungarian legal system. Of course, in addition to these acts, media law is also linked to several other legal sources. Many of them were also amended in the 2010s: in 2011 a new constitution, the Fundamental Law of Hungary¹⁰⁴, was adopted, in 2012 a new Criminal Code¹⁰⁵ entered into force, and in 2013 also a new Civil Code¹⁰⁶.

The role of the media authority in the context of available data has already been discussed in the introduction: there are a decent number of theoretical and analytical studies and books from the media authority itself and its Institute for Media Studies. In the context of legal and accountability issues, interpretations for specific legal areas, good practices from abroad or comparative legal studies have been published (Csink & Mayer, 2012; Grad-Gyenge, 2015; Koltay, 2013a; Koltay & Školkay eds., 2016; Tóth, 2017).

Some Hungarian law faculties have media law departments and/or media law research groups, such as the departments of Infocommunication Law at the Károli Gáspár University and the University of Pécs, or the Pázmány Péter Catholic University (Department of Private Law – Media Law Research Group).

There are a relatively large number of legal journals in Hungary, among which in the field of media law the most relevant ones are: Infocommunication and Law¹⁰⁷, Fundamentum¹⁰⁸, iustum aequum salutare¹⁰⁹, Hungarian Journal of Legal Studies¹¹⁰, Hungarian Law¹¹¹, Law Gazette¹¹² and In Medias Res¹¹³.

⁹⁷ Act II of 1986 on the Press (in Hungarian):

<http://www.jogiportal.hu/index.php?id=c8je2up1nslwg6hht&state=20090112&menu=view>

⁹⁸ Act CIV of 2010 on the Freedom of the Press and the Fundamental Rules of Media Content:

https://nmhh.hu/dokumentum/162262/smtv_110803_en_final.pdf

⁹⁹ Act I of 1996 on Radio and Television Broadcasting (in Hungarian):

<https://mkogy.jogtar.hu/jogszabaly?docid=99600001.TV>

¹⁰⁰ Act CLXXXV of 2010 on Media Services and Mass Media:

https://nmhh.hu/dokumentum/106487/act_clxxx_on_media_services_and_mass_media.pdf

¹⁰¹ Act LXIII of 1992 on the Protection of Personal Data and the Publicity of Data of Public Interest (in Hungarian): <https://mkogy.jogtar.hu/jogszabaly?docid=99200063.TV>

¹⁰² Act XC of 2005 on Freedom of Information by Electronic Means (in Hungarian):

<https://mkogy.jogtar.hu/jogszabaly?docid=a0500090.TV>

¹⁰³ Act CXII of 2011 on the Right of Informational Self-Determination and on Freedom of Information:

https://www.naih.hu/files/Privacy_Act-CXII-of-2011_EN_201310.pdf

¹⁰⁴ The Fundamental Law of Hungary:

<https://www.parlament.hu/documents/125505/138409/Fundamental+law/73811993-c377-428d-9808-ee03d6fb8178>

¹⁰⁵ Act C of 2012 on the Criminal Code: https://thb.kormany.hu/download/a/46/11000/Btk_EN.pdf

¹⁰⁶ Act V of 2013 on the Civil Code: https://uj.njt.hu/translation/I2013T0005P_20210701_FIN.PDF

¹⁰⁷ Infocommunication and Law <https://infojog.hu/>

¹⁰⁸ Fundamentum <http://fundamentum.hu/>

¹⁰⁹ iustum aequum salutare <http://ias.jak.ppke.hu/hir/ias/ias.htm>

¹¹⁰ Hungarian Journal of Legal Studies <https://akjournals.com/view/journals/2052/2052-overview.xml>

¹¹¹ Hungarian Law https://hvgorac.hu/magyar_jog

¹¹² Law Gazette https://hvgorac.hu/jogtudomanyi_kozlony

¹¹³ In Medias Res <https://media-tudomany.hu/>

The academic legal literature features some overviews of media law, which provide useful information for many of the domain's variables. The very first comprehensive book was Gálik and Polyák's *Médiaszabályozás* [Media Law], followed by Polyák's doctoral thesis (2008), Koltay's comparative work (2009) and his edited volume, *Hungarian Media Law* (2012). Together with the books *Hungarian Media Law* by Polyák and Nagy (2015) and *Media Law in Hungary* by Bayer, Urbán and Polyák (2019) from the 2010s, these overviews cover the whole research period between 2000 and 2020. Several volumes published by Wolters Kluwer in the care of the Media Authority and the Media Research Group of the Hungarian Academy of Sciences also take a comprehensive approach to contemporary media law issues of the given period (Koltay, 2019b; Koltay & Török eds., 2014, 2015, 2016, 2017).

NGOs are also involved in the discussion and analysis of human rights and domestic media law issues. Mertek Media Monitor has produced several analyses on the media laws of 2010, the legal environment of the public service media, and competition issues in the media market (Mertek Media Monitor, 2012, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021c). The Hungarian Civil Liberties Union¹¹⁴ is concerned with the interpretation of the law in matters relating to the protection and advocacy of journalists and media consumers (Hungarian Civil Liberties Union, 2020a, 2020b, 2020c).

2.1. Freedom of Expression

In Hungary, *freedom of expression* is recognised in Article IX of the Fundamental Law, and its restrictions are also found here, as well as in the relevant sections of the Criminal¹¹⁵ and Civil Codes¹¹⁶, and in several Constitutional Court decisions¹¹⁷ related to this fundamental right.

Concerning restrictions on freedom of expression, such as *defamation*, a number of studies are available examining these laws in the context of the press. The new Criminal and Civil Codes, which entered into force in 2012 and 2013, have given impetus to the study of the criminal and civil law aspects of personality rights and media. In a 2014 edited volume devoted to this topic, two studies also deal with the issue of defamation: Görög (2014) analyses the protection of the right to honour and reputation in the light of the case law of the ECtHR and the ECHR, Hungarian and other European national courts, while Békés' article (2014) sheds light on the controversial issues of defamation and libel in criminal law through the case law of the Hungarian courts and the ECtHR. Koltay (2014a, 2014b) deals with the protection of the reputation and honour of public figures by discussing Hungarian and European case law. Tóth (2017) has dedicated an entire book to exploring the topic, which was published by the Media Council's Institute for Media Studies in 2017. The author provides a comprehensive overview of the philosophical background of the concept of defamation, its legislative history in Hungary and other European legal systems, and discusses the case law of the ECtHR.

Another area where freedom of expression is restricted is *hate speech*, which is regulated by the Criminal Code¹¹⁸, the Press Act¹¹⁹, Constitutional Court decisions¹²⁰ and media authority

¹¹⁴ <https://tasz.hu/temaink/audience/ujsagirok?q=>

¹¹⁵ Act V of 2013 on the Civil Code, Sections 2:44, 2:45, 2:54.

¹¹⁶ Act C of 2012 on the Criminal Code, Sections 331, 332, 333, 334, 335, 336, 337, 338.

¹¹⁷ Such as: Constitutional Court Resolution No. 30/1992. (V. 26.) AB, Constitutional Court Resolution No. 36/1994. (VI. 24.) AB, Constitutional Court Resolution No. 12/1999. (V. 21.) AB, Constitutional Court Resolution No. 18/2004. (V. 25.) AB, Constitutional Court Resolution No. 95/2008. (VII. 3.) AB, Constitutional Court Resolution No. 96/2008. (VII. 3.) AB

¹¹⁸ Act C of 2012 on the Criminal Code, Sections 332, 333, 334, 335.

¹¹⁹ Act CIV of 2010 on the Freedom of the Press and the Fundamental Rules of Media Content, Section 17.

¹²⁰ Such as: Constitutional Court Resolution No. 1006/B/2001. AB, Constitutional Court Resolution No. 165/2011. (XII. 20.) AB

decisions¹²¹. The Constitutional Court's assessment of the 2010 media laws and the new Criminal Code have given a new boost to the review of this topic. Koltay (2013b) analysed the decisions of the media authority on hate speech and its judicial reviews in the period between 2001 and 2013. In the same year he also edited a volume (2013c), which explores the Hungarian case law on hate speech, the decisions of the media authority and ECtHR rulings. Gárdos-Orosz (2013), and Gárdos-Orosz and Pap (2014) discuss the implications of the new constitutional and civil law regulation on hate speech.

Hungary also restricts freedom of expression concerning the dissemination of fake news or scaremongering (*disinformation*).¹²² The supplement about scaremongering¹²³ to the Coronavirus Protection Act created a lot of uncertainty among the press workers. The related concerns are explored in the studies by Bencze and Ficsor (2020), Koltay (2020a, 2020b, 2020c) and Polyák (2020).

The issue of *personality rights* in the Hungarian legal system is divided in two with regard to the conceptual variables of the Mediadelcom project's legal regulation domain: one part of this area of law is related to the fundamental right of freedom of expression, which is regulated by the Press Act in addition to the Fundamental Law and the Civil Code, and the other part is related to freedom of information, which is regulated by the Act on Informational Self-Determination and Freedom of Information. Thus, in relation to the media, the first one includes, for example, the rights of public figures to privacy or questions about public affairs and privacy. Fleck (2005) discusses the conflict between freedom of expression and the protection of personal rights as well as the related civil law jurisprudence. Sarkady (2006) deals with the judicial practice in connection with the personality rights for public figures. Mezei's paper (2013) examines the relationship between press retraction procedures and the protection of personality rights. Szeghalmi (2014) discusses the civil law regulation of the right to the protection of one's image and its implications for the press. Koltay (2019a, 2020d) also analyses the question of balancing freedom of expression and protection of personality and the related legal practices.

The second topic, which includes the rights to the protection of personal data belongs partly to the conceptual variable of freedom of information. Jóri's dissertation (2009) reviews the main institutions of Hungarian data protection law and their enforcement in practice, and outlines the EU's emerging efforts towards a harmonised regulation of personal data protection. The analysis of this legal field was boosted by the adoption of the Information Act in 2011. Péterfalvi (2012), the president of the National Authority for Data Protection and Freedom of Information deals with the practical implementation of the new Information Act in his edited volume. The adoption of the new law has also been explained by several other authors (Jóri, 2014; Ligeti, 2014; Szabó, 2014). The introduction of the GDPR in 2016 and its implementation in the Hungarian law in 2018 gave new impetus for the study of the topic. Sepsí's volume (2019) summarises the most basic practical information on the national implementation of the GDPR, primarily as a guide for data controllers and data processors. Zavodnyik (2020) examines the interpretations about the GDPR by the National Authority for Data Protection and Freedom of Information in 2019. *SLAPP cases*, which are typically found in connection with GDPR in Hungary, were analysed by Bodrogi (2021) and the Hungarian Civil Liberties Union (2020a).

The Act LXXVI of 1999 on *Copyright* provides the guarantees and the necessary exceptions for the press to exercise the right of freedom of expression¹²⁴. Sarkady (2012, 2016) looks specifically at copyright issues from the perspective of media law. In her 2012 study, she reviews the

¹²¹ Such as: ORTT Decision 1470/2001 (26.X.), ORTT Decision 1185/2002 (18.VII.), ORTT Decision 117/2002 (10.I.), ORTT Decision 1516/2003 (4.IX.), ORTT Decision 1754/2004 (24.XI.), ORTT Decision 326/2005 (17.II.)

¹²² Act C of 2012 on the Criminal Code, Sections 4, 337.

¹²³ Act XII of 2020 on the Containment of Coronavirus

¹²⁴ Act LXXVI of 1999 on Copyright, Sections 1(5), 34(1), 36(1),(2).

main legal sources regulating the conflict between the two rights, between the private and the public interest. In their book, co-authored with Grad-Gyenge, published by the media authority, they cover the copyright aspects of the entire media value chain (Sarkady & Grad-Gyenge, 2012). The studies after 2016 address issues related to the development of the EU Copyright Directive¹²⁵, which was published in 2019 and implemented at the member state level in 2021. Pogácsás discuss copyright law issues in the context of the transformation of the public sphere (2016), reviewing the challenges that copyright regulation faces as the role of the public has changed, breaking up the previously existing status quo between authors and the public (2017b). In her 2017 study, she examines the aims and instruments of the common EU regulation (Pogácsás, 2017a). Polyák's edited volume (2020), which deals with the regulation of internet intermediaries, devotes several chapters to the impact of the EU's new copyright and related rights regulation on the press.

2.2. Freedom of information

Freedom of information in Hungary is recognised in Article VI of the Fundamental Law, and the details are set out in Act CXII of 2011 on the Right to Informational Self-Determination and Freedom of Information. The possible restrictions to freedom of information are also defined in this legal source.¹²⁶ The studies of Ligeti (2014), and Szabó (2014) provide an overview about the changes in the freedom of information regulations and the practices of public authorities and public bodies that have developed along these changes.

Act CLV of 2009 on the Protection of **Classified Information** details the scope of public interests that can be protected by classification.¹²⁷ The Civil Code¹²⁸ regulates the issue of trade secrets. Révész and Buzás (2018) discuss the issue of freedom of information in the context of transparency of public funds, reviewing the legislation ensuring and restricting access to information. In his monograph, Majtényi (2006), who was Hungary's first data protection commissioner, reviews the regulatory history of data protection and the **access to public data** through national and international case law. In the context of the fight against the coronavirus, the government has introduced restrictions also on freedom of information¹²⁹, extending the deadline for fulfilling public interest requests from 15 to 45+45 days.¹³⁰

The **protection of journalistic sources** is ensured by the Press Act¹³¹ and only allows the disclosure of sources in criminal proceedings. Koltay and Polyák's paper (2012) evaluates the Constitutional Court's decision that declared a provision of the Media Act on the protection of journalistic sources constitutionally invalid.¹³² On the occasion of the same decision, Kóczyán's (2013) study reviews the Hungarian legislation on the protection of information sources, and through the analysis of the Bodoky-case, it sheds light on the problems of the previous legislation and discusses the guarantees offered by the new amendment (T/7022/37) to the law.

Hungary has not yet implemented the EU's Whistleblowing Directive, but regulation in this area has already been in force since 2013. The **protection of whistleblowers** is guaranteed through

¹²⁵ Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC

¹²⁶ Act CXII of 2011 on the Right to Informational Self-Determination and Freedom of Information, Section 27.

¹²⁷ Act CLV of 2009 on the Protection of Classified Information (in Hungarian):

<https://net.jogtar.hu/jogszabaly?docid=a0900155.tv>

¹²⁸ Act V of 2013 on the Civil Code, Section 2:47 (1)

¹²⁹ Government Decree 521/2020 (XI. 25.) - on the derogation from certain provisions on requests for data during an emergency

¹³⁰ See the opinion of the Hungarian Civil Liberties Union on this topic (in Hungarian):

<https://tasz.hu/cikkek/a-jarvany-nem-lehet-urugy-az-idohuzasra-az-alkotmanybirosag-szerint-sem>

¹³¹ Act CIV of 2010 on the Freedom of the Press and the Fundamental Rules of Media Content, Section 6.

¹³² Constitutional Court Resolution No. 165/2011. (XII. 20.) AB

the Act CLXV of 2013 on Complaints and Public Interest Disclosures¹³³ - Hajdú and Lukács (2018a, 2018b) give an overview about the Hungarian legislation.

Transparency of media ownership – as well as other businesses in Hungary – is regulated by the Act V of 2006 on Public Company Information, Company Registration and Winding-up Proceedings. Media Pluralism Monitor reports regularly examine the issue of ownership transparency in media businesses (Bátorfy et al., 2022).

2.3. Accountability system

In Hungary, the issue of ethical regulation is not one of the hottest topics, neither for the professionals concerned nor for researchers. As a consequence, limited data and analysis are available on the conceptual variables of professional, market, public and international accountability, the bibliographical database contains only 37 references under this subdomain. However, interview and survey-based researches on Hungarian journalists (Mertek Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021e; Róka et al., 2017; Vásárhelyi ed., 1999, 2007) also pay attention to the ethical issues of the profession, this topic is explained in the journalism domain's journalistic competencies part (section 3.4.3). The issue of self-regulation is addressed from time to time in professional and academic circles, no progress has been made, nor has a real professional debate been awakened. The sources available over the past 20 years include studies by the media authority, various professional and non-governmental organisations, and academic actors.

Sükösd and Csermely's edited volume (2001), which deals with ethical issues in journalism and focuses on the need to develop professional standards, is from the early 2000s. Krokavay's book (2003) takes a philosophical approach to the moral issues of the press and the role of the media in society. In 2008, the OSCE's Commissioner for Freedom of the Press, Miklós Haraszti, published a guide in Hungarian on the application of the key elements of media self-regulation (Haraszti, 2008). The Institute of Media Studies of the Media Council of the National Media and Infocommunications Authority prepared an analysis in 2012 about the state-, self-, and co-regulatory system of media regulation, its legal, institutional, and professional issues (Csink & Mayer, 2012). In 2014, after a series of debates based on 10 months of social dialogue, the NGOs Mertek Media Monitor and the Center for Independent Journalism put together an alternative concept for media regulation – also as a kind of critique of the new authority's practices – which includes the decentralisation of media authority tasks and the development of a rethought self-regulatory system (Center for Independent Journalism & Mertek Media Monitor, 2014). Tófalvy (2013) reviews the failed decades of self-regulation in Hungary in his study. He explores the reasons for the lack of well-functioning self-regulation in Hungary¹³⁴ and deals with the most important actors and regulatory instruments. The Erasmus+ project *New Skills for the Next Generation of Journalists*, involving 4 countries, Hungary, Germany, Portugal, and Romania, also addressed the issue of ethical regulation. Interviews with heads of communication and media departments, academics, and journalists from different media outlets were conducted to explore the state of journalism ethics in the country and its role in journalism education (Bettels-Schwabbauer et al, 2018). In the European Audiovisual Observatory's comparative review about the national self- and co-regulatory systems, in the Hungarian chapter Polyák (2019) presents the conditions provided by the domestic legal environment and their realisation in practice.

¹³³ Act CLXV of 2013 on Complaints and Public Interest Disclosures:

[https://www.ajbh.hu/documents/14315/130159/Act CLXV of 2013 .pdf/faa3e557-8e16-473f-1fa9-539e7cdb0f22](https://www.ajbh.hu/documents/14315/130159/Act+CLXV+of+2013+.pdf/faa3e557-8e16-473f-1fa9-539e7cdb0f22)

¹³⁴ According to Tófalvy (2013), these reasons are the lack of professional consensus and organisational framework, the over-politicised media system, the over-politicised and outdated legal environment, the fragmentation of the journalistic community, the general lack of resources, the lack of transparency and readers' lack of interest in quality assurance.

Two country chapters written by Urbán (2018, 2021) in the European and Global Handbooks of Accountability give an overview about Hungarian accountability instruments and their effectiveness.

2.3.1. Professional accountability

To assess the variables of professional accountability we have information on **journalists' organisations** in Hungary, four of which are also co-regulators assisting the state regulator media authority (Polyák & Uszkiewicz eds., 2014; Tófalvy, 2013; Urbán, 2018, 2021). Unfortunately, there is no information available on how many and in which **types of cases** they act, neither on their websites nor in the reports of the media authority. In Hungary, there are many different **codes of ethics** in circulation, but there is no common one adopted by all the professional organisations. While a general picture can be obtained from studies reviewing accountability instruments (Polyák, 2019; Tófalvy, 2013; Urbán, 2018, 2021), no scholarly analyses have been carried out on the subject.

2.3.2. Market accountability

In Hungary, there is no tradition of **newspaper ombudspersons**. Tófalvy (2013) writes about the two occasions, when domestic newspapers employed an ombudsman: László Majtényi, former data protection commissioner and president of the media authority, was the newspaper ombudsman of Magyar Hírlap for the first and then Népszabadság in the mid-2000s.¹³⁵ There are few press organs that have an independent, **organisational code of ethics** (Tófalvy, 2013); in most cases, the individual editorial offices apply the code of ethics of a journalists' organisation. **Professional self-reflection**, i.e. journalism about the media itself, is represented by four media outlets in the country, which provide news and analysis on the media. The Hungarian media system as a whole, however, is constantly in the centre of public discourse, so a relatively large number of articles, analyses, and data on the media also appear in the general press. Tools related to **editorial transparency** are not a feature of the domestic media, we do not have information about it.

2.3.3. Public accountability

The **media critical discourse** on ethical regulation can be traced back to the analyses and studies detailed in the introduction of this sub-chapter, and although Tamás Tófalvy, media researcher, and Gábor Polyák, one of the authors of this study, media lawyer and researcher of the Mertek Media Monitor, have also repeatedly addressed the topic, and also the Center for Independent Journalism has paid special attention to the establishment of self-regulatory practices in Hungary, these initiatives have not yet found a suitable breeding ground. Just as self-regulatory practices have not become well established in the traditional press, the ethical aspects of the activities of **non-professional content providers** are more not.

2.3.4. Political accountability

About the role of the **state authority**, we have more systematised knowledge. The National Media and Infocommunications Authority (NMHH), was created in 2010, merging its two predecessors, the National Radio and Television Authority (ORTT) and the National Infocommunications Authority (NHH). In the field of media regulation, the NMHH is represented by the Media Council, which has independent powers and is the successor to the ORTT. Information on the cases

¹³⁵ Emasa. (2006). László Majtényi: the Hungarian press is incapable of self-reflection. <http://www.emasa.hu/cikk.php?id=1587>

handled by the media authority can be obtained from their annual reports.¹³⁶ Operation of the authority is constantly in the focus of studies and country reports (Dezséri, 2011; Directorate General Human Rights and Rule of Law, 2012; Kitta, 2011; Koltay, 2013a; Lampé, 2011; Majtényi, 2011; Mertek Media Monitor, 2015a, 2016a, 2018a, 2021c; Nagy, 2010, 2011, 2016a, 2016b; National Media and Infocommunication Authority, 2011; Polyák & Nagy, 2015; Polyák & Rozgonyi, 2015; Polyák & Urbán, 2016; Vincze, 2012a, 2012b; WAN IFRA, 2013).

In Hungary, the **ombudsman** is the Commissioner for Fundamental Rights.¹³⁷ After 2010, the independence of this institution was questioned (Majtényi, 2014), and in 2021 the ENNHRI, the European Network of National Human Rights Institutions, proposed to downgrade the Hungarian Ombudsman from A to B grade¹³⁸ (European Network of National Human Rights Institutions, 2021). The authority also has a Media and Infocommunications Commissioner, to whom consumers can turn in case of complaints and who makes recommendations¹³⁹. The institution of a **government commission** is unknown in the country, but there is a commission in the parliament – also with a majority of the governing parties – which meets to discuss cultural and media issues.

2.3.5. International accountability

Since 2010, there has been a lively international discourse on Hungary. Since 2018 the country is also under Article 7 procedure, so there is almost no international (political or non-governmental) organisation dealing with human rights and the rule of law that has not paid attention to the Hungarian situation. Among the **international journalistic organisations** active in Hungary, the International Press Institute has been particularly promotive – with conferences, trainings and training materials on accountability issues addresses to the domestic professionals. However, generally, the main concerns of these international organisations are more fundamental, such as the state of press freedom or media pluralism. In 2019, the International Press Institute (IPI), Article 19, the Committee to Protect Journalists (CPJ), the European Centre for Press and Media Freedom (ECPMF), the European Federation of Journalists (EFJ), Free Press Unlimited (FPU) and Reporters Without Borders (RSF) organised a joint mission to map the media situation in Hungary and formulate recommendations to the EU and the Hungarian government (IPI et al., 2019). Other **non-journalistic international organisations** dealing with media-related issues are also active in Hungary, such as Transparency International¹⁴⁰, which focuses on freedom of information, whistleblower protection, promoting social dialogue, and supporting investigative journalism. Advocacy organisations, such as Amnesty International and the Helsinki Committee also have their own Hungarian sections.¹⁴¹ Among the **international political actors**, the activities of the EU institutions, the UN, the OSCE, and the OECD are relevant to the situation of the Hungarian media, but also the embassies of some countries have good relations with Hungarian NGOs. There is little information on **international market players**. Galambos (2008) examined German publishers, who dominated the Hungarian press after the regime change, and their impact on the quality and standards of Hungarian journalistic work – but he found that their presence had a little direct impact.

¹³⁶ National Statistical Data Collection Programme - Activities of postal, communications, media, and broadcasting authorities (2018, 2019, 2020) <https://nmhh.hu/kozerdeku-adatok/tevekenyseg-mukodes/mukodesi-statisztika>

Parliamentary reports (2010-2020) <https://nmhh.hu/kozerdeku-adatok/tevekenyseg-mukodes/orszaggyulesi-beszamolok>

¹³⁷ <https://www.ajbh.hu/>

¹³⁸ Source: <https://helsinki.hu/en/peers-from-other-countries-recommend-that-the-ombudsperson-is-downgraded-as-a-national-human-rights-institution>

¹³⁹ For more information in Hungarian see: <https://nmhh.hu/media-es-hirkozlesi-biztos>

¹⁴⁰ Access: <https://transparency.hu/>

¹⁴¹ Access: <https://www.amnesty.hu/> and <https://helsinki.hu/en/>

3. Publications, data sources and main monitoring actors of journalism domain

In Hungary, there is no institutionalised research on journalism, and yet this domain represents the largest body of literature in the Hungarian bibliographic database, 389 references, out of which 150 belong to the journalistic competences sub-domain. The domain covers also the issues of the media market, a deeply discussed topic in Hungary - this is the main reason for the extensive number of sources.

Public institutions, such as the media authority or the Central Statistical Office, provide a limited amount and quality of data for the analysis of journalism variables. Professional organisations, such as market measurement companies and journalists' organisations also provide just limited publicly available data. These are described under the single variables. In Hungary, the polarisation of the media has led to a particular focus on the performance of the press – academia, media outlets, professional organisations and NGOs regularly thematise and examine how the different news sources cover certain topics. Parallel to the situation outlined in the introduction, that there is a lack of tertiary education specifically focused on journalism, interest in journalism research is also relatively low among scholars in communication and media research.

An outstanding source of quantitative research is the work of Mária Vásárhelyi and her team, who conducted two big survey studies among Hungarian journalists at the end of the 1990s and the 2000s (Vásárhelyi ed., 1999, 2007). Another large quantitative study on Hungarian journalists was conducted in 2017 as part of the *Worlds of Journalism Study* (Róka, Frost & Hanitzsch, 2017). There are also recent results from the “*Newsreel - New Skills for Next Generation of Journalists*” and “*Newsreel2 - New Teaching Fields for the Next Generation of Journalists*” research projects. In the first research phase, researchers from the four countries focused on the state of journalism education, journalistic competencies, data journalism, and collaborative journalism, new business models, and ethical challenges for the profession, while in the second phase, on social media communication, the role of journalism in democracy and the fight against disinformation. The results of their research were used to develop e-learning materials for journalism education (Bettels-Schwabbauer, 2018; The Newsreel Project Consortium, 2021).

In the case of NGOs focusing on journalism research, data on the situation of Hungarian journalism are mainly provided by the results of international statistical measurements or by the various sub-sectors of indices, such as *Freedom of the Press Report* of Freedom House, *World Press Freedom Index* by Reporters Without Borders or the *Media Pluralism Monitor* by ECMPPF. For the period after 2010, we can draw on the researches conducted by Mertek Media Monitor to understand a wide range of topics in connection with the media market, news media, and the journalistic profession. The *Press Freedom Index* from 2013 to 2017 measured attitudes towards the media of the public, journalists, and media managers and also sought to map the working conditions of journalists (Mertek Media Monitor, 2014, 2015b; Timár, 2016, 2017). Since 2013, Mertek Media Monitor has also published annually or biannually its *Soft Censorship* reports, which examine the market impact of public advertising, public service media, the independence of the media authority and the situation of journalists, using a variety of research methods (WAN IFRA, 2013; Mertek Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021b, 2021c, 2021d, 2021e). The 2021 research was a comparative study with three other Central and Eastern European countries, the Czech Republic, Romania, and Slovakia.

3.1. Market conditions

There are few statistics available on journalism in Hungary. The website of the media authority lists *registered media service providers*¹⁴², but it is no longer possible to find out which ones are active in serious journalism. We also do not have data on the *number of journalists* in the society, Róka's analysis gives an estimate of around 8,000 (Róka, Frost & Hanitzsch, 2017). However, the estimation itself is also difficult, given that an increasing number of journalists today work anonymously at press organisations, publishing their articles without the author's name. In some media outlets, the majority of articles are published without the author being identified.

In terms of *advertising revenues*, there are also several analyses available for each media market segment, some of which are public data¹⁴³ but most of which can be purchased as services from research companies. Until 2013, *Media Market Overview* reports were published, providing data on the performance of each media market segment (Incze, 2006, 2007, 2008, 2009; Mrs. White Media Consulting Kft., 2012a, 2012b, 2013). The disadvantage of these aggregated data is that they do not detail the data of media companies that are also active in journalism. In the case of the largest players, Urbán focuses in her analyses on the evolution of advertising expenditure by the state for each media company. She also analyses the data about the total revenues of the largest journalistic media companies from the publicly available database, showing the dependence of media outlets on public advertising revenues (Bátorfy & Urbán, 2019, 2020; Bátorfy, Urbán & Győri, 2017; Mertek Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021b; Urbán, 2013, 2015a).

Hungarian (independent) journalism has only one very limited possibility of *state support*: only audiovisual and radio service providers can benefit from the *Hungarian Media Patronage Programme*, which aims to support the production of public service radio and television programmes, and the operating and development costs of these services.¹⁴⁴ Based on the previously mentioned analyses of Urbán (Bátorfy & Urbán, 2019, 2020; Bátorfy, Urbán & Győri, 2017; Mertek Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021b; Urbán, 2013, 2015a), in Hungary, state advertising expenditure can currently be considered as a form of state aid, which seriously infringes EU competition law. In this regard Mertek Media Monitor, Klubrádió and former MEP, Benedek Jávor lodged a complaint for the European Commission in 2019.¹⁴⁵ In their study, Szeidl and Szucs (2021) investigated the exchange of favours between politics and the media, how market changes (e.g. change of ownership) affect the public advertising allocated to media outlets, and whether this causes also a change in their content.

Concentration in the Hungarian media market has been the subject of numerous studies in the last twenty years, most notably in the works of Mihály Gálík and Ágnes Urbán. (Gálík, 2004a, 2004b, 2007, 2008, 2011; Gálík & Vog, 2011, 2012; Urbán, 2015a, 2015b, 2016, 2021) Traditional *concentration indicator* analyses for the Hungarian media market are almost non-existent, but in her 2015 study, Urbán calculated C4 and Herfindahl-Hirschman Index (HHI) values for the state advertisement spendings (Urbán, 2015a). Data on *the audience reach* of public service channels and their position in the television market has been available in the annual reports of the CEOs of Duna Media Services since 2012.¹⁴⁶ After the regime change, *foreign professional investors* became market leaders in several media segments, including newspaper publishing, radio, and television. After 2010, most of them sold their domestic interests and withdrew from

¹⁴² Link to the database: <https://english.nmhh.hu/stakeholders/registers-databases>

¹⁴³ Television commercials: <https://www.memeinfo.hu/reklamtorta>; digital advertisement spending data (2008-2020): https://iab.hu/wp-content/uploads/2021/04/IAB_HU_Adex_2020.pdf; WHITEREPORT Key Performance Indicators – public macro data on the media market: http://whitereport.hu/kpi_offer.aspx

¹⁴⁴ Source: <https://tamogatas.mtva.hu/rolunk/>

¹⁴⁵ Source: <https://mertek.eu/en/2019/01/29/state-advertising-spending-in-hungary-an-unlawful-form-of-state-aid/>

¹⁴⁶ Access: https://dunamsz.hu/kozerdeku/?lang=hu_hu

the Hungarian market, and this is when domestic media owners, mainly from pro-government investor circles, started to gain strength. The ownership shifts of the 2010s, the steady increase of market concentration, and in this regard the impact of the creation of Central European Press and Media Foundation (CEPMF) in 2018, are well documented in the Soft Censorship reports of Mertek Media Monitor (Mertek Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021b).

3.2. Public service media

Parallel to the 2010 media laws and the transformation of the media authority, the Hungarian *public service media system* has also been restructured. 2015 saw another major reorganisation of the PSM. There is a lively academic work on the structural changes, the legal environment, and the functioning of public service media since the beginning of the 2010s (Gálik, 2012; Hammer, 2012; Majtényi, 2015; Polyák & Urbán, 2015; Vincze, 2012a). But even before, many researchers were dealing with the topic - given that in Hungary, never since the fall of communism has public media managed to become independent from the actual government (Csepeli et al., 2007; Gálik, 2002; Jakubowicz, 2004; Koltay, 2007; Szente, 2002). The *Soft Censorship* reports take a close look at the Hungarian *media policy* in the 2010s, including the functioning of PSM and other media market issues such as subsidies and taxes on service providers (Mertek Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021b, 2021d). Szicherle and Wessener (2017) also review the direction of domestic media policy and the performance of the public service media. To capture the extent to which Hungarian public service media do not meet the normative expectations set out in the Public Service Code¹⁴⁷, Mertek Media Monitor has been monitoring the PSM news since 2016 in its *Szűrőpróba*¹⁴⁸ analysis series.

3.3. Production conditions

We do not have data on the *digital resources* of newsrooms, the proportion of *multimedia reporters*, the proportion of *investigative journalists*, the number of *foreign correspondents*, the degree of *monitoring of social media*, or the extent of *collaborative journalism*. It could be said, that absolutely no quantitative data is available on the production conditions of journalists, but it is worth taking qualitative knowledge into account for an understanding of the topic. From the interview-based studies about journalists conducted regularly by Mertek Media Monitor (2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021e), we can gain an insight into the wider factors that affect their daily work: an increasing number of working hours, a decrease in the amount of time available for a story, shrinking availability of information, and decreasing resources for local or international issues - all of which are attributed directly or indirectly to the politicisation of the media. Of great importance for the topic is the *MODEM* (Hungarian Online and Digital Media History) project, which is building an archive of oral history interviews with actors from various fields of the domestic media. So far, more than 40 interviews have been completed, mainly in the fields of content production, online media and journalism.¹⁴⁹

3.4. Working conditions

Information on *job satisfaction*, *employment types*, *feelings of security*, and *threats to journalists* can all be found in the Vásárhelyi (ed. 1999, 2007) and the *Worlds of Journalism Study* (Róka, Frost & Hanitzsch, 2017) surveys. However, questions on the *degree of movement* between oth-

¹⁴⁷ The Public Service Code in Hungarian:

https://nmhh.hu/dokumentum/169246/kozszolglati_kodex_2016_januar_1_tol.pdf

¹⁴⁸ Mertek Media Monitor. *Szűrőpróba* [Spot-check]. 2016- (to present)

<https://mertek.eu/page/9/?s=sz%C3%BAr%C3%B3pr%C3%B3ba>

¹⁴⁹ Source: <https://www.mediatoritenet.hu/interjuk/>

er areas of the communications sector, *earnings opportunities*, *intra-organisational training*, and *career prospects* were still included in the Vásárhelyi surveys (1999, 2007), but the *Worlds of Journalism Study* (Róka, Frost & Hanitzsch, 2017) did not address them. Therefore, we only have information on these questions from the first half of the research period.

3.4.1. Intra-organizational diversity

The journalist surveys conducted by Vásárhelyi (ed. 1999, 2007) and Róka, Frost and Hanitzsch (2017) show the proportion of journalists by **gender** and **age**, but we do not have more information for example on their **class** or **cultural background** neither at the national level nor at the level of the newsrooms.

3.4.2. Journalistic competencies, education, and training

As already explained in section 1.3.1, there is no actual journalism education at tertiary level in Hungary, but journalism can be studied at private academies and programs, and indirectly at the communication and media departments of some universities. The situation of **journalism education** has been subject of several studies (Association of Hungarian Content Providers, 2014; Bajomi-Lázár, 2009, 2015d; Demeter & Horányi, 2015; Derényi, 2015; Gálik, 2015; Mester & Torbó, 2019; Polyák & Torbó, 2019; Szabó, 2021; Szijártó, 2015; Weyer et al., 2015a, 2015b). The Vásárhelyi survey (2007) takes stock of journalists' **qualifications** and language skills. Some outstanding qualitative studies also highlight other important areas: Gödri (2021) deals with the situation of the career-starting journalists. Galambos (2008) examined the role played by German owners and publishers in the democratisation of the Hungarian media market after the regime change and the professional knowledge and skills they managed to transfer to the Hungarian journalism society. Barta's studies (2015, 2018) deals with journalists' social media practices and their digital **competencies**. Lampé in her study entitled "*Return Service*" (2008) explores the problematic practice of pre-publication checking and transcription of articles in Hungary, evaluating the role of journalists and interviewees in this phenomenon.

3.4.3. Professional culture and role perception

Excellent data are available from the research of Szabó and her colleagues, who examined the **role performance** of Hungarian journalists by analysing the content of articles in the four largest Hungarian daily newspapers (Szabó, Kormos & Zagyi, 2016). Some other studies use also content analysis to investigate how different newsrooms represent certain themes or social groups (Bene & Szabó, 2019; Bernáth & Messing, 2012, 2015; Bognár & Janky, 2015; Demeter, 2018; Hajdu et al., 2018). Bajomi-Lázár (2016, 2017) assessed the state of Hungarian political journalism, exploring the historical and social reasons behind the emergence of two schools of journalism, one seeking neutrality and the other politically committed. The parallelism between media and politics and its impact on journalism is regularly handled by Bajomi-Lázár (2010, 2015a, 2015b, 2015c, 2019, 2020, 2021). Barta deals in her researches with the changing roles of journalists as an impact of new media: how the emergence of citizen journalism influenced the role of professional journalists in mainstream media (2007), what impact algorithms have on online journalism (2015) or what potentials lay in participatory journalism (2020).

The research conducted by Vásárhelyi (2007) provides information on the **self-image and ideological orientation** of journalists. The *Press Freedom Index* reports (Mertek Media Monitor, 2014, 2015b; Timár, 2016, 2017) and later the *Soft Censorship* reports (Mertek Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021e) deal with journalists' perceptions of the media's role performance, their perception of media diversity (inclusiveness), presence of self-censorship and commitment for their profession. The journalist interviews within some of the reports examine also the situation and attitudes of journalists in the light of current events in

the media market. The special issue of the 2021 report looks in more detail at the role of journalists and the reputation of the profession (Mertek Media Monitor, 2021e).

Bajomi-Lázár (2003), in his article *“In the traces of the objectivity doctrine”*, discusses **journalistic norms** and the roles of journalists that can be mapped out along the value of objectivity. In his 2019 study, he reviews the needs and norms that guide journalists in the pro-government media. Tófalvy (2015, 2016, 2017) deals with the **values and ideologies** of the journalistic society, primarily from a theoretical point of view, and his writings also tell us who the law or the profession considers a journalist. One of the main elements of the *Newsreel* project is to examine the **ethical challenges** journalists face (Bettels-Schwabbauer, 2018; The Newsreel Project Consortium, 2021). Vásárhelyi's (2007) edited volume provides information on the ethical standards of journalists by which they carry out their work and their situation on **autonomy**. The *Worlds of Journalism Study* explored the basic journalistic values and ethical standards, journalists' trust in certain public institutions, and also examined the issue of autonomy (Róka, Frost & Hanitzsch, 2017). The *Press Freedom Index* reports give insight into the political, economic, and legal pressures journalists face and the values they consider important for their professional freedom (Mertek Media Monitor, 2014, 2015b; Timár, 2016, 2017).

4. Publications, data sources and main monitoring actors of media usage patterns

Despite the limited and sporadic public availability of official audience measurement data, Hungary is well covered for the assessment of the media consumption variables. The bibliographical database has 104 references connected to the media usage domain. For each variable, we can find sufficient data of good quality, in many cases even on a longitudinal basis (primarily from the second decade of the research period).

Audience measurement for television, print, and online media is carried out by private companies, while for the radio listenership data the National Media and Infocommunications Authority is responsible. In the case of television audience measurement, market players are financing the measurement services of Nielsen¹⁵⁰, so the data is not publicly available – it is up to the television companies to decide which results they want to publish. Internet audience measurement is carried out by Gemius Hungary on behalf of the Digital Audience Measurement Council¹⁵¹, which is also ordered by market stakeholders, with funding coming from publishing companies, agencies, and sales houses (Bucsky, 2021 July 12, 2021 July 14, 2021 July 19). Some of their basic data is publicly available. The Hungarian Audit Bureau of Circulations (MATESZ)¹⁵² audits print publications, and according to their introduction, 85% of all publications on the market are on their list. It is also funded by publishers, agencies, and advertisers. Data on circulation figures are publicly available on a quarterly basis. Kantar Hoffmann-M-Meter measures radio listening on behalf of the NMHH.¹⁵³ Detailed data are published by the media authority in quarterly reports.

Eurostat's “Digital economy and society¹⁵⁴” theme also provides useful data, mainly on access possibilities of users. The Hungarian Central Statistical Office's raw data about media usage can be found in the themes “Culture”¹⁵⁵ and “Information, communication”¹⁵⁶.

¹⁵⁰ Nielsen Audience Measurement: <https://www.nielsen.com/hu/hu/solutions/measurement/television/>

¹⁵¹ For more information in Hungarian see: <https://dkt.hu/>

¹⁵² For more information in Hungarian see: <https://matesz.hu/>

¹⁵³ Data is available at <https://nmhh.hu/kutatasok>

¹⁵⁴ Data is available at <https://ec.europa.eu/eurostat/web/digital-economy-and-society/overview>

¹⁵⁵ Data is available at <https://www.ksh.hu/culture>

In addition to raw data, there are a number of national and international surveys that provide a comprehensive picture of the media usage habits of the population. Some of these relate to media consumption in general, while others focus specifically on news media and information habits. The data on the latter are much more useful for the study of deliberative communication.

Since 2012, MerteK Media Monitor has been conducting almost every two years a representative survey about the sources of political information, providing a picture of the most relevant news sources among the Hungarian voting-age audience (MerteK Media Monitor, 2013, 2016b, 2018b, Hann et al., 2020). These analyses provide data for several variables of the media usage domain, such as access to media, the relevance, and quality of news media, or the trust in media. On the media consumption habits of young people, useful information can be obtained from the relevant chapters of the *Youth Research* studies published every four years since the early 2000s (Bauer & Szabó, 2005, 2009; Kitta, 2012; Laki, Szabó & Bauer, 2000; Társadalomkutató Kft, 2020; Tóth, 2016). *Reuters Digital News Reports* (Bognár, 2022) or the country reports of *Media Pluralism Monitor* (Bátorfy et al., 2022) give valuable data for many of the variables in the media usage domain.

In addition to longitudinal surveys, some periodic projects can also provide evaluations on specific issues, such as the Media Council's representative survey on the population's media usage (National Media and Infocommunications Authority, 2011b), the Hungarian country report of *Mapping Digital Media* by the Open Society Foundations (2012), the *Standard Eurobarometer 92 Survey* on the media use in the European Union (European Commission Directorate-General for Communication, 2020) or the mixed methodology research conducted by the London School of Economics (2020).

4.1. Access to media and diversity of media provision

Information on **internet penetration**, the number of internet subscriptions, and mobile internet usage is available from the Hungarian Central Statistical Office¹⁵⁷ or from the statistical database of the National Media and Infocommunications Authority¹⁵⁸. We do not have precise data on which **groups has no access** to news media, social media, or mobile internet. However, a source for the proportion of the adult population that does not use specific types of media or social media for information can be obtained from the MerteK-Medián news consumption surveys (MerteK Media Monitor, 2013, 2016b, 2018b, Hann et al., 2020).

For the assessment of the **diversity of the media market**, see Bátorfy and Szabó's analysis from 2020 (Bátorfy & Szabó, 2020) and MerteK Media Monitor's *Soft Censorship* reports (MerteK Media Monitor, 2015a, 2016a, 2017, 2018a, 2019, 2021a, 2021b). The Hungarian team members of Mediadelcom investigated also the relationship between media supply and news consumption based on representative survey data (Polyák, Szávai & Urbán, 2019; Polyák, Urbán & Szávai, 2022). On the **reach of individual media outlets**, we can rely on the MerteK-Medián news consumption surveys (MerteK Media Monitor, 2013, 2016b, 2018b, Hann et al., 2020), as well as on measurements by Nielsen (television), Kantar Hoffmann-M-Meter (radio), MATE SZ (print media), and DKT-Gemius (online media). Television data's publicity is limited, but viewing statistics for the top evening news programmes can be found in the media authority's annual parliamentary reports¹⁵⁹.

¹⁵⁶ Data is available at <https://www.ksh.hu/information-communication>

¹⁵⁷ Data is available at <https://www.ksh.hu/>

¹⁵⁸ Data is available at <http://ehmmsa.nmhh.hu/informatika-internet>

¹⁵⁹ The reports are available in Hungarian: <https://nmhh.hu/kozerdeku-adatok/tevekenyseg-mukodes/orszaggyulesi-beszamolok>

Public service media services must be made accessible free of charge for subscribers by content providers. PSM is **obliged to provide** independent programmes for the recognised nationalities living in Hungary and also performs news agency tasks through the operation of the Hungarian News Agency (MTI).¹⁶⁰ According to the Media Act, commercial audiovisual service providers with significant influence are obliged to broadcast prime-time news.¹⁶¹ The law also contains provisions for services for people with disabilities.¹⁶²

4.2. Relevance of news media

The results of the MerteK-Medián news consumption surveys (MerteK Media Monitor, 2013, 2016b, 2018b, Hann et al., 2020) provide useful input for the evaluation of this topic. The survey is focusing on the **frequency of news consumption** of the individual news sources. The last survey in 2020 included 54 specified media outlets, tv and radio channels, print and online newspapers. The research also pays special attention to the individual's political interests: how much interest they have in politics, how much time they spend informing themselves about public affairs, and what media they use for this. Thus, we have basic demographic data on the **news avoiders**, but in-depth analyses are lacking. Based on this survey data, the authors of the present paper published two studies, which draw a picture of different consumption patterns for public information, also identifying pro- and anti-government opinion bubbles in Hungarian society (Polyák, Szávai & Urbán, 2019; Polyák, Urbán & Szávai, 2022).

Subscription-based online media are still rare in Hungary, although hybrid practices (free articles + paid contents) are increasingly emerging. Most independent news portals try to sustain themselves through donations and crowdfunding. The MerteK-Medián survey also asked whether consumers support any media with donations. We do not have much information on the audiences of **alternative news sources**, but there have been some recent analyses of the role of “grey-zone” news sources (Political Capital, 2022) and social media “news providers” and influencers¹⁶³ in the public discourse.

4.3. Trust in media

Data on the level of trust in the media and also in individual news sources are also available from the MerteK-Medián surveys, as well as questions on consumer expectations and attitudes towards the media (MerteK Media Monitor, 2013, 2016b, 2018b, Hann et al., 2020). Measurements about the trust in media are also published in the *Reuters Digital News Reports* and *EBU Net Trust Index*¹⁶⁴.

5. Publications, data sources and main monitoring actors of media related competencies domain

For the operational variables on media-related competencies, limited data are available in Hungary. The bibliographical database contains 90 literatures for this domain. In the theoretical approach to media literacy, there are a good number of expert books, textbooks, and practical guides in the Hungarian academic and practice-oriented literature. In 2015, the media authority published some books on the subject, including volumes by Hungarian authors or translations from international authors (Aczél, Andok & Bokor, 2015; Antalóczy & Pöröcz eds., 2015; Hartai,

¹⁶⁰ Act CLXXXV of 2010 on Media Services and on the Mass Media, section 98 and 101.

¹⁶¹ Act CLXXXV of 2010 on Media Services and on the Mass Media, section 38.

¹⁶² Act CLXXXV of 2010 on Media Services and on the Mass Media, section 39.

¹⁶³ See the analysis of Atlo: <https://atlo.team/ner-metaverzum/>

¹⁶⁴ Data is available at https://www.ebu.ch/publications/research/login_only/report/trust-in-media

2015; Kósa & Berta eds., 2015). However, empirical data are periodical and sporadic. The research tradition is mainly based on small sample research among children of different age groups (some research also on elderly people), and on teachers' media literacy and teaching practices. Large sample surveys or research on the competencies of the adult population are not common in Hungary. Although results of a number of international longitudinal or project-based researches are available, which comply for subsequent comparative analysis on a quantitative basis. For example the *Programme for the International Assessment of Adult Competencies* – PIAAC (2017/2018), *Programme for International Student Assessment* – PISA (2003-2018), *United Nation E-Participation Index* (2003-2020), Open Society Institute Sofia's *Media Literacy Index* (2017-2021), European Audiovisual Observatory – *Mapping of media literacy practices and actions in EU-28* (2016), European Association for Viewers Interests' *EMEDUS Project* (2012), ANR TRANSLIT and COST "Transforming Audiences / Transforming Societies" (2013) and the *European Values Study* (since 1990).

5.1. Normative sources

Several studies have assessed the **structural factors** of media literacy in the last decades (Hartai, 2014; Neag & Koltay, 2019; Pelle & Neag, 2016; Schleicher & Rétfalvi, 2014, 2015). A comprehensive document is the evaluation published by the Commissioner for Fundamental Rights (2016), which handles the actors and programmes of the Hungarian public and civil sector dealing with media literacy, and based on their feedback identifies good practices and gaps, also makes recommendations on areas for improvement. The *Digital Success Programme* was launched by the state in 2016, as part of Hungary's *Digital Education Strategy*.¹⁶⁵ It sets out the infrastructural, substantive, and methodological goals for the entire education system. The document also provides a status report on all levels of the education system. Another key area of the programme is effective child protection, which Hungary's *Digital Strategy for Child Protection* aims to achieve.¹⁶⁶ One of the three pillars outlined in the document is the development of media literacy. The Bűvösvölgy [Magic Valley] Media Literacy Training Centre is run by the media authority and currently offers thematic programmes for school groups in three locations in the country, as well as publishing textbooks, guides, and teaching materials to support teachers in their media education efforts.

Media literacy policies have been thoroughly mapped by Neag (2017) in her dissertation and in the Hungarian country report of the ANR TRANSLIT and COST project, "Transforming Audiences/Transforming Societies" (Schleicher & Rétfalvi, 2014, 2015). Nagy (2018) has dealt with the European and Hungarian policies and regulation on media literacy.

The situation of media literacy in the **education system** has been regularly discussed by academics (Borbás et al., 2015, 2016a, 2016b; Buda, 2017; Hartai, 2014; Neag, 2015, 2017; Szíjártó, 2008). Research has also been conducted on the performance of media literacy education in schools (Herczog, 2012, 2016; Herczog & Racsco, 2012; Rajnai, 2021a, 2021b; Szőke-Milinte, 2016).

NGOs also play an active role in media literacy policies and practices in Hungary, such as the Televele Media Education Association¹⁶⁷, the Multimedia in Education Section of the John von

¹⁶⁵ Digital Success Programme. (2016). *Digital Education Strategy of Hungary*. <https://digitalisioletprogram.hu/files/0a/6b/0a6bfcd72ccbf12c909b329149ae2537.pdf>

¹⁶⁶ Digital Success Programme. (2016). *Digital Child Protection Strategy of Hungary*. <https://digitalisioletprogram.hu/files/c2/61/c2610c5560ef56425860d4d7bdd68b3d.pdf>

¹⁶⁷ Website: <https://televele.hu/english/>

Neumann Computer Society¹⁶⁸, the Médiatudor - Hungarian partner of the MediaSmart Programme¹⁶⁹ or the Idea Foundation¹⁷⁰.

5.2. Assessment of media-related competencies among citizens

Besides the results of the international surveys mentioned in the introduction of this chapter, there is sporadic research for the assessment of the individual variables. **Cognitive abilities** in the Hungarian population, such as the ability for rational argumentation can be understood through the analysis of Gerencsér and Szűts (2020), in which they examine the transformation of the debate on social networking sites, and the shift towards an emotion-based argumentation. In her study, Tomori (2021) conducted a document analysis of the current core curriculum, mapping how different cognitive communication skills appear theoretically in the Hungarian education system. Faragó (2019) examined the cognitive and emotional impacts of ICT use. On the topic of **communication competencies**, Bak and Kővári's (2021) survey can be mentioned on the different social media use habits of different generations. In the assessment of **user skills**, we also find large sample studies, such as Borbély's analysis about the digital competencies of teachers. Based on a representative sample, the questionnaire took into account different areas of competencies, such as information, communication, security, content, and problem-solving (Eszenyiné Borbély, 2018, 2019). Lannert and Hartai's (2021) mixed method research examined the attitudes and practices of media literacy teachers. Buda (2017) conducted a survey on teachers' competencies and the use of ICT tools in their teaching practice. The **digital competencies** of students and teachers at different levels of the education system have been mapped by the ELTE Information Society Education and Research Group, and their results have been published in a study volume (Ollé et al., 2014). Herzog (2012) investigated the competencies of secondary school students and teachers in her doctoral thesis. Political Capital conducted a study on competencies and development opportunities related to fake news among teachers and young people aged 16-24 (Bálint et al., 2019). About **ethical capabilities** information is limited. In their research, Dányi and Altorjai (2003) sought to find out to what extent Hungarians see the Internet as an opportunity for democratic participation. Information on the level of interest in public life and the time spent gaining public affairs news can be found in the Mertek-Medián news consumption surveys (Mertek Media Monitor, 2013, 2016b, 2018b, Hann et al., 2020).

6. Analysis of Research and Monitoring Capabilities and Quality

6.1. Comparative analytical overview of sources and access to these sources

For the analysis of the Hungarian bibliographic database containing 650 records, every identified literature has been categorised according to its primary domain, although many of the studies are relevant to more than one. In order to find out how well the different domains are covered, we also made another breakdown, in which references that address more than one domain have been assigned to all relevant ones.

¹⁶⁸ Website: <https://njszt.hu/hu>

¹⁶⁹ Website: <https://www.mediatudor.hu/>

¹⁷⁰ Website: <https://ideaalapitvany.hu/>

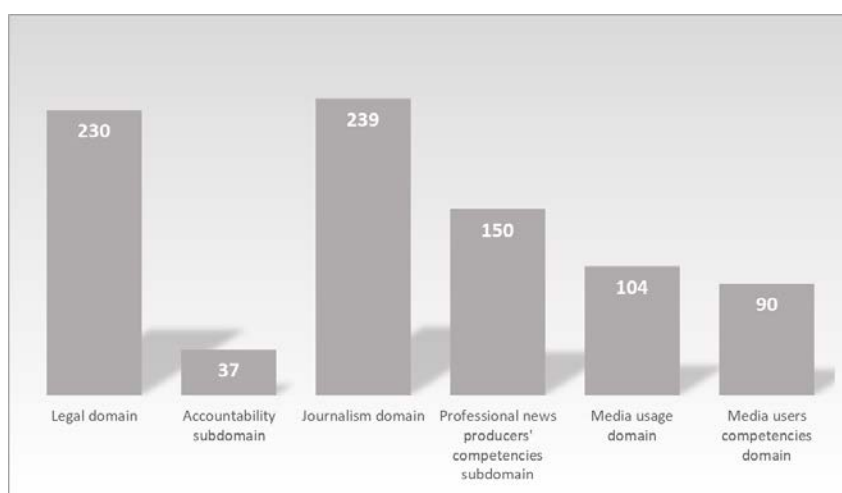


Figure 1. Distribution of the identified studies by domain (number, N=650/850). Source: Authors.

Note: The total number of items in the figure exceed the total number of studies in the database, as papers covering multiple domains have been added to all relevant ones.

The largest part (46%) of the relevant literature belongs to the journalism domain, which covers both media market issues and journalistic competences and contexts. This is followed by the legal and accountability domain (31%), and by a much smaller proportion in the media usage (12%) and media competences (11%) domains.

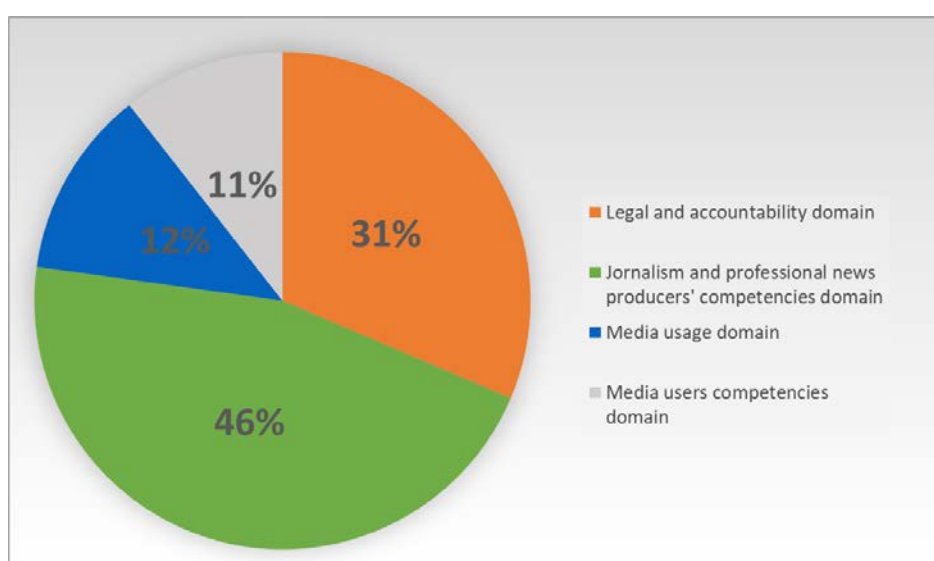


Figure 2. Distribution of the identified studies by domain (%). Source: Authors.

Although the journalism domain is the most extensive one, this can be explained by the fact that the theoretical part contains a relatively high number of variables spanning across a wide range of topics. This domain includes practically all aspects of the media market, public service media and journalistic culture, which have been hot topics in Hungary, especially in the last decade. Despite this, Hungary lacks very specific data for the assessment of some of the journalism domain's variables, such as the number of multimedia reporters or foreign correspondents, percentages of digital and investigative resources or intraorganisational demographics. Official journalistic statistics do not exist, and although survey-based researches can yield some quantitative data, qualitative evaluations based on interviews with journalists dominate this field.

The legal domain is where we have the most comprehensive knowledge for the study of risks and opportunities for deliberative communication in the Hungarian media system. For almost

all relevant variables, there are legal references, legal interpretations, and case law assessments. The least covered variable is the issue of whistleblowing protection. The scarcity of literature on the accountability subdomain does not mean that there is a clear research gap about the issue in Hungary. It is not researched because also the profession pays almost no attention to it. Apart from a few attempts to thematize this issue, there is not much to be found in this field. The references are dominated by theoretical texts, knowledge about specific accountability tools is lacking because they are not really present in the practice as well. The well-documented aspects concern the related problems of the state regulator and the normative approaches of accountability.

Even though the media usage domain represents a relatively small share of the total, it includes more than 100 relevant literatures. These publications provide a comprehensive understanding of the Hungarian context for all important variables in the domain. Also, rich quantitative data are available, mainly from the surveys carried out by Mertek-Medián and the international studies that explicitly assess the public information of the adult population in Hungary.

The variables in the media users' competencies domain cover very specific questions. We must mostly rely on findings from international surveys, given research on media literacy in Hungary has not addressed the issues identified as the domain variables. Media literacy research is biased toward studying children's and teachers' competencies, thus there is a wide range of small-sample, qualitative research in the field.

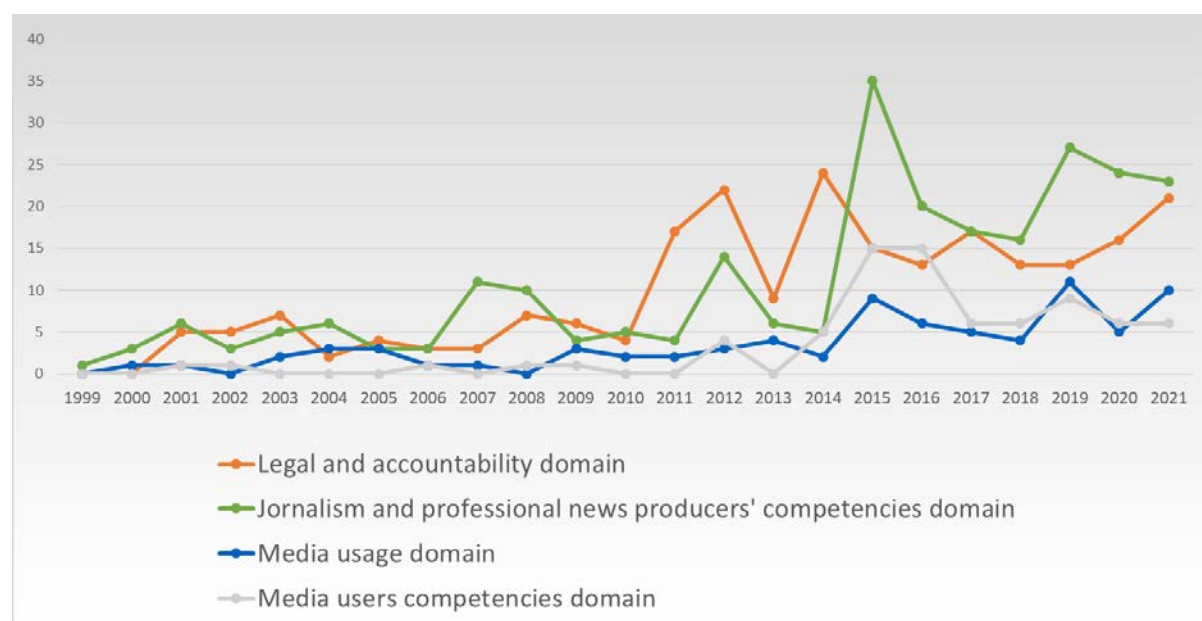


Figure 3. Number of studies published by domains in the research period (number/year, N=650). Source: Authors.

Compared to the last ten years, there is less information available for the period before 2010. This is partly because less digitalisation made it more difficult to find all the relevant data, and partly because many of the issues in focus of the Mediadelcom project have attracted the attention of researchers as a consequence of the media policy changes after 2010. In the legal domain, longitudinality is ensured by the overview volumes of Hungarian media law that cover the entire twenty years, as well as the lively professional discourse based on following and referencing the works of others. Because ethics and accountability are not the primary concerns in the Hungarian media landscape, there are not much recent data. Issues of the media authority and state engagement in the coregulatory system have been thoroughly documented after 2010. We've already highlighted that there are no regular longitudinal surveys and statistical measurements for the journalism domain's variables, but we do have some snapshot data from the

big journalists' surveys conducted by Vásárhelyi (1999, 2007) and in the *Worlds of Journalism Study* (Róka et al., 2017). The questions of these surveys are mainly related to the variables of journalistic competencies. Qualitative evaluations based on journalists' interviews typically became more frequent in the 2010s. As for media usage and media users' competencies domains, very few sources are available from the first decade of the 2000s.

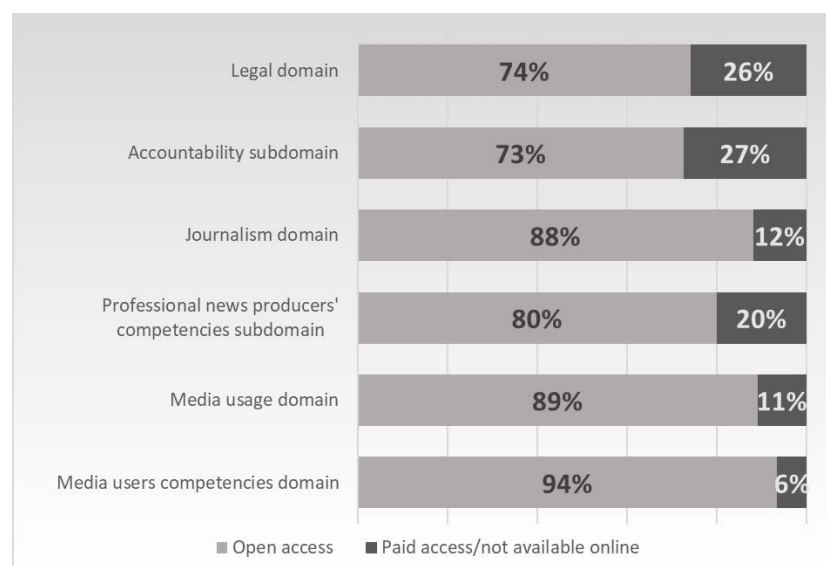


Figure 4. Share of open access sources by domains (%). N=650. Source: Authors.

The high proportion of open access literature in the bibliographical database can be explained by multiple factors. First, when the Hungarian literature was collected for the database, online searching probably favoured the use of digital sources. Second, as shown in Figure 5, the overall sample contains a relatively high proportion of research reports, which are always released publicly. And finally, the great number of open access publications is supported by the Hungarian journals, most of which provide free access to their full content online. From these aspect also the Repository of the Hungarian Academy of Sciences is also of great importance, with almost 20,000 social science publications available.

6.2. Monitoring capabilities and the quality of data and knowledge

Across all domains, academic publications make up the majority of the corpus, with journal articles dominating, and to a smaller proportion, full books and book chapters representing themselves. The largest number of research reports and the comparably bigger number of non-academic articles are found in the journalism domain. The latter category mainly consists of the media related analyses of the Átlátszó news portal and its data journalism team, Atlo.

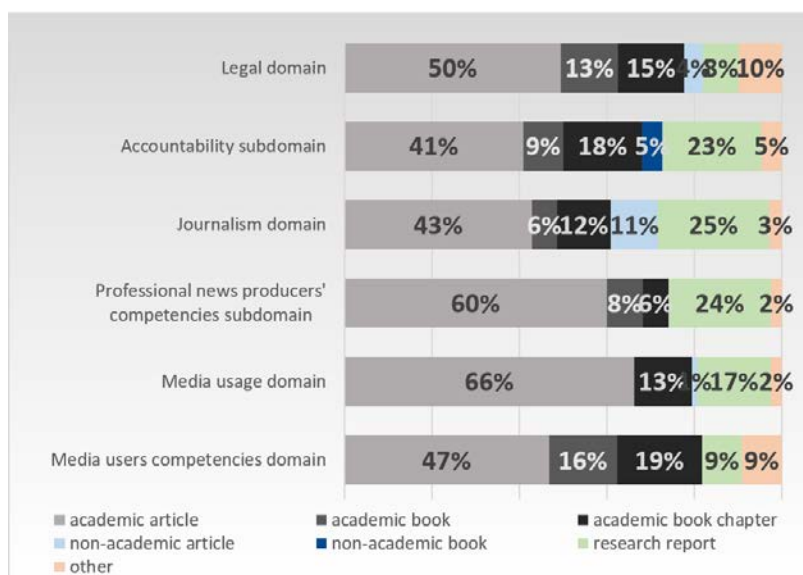


Figure 5. Type of publications by domains (%). Source: Authors.

As cumulative data for the domains show, the Hungarian media research focus appears to be on domestic issues, with 78% of publications dealing with the national context. In 13% of the sources other countries appear as well with more or less depths of analysis – in many cases in a comparative manner. Only 9% of the studies does not have a territorial focus, these are mainly the identified normative or theoretical publications. Broadly matching numbers are seen regarding whether the literature is published by a national or international publisher. 75% of the sources were published nationally. Regarding the language of the texts, there are considerable differences between the domains. We see a high proportion (above 40%) of English language publications in the journalism and media usage domains. This might be explained by the fact that these are the domains where most comparative studies have been carried out, as well as by the international attention paid to the situation in the Hungarian media market.

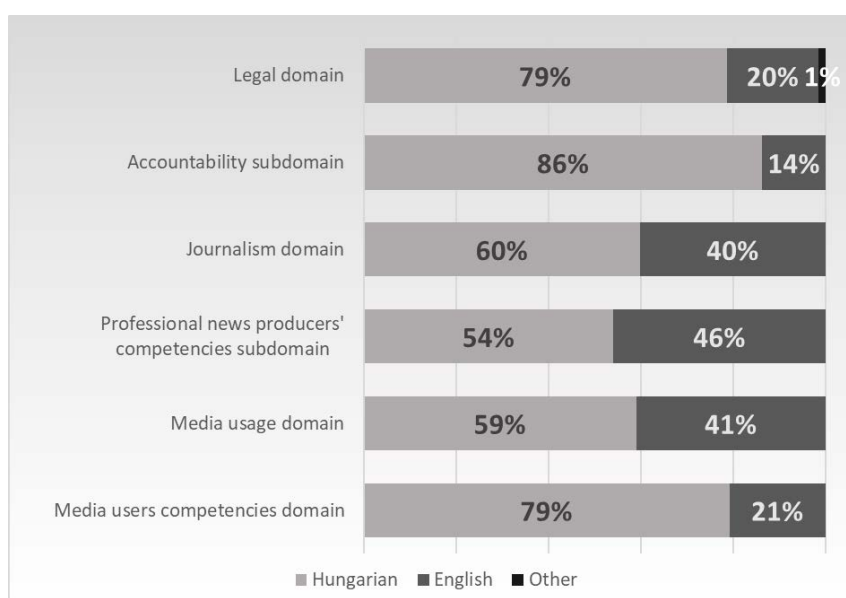


Figure 6. Language of the publications by domains (%). Source: Authors.

Hungary's media research scenario is particularly difficult in terms of the reliability of sources. Our scientific life is becoming even more polarized, much the same as our society as a whole or

our public discourse. The divide is along the pro-government – government-critical fault line, the democratic understanding of the media does not mean the same for everyone anymore. Journalism or the news media itself is also a very polarised area of Hungarian society. Government critics refer to media supporting the government and working with a single, central narrative as propaganda and party press, and from the pro-government side, there is no such thing as independent media, only left-liberal, opposition media. Researchers, experts, journalists, and even consumers are divided. Both sides consider the other discredited, a significant part of the public sphere also refuses to listen to opinions that disagree with their own beliefs. Some research institutes, which operate mainly with state support, funded through pro-government foundations, and almost exclusively by state or government contracts, also produce analyses relevant to the Mediadelcom project. As part of our research, we have also tried to map their analyses, but only found a small number of them – despite the fact that experts from these institutions are highly active in the public sphere and regularly express their views on media-related issues. Among the individual researchers, we should highlight the role of András Koltay, media law expert, who has a very large number of publications on topics relevant to the Mediadelcom project. According to his introduction¹⁷¹ more than 400 publications are associated with his name. He was involved in the preparation of the much-debated 2010 media laws, and was member of the Media Council until his appointment as President of the media authority in December 2021. In an interview earlier this year he explained that he does not believe in the ideal of journalistic independence: *“Even in the West, there are brave authors who write that media independence is a self-made myth. After all, it always works in the interests of the owner and other interest groups, and journalists are necessarily biased.”*¹⁷²

7. Conclusion

Despite the fact that media studies in Hungary has not yet earned recognition as an independent discipline in the academic system, and that government education policy – together with other humanities and social sciences – is making it increasingly difficult for communication and media studies departments to operate, we have a sufficient quantity and quality of data and research to evaluate the study by the criteria defined in the theoretical background of the Mediadelcom project. Not only the analyses produced by the academic sector, but also the work of the civil sector, professional organisations and investigative and data journalists are helpful in this respect.

Research in media law (chapter 2) is the most coherent field of study, with excellent experts and a high degree of specialisation in the various subfields. The domains of journalism (chapter 3) and media literacy (chapter 5) are the most fragmented ones, with limited specific quantitative data but with a wide range of studies based on qualitative, small sample study tradition. Quantitative data are available for the analysis of the media usage (chapter 4) variables, even from a longitudinal perspective in the 2010s. Accountability (section 2.3) is by far the most neglected topic, not only in the context of research but also in its practical realization.

The main risks for media research in Hungary are related to the transformation of the university and academy system and their funding practices (sections 1.2, 1.3.1, 1.4). The phenomenon of self-censorship is penetrating the previously autonomous university-academic sphere, people are losing or gaining positions on political grounds. Divisions are increasingly affecting more and more areas of the public sphere; different perspectives can no longer find common ground. The ethical issues of journalism, the working conditions of journalists and their role performance (sections 3.3, 3.4) are daily topics in the public discourse, but academic reflection on

¹⁷¹ Source: https://english.nmhh.hu/article/1767/Dr_Andras_Koltay

¹⁷² Source: <https://24.hu/belfold/2022/02/21/koltay-andras-nmhh-elnok-mediatanacs-interju/>

these issues is insufficient, research is not systematic, existing information is sporadic and fragmented. There is no proper journalism education in Hungary (section 1.3.1). Although there is valuable, longitudinal data and information on media usage (chapter 4), these are primarily non-academic sources - we have just little scientific knowledge on the subject. The fact that market measurement companies (section 1.3.3) only make very little, if any, data publicly available, creates the risks that 1) market players will only publish data that is favourable to them – this is how for example both of the two big competing national commercial TV stations can claim themselves as market leaders. And 2) the predominance of market interests makes it impossible to scientifically analyse these data which could help to deepen our understanding of media consumption habits and patterns.

Among the opportunities should be mentioned the fact that the state of the Hungarian media is in the spotlight both on the national and international scene. And while domestic sources support only limited research on the media, some funding for the study of the Hungarian public sphere is coming from the international private and civil sector, and also from political actors. These research findings generally attract considerable attention and raise public awareness about these issues. The biggest problem, however, is that beyond keeping the issue on the agenda, stakeholders failing to take action to the policy level.

The findings of various large comparative country analyses, as will be the output of the Mediadelcom project as well, provide a good opportunity to assess systemic risks behind the media. In Hungary, a critical discourse has recently emerged around some internationally acknowledged comparative methodology reports. Some argue that these are all distorted and assess Hungary's media system from the point of view of liberal democracies, although this is not the only legitimate understanding of democracy.¹⁷³ The authors of this paper, while attempting to present these perspectives, assess the situation of the Hungarian media according to the values of deliberative communication underpinning the theoretical background of the Mediadelcom project.

¹⁷³ See the critiques by the Foundation for Transparency in Journalism:

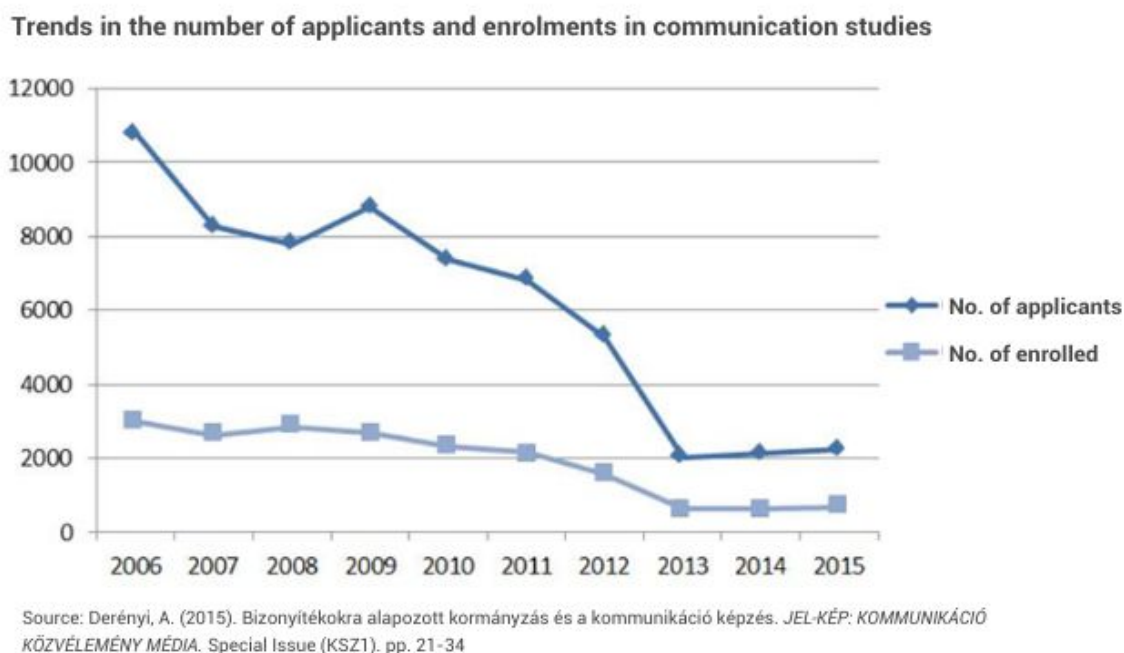
Reuters Digital News Report: <https://ojim.hu/digital-news-report-a-reuters-intezet-kozzetette-globalis-mediajelenteset/>

RSF World Press Freedom Index: <https://ojim.hu/az-rsf-sajtoszabadsag-index-es-ami-mogotte-van/>

Media Pluralism Monitor: <https://ojim.hu/modszertani-hibak-a-magyarorszagot-negativ-fenyben-feltunteto-eu-s-mediajelentesben/>

Appendix

Supplement 1.



Supplement 2. List of Hungarian universities' media institutes and departments

Budapest Business School

Department of Communication

<https://uni-bge.hu/en/kkk/departament-of-communication>

Budapest Metropolitan University

Institute of Communication

<https://www.metubudapest.hu/institutes-and-lecturers>

Budapest University of Technology and Economics

Department of Sociology and Media Studies

<https://szoc.bme.hu/hu/>

Corvinus University of Budapest

Department of Communication and Media

<https://www.uni-corvinus.hu/main-page/about-the-university/departments/departament-of-communication-and-media-science/?lang=en>

Department of Infocommunication

<https://www.uni-corvinus.hu/main-page/about-the-university/departments/departament-of-infocommunication/?lang=en>

Eötvös Loránd University

Department of Media and Communication

<http://media.elte.hu/eng/>

Eszterházy Károly Catholic University

Department of Film and Media Studies

<https://uni-eszterhazy.hu/film-es-mediatudomanyi-tanszek/>***Károli Gáspár University of the Reformed Church***

Department of Communication and Media Studies

<https://btk.kre.hu/index.php/2015-10-20-11-09-16/2015-10-20-11-15-36/tarsadalom-es-kommunikaciotudomanyi-intezet/kommunikacio-es-mediatudomanyi-tanszek.html>***Kodolányi János University***

Department of Communication and Media Studies

<https://www.kodolanyi.hu/en/about-kju/organization>***Milton Friedman University***

Department of Communication and Cultural Studies

<https://uni-milton.hu/en/department-of-communication-and-cultural-studies/>***Pázmány Péter Catholic University***

Institute of Communication and Media Studies

<https://btk.ppke.hu/en/academics/institutes-and-departments/institute-of-communication-and-media-studies>***University of Debrecen***

Department of Communication and Media Studies

<https://kommunikacio.unideb.hu/>***University of Dunaújváros***

Department of Organizational Development and Communication Science

<https://www.uniduna.hu/en/education/institute-of-social-sciences>***University of Pannonia***

Institute of Social Sciences

<https://english-ti.mftk.uni-pannon.hu/>***University of Pécs***

Department of Communication and Media Studies

<https://commonline.hu/>***University of Public Service***

Department of Social Communication

<https://antk.uni-nke.hu/tanszekek/tarsadalmi-kommunikacio-tanszek/bemutatkozas>***University of Szeged***

Department of Communication and Media Studies

<http://www.media.u-szeged.hu/>

List of abbreviations

AB	Constitutional Court	Alkotmánybíróság
Btk.	Act C of 2012 on the Criminal Code	2012. évi C. törvény a Büntető Törvénykönyvről
CEPMF	Central European Press and Media Foundation	Közép-európai Sajtó és Média Alapítvány
CEU	Central European University	Közép-európai Egyetem
CPJ	Committee to Protect Journalists	
DKT	Digital Audience Measurement Council	Digitális Közönségmérési Tanács
EAVI	European Association for Viewers Interests	
ECPMF	European Centre for Press and Media Freedom	
EFJ	European Federation of Journalists	
ELKH	Eötvös Lóránd Research Network	Eötvös Lóránd Kutatási Hálózat
ENNHRI	European Network of National Human Rights Institutions	Nemzeti Emberi Jogi Intézmények Európai Hálózata
EC	European Commission	Európai Bizottság
EU	European Union	Európai Unió
FKGP	Independent Smallholders Party	Független Kisgazda Párt
FPU	Free Press Unlimited	
Privacy Act (Infotv.)	Act CXII of 2011 on the Right to Informational Self-Determination and Freedom of Information	2011. évi CXII. törvény az információs önrendelkezési jogról és az információszabadságról
IPI	International Press Institute	Nemzetközi Sajtóintézet
KDNP	Christian Democratic Party	Kereszténydemokrata Néppárt
KESMA	Central European Press and Media Foundation	Közép-Európai Sajtó és Média Alapítvány
KSH	Hungarian Central Statistical Office	Központi Statisztikai Hivatal
MATESZ	Hungarian Audit Bureau of Circulations	Magyar Terjesztés-ellenőrző Szervezet
MDF	Hungarian Democratic Forum	Magyar Demokrata Fórum
MSZP	Hungarian Socialist Party	Magyar Szocialista Párt
MTA	Hungarian Academy of Sciences	Magyar Tudományos Akadémia
MTI	Hungarian News Agency	Magyar Távirati Iroda
Media Act (Mttv.)	Act CLXXXV of 2010 on Media Services and Mass Media	2010. évi CLXXXV. törvény a médiaszolgáltatásokról és a tömegkommunikációról
MÚOSZ	Association of Hungarian Journalists	Magyar Újságírók Országos Szövetsége
MTVA	Media Services Support and Asset Management Fund	Médiaszolgáltatás-támogató és Vagyonkezelő Alap
NAIH	Hungarian National Authority for Data Protection and Freedom of Information	Nemzeti Adatvédelmi és Információszabadság Hatóság
NHH	National Infocommunications Authority	Nemzeti Hírközlési Hatóság
NKA	National Cultural Fund	Nemzeti Kulturális Alap
NMHH	National Media and Infocommunications Authority	Nemzeti Média- és Hírközlési Hatóság

NVI	National Election Office	Nemzeti Választási Iroda
OECD	Organisation for Economic Co-operation and Development	Gazdasági Együttműködési és Fejlesztési Szervezet
ORTT	National Radio and Television Authority	Országos Rádió és Televízió Testület
OSCE	Organization for Security and Co-operation in Europe	Európai Biztonsági és Együttműködési Szervezet
OTKA	National Scientific Research Funding Programmes	Országos Tudományos Kutatási Alapprogramok
PIAAC	Programme for the International Assessment of Adult Competencies	Felnőttek Képesség- és Kompetenciamérése Program
PISA	Programme for International Student Assessment	Nemzetközi Tanulói Teljesítménymérés Programja
PSM	Public Service Media	Közszolgálati média
Ptk.	Act V of 2013 on the Civil Code	2013. évi V. törvény a Polgári Törvénykönyvről
RSF	Reporters Without Borders	
Press Act (Smtv.)	Act CIV of 2010 on the Freedom of the Press and the Fundamental Rules of Media Content	2010. évi CIV. törvény a sajtószabadságról és a médiatartalmak alapvető szabályairól
SZDSZ	Alliance of Free Democrats	Szabad Demokraták Szövetsége
TASZ	Hungarian Civil Liberties Union	Társaság a Szabadságjogokért
UN	United Nations	Egyesült Nemzetek Szervezete

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ITALY

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive Summary

In this report we assess the state of the matter of the governance and the role of media in the case of Italian democracy based on deliberative communication. We explain how legal and ethical regulation, journalistic production, media usage patterns and media literacy influence and determine the development of democracy. Finally, employing the field theory of Bourdieu, we describe the Italian media ecosystem in terms of risks and opportunities for deliberative communication, and, more broadly, deliberative democracy.

1. Introduction

In this report Italian team analyzes the risks and opportunities regarding governance and media landscape in Italy¹⁷⁴ based on deliberative communication. To introduce this report, we present: firstly, the main traditions and trends in the last twenty years (2000-2020) and the present-day situation of the Italian media research and monitoring system; secondly, the structural peculiarities that may be important for this report and that determine the risks and opportunities related to deliberative communication (and its four domains); thirdly, the institutions, bodies and actors of media, communication, journalism research, education institutions, transnational organizations that monitor media systems globally, large comparative research projects that collect data periodically and produce comparative analysis over certain periods, units in the media industry structures or linked to media, scholars and research groups in universities, independent organizations or professional associations, and organizations that may be regarded as a branch of Government or public body; fourthly, the funding system of media research and monitoring (public, private, project-based, etc.); and, fifthly, the national research database and most important journals in the area of communication and journalism.

1.1. Main traditions and trends in the 21st century and current situation of the media research and monitoring system in Italy

In the Italian social sciences, public opinion and research community debates, the legal/normative discourse is notoriously dominant in terms of risks and opportunities for deliberative communication (see for example Splendore 2017b concerning the regulations of journalistic activity or Padovani *et al.* 2021). This means that even in the media and journalism — as

¹⁷⁴ Italy is a country with a population of 59,066,225 (2021) that maintains a negative growth of -0.6. The index of Individuals using the Internet (% of Italians that have used the Internet in the last 3 months) is 70, according to the International Telecommunication Union (ITU, 2020) and Telecom Italia (Ministry of Economic Development-Communication).

a profession, when different actors (practitioners, stakeholders, or users of media content) want to improve the quality or effectiveness of their work, they must necessarily succeed in introducing or changing legal regulations. This situation explains why one of the characteristics of the field we are analyzing here is precisely the little recognition that many actors (excluding government bodies) have. This also means that, within the Italian context, the legal domain takes on even greater importance.

The Italian media environment has traditionally been characterised by a particularly strong television sector (although it is declining slightly) and a weak and declining newspaper sector, according to The Reuters Institute for the Study of Journalism in its Digital News Report 2022. In the first decade of the new millennium, the case of the transition from analog television to digital television was paradigmatic of the importance of the regulatory body as well as the irrelevant attention that academic studies receive.

Despite the copious scientific production on the subject (Balbi & Prario, 2009; Prario, 2007; D'Arma 2009) the discourse was almost exclusively legal (and political), with monitoring and document production of *Autorità per le Garanzie nelle Comunicazioni* (AGCOM)¹⁷⁵ as the most relevant body/authority to preside over the switch-over. Many scholars repeatedly recommended legislative reform to strengthen the independence of AGCOM, especially the exclusion of the Government from appointing any board members (Mazzoleni *et al.* 2021). We will return to this case in the following paragraph in relation to the question of pluralism.

More recently, a different case took place, related to public access to data and the introduction of a *Freedom of Information Act* (FOIA)¹⁷⁶ (May 2016), granting everyone the right to access documents held by public bodies. If in the case of the switch to digital terrestrial the game was almost entirely political and played through AGCOM, the question linked to open data appeared instead quite different. This theme is related to the field that we are analyzing here on at least three levels (see Porlezza & Splendore, 2021):

- 1) It has precisely to do with public access to data of public interest, generated by the public administration (those data may also include data related to the functioning of the media). Their “publicity” is necessary to increase citizens' knowledge on several levels and to allow them a more accurate “deliberative communication”.
- 2) The open data debate involved data-journalists as the main stakeholder, who need reliable data flows to produce adequate information.
- 3) This debate concerns the transformations of media and technology on which the growth of data journalism strictly depends.

The work of journalists and various associations and pressure groups was able to pass a FOIA. The approval of a FOIA may only apparently seem less important than the digital transition. Beyond the scope of the two changes, what appears evident in the difference between the two situations is that in the second case the change in the ecology of the media has led to greater focus in the introduction of the law. The transition from digital television certainly took place in a different political climate in which one of the main political exponents, Silvio Berlusconi, was also the owner of national television stations, but the open data and FOIA case demonstrates how the public debate (which in this case resulted also in being deliberative) sees the active participation of actors who are not strictly political. As Gianpietro Mazzoleni affirms, “Silvio Berlusconi became an influential and controversial political figure thanks to his television networks”¹⁷⁷.

¹⁷⁵ Website of AGCOM: <https://www.agcom.it/>

¹⁷⁶ Website of FOIA: <https://www.foia.gov/>

¹⁷⁷ Jeanpietro Mazzoleni is a professor at the University of Milan. This comment came from an interview conducted by Sergio Splendore (June, 2022).

The other important element is then the fact that, as mentioned above, this urgency for change is still a product of media transformation. Although such significant results cannot be imagined, something similar is also happening for whistleblowing platforms (Porlezza & Di Salvo, 2020).

1.2. Structural peculiarities of this report

An approach based on risks and opportunities linked to the transformation of the media ecology is rather entrenched in both journalism studies and political communication. Umberto Eco (Eco & Lumley, 1994) used to talk about apocalyptic and integrated to define and to split techno-enthusiasts from techno-skeptics. The Italian communication field is not an exception, more than 200 academic articles/books [Appendix] published in the last twenty years; current national legislation (1948 Constitution, 1930 Criminal Code, Legislative Decree No. 97 of 2016 on the prevention of corruption, among others); regulations on information and communication (2019 Regulation containing provisions on respect for human dignity and the principle of non-discrimination and combating hate speech from *Autorità per le garanzie nelle comunicazioni*) include explicitly what we may define as a risks and opportunities (ROs) approach in the frame of deliberative communication in Italy.

We use the word 'field' on purpose (or deliberately) to employ for this paper a Bourdieusian approach (Bourdieu, 1999; Bourdieu, 1993). Field theory conceives society (or the social) as composed of different fields which are separate as well as related. Each field has its proposals, but also its own specific logics. Using the Bourdieusian approach here means conceiving as a social sub-field the ensemble of actors and their relations that attempt to define, describe, and analyze the Italian media ecology in terms of risks and opportunities for deliberative communication (and, more broadly, deliberative democracy).

What we dare to define as ROs sub-field, like many other sub-fields, is prevalently linked to the field of politics, society and economy, but for its features, many other fields are here interconnected and overlapping (academic and journalistic fields first). In this sub-field, the key points is exactly defining and measuring which risks and opportunities media ecology transformation may involve (and, therefore, influencing policymakers).

1.3. Main institutions/bodies and actors of media/communication/journalism research, monitoring and education

In Italy, this sub-field is inhabited by different actors, which compete or collaborate to define what the risks and opportunities are as far as deliberative communication is concerned. Following the Mediadelcom framework¹⁷⁸, we identify and use for our analysis, mainly, six different actors that inhabit the sub-field:

- 1) Transnational organizations that monitor democracy and media systems globally (e.g., Freedom of the Press, Reporters Sans Frontières, Eurobarometer, Reuters Institute Digital News Report, Open Society Institute, among others):
 - a. Human Freedom Index 2021¹⁷⁹: 8.49/10, ranking 26; Personal freedom: 9.12; Economic freedom: 7.61.
 - b. Freedom House 2022 score¹⁸⁰: Global Freedom: 90/100; Internet Freedom: 76/100; Political rights: 36/40; Civil liberties: 54/60. Status "Free".
 - c. Corruption Perceptions Index¹⁸¹: Level of public sector corruption: 56/100 (0 is highly corrupt) (A positive trend has been seen from 2012 when the score was 42); Rank in the world: 42/180.

¹⁷⁸ MediaDelCom Website: <https://www.mediadelcom.eu/outreach/departure-point-1/>

¹⁷⁹ Website of Cato Institute: <https://www.cato.org/human-freedom-index/2021>

¹⁸⁰ Website of Freedom House: <https://freedomhouse.org/countries/freedom-world/scores>

- d. Reporters Sans Frontières¹⁸²: score 68.16, ranking 58/180; Political indicator: score 65.89, ranking 57/180; Economic indicator: score 47.52, ranking 67/180; Legislative indicator: score 73.93, ranking 59/180; Social indicator: score 80.00, ranking 49/180; Security indicator: score 73.48, ranking 68/180.
- 2) Large comparative research projects that collect data periodically and produce comparative analysis over certain periods (e.g. Worlds of Journalism Study¹⁸³).
- 3) Units in the media industry structures or linked to media industries (like *audiweb*, *auditel*, but also *Nielsen*).
- 4) Scholars and research groups in different universities (a.g., *Dipartimento di Scienze sociali e politiche* at the University of Milan).
- 5) Independent organizations or professional associations (a.g., *Carta di Roma*, *Ordine dei Giornalisti*, *Rai Code of Ethics*, *l'Osservatorio sul giornalismo* - 2014, etc.).
- 6) Organizations that may be regarded as a branch of Government or public body (e.g., the Italian Communications Regulatory Authority - *Autorità per le Garanzie nelle Comunicazioni*, AGCOM).

All the six actors outlined above are very well institutionalized in terms of being equipped and structured to precisely monitor ROs (especially regulatory offices – including a branch of Government, legislation, universities, media practitioners' professional associations). When we use the term institutionalization, we mean that these actors are equipped to regularly produce and/or analyze documents or data related to deliberative communication and the risks and opportunities linked with this (e.g. reports based on data they have collected, raw data, policy proposals). Other actors may take part occasionally in the field, even politicians or pundits, but they are not structurally designed to monitor ROs.

1.4. Funding system of media research

Although there are different actors in charge of investigating this sub-field related to deliberative communication - as we saw in the preceding paragraphs - the Italian government is the main institution in charge of financing research into the media and, moreover, the media themselves - especially the public ones. Specifically, the Italian Ministry for Education, University and Research (MIUR)¹⁸⁴ is the key Research and Technological Development (RTD) policy actor and funding agency in Italy at state level. This institution oversees the National Research Programme entitled *Piano Nazionale della Ricerca* (PNR)¹⁸⁵.

To adapt the Italian research context to the European standard, MIUR adopted in March of 2013 a strategic document called "Horizon 2020 Italy", a proof of the effort being made in Italy at the institutional level, promoting initiatives such as the funds for the diffusion of scientific culture (PUS) and enforcement of EU and international rules on university education and research. A final point highlighted by organizations focused on international research such as Flag-Era¹⁸⁶.

¹⁸¹ Website of Transparency International. The global coalition against corruption: <https://www.transparency.org/>

¹⁸² Website of Reporters without Borders: <https://rsf.org/en/country/italy>

¹⁸³ Website of Worlds of Journalism Study: <https://worldsofjournalism.org/>

¹⁸⁴ Website of MIUR: <https://www.mur.gov.it/it>

¹⁸⁵ The National Research Program (PNR), provided for by Legislative Decree 204/1998, is the document that guides research policies in Italy, with the administrations of the State contributing to its implementation (or compilation???) with the coordination of the Ministry of the University and of Research.

¹⁸⁶ FLAG-ERA gathers most regional and national funding organisations (NRFOS) in Europe with the goal of supporting the Future and Emerging Technologies (FET): <https://www.flagera.eu/about/>

Regarding media funding, new measures have changed the dynamics of the segments of the *Sistema Integrato delle Comunicazioni* (SIC)¹⁸⁷. The competencies of the authority in relation to the Integrated Communications System (SIC) are dictated by Legislative Decree 31 July 2005, no. 177, called the “Consolidated text of audiovisual and radio media services” (Tusmar)¹⁸⁸. According to the “Media Influence matrix: Italy. Funding journalism” (Center for Media, Data and Society, 2020), one of them is related to the system of state financial contributions for local broadcasters, which was reformed by the Stability Law (Law no. 208 of 2015) and subsequently by Law no. 198 of 2016. The latter introduced the so-called Unique Fund for pluralism and innovation in information.

This report also highlights that, firstly, advertising remains the main source of financing for almost all operators in the Italian media market, increasing by €1,415 millions between 2015 and 2019. However, the share of advertising sales in the total media market has decreased, except for the online segment. And, secondly, the role of philanthropic funding in the Italian media is marginal (Media Impact Funders, MIF)¹⁸⁹.

1.5. National research database and most important journals

Research in Italy is encouraged through the *Istituto Nazionale di Statistica* (ISTAT)¹⁹⁰ and the National Research Program (PNR), provided for by Legislative Decree 204/1998. The PNR guides research policies in Italy, with the administrations of the State contributing to its implementation with the coordination of the Ministry of the University and of Research (*Ministero dell'Università e della Ricerca*)¹⁹¹. On 15 December 2020, the National Research Program 2021-2027¹⁹² was approved at CIPE, as a result of a broad and in-depth discussion initiated by the Ministry of University and Research with the scientific community, with the administrations of the State and regional entities, and extended, through a public consultation, to public and private stakeholders and civil society.

Under Italian law 150/2000, the *Consiglio Nazionale delle Ricerche* (CNR)¹⁹³ was established with the aim of enhancing information provided by scientific departments, research institutes and offices by issuing press releases and notes and handling the overall media communication. The office of CNR publishes the web magazine *Almanacco della Scienza* and makes available a daily press review operated in collaboration with a specialized service, monitoring thousands of newspapers, magazines, journals, as well as television and radio programs; a collection of the most relevant press platforms is also provided by email.

However, the most important organization that may be regarded as a branch of Government or public body is the Italian Communications Regulatory Authority (*Autorità per le Garanzie nelle Comunicazioni*, AGCOM). AGCOM's core competencies include, firstly, the promotion of research and study in the field of technological innovation, developing the communication sector and the multimedia service, as well as the advancement of the superior institutions of the postal and telecommunications services; and, secondly, verification of the financial statements and data

¹⁸⁷ Integrated Communications System: <https://www.agcom.it/sistema-integrato-delle-comunicazioni-sic>

¹⁸⁸ The last results can be consulting in the “*Resultati del processo di valutazione (2019)*”: <https://www.bit.ly/3zIYF8n>

¹⁸⁹ Web page of Media Impact Funders: <https://mediainpactfunders.org/>

¹⁹⁰ Web page of National Institute of Statistics (ISTAT): <https://www.istat.it/en/>

¹⁹¹ Web page of *Ministero dell'Università e della Ricerca*: <https://www.mur.gov.it/it/aree-tematiche/ricerca/programmazione/programma-nazionale-la-ricerca>

¹⁹² PNR (2021-2027). *Programma nazionale per la ricerca*: <https://www.mur.gov.it/sites/default/files/2021-01/Pnr2021-27.pdf>

¹⁹³ Web page of National Research Council (CNR): <https://www.cnr.it/en>

relating to the activities and ownership of the authorized subjects or concessionaires of the radio and television service, according to the procedures established by regulation (AGCOM)¹⁹⁴.

In addition to the public institutions of the state there are other bodies such as associations, organizations, professional institutions related to this area which we will systematize later in this report (eg. *Federazione Nazionale della Stampa Italiana* (Fnsi), *Consiglio Nazionale Ordine dei giornalisti*, USPI – *Unione Stampa Periodica Italiana*, *Centro di Studi ed Iniziative Culturali* (<http://www.piolatorre.it/>), among others.

Universities and scientific publishers in the field of communication also play a fundamental role in the dissemination of research in Italy (as we will show later in this report from our results). In Italy there are several journals focus on communication and its related fields, but only seven are indexed in *Scopus*.

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

Isabella Splendore, General Counsel of Federazione Italiana Editori Giornali (FIEG), highlights that “we have seen some changes in the field of information which pose major challenges from a legal and ethical perspective”¹⁹⁵. This is the main reason why the domain of legal and ethical regulation is well researched in general terms – along with the domain of journalism and media usage patterns - as we will see later; even more with respect to freedom of expression (defamation, privacy, disinformation and copyright, among others) and information (access to documents, the protection of journalistic sources, whistleblowing, trade secrets and transparency in media ownership, among others).

2.1. Freedom of expression

The right to and protection of freedom of expression is presented in the main legal documents that legislate the Republic of Italy, such as *Costituzione della Repubblica Italiana*, art. 21 of 1948 (Italian Constitution), *Codice Penale Italiana*, art. 595 de 1930 (Criminal Code) and legislative decrees (as No. 97 of 2016) and other laws (as Law No. 112 of 2004). The freedom of expression of media professionals, and of all professionals, is one of the rights that Italian law most vigorously protects. However, *Freedom of the Press* and *Reporters Sans Frontières* have ranked Italy as a country where the level of freedom of the press is lower than its neighbouring countries and Western democracies in general. Due to these inconsistencies, the main variables that define freedom of the press, in addition to being legislated directly and precisely, are studied recurrently in the Italian academy.

Regarding freedom of expression, the variables most studied and analyzed are defamation, hate speech, disinformation, protection of personal data and protection, exceptions and copyright especially in relation to defamation, because - according to the *Costituzione della Repubblica Italiana* (1948) - everyone has the right to express their thoughts freely in speech, writing and any other media, and the law recognizes honour and reputation.

Furthermore, the press may not be subject to authorisation or censorship. If there exists a “positive part” of the right to report the news, there is, also, a “negative”, interspersed with the defence that the law recognises honour (understood as including reputation). It is, therefore, in the “balancing of opposing interests” that the solution to the limits of the reciprocal expansion (Pacileo, 2013). In case of not complying with the legislation, if the offence is committed through

¹⁹⁴ Web page of AGCOM: <https://www.agcom.it/>

¹⁹⁵ Interview made by Sergio Splendore (June, 2022).

the press or any other means of publicity, or in a public document, the penalty shall be imprisonment for a term of between six months and three years or a fine of not less than five hundred and sixteen euros (*Codice Penale italiano*, 1930).

The defamation law continues its discussion in the Constitutional Court and Italian Parliament (Article 19)¹⁹⁶. In the journalistic and Italian media context this phenomenon is relevant because, according to the ISTAT, in 2017 alone, a total of 9,479 proceedings for defamation were initiated against journalists, of which 60% were dismissed after preliminary investigation and 6.6% went to trial. A reality shown by Pacileo (2013) in his research based on the condemnation of the editor of the *Libero* newspaper. Both Pacileo (2013) and Cultrera (2006) advocate for the decriminalization of defamation by the press to offer greater weight to the civil responsibility of each citizen.

Defamation began to be part of the interest of researchers from the first decade of the 2000s due to the popularization of digital platforms that gave citizens a greater voice and visibility. The clearest example is social media such as *Facebook* and *Twitter*.

There are other documents that act as regulations in the media and journalistic field regarding freedom of expression. Firstly, Resolution No. 157 of May 15, 2019 of the Council of the communication regulates the contents provisions out of respect for human dignity and the principle of non-discrimination and combating hate speech:

Audiovisual and radio media service providers, in compliance with the principles of Article 3, and taking into account the provisions of the current Consolidated Law on the Duties of Journalists of the duties of journalists in force, observe a series of cautions and guidelines, paying particular attention to the identification of the specific context of reference with respect to possible stereotyped representations and generalisations which, through the use of hate speech, could generate prejudice against people who are associated with a certain category or group of people associated with a certain category or group subject to discrimination, thus offending human dignity and harming the rights of the individual (Art. 4).

RAI, in its role as manager of the public radio, television and multimedia service and multimedia, also in execution of the service contract, promotes the diffusion of contents that enhance the principles of respect for non-discrimination, social principles of respect for human dignity, inclusion and social cohesion, as well as combating incitement to violence and hatred (Art. 5).

Secondly, article 13 on the Law of the Press no. 47/1948: “(1) Personal freedom shall be inviolable. (2) No one shall be detained, inspected, or searched nor otherwise restricted in one's personal liberty save by order of the judiciary for which the reason must be stated, and then only in such cases and in the manner as the law provides for”.

Reports such as, firstly, “*News vs. Fake-news nell Sistema dell'informazione*”¹⁹⁷ that through the direct observation of data, studies the scenarios that characterize the Italian system, focuses its study both on the profile of the production and dissemination of information, and on the peculiarities and methods of dissemination of disinformation. This report shows that our national information system is seeing an increase in the volume of fake content.

And, secondly, “*Le strategie di disinformazione online e la filiera dei contenuti fake*”, a technical report that focuses its analysis on the distortions of online information as a phenomenon, in terms of characteristics, subjects involved, underlying motivations, communication techniques

¹⁹⁶ Website of Article 19: <https://www.bit.ly/3U6RbnQ>

¹⁹⁷ Interim Report Indagine Conoscitiva del. 309/16/cons (Autorità per le garanzie nelle comunicazioni): <https://www.agcom.it/documents/10179/3744102/Allegato+22-11-2018/3aff8790-8039-4456-8f9a-dae2497289a4>

used to compose fake content, tools and technologies used. Specifically, the latter determines that the textual analysis of the fake content produced by disinformation sites in 2018 leads to the identification of 9 main topics: politics, rights, economy, health and environment, family and faith, news, foreign affairs, science and immigration. Both reports have been published by the *Autorità per le garanzie delle comunicazioni*.

In the same vein, and within the academy, Bentivegna & Rega (2020), Nicolosi (2019), Magnani (2019) and Scamuzzi, Belluati, Caielli, Cepernich, Patti, Stecca & Tipaldo (2021) focus their analysis on the phenomena of hate speech. Specifically, in the discussion around the relationship between hate speech, fake news, users and media, and the regulatory actions in this regard. According to Scamuzzi et al. (2021), “hate speech and fake news are two different phenomena, but unfortunately often very connected, and as international as the network that made them possible, now widely perceived as worrying” (p. 50). In Italy, specifically, Federico Anghelè, Italian office Director & Head of policy at The Good Lobby and University of Bologna, highlights “the risk of the permanent political campaign model. It shows how the political forces use hate speech and violent language to discredit the opponent on the one hand and on the other to accredit themselves from a political point of view. From the point of view of regulation there is still a lot to do and that is the problem”¹⁹⁸.

When we talk about disinformation we refer to anyone who publishes or disseminates false, exaggerated, or tendentious news that may disturb public order. According to the *Codice penale italiano* (1930), it shall be punished, unless the act constitutes a more serious offence, with imprisonment of up to three months or a fine of up to €309. The disinformation, in addition to addressing its regulation in the laws mentioned above, is being extensively studied by Bracciale & Grisolia (2020), Cappello & Rizzuto (2020), Lovari, Martino & Reighetti (2021), Scamuzzi et al. (2021), Pierri (2020), De Grazia (2013), Patterson, Smith, Fullerton, & Tuñón Navarro (2017).

Defamation, mostly investigated by university researchers in Italy, has been also analysed by magistrates (Pacileo, 2013), lawyers (Cultrera, 2006; Verri & Cardone, 2013) and journalists (Picca, 2005) due to its highly detrimental connotations for the development of a deliberative democracy.

Publications made by the *Ordine dei Giornalisti*, such as “*Testo unico dei doveri del giornalista*”¹⁹⁹ (Journalist's Text of Duties) (in force from 1 January 2021), a set of deontological rules relating to the processing of personal data in the exercise of journalistic activity. This text focuses, firstly, on the protection of personal data and the dissemination of the data: “The processing of data by journalists is essentially free. Journalists may also process (and publish) sensitive and judicial data without having to obtain the consent of the data subject, provided that two requirements are met: the data have been collected (1) lawfully and (2) correctly (principle of lawfulness)”; and, secondly, on the protection of journalistic sources through the duty of the journalist and editor to respect professional confidentiality as to the source of news: “The dissemination of the data takes place within the limits of the essential nature (principle of essentiality) of the information concerning facts of public interest”²⁰⁰.

But, according the *Ordine dei Giornalisti*, “Journalists and editors are obliged to respect professional secrecy about the source of news, when required by the fiduciary nature of the news, and to promote a spirit of collaboration between colleagues, cooperation between journalists and editors, and trust between the press and readers” (Art. 1 of the Journalist's Text of Duties). An area also addressed from the academy by Porlezza & Di Salvo (2020).

¹⁹⁸ Interview made by Martín Oller Alonso (August, 2022).

¹⁹⁹ Ordine Dei Giornalisti. Consiglio Nazionale: <https://www.odg.it/testo-unico-dei-doveri-del-giornalista/24288>

²⁰⁰ From ODG webpage: <https://www.odg.it/testo-unico-dei-doveri-del-giornalista/24288>

The current legislation, and the one that is Under debate prior to approval, the reports published by professional associations and institutions related to journalism and the media, and academic scientific studies all confirm that freedom of expression has been evaluated from the point view of disinformation, hate speech and defamation.

Legislative interventions in this direction, Article 15 of the 2019 EU Directive on Copyright in the Digital Single Market: Article 15 DSM Directive presents numerous critical issues, which make the prospects of effectiveness in the medium and long term uncertain.

The introduction of a new exclusive right represents a protectionist squeeze in favor of publisher-investors rather than a step towards sustainable regulation in step with the times. Although the obligation to redistribute the proceeds generated by the exploitation of related laws in favor of individual authors remains a fundamental and long-awaited intervention in the contractual framework of copyright, Article 15 DSM Directive risks failing in the attempt to find the right balance between fundamental rights and freedoms of those who invest in the production and dissemination of journalistic content and of the users for whom it is intended.

The arduous task to which the Italian legislator is called today is to remedy the weaknesses and flaws of the community law, in favor of a regulatory approach capable of responding to the challenges of the times, sensitive to all the interests at stake and well calibrated - a task difficult, but not impossible.

2.2. Freedom of information

The right to and protection of information - as the right of expression - is presented in the *Costituzione della Repubblica Italiana* and the *Codice Penale Italiana*. The FOIA (Freedom of Information Act) legislation, introduced by Legislative Decree No. 97 of 2016, is an integral part of the public administration reform process, defined by Law No. 124 of 7 August 2015.

When right of information refers to the access to information/documents, there are several problems in obtaining data: (1) Data exist but are not available in open and digital format; (2) Data exist, are in table format, are accessible and open, but have unprocessable extensions (pdf, scanned images, closed format); and (3) Data exist, can be accessed, but are not provided in a tabular and structured format (Splendore 2016a; Porlezza & Splendore 2019).

Talking about trade secrets, the *Codice penale italiano* (Codice Rocco, 1988) states that “if the news is indispensable for the purposes of proving the offence for which proceedings are being brought and its truthfulness can only be established by identifying the source of the news, the court orders the journalist to indicate the source of his information” (Art. 200).

The Italian law establishes, by general rules, that the means of financing the periodical press shall be disclosed (*Costituzione della Repubblica Italiana*, art. 21). A rule related directly with the media ownership and transparency (an area studied in considerable depth by scholars like Mazzoleni, 2006; Cornia, 2016; Mancini, Mazzoni, Barbieri, Damiani & Gerli, 2021; Molé, 2013; Craufurd Smith, Klimkievicz & Ostling, 2021). In this sense, the Italian law offers greater prominence of audiovisual media services of general and public interest:

- Law No 112 of 2004 (the so-called Gasparri Law) redefined the tasks of public service broadcasting and of the concessionaire, defining when and how to start the privatisation process of RAI, modifying the duration of the concession and the composition and appointment procedures of RAI's bodies. These rules were then incorporated in the Testo Unico della Radiotelevisione.
- The tasks of the public broadcasting service and the public service tasks in the regional and provincial spheres are defined. The public broadcasting service must be guaranteed.
- Full coverage of the national territory.

- An adequate number of hours of television and radio broadcasting devoted to education, information, training, cultural promotion and the implementation of distance-learning activities.
- Access to programming in favour of political parties and groups, associations of local authorities, national trade unions, religious denominations, ethnic and linguistic groups, and other groups of major social interest who request it, and the free transmission of socially-useful messages.
- The establishment of a company for the production, distribution and broadcasting of radio and television programmes abroad, aimed at increasing knowledge and enhancement of the Italian language, culture and enterprise.
- The broadcasting of radio and television programmes in German, Latin, French and Slovene for the border regions and the enhancement and strengthening of decentralised production centres for the promotion of local cultures and language tools.
- The broadcasting, at appropriate times, of content specifically intended for minors.
- The preservation of historical radio and television archives.
- The allocation of at least 15% of total annual revenues to the production of European productions.
- The protection of people with sensory disabilities.
- The law n. 112/2004, so-called Gasparri, decrees the resurgence of representatives of political parties to the Board of Directors of Italian public service corporation, the RAI. This change to the previous 1993 law, along with the governance pattern of the corporation stated by the law, limit its industrial nature and reduce pluralism in the Italian duopolistic market of broadcasting. The law represents a meeting of interests between the Government, owner of the private side of the TV duopoly, and the system of political parties, as represented in Parliament, in control of the RAI in sight of its privatisation, also provided for by the law (in Spada 2005).

Within the academic spectrum, the legal environment and implementation of the laws concerning freedom of expression and information have been analysed based on a theoretical and normative perspective and other instruments of media accountability. From a critical point of view in this regard, Splendore (2017) highlights that there is an excessive number of regulations that Italian journalism has adopted without effective sanctions; a dynamic fuelled by a widespread clientelism, a partisan news media, an alternative definition of public interest, and weak professionalism (Patterson et al. 2017). A highly regulated system (Padovani et al. 2021) that in the last two years has focused on aspects of misinformation between citizens and the government due to COVID-19 (Lovari, 2020) and migrants and media newsmaking practices (Gemi et al. 2013; Arcila et al. 2021).

2.3. Accountability system

The list of what can be considered instruments in dealing with media accountability in Italy is long, detailed and puzzling. According to Puppis (2007) with regard to definitions of media regulation, Italy is an assortment of a state-regulated domain, some self-regulation and a consistent mixture of the two (where public and private sectors jointly operate). The variables referring to legal and ethical regulation have been studied systematically in the academy (Razzante, 2005; Roidi, 2001).

In terms of influence on Italian journalists' practices and behavior, state law is unequivocally the most significant (Fengler, Eberwein, Mazzoleni, Porlezza & Russ-Mohl, 2014), although ethics and media responsibility studies have a long tradition in Italian academia and among journalists and journalists' associations (Razzante, 2005; Ordine dei Giornalisti; Roidi, 2001; Splendore, 2017; D'Arma, 2009; Gemi et al. 2013; Padovani et al. 2021; Lovari, 2020; Patterson et al. 2017). This is an area of great interest to researchers because the difficulties that Italian journalism

faces to be accountable depend the excessive number of regulations that Italian journalism has adopted without effective sanctions. The result is that in Italy even the simplest disagreements, that could be solved by a system of self-regulation, tend to be regulated by law (see Splendore 2017).

This has been so because the discourse around the press council and the code of ethics is extremely complex. The Italian equivalent to a press council is the *Ordine dei Giornalisti (OdG)*, which the Association of Journalists established by law, and to which all journalists must belong to see their qualifications recognized. The OdG can be regarded as a press council, at least in the sense of it being an institution established in defence of press freedom, which is guaranteed by the Constitutional Law, and which should monitor the accordance of the content provided by media associates. When media practitioners become members of the OdG, they must, now being professional journalists, sign the OdG's code of ethics. The OdG has the legal capacity to ensure the code is abided by.

The journalistic code of ethics is thoroughly articulated (and generally based on co-regulation) (Splendore, 2017). Sergio Splendore (2016 b, p.2-5) has also studied the role of ombudspersons as part of communication processes and journalism. According to this author, the introduction of newspaper ombudsmen has hardly been on the agenda of the domestic media players. Historically, Italian journalism has experienced only two ombudsmen initiatives and neither that of *Il Messaggero*, one of the most important dailies in the Italian central region, nor of *La Repubblica*, one of the most influential national newspapers, lasted. The basic problem facing ombudsmen is that they are perceived as an “odd institution” in the Italian political and cultural context.

The Register of Communication Operators (ROC)²⁰¹ is the instrument to which the institutive law of the Authority entrusts guarantee functions, in terms of transparency and publicity of the ownership structures of communications operators. Keeping the ROC constitutes an essential requirement for the purpose of exercising a variety of institutional tasks such as, among other things, the protection of information pluralism, the verification of compliance with the limits set for shareholdings in foreign companies and activities relating to anti-concentration discipline. Last year (2020), according to “*Relazione Annuale 2021. Sull'Attività svolta e sui programmi di lavoro*” published by AGCOM, the judicial litigation has considered areas of intervention of the Authority, as well as the discipline of the proceedings.

Here are the two of most relevant decisions: (a) Electronic communications, with reference to the obligations regarding universal service, the Council of State, with the sentence of 6 April 2021, n. 2790; (b) Audiovisual media services, regarding advertising crowding and the notion of cross-media group, the ordinance of March 25, 2021, n. 2504, with which the Council of State made a preliminary reference to the Court of Justice of the European Union²⁰².

It is important to highlight that AGCOM represents in Italy a complex body, in terms of objectives assigned by law, assigned skills, functions performed, relationships with stakeholders and institutional networks to which it belongs at national and international level. In the last year, however, the administration has had to deal, on the one hand, with the health emergency and the related repercussions both on the markets and on its own organization, on the other hand, with the attribution of new skills and the beginning of a new cycle, as always happens at the start of a new Consiliatura (p. 179).

²⁰¹ Web page of Ministero dello sviluppo economico:

<https://www.mise.gov.it/index.php/it/comunicazioni/servizi-alle-imprese/registro-operatori-di-comunicazione-roc>

²⁰² In the matter of level playing field, the Lazio Regional Administrative Court, with the sentence of 2 December 2020, n. 12915, annulled the order-injunction (resolution no. 152/13 / CONS) with which the Authority sanctioned a national broadcaster for violation of the electoral level playing field (political elections 2013).

3. Publications, data sources and main monitoring actors of journalism domain

The domain of Journalism is the best researched in Italy, especially regarding: Market, production, public service media, working conditions, organization, professional culture and journalistic competencies.

3.1. Market conditions

In regard to market condition in Italy, one highlighted concern of academic researchers during the last fifteen years is ownership diversity. According to Cornia (2016), Mazzoleni (2006), Manchini et al. (2021) Dalpiaz and Ravasi (2010), in Italy this leads to a poorly-supervised media environment and therefore strongly influenced by both economic and political factors that are often strictly intertwined. Specifically, Cornia (2016) suggests that in Italy the digital transition has led to only moderate changes within the Italian media system and generated limited implications for pluralism of information because although the new media, compared to the traditional media, have lower technological barriers inhibiting entry, market and political factors still hinder the entrance of newcomers: it is only legacy outlets, which are in a position to invest in innovation, that are able to reach a large audience. Cornia (ibid, p. 4) also highlights that pluralism is not the automatic result of technological developments.

According to the Centers for Media, Data and Society (CMDS) (2020)²⁰³, the most important service operators in Italy are *Sky Italia* (Comcast Corporation), *RAI* (State-owned), *Mediaset* (Fininvest), *RCS* (Cairo Communications), *GEDI* (Exor), *Walt Disney* (Institutional investment companies), *Discovery Italia* (Discovery Group), *Gruppo 24 ORE* (Confindustria), *Caltagirone Editore* (Francesco Gaetano Caltagirone), *Viacom CBS Networks Italia* (Viacom CBS), *Società Editoriale Il Fatto* (No majority shareholder), *Ciaopeople Media Group* (Gianluca Cozzolino) and *Editoriale Nazionale* (Monrif) [more information in Index]. This distribution of operators shows that “the Italian media market is increasingly characterized by a strong cross-mediatlity” (p. 7).

Regional and local journalism was already the focus of study by journalists themselves at the beginning of the millennium (Schiavazzi & Tallia, 2003; Campanella, 2003; Capra, 2003), but it is in recent years that scholars have focused on the “new life” of local information (Marrazzo, 2020; Splendore, 2020; Sorrentino & Mazzanti, 2020; Pogliano & Ponzio, 2019; Bifulco, Tirino & Castellano, 2020; Ferrandi, 2011). Local information is acquiring new life thanks to the new dynamics of the digital information ecosystem, rediscovering a role that is no longer in the background in the continuous flow of information of social networks (Marrazzo, 2020).

Other aspects that are also considered in studies related to the market are news media income and the labor market. It is relevant because, although television remains relatively stable in terms of popularity (dominated by the country’s two historical players, *RAI* and *Mediaset*), and online portals are steadily growing, the revenues in this segment are still only a fraction of the total media market. Moreover, online portals are increasingly dependent on intermediaries, the large technology companies. In 2018 alone, 41% of the advertising revenues generated by traditional online publishers was collected through programmatic advertising (CMDS, 2020). And online advertising revenues overtook television advertising revenues for the first time in 2019, and now represent almost half (49%) of overall advertising revenues in the Italian media sector (AGCOM, 2021)²⁰⁴.

In a fragmented profession like journalism, where the competition between the media is increasingly voracious (Rea, 2010; Splendore, 2016 b), the growth of commercial logic among

²⁰³ Website of CMDS: <https://www.ceu.edu/unit/cmds>

²⁰⁴ More information in the web page of AGCOM: <https://www.agcom.it/relazioni-annuali>

digital platforms and social media hurts journalists, users, and regular consumers (Mazzoleni & Sfardini, 2009; Curini, 2020; Dalpiaz & Ravasi, 2010; Porlezza & Splendore, 2016; Capra, 2003; Bifulco, Tirino & Castellano, 2020; Ferrandi, 2011; Schaiavazzi & Tallia, 2003). We can see in the “Digital News Report of 2022”, published by Reuters Institute, that “in 2022, for the first time, a digital-born outlet, *Fanpage*, obtained the widest online reach in our survey (21%), surpassing established broadcasters, the main Italian news agency (ANSA), and the most important newspapers.

Other digital-born outlets achieving good online results are *HuffPost* (9%), *Il Post.it* (7%), and *Open* (4%). Conversely, the offline news market is still dominated by the main Italian broadcasters (the public service broadcaster *RAI* and the commercial players *Mediaset*, *StyTg24*, and *TgLa7*), followed by established print outlets such as *La Repubblica* and *Il Corriere della Sera*” (p. 88).

In contrast, foreign interests, even though Italian news media ecology maintains a decent level of autonomy from journalistic foreign influence, are little explored at academic level. A situation that is surprising due to the “overturn” that has occurred in the media ecosystem, increasingly influenced by transnational digital platforms -as we show in the preceding paragraphs.

3.2. Public service media

One topic widely explored by numerous Italian scholars (Curini, 2020; Mazzoleni & Sfardini, 2009; D’Arma, 2009; Gardini, 2004, 2008; Avvisati, 2015; Giglioni, 2004; Vigevari, 2012; Cicheri, 2018; Brogi, 2005; Spada, 2005) and international comparative studies (e.g., *Worlds of Journalism Study*) is the public service media conditions from the autonomy and financing perspective. The autonomy of public media is seriously affected and threatened by competition and multiplication of platforms and media channels that follow commercial logic.

The competition exacerbated by the multiplication of information channels due to the advent of Web 2.0 and social media platforms has brought newspapers to slant the content of the news they produce. In the case of public media, the first decade of the 2000s is defined as a “performance measuring and assessing phase”, based on the digitalization processes and the new criteria for measuring and assessing achievement of the public sector organizations’ performance objectives (Ducci, Materassi & Solito, 2020, p. 1074). However, their main objective today is to control their regular audience. This process has also led RAI, the Italian Public Service Broadcaster, to adhere to commercial logic to survive (Mazzoleni & Sfardini 2009).

Moreover, during the first nine months of 2020 total revenues for the Italian media sector fell by €780m, with considerable decreases observed in both the newspaper (-15%) and broadcasting sectors (-8%), while online advertising grew (+7%) (*Osservatorio sulle comunicazioni*, AGCOM, 2021).

The fear for the loss of autonomy of public media has caused the increase of its study by the researchers in the Italian universities for the last twenty years. According to Ducci, Materassi & Solito (2020), in connected society some topics of reflection which to some extent have always accompanied the evolution of public communication in Italy – also in terms of its regulation – now become inevitable challenges and priorities²⁰⁵. For these reasons, these authors propose the following aspects in public communication review: (1) regulation, (2) competences, (3) training, (4) coordination, (5) listening, and (6) languages, (p. 1078-1079).

The relevance of the financing of public service media is shown in its level of legislation. The Gasparri law (Law No 112 of 2004) establishes the financing of the public broadcasting service,

²⁰⁵ On 9 January 2020, the Ministry of Public Administration - as part of the fourth Open Government Partnership action plan - purpose to reform of Law no. 150/2000 and draws up a national social media policy.

introducing an obligation for the concessionaire company to allocate the revenues deriving from the licence fee only to the costs incurred for the provision of the public service, providing, to this end, for the keeping of separate accounts, subject to the control of an independent auditor.

The relationship between the independence of the public media and the strength of Italian democracy has led many journalists (Somalvico, 2000; Spada, 2005), international institutions (European University Institute, 2005) and Italian researchers to study this issue for more than twenty years (Brogi, 2005; Richeri, 2018; Vigevani, 2012; Giglioni, 2004; Avvisati, 2015; Gardini, 2004, 2008; D'Arma, 2009; Mazzoleni & Sfardini, 2009; Curini, 2020).

3.3. Production conditions

The production conditions of the Italian media have been transformed due to the digitalization process. Studies in this regard began incipiently in the first decade of the 21st century (Prario, 2005; Cultrera, 2006; Campanella, 2003; Fortunati & Sarrica, 2010; Fortunati, O'Sullivan, Raycheva & Harro-Loit, 2010), gaining strength during the second decade (Cola & Prario, 2012; Portezza, Maier & RussMohl, 2012; Evens & Prario, 2012; De Grazia, 2013; Medina & Prario, 2013; Splendore, 2013, 2016c; Fortunati, Deuze & De Luca, 2014; Ramirez de la Piscina, Zaballondo, Aiestaran & Agirre, 2016; Cobiانchi, Del Sal & Airoidi, 2016; Cobiانchi, Del Sal & Splendore, 2014; Splendore, Caliandro & Airoidi, 2016; Porlezza & Splendore, 2016; Cornia, 2016; Mancini, 2013; Bentivegna & Marchetti, 2016), and consolidated in the last five years (Splendore, 2017, 2018; Iannelli & Splendore, 2017; Bentivegna & Rega, 2020; Nicolosi, 2019; Bracciale & Grisolia, 2020; Corchia & Bracciale, 2020; O'Sullivan, Fortunati, Taipale & Barnhurst, 2017; Nozal Cantarero, González-Neira & Valentini, 2020; Mattoni & Ceccobelli, 2018; Splendore & Rega, 2017; Splendore & Brambilla, 2021; Binotto, Nobile & Rega, 2020).

As we saw in the previous paragraph, the large number of studies carried out over the past twenty years allows us to appreciate that Italian journalism has generally been slow to adopt new technologies (Splendore, 2017) and that the Internet, and digital communications in general, have had a limited impact on the Italian market when compared with other European country markers (Richeri & Prario, 2016). However, since the outbreak of COVID-19 (2020), the entire media digitization process has accelerated.

Hence, this trend towards studies on the digitization of the media and all communication processes is not surprising. The Italian digital market reached 44.6 million users connected to the internet in December 2021, ranking the four global giants - *Google, Facebook, Amazon* and *Microsoft* - as platforms with the largest number of users; staying ahead of Italian media companies as *RCS Media Group, ItaliaOnline, Governo Italiano, Mediaset, GEDI editorial group* and *Mondadori* (AGCOM, 2021). In this regard, "one of the most important challenges of this current time is regarding the relationship between announcement data and the protection of editorial content. Specifically, "with reference to the relationship between press publishers and digital platforms, the so-called big four, and other service providers offering information to society" (Isabella Splendore, General Counsel of *Federazione Italiana Editori Giornali*, June 2022).

In addition to digitization, the production conditions have been determined, firstly, by the investigative resources. Beyond its traditional political parallelism (Hallin & Mancini, 2004), another reason why in Italy the economic and political factors that shape the media environment are often strictly intertwined is in regard to the fact that since Italian newsrooms in many cases lack the necessary resources to promote independent coverage, they tend to heavily rely on institutional sources (Tiffen et al. 2014; Splendore, 2020). Secondly, by the foreign offices/correspondents due to the change suffered in the last two decades. In the early 2000s the legacy media all had a correspondent in the major western cities. These correspondents enjoyed prestige and autonomy in their work. They had important language and cultural translation functions. However, due to the crisis in the Italian journalistic sector, the funding of these ex-

pensive foreign bureaus was cut (Splendore & Mazzoleni, 2008). Moreover, Italy has witnessed of increased competition from both foreign and domestic firms since the regulations were implemented (Richeri & Prario, 2016).

While the first topic – investigative resources – has been widely explored by numerous scholars (Gemi et al. 2013; Gerli, Mazzoni & Mincigrucci, 2018; Splendore, 2020) based on the constraints and limitations of investigative journalism due to the instrumentalization of the profession, foreign offices and correspondents have been little studied at academic level. In this regard, Sergio Splendore and Gianpietro Mazzoleni stand out. An example of the importance given to investigative journalism - and the resources necessary to carry it out - by the journalists' guild is that, even with the Covid-19 pandemic, the UGIS - Union of Italian Scientific Journalists - presented in December 2018 the "Piacenza Manifesto - Deontological Charter of Scientific Journalism". The Piacenza Manifesto highlights:

- Science and technology in their dissemination require a dedicated professional update in the context of lifelong learning;
- Reference should be made to multiple and qualified scientific sources, including international ones, for precise evaluations in a critical view;
- The results of scientific research sometimes become an economic matter to be considered;
- The importance of ethical duty in verifying the correctness and truthfulness of the news, in compliance with current and subsequent privacy regulations;
- The importance of not creating unfounded expectations or unjustified alarms (especially when dealing with issues related to health) and indicating the necessary research and experimentation times before a discovery can be applied;
- The need to account for different positions;
- The importance of caution, prudence and balance: keywords in the management of scientific news;
- Support in the media for the role of the science journalist as a mediator trained in validating information.

3.4. Working conditions

The Worlds of Journalism Study (Hanitzsch et al. 2019) states that the perceived level of autonomy of Italian journalists is one of the lowest in the world. Specifically, in relation to choice of topics, journalists who do not hold positions of responsibility in the newsroom feel that they have less freedom in their choice of news. Those who work for private editors perceive more freedom in the choice of topics and frames, especially if these private media are online. Regarding the choice of frame, those who work for national newspapers feel less autonomous in the way they cover the news (Sorrentino & Splendore, 2022).

Also, WJS offers a detailed analysis of the profile of Italian journalists: most of the Italian journalists interviewed in WJS (2013-2016) held a full-time position (62.9%), whereas 4.8 percent of the respondents indicated that they had part-time employments, and 32.3 percent worked as freelance journalists. Italian journalists had on average 16.84 years of professional experience ($s=9.79$ and median=15); the sample also includes the 67.7 percent of journalists who worked on various topics. The selected sample is conformed by professional journalists included in the so-called "Ordine dei Giornalisti". More than half of the Italian journalists (56.8%, $s=0.8$) worked for just one newsroom and 27.5 percent held other jobs outside the area of journalism (Splendore, 2016 c).

AGCOM has regularly pointed out the economic crisis that affects the Italian media system. This organization has repeatedly highlighted the lack of pluralism provided by the national media

system. Nevertheless, even if politically unnoticed, the most accurate and timely research came from media scholars. Specifically, Ceron et al. (2019) emphasize the importance of the autonomy of journalists in their professional careers. Even more so in an environment in which media polarization and political instrumentalization of journalists is a reality in Italy. Italian scholars, in their articles and books, generally maintain a traditional, normative point of view. It means that they consider journalism in based on its capability to set the actual conditions for deliberative communication.

The job satisfaction of Italian employees (journalists) depends directly on their working conditions. According to the main researchers in this area, although in Italy the *Ordine dei Giornalisti* is a professional association which journalists must join to be included by law and to legitimately practice the profession, only six out of ten of them work full-time in a fragmented profession with profound differences between various segments (Rea, 2010), and under the influence of left-leaning and right-leaning editors (Ceron, Splendore, Hanitzsch & Thurman, 2019).

All this occurs in a context of clear manifestation of the commercialization of journalism, arising from the extremely fierce competition rather than by the multiplication of information channels, the advent of Web 2.0 and social media platforms (Curini, 2020; Mazzoleni & Sfondini, 2009; Splendore & Curini, 2020; Mancini, 2013, 2020).

There are two aspects that the law considers to be fundamental in regard to the working conditions of journalists. The first is education and training (Splendore, Di Salvo, Eberwein, Groenhardt, Kus & Porlezza, 2016), which gives access to the journalistic profession (Art. 32 of Law No. 69/1963); the second, which has gained fervent interest in recent years, is threats/harassment/hate towards journalists (Garusi, Splendore & Oller, 2022), due to the number of incidents of intimidation against journalists recorded by the Ministry of the Interior's Observatory that has risen by 21 per cent. Almost one threat in two (47 percent) comes via the web and social networks (Federazione Nazionale Stampa Italiana, FNSI, 2021). Specialized journalists who work on specific issues, such as migration, are victims of hate speech (crime) on a recurring basis (according to results from PHARM²⁰⁶).

The organizational structure of media platforms directly affect their workforce (Comunello; 2015; Markova & McKay, 2013; Josephi & Oller Alonso, 2021), especially regarding women, who continue to hold lower positions on the hierarchical ladder (Azzalini, 2015; Comunello, 2015). The profile of the typical Italian journalist is almost in line with the "Italian white-collar" composition; journalists that also comprises a similar percentage of women (42.4%) to other professions - such as doctors or lawyers (Splendore, 2016 c).

3.4.1. Intra-organizational diversity

The rest of the professional variables that analyse journalistic skills have been less studied in Italy: firstly, professional values of Italian journalists, that in the changed context of the current media landscape are legitimised by a wide range of normative guidelines that were previously ignored (Örnebring, 2013; Splendore, 2017; Sorrentino & Splendore, 2022).

Secondly, knowledge and ability of journalists are tested based on the accredited training they must have before entering the profession (Örnebring & Mellado, 2018; Pogliano, 2019; Pogliano & Ponzo, 2019). Because of that, on an educational level, according to WJS (2013-2016), Italian journalists generally are well educated (72.9% of the sample have at least a college degree; 24.5% have a university degree). Just half of them (50.1%) hold a degree in journalism or communication. In this regard, since journalists covering immigration often lack the specific skills to put the events they report on into a broader context, even greater power to define the situation is given to actors from the political field (Pogliano 2019; Pogliano e Ponzo 2019).

²⁰⁶ Web page of PHARM: <https://pharmproject.usal.es/?lang=es>

3.4.2. Journalistic competencies, education and training

To become a professional journalist in Italy, and to be registered on the relevant list, journalists need to:

A) Complete an internship or school of journalism course.

- Complete 18 months of internship (Article 34 of Law No. 69/1963 and interpretative criteria at www.odg.it/leggi-e-documenti) and, in addition, attend one of the theoretical preparation courses, including “distance learning” courses, lasting at least 45 hours and accredited by the National Council or Regional Councils of the Order.
- Alternatively, to have attended for two years one of the schools of journalism recognised by the National Council of the Order of Journalists (www.odg.it/scuole-di-giornalismo).

B) Pass the examination of professional suitability (Article 32 of Law no. 69/1963).

For this reason, and in accordance with WJS (2013-2016), Italian journalists are well educated and have at least a college degree. However, the discrepancy between normative ideals and the everyday practice can be seen in the impossibility to fulfil a watchdog role in Italy. The journalistic practice is threatened by the instrumentalization of the media outlets by external actors, the weakness of the print press market and the low level of professionalism (Genli, Mazzoni & Mincigrucci, 2018).

3.4.3. Professional culture and role perception

In Italy, despite there being several stakeholders interested in enabling such positive conditions, there is little cooperation, if any, between them. For example, although this country is one of the few countries around the world that has a national association of journalists (*Ordine dei Giornalisti*), the main purpose of which is to supervise and protect its members, its codes of practice and social norms are fought over, challenged and not unanimously recognised or legitimised even by journalists themselves (Splendore, 2017a).

The professional culture of Italian journalism has mostly been studied based on ethics and autonomy parameters. According to some of the scholars that studied these topics, journalists that work for national newspapers and hold positions of responsibility in the newsrooms feel less autonomous. Mancini (2000) was the most recognized pioneer in talking about professional culture in Italy. For a little over ten years other authors began to grow the study framework, in which many international comparative studies transcend the national borders of Italy²⁰⁷. In the second decade of 2000s, Currant et al. (2013) comparatively analyze the internet phenomenon from the point of view of digital utopianism, empowerment, technological determinism, and online news. Esser et al. (2012) focus on the study of incidental learning and public affairs coverage on thirteen television systems focus on a comparative perspective. Mosca & Quaranta (2016) analyse the news diets, social media and non-institutional participation in three countries based on contextual characteristics and online surveys. And, like the last example in this regard, Curini (2020) studies the political parallelism and newspapers’ ideological slant.

In recent years, as we stated in the preceding paragraphs, the media and the journalistic profession in Italy have been marked by the digitization process that the profession is undergoing and

²⁰⁷ Lavazza (2008); Cornia (2010); Archetti (2010, 2016); Hopmann, Van Aelst & Legnante (2012); Gnisci & Nielsen, (2013); Ciaglia (2013); Markova and McKay (2013); Azzalini (2015); Comunello (2015); Splendore (2016); Büchel, Humprecht, Castro-Herrero, Engesser & Brüggemann (2016); Esser & Umbricht (2013); Van Dalen & Di Conza (2014); Mosca & Quaranta (2016); Gerli, Mazzoni & Mincigrucci (2018); Humprecht & Esser (2018); Bentivegna & Marchetti (2018); Mattoni & Ceccobelli (2018); Barbieri, Campus & Mazzoni (2019); Nozal, Cantarero, González-Neira & Valentini (2020); Curini (2020); Josephi & Oller Alonso (2021); Humprecht, Castro-Herrero, Blassnig, Brüggemann & Engesser (2022); Sorrentino & Splendore (2022).

the changes that journalism is experiencing due to periods of crisis, political interests, market demands and the evolution of the professional profiles and roles of journalists. Regarding this last aspect, journalistic competencies in Italy are mainly studied from the perspective of the professional roles of journalists continuously for a decade (Splendore, 2006, 2013, 2014, 2016d, 2017, 2018; Poletti & Brants, 2010; Vaccari, 2011; Domaneschi & Splendore, 2012; Gemi et al. 2013; Ardizzoni, 2013; Splendore & Legnante, 2014; Memoli & Splendore, 2014; Cobianchi, Del Sal and Splendore, 2014; Ciaglia, Mazzoleni, Mazzoni and Splendore, 2014; Splendore, Calian-dreo and Airolidi, 2016; Splendore and Rega, 2017; Binotto, Nobile and Rega, 2020; Bruno and Peruzzi, 2020; Splendore and Brambilla, 2021; Standaert, 2021; Sorrentino & Splendore, 2022).

According to results from some of these authors, most Italian journalists identify with the “monitoring role” and consider it to be especially important to report things as they are. The results from WJS study (2013-2016) about professional role orientations/priorities show that Italian journalists found it most important to report things as they really are (mean=4.60 and s=0.71), to be a detached observer (mean=4.47 and s=0.81), to provide analysis of current affairs (mean=4.13 and s=0.89), and to let people express their views (mean=3.82 and s=1.17). The relevance of functions such as the first two (“to report things as they are” and “to be a detached observer”) are common in Western journalism, nevertheless they are in contrast with the typical representations of Italian journalism. The two functions that carry the lowest level of support are “Support national development” (mean=1.32 and s=0.67) and “Support government policy” (mean=1.32 and s=0.65), (p. 2-5).

With specific regard to investigative journalism, Gerli, Mazzoni and Mincigrucci (2018), in a comparative study of Hungary, Italy, Latvia and Romania, found that the opportunity to fulfil a watchdog role in Italy is threatened by: (1) The instrumentalization of the media outlets by ‘external’ actors, (2) the weakness of the print press market and (3) the low level of professionalism (here mainly understood as the self-censorship of journalists).

In line with the perception of the role identified by Italian journalists, there is substantial agreement between scholars²⁰⁸, of an objectivism characterised by “limiting oneself to reporting reality as it appears”. However, the younger journalists are the ones who, from this evidence, differ the most. (Sorrentino & Splendore, 2022).

4. Publications, data sources and main monitoring actors of media usage patterns

The **domain of Media usage patterns** is well-researched in Italy, especially regarding access to media, diversity in the media system and relevance of public service media.

4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in media system

Although Campanella (2003) is one of the researchers who at the beginning of this millennium focused on the study of media access and diversity in Italy, Bracciale is the author who has maintained the record of publications over recent years (Bracciale and Mingo, 2009, 2015, 206; Andretta and Bracciale, 2017; Mingo and Bracciale, 2018). In Italian media market there are three main concerns that raise fundamental questions about the diversity in media systems.

²⁰⁸ Garusi, Splendore and Kalfeli (2020); Delmastro and Splendore (2020); Humprecht and Büchel (2013); Fortunati and O’Sullivan (2021); Porlezza, Maier and RussMohol (2012); Bentivegna and Marchetti (2019); Zerback, Reinemann, Van Aelst and Masini (2020); Wettstein, Esser, Schulz, Wirz and Wirth (2018); Splendore (2020); Bentivegna and Marchetti (2016); Splendore, Calian-dreo and Airolidi (2016); Cobianchi, Del Sal and Splendore (2014).

Firstly, the significant ownership concentration for free broadcast TV that has now persisted for over 20 years. Two companies control 87.2% the Italian broadcast television market: the public *RAI* and the Berlusconi family's *Mediaset*. Secondly, the high concentration of advertising investment in the field of television. For several years, Italian television has received over half of the total advertising investments made. And, thirdly, the political corporate relationship in Italy. A prime example of this was the investor founder Silvio Berlusconi, who served as prime minister three times: in 1994, from 2001 to 2006, and again from 2008 to 2011 (Richeri & Prario, 2016).

In addition, the media have an increasingly closer link with social networks. According to Valeriani and Vaccari (2016), inadvertent encounters with political content on social media are likely to reduce the gap in online engagement between citizens with high and low interest in politics, potentially broadening the range of voices that make themselves heard. In line with this result, a study by Mosca & Quaranta (2016) finds that social movements and protesters use online platforms extensively to inform and mobilize other citizens by-passing the gatekeeping function of traditional media. For all these reasons, and despite the high level of media concentration in Italy, there is a growing proliferation of media options to consume news, and a considerable proportion of their sample opt-out of news use or have a low-source, low-frequency news media diet (Castro et al. 2021).

The Italian media users have full access to media and preferred channels (97.4%) (AGCOM, 2018; Ramirez de la Piscina, Zabalondo, Aiestaran and Agirre, 2016; Mosca & Quaranta, 2016; Curini, 2020). Also, they offer high relevance to media news because 94.9% of them watch/read news in their average day (AGCOM, 2018; Mosca & Quaranta, 2016; Curini, 2020; Bentivegna & Marchetti, 2019; Ceron and Splendore, 2018, 2019; Durante & Knight, 2012; Mosca & Quaranta, 2017; Bentivegna & Marchetti, 2014; Stier, Kirkizh, Froio & Schroeder, 2020; Steppat, Castro-Herrero & Esser, 2021).

4.2. Relevance of news media

The relevance of public service media is a topic analysed mainly by research institutes and Italian institutions. The *Autorità per le Garanzie nelle Comunicazioni* (AGCOM), as an independent Italian regulatory and guarantee administrative authority, watches over the General Public Broadcasting Service based on the principles laid down by the Italian Constitution and by the European Union. It is important because, for example, the public channel *RAI* is the television news program with the highest number of viewers (AGCOM, 2020). Hence, AGCOM not only regulates aspects in that area, but also establishes itself as the main regulatory body for aspects such as relevance, access, preferences, quality, and functionalities of news media.

The mission of the General Public Broadcasting Service is based on the principles laid down by the Italian Constitution and by the European Union in the “TV without Frontiers” Directive of 1989 and subsequent amendments, the 9th Protocol on Public Television annexed by the Treaty of Amsterdam of 1993 and the subsequent Communication of the Commission of the European Communities 2009/C 257/01 published in the Official Journal of the European Union of 27 October 2009.

Public service obligations are defined by all these sources, by Law No. 249 of 31 July 1997, Law No. 112 of 3 May 2004, the Consolidated Law on Audiovisual and Radio Broadcasting Media Services, approved by Legislative Decree No. 177 of 31 July 2005, and the Service Contract signed with the Ministry of Communications. According to Article 45 of the Consolidated Law on Audiovisual and Radio Broadcasting Media Services, public service broadcasting must guarantee the following, thus setting the minimum mandatory content, which may be supplemented through the Service Contract:

- a. the broadcasting of all public service television and radio transmissions with full coverage of the national territory, insofar as science and technology allow;
- b. an adequate number of hours of television and radio broadcasts devoted to education, information, training and cultural promotion, with particular regard to the promotion of theatrical, cinematographic, television, including original language, and musical works recognised as being of a high artistic level or more innovative; this number of hours shall be defined every three years by resolution of the Authority; entertainment broadcasts for minors shall be excluded from the calculation of such hours
- c. the broadcasting of the transmissions referred to in subparagraph (b), in a proportionate manner, in all time slots, including those with a large audience, and on all television and radio programmes;
- d. access to programming, within the limits and according to the modalities indicated by the law, in favour of parties and groups represented in Parliament and in regional assemblies and councils, of the associative organisations of local autonomies, of national trade unions, of religious denominations, of political movements, of political and cultural bodies and associations, of legally recognised national associations of the cooperative movement, of associations of social promotion registered in the national and regional registers, of ethnic and linguistic groups and of other groups of relevant social interest that request it;
- e. the establishment of a company for the production, distribution and broadcasting of radio and television programs abroad, aimed at the knowledge and enhancement of the Italian language, culture and enterprise through the use of the programs and the diffusion of the most significant productions of the national audiovisual panorama;
- f. the broadcasting of radio and television programs in German and Ladin for the autonomous province of Bolzano, in Ladin for the autonomous province of Trento, in French for the autonomous region of Valle d'Aosta and in Slovene for the autonomous region of Friuli-Venezia Giulia;
- g. the broadcasting, free of charge, of messages of social utility or of public interest that are requested by the Presidency of the Council of Ministers and the broadcasting of appropriate information on the feasibility of Italian roads and motorways
- h. the broadcasting, at appropriate times, of content specifically intended for minors, taking into account the needs and sensitivity of early childhood and developmental age;
- i. the preservation of the historical radio and television archives, guaranteeing public access to them;
- j. the allocation of at least 15% of total annual revenues to the production of European works, including those made by independent producers;
- k. the realization, within the deadlines provided for by law no. 112 of 3 May 2004, of the infrastructures for radio and television broadcasting on terrestrial frequencies in digital mode;
- l. the implementation of digital interactive services of public utility;
- m. compliance with the advertising crowding limits provided for by article 38 of the Consolidated Law;
- n. the articulation of the concessionaire company in one or more national seats and in seats in each region and, for the Trentino-Alto Adige region, in the autonomous provinces of Trento and Bolzano;
- o. the adoption of appropriate measures to protect people with sensory disabilities;
- p. the enhancement and strengthening of decentralized production centres;
- q. the implementation of distance learning activities.

Also, *RAI* is committed to guaranteeing the visibility of the country's linguistic minorities. Based on the agreements currently in force, *RAI* guarantees television and radio programming for the

following linguistic minorities in the German and Ladin-speaking areas of Italy, in the provinces of Bolzano and Ladin:

- German and Ladin in the provinces of Bolzano and Trento;
- Slovenian in Friuli-Venezia Giulia;
- French in Valle D'Aosta.

At an academic level, the role and relevance of public service media has also been analyzed in an appropriately manner since the end of the first decade of this millennium by Gardini (2004, 2008); Orofino (2011); Richeri (2018); Cola and Prario (2012); Castro-Herrero, Nir and Skovsgaard (2018), as the main examples.

In Italy there is uncertainty about the functionalities of media. In this regard, there is a question to be answered: is there sufficient demand to justify investments in infrastructure? In such a situation, the excessive fragmentation of the market and strong competition without proper regulation will discourage investment. The sector is moving to grow high-speed broadband networks and to diversify its offerings, but it is still unclear as to who will undertake the requisite infrastructure investments (Fortunati and O'Sullivan, 2021; Richeri & Prario, 2016; Valeriani and Vaccari, 2016; Toraldo, Vergari and Toraldo, 2015; Calenda & Mosca, 2007; Tosoni and Tarantino, 2013; Vaccari and Valeriani, 2018; Mosca & Quaranta, 2017). Until 2020, according to the "*Rapporto sul consume di informazione*" published by AGCOM²⁰⁹, the main sources of information were television (48.2%), internet (26.3%), newspapers (17.1%) and radio (8.4%). And, until before the Covid-19 pandemic, 94.9% of Italians watched/read news in their average day (AGCOM, 2018).

Today, according to the data from "2022 Digital News Report", the media sector is now fully experiencing the impact of the digital transition. The main sources of information are online (75%) and TV (70%), social media (47%) and newspapers (15% in free fall for years). The social networks most popular for news are *Facebook*, *WhatsApp* and *YouTube* [TikTok (4%)]. However, the economic model of online media in Italy is still undergoing restructuring, since the percentage of users willing to pay for news is also low (12%).

And, of course, the functionality of the news media in Italy is directly related to their quality and the emergence of a marked cross-media phenomenon. Laura Carrer, journalist in *MilanoToday* and freelancer, is very critical about the quality of Italian media: "Quite bad in most cases. In fact, the integrity of newspapers on some levels no longer exists. There are many people who, precisely because they are freelancers, collaborate with some newspapers to let them know that they are doing them a favour, while there are other professionals within the newsrooms that do not work well"²¹⁰. For this reason, among others, although three quarters of the Italian population access the media for information purposes, 'only the medium of television retains its own pool of exclusive users (about 8% of the population) of exclusive users (the so-called "television" of the population). Finally, there remains a niche of Italians (about 5%) who do not access information at all (at least not through the mass media) (Corchia & Bracciale, 2020). In any case, the academy has a unfinished business regarding this subject that has yet to be investigated in depth.

4.3. Trust in media

Despite the relevance of the media as information services in Italy, the trust that users place in them is particularly low in Italy. The Organization for Economic Cooperation and Development

²⁰⁹ Link to download this report: <https://images.agi.it/pdf/agi/agi/2018/02/19/124325678-b198b2cb-affe-4842-b6b8-4e297aba9a82.pdf>

²¹⁰ Interview made by Martín Oller Alonso (August, 2022).

(2020)²¹¹ confirms that the level of trust in the Italian government is 35/100, one of the lowest levels in the world. According to Reuters Institute (2020), after an 11-percentage point fall in 2020, trust level recovered slightly in 2021, but is still relatively low. The most trusted brands are generally those that are known for lower levels of political partisanship (ANSA, SkyTG24 and Il Sole 24 ore). Least trusted are outlets with a pronounced partisan bias and the popular digital-born outlet (Fanpage, Libero Quotidiano and Il Giornale). A situation that, rather than decreasing, is currently increasing: On average, just 13% and 15% of users believe that the Italian media are independent of undue political and commercial influences, respectively (Digital News Report, 2022). A topic analyzed in greater depth by reports published by national research organization (AGCOM), international institutions (Reuters Institute) and projects (WJS, 2007, 2012, 2021). Even so, the increase in studies carried out from the academy (Iannelli, Splendore, Valeriani and Marino, 2020; Ricci and Splendore, 2021; Stefani, Cavicchi, Romano and Lobb, 2008; Pogliano, 2015; Bordignon and Ceccarini, 2020) is mainly due to the partisan nature of Italian journalism (Splendore and Curini, 2020) and to the strong influence of political and business interests on news organizations (Memoli and Splendore, 2014). Brands that are most trusted are generally those that are known for lower levels of political partisanship. Least trusted is the popular digital-born website Fanpage (Lovari, 2020).

What is clear from the European Union about freedom of expression on a comparative level in all European countries is that the lack of freedom and pluralism of the media can represent a further serious obstacle to freedom of expression as well as to that of receiving and disseminating information and creating, by weakening public trust in the media, a vulnerability to democracy (Servizio Ricerca del Parlamento europeo, 2019).

5. Publications, data sources and main monitoring actors of Media related competencies domain

The domain of media usage related competencies is analysed in a partial and unbalanced way, constituting itself as the least investigated research area. Parameters like users' cognitive abilities, communication competencies and ethical capabilities, and social context of media related competencies began to be investigated in depth less than a decade ago in Italy.

Regarding users' cognitive abilities, the most studied variable, although only recently, is the authenticity of communication. According to Vegetti and Mancosu (2020) people tend to perceive all partisan-consistent news as more plausible, but political sophisticates are better able to tell real from fake news. These authors conclude that while political information is affected by motivated reasoning, political sophistication can effectively reduce citizens' likelihood believe misinformation. As predicted, people are more likely to believe a news report by a source that has previously given them congruent information. However, this only holds if the source is fake. Furthermore, we use machine learning to uncover treatment heterogeneity in the data. Effects vary most strongly for various levels of trust in the mainstream media and for those having voted for the populist right (Bauer and Clemm von Hohenberg, 2021). Additionally, in a country like Italy, where the most popular news programs have determined for decades, and still determine, much of the country's political and public opinion²¹².

And, secondly, digital skills and literacy (Bracciale and Mingo, 2009, 2015, 2016; Andretta and Bracciale, 2017; Bracciale 2017; Mingo and Bracciale, 2018). The case of Italy is peculiar because the country suffers from digital backwardness due to the more conspicuous presence of

²¹¹ Website of OECD: <https://www.oecd.org/italy/>

²¹² Jeanpietro Mazzoleni is profesor at the University of Milan. This comment comes from a interview made by Sergio Splendore (June, 2022).

citizens who belong to the group of information “have nots” compared to other European countries, which results into the inability to fully exploit the benefits of digitalisation (Bracciale and Mingo, 2015; Mingo and Bracciale, 2018).

In addition to its novelty as a field of study, as is the case of digital literacy, its research is characterized by being carried out by a small group of scholars, as is the case of Bracciale, or researchers belonging to European universities and centers outside of Italy (Mannheim Centre for European Social Research; European University Institute). A trend that is maintained in all study areas of the domain of media usage related competencies (Open Society Institute; European Schoolnet).

The effects of this health crisis, together with the delay in the development of the users’ skills of Italian citizens, means that the use of media and media technology continues at quite low rates when compared to neighboring European countries. Italy ranks only 21st out of the 35 European countries according to the “Media Literacy Index (2021)” (Lessenski, 2021; Taddeo and Tirocchi, 2021; Selva, 2020; Cappello, 2019).

The social context of media related to media usage competencies, even though it has been investigated for a decade by European institutes and universities (eg. European Commission, University of Liège, Norwegian University of Science and Technology) and Italian researchers (eg. Mascheroni, 2012; Pillera, 2015), remains under-researched and the amount of literature in the field is still limited (Ranieri, Bruni and Kupiainen, 2018).

At the beginning of the second decade of this century, only 19% of Italian students in schools had a virtual learning environment (the average in Europe was 61%), and schools with VLEs offered external access with roughly equal levels of access to teachers and parents at all grades (European Schoolnet, 2012). Despite the general increase in the spread of technologies in recent years, regarding competencies in Italian socio-demographic groups, according to the results of Mingo and Bracciale (2018), there exists a relative “Matthew effect” in Italy: despite the general increase in the spread of technologies, we are witnessing a progressive impoverishment of the weakest sectors of the population: older people, people with disabilities, women, lower education groups, unemployed and “those in less-developed” regions.

In the domain of media usage related competences, variables such as rational argumentation in public communication, critical consideration of information and knowledge and understanding of contexts of communication (within the dimension of users’ cognitive abilities), self-expression ability, ability to listen, and to communicate in an assertive manner (within the dimension of users’ communication competencies), use of media and media technology, privacy and data protection skills (within the dimension of users’ skills), and users’ ethical capabilities are poorly studied. To the point that it is extremely difficult to find information about them in the Italian context.

5.1. Normative sources

The media usage patterns are determined by the media literacy policies (Cappello and Rizzuto, 2020; Ranieri, Fabbro and Nardi, 2019; Tirocchi, 2017; Silva, 2017; Ferro Allodola, 2020; Morgese, 2012; Bruni, Garavaglia and Petti, 2019; Felini, 2014). Despite some valuable attempts to introduce Media Education in Italian schools, unfortunately non-systematicity, non-organicity, and poor interdisciplinarity still shape the educational and teaching practices (Doni, 2015).

It is worth anticipating an aspect that is crucial for the possibilities of developing a deliberative communication context, which will be dealt with in more detail below. While there is no doubt that the Internet and social media platforms are intrinsically democratising technologies capable of enriching individual repertoires, this opportunity is highly dependent on the level of media literacy (Ferro Allodola, 2020) and digital inclusion (Andretta and Bracciale, 2017) in differ-

ent territorial and socio-cultural contexts. The understanding of and the access to communication structures is in fact an essential precondition for access to political and cultural citizenship.

5.2. Assessment of media related competencies among citizens

The Media related competencies domain can be considered because of the intertwined work of the three domains we discussed so far. In fact, the normative aim of any citizens is to develop preferences about the various policy issues under discussion, and they come to these preferences in part from the news they consume (Curran, 2002). As a result, journalism serves to provide citizens with the information they need to be free and self-governing (Strömback, 2005). Especially in the information society, deliberative communication strongly depends on the news media's ability to provide truthful information and to carry out argumentative discussions to solve problems and reach – at least temporary – agreement (Van Der Wurff *et al.* 2016).

A large body of work is devoted to understanding the mechanisms of diffusion of inaccurate and false news contents (especially on social media). However, a clear flaw in this strand of studies is evident: only a few of them have focused on the individual mechanisms by which people believe that news (Vegetti and Mancosu, 2020). In a similar vein, Bauer and Clemm von Hohenberg (2020) argue that even though the increasing spread of fake news represents one of the greatest challenges societies face in the 21st century, there is little understanding about how sources influence whether people believe and share what they read. If we consider the more than 200 bibliographic references that we have been able to collect about a ROs approach, we may assume that the Media Related Competencies domain is by far the least investigated in Italian academic literature.

Analyses of this kind would be particularly useful in Italy, where the level of media literacy is relatively low. Also, in the specifics of the school system, the situation could be improved. As noted by Doni (2015), despite some valuable attempts to introduce Media Education in Italian schools, unfortunately non-systematicity, non-organicity, and poor interdisciplinarity still shape the educational and teaching practices.

For all these reasons, Ferro Allodola (2020) highlights the urgent need to spread “media resilience”, that is the ability to be aware of the risks of false, incomplete, and obsolete information to which we are subjected on a daily basis and to be able to cope with it in order to be able to exercise control over our choices, decisions, and actions, both in personal relationships and in political and social life. As pointed out by Bracciale (2017), new forms of social *ghettoisation* are taking shape for those excluded from the circuits that allow them to exercise their rights of political and cultural citizenship, which are less and less linked to the methods of production, but more dependent on the effective capacity to manage information flows in the information society.

Ferro Allodola (2020) continues by stating that the empowerment of citizens through media resilience is only feasible if free and sustainable access to the information and infrastructures of the digital society is guaranteed. As a matter of fact, the utopia of the democratising narrative is based on (1) the idea of the Internet and social media platforms as tools capable of guaranteeing more solid rights of citizenship, (2) a more intense collective participation, thanks to the simplification in the processes of accountability made possible by the technological infrastructure, and (3) the redistribution of decision-making power into the hands of citizens, strongly dependent on the level of digital inclusion in the various territorial and socio-cultural contexts (Andretta and Bracciale, 2017). On the one hand, therefore, there is the deep transformation of democracy itself, because the new discourses on which it is built take place within a pluralised public sphere, in which the processes of mediation are closely linked to technological affordances; on the other hand, there emerges a downsizing of the pre-conceived opportunities for participation that sharpens the distance between elites and non-elites (*ibid.*).

In this context, the case of Italy is peculiar because the country suffers from digital backwardness due to the more conspicuous presence of citizens who belong to the group of “information have nots” compared to other European countries; which results in the inability to fully exploit the benefits of digitalisation (Bracciale and Mingo, 2015; Mingo and Bracciale, 2018).

6. Analysis of Research and Monitoring Capabilities and Quality: Comparative analytical overview of available research and access to the research

The last part of this report analyses what kind of data this sub-field can produce in terms of availability, recency, and continuity, the complexity of data-gathering, reliability, and availability of experts and research structures. In this way, we will be able to offer a holistic view of the study and research concerning the risks and opportunities in relation to deliberative communication and, consequently, social cohesion in Italy.

Splendore (2016) affirms, as far as Italian context is concerned, that when researchers want to retrieve data on the four domains that structure the analysis of deliberative communication, they may be faced with different types of problems:

1. Data are non-existent (nobody produces them).
2. Data exist but are not available in open and digital format.
3. Data exist, are in table format, are accessible and open, but have unprocessable extensions (pdf, scanned images, closed format).
4. Data exist, can be accessed, but are not provided in a tabular and structured format.
5. Data poorness.
6. Irregular spread of data.
7. Lack of reliability of data.

The existence of data does not seem to be a problem in Italy. In fact, there are many actors involved in the ROs sub-field concerning deliberative communication. Concerning the second kind of closure, despite extensive research conducted by scholars and research groups in universities, data are rarely made available. This is a habit that also characterizes the Italian organizations that may be regarded as a branch of Government or public body, such as the aforementioned AGCOM. Instead, data delivered by the transnational organizations that monitor media systems globally often suffer from the problems of points 3 and 4. For example, data conveyed by *Reporters Sans Frontières* are not processable and lack a tabular and structured format, which would facilitate their analysis. In addition, it has been shown that political and ideological issues affect the construction and structure of the measuring instruments used by the *Freedom House* (Giannone, 2010).

Actors offering data in a processable and structured format and with a high level of reliability unfortunately are presented with other types of closure. For example, the different large comparative research projects that collect data and produce comparative analysis over certain periods (like *Worlds of Journalism Study* and *Nepocs*) do not offer annual monitoring. In addition, *Nepocs* change periodically the subject of analysis. Moreover, the data offered by the Italian units in the media industry structures or linked to media industries are often poor in terms of available variables, which hinder cross-data analysis. Also, despite the fact that various Italian independent organizations or professional associations can be considered reliable, they offer data that are often only useful to themselves, thus not contributing to the spread of democracy.

Regarding the availability of data on legal and ethical regulation, journalism, media usage patterns, and media-related competencies domains in Italy, our result shows that, even though

there is relatively abundant and available information, there is an imbalance between the different domains (as we showed in the preceding paragraphs). Our collection of research and additional data (researchers, institutions, dates, among others) show in more detail which domains (and different measurables and variables inside them) are well represented and researched. And, of course, the lack or absence of certain kinds of research. There are abundant data concerning the domains of journalism. There is quite a lot of information about legal and ethical regulation and media usage patterns and little research focused on media-related competencies.

5.1. Comparative analytical overview of the sources and access to these sources

It can be inferred that the lack of cooperation between these actors involved in the communicative processes in Italy leads to a poorly supervised media environment and one therefore strongly influenced by both economic and political factors that are often strictly intertwined. For example, Cornia (2016) suggests that in Italy the digital transition has led to only moderate changes within the Italian media system and generated limited implications for pluralism of information because although the new media, compared to the traditional media, have lower technological barriers inhibiting entry, market and political factors still hinder the entrance of newcomers: it is only legacy outlets, which are in a position to invest in innovation, that are able to reach a large audience. In line with this result, Cornia (ibid.) also highlights that pluralism is not the automatic result of technological developments since there is a “chronic resistance to change within the Italian media system, where the lack of appropriate and effective media policies has allowed dominant players strongly connected with political forces to fix the rules of the game in their markets and to influence the regulation in their media sectors” (191). In a similar vein, Ciaglia (2013) highlights that: “The norms enforced in Italy seem perfectly tailored to the enduring iron duopoly, which continues to persist in spite of the emergence of a viable new competitor (*Sky Italia*) and the new possibilities engendered in the digitization of the Italian TV system” (p. 424).

The analysis of Evens and Prario (2013) reveals that this situation enables no single Italian mobile operator to provide a comprehensive supply of television channels that could compete with traditional offerings. In addition, Curran *et al.* (2013) suggest that a key influence that has constrained the development of independent online journalism is:

the success of established media organisations in extending their hegemony across technologies by setting up heavily subsidised news websites supported by extensive newsgathering resources, prominent brand names, and the ability to cross-promote. Faced by these superior resources and operating in a context where people expect online content to be free, independent news websites – with the potential to be different – have often struggled to survive (892).

Despite the relatively moderate change aforementioned, according to Curini (2020) the level of pluralism did not improve. The competition exacerbated by the multiplication of information channels due to the advent of Web 2.0 – during the first decade of this new century – and social media platforms have brought newspapers to slant the content of the news they produce. Their main objective is to cater to the prejudices of their regular readers. This process has also led RAI, the Italian Public Service Broadcaster, to follow commercial logic to survive (Mazzoleni and Sfardini, 2009). In this regards, Marco Gui, professor at the Department of Sociology and Social Research, University of Milan, shows his concern about the “increased of use of sensational content. A phenomenon that has always been a problem for Italian journalism, but in the digital world has multiplied”²¹³.

²¹³ Interview made by Martín Oller Alonso (August, 2022).

Beyond its traditional political parallelism (Hallin & Mancini, 2004 and recently corroborated by Humprecht et al. 2022), another reason why in Italy the economic and political factors that shape the media environment are often strictly intertwined is in regard to the fact that since Italian newsrooms in many cases lack the necessary resources to promote independent coverage, they tend to heavily rely on institutional sources (Tiffen et al. 2014; Splendore, 2020).

Journalism that requires more time and financial resources, due to the nature of the topics it covers, is particularly affected by this trend. For example, regarding migration coverage, there is an objective difficulty on the part of migrants to consider themselves as a legitimate source to express their point of view even on the issues that most directly affect them. For this reason, news concerning migrants is often presented in Italian media from the point of view of institutional sources and not from that of the actors personally involved in the events (Cerase, 2004; Gemi et al. 2013).

Moreover, since journalists covering immigration often lack the specific skills to put the events they report on into the broader context, even greater power to define the situation is given to actors from the political field (Pogliano, 2019; Pogliano and Ponzio, 2019). Regarding investigative journalism, Gerli, Mazzoni and Mincigrucci (2018) found that the opportunity to fulfil a watchdog role in Italy is threatened by:

the instrumentalization of the media outlets by 'external' actors, the weakness of the print press market and the low level of professionalism (here mainly understood as the self-censorship of journalists) (34).

In this scenario, there is an urgent need for a place for collective reflection, where the actors from academia, those from within the profession, and those from the different authorities and associations concerning journalism can be brought together and interact. It seems to us that only effective cooperation between all these actors will make it possible to intercept, make sense of, and, if necessary, intervene in the current media environment.

6.3. Monitoring capabilities and the quality of data and knowledge

6.3.1. Data on research conditions and environments

Moreover, despite the presence of an official authority designed to ensure fair competition between operators in the information market and to protect users' consumption freedom (AGCOM), as already mentioned above, it is often criticised for not being autonomous from politics. In addition, despite a large amount of research carried out in the field of journalism studies and the presence of several specialised journals - especially those with the greatest impact previously described in this document - there is still little communication between academia and journalists. This is a long-standing problem of the Italian media system; as early as 1995 Agostini (published in 2013) observed that the professional profile that straddles journalism and research, which has been the strength of most journalism schools abroad, is an exception in Italy. For example, Sorrentino (2014) argues that one of the most frequent complaints from journalists to academic scholars relates to the timescales of research and scientific publication, which are much slower than the hurried responses journalists and the journalistic field need.

6.3.2. National databases, universities, centers of research and national institutions specializing in communication and journalism

Research in Italy is encouraged through the *Istituto Nazionale di Statistica* (ISTAT)²¹⁴ and the National Research Program (PNR), provided for by Legislative Decree 204/1998. The PNR guides research policies in Italy, which the administrations of the State contribute to the realiza-

²¹⁴ Web page of National Institute of Statistics (ISTAT): <https://www.istat.it/en/>

tion of with the coordination of the Ministry of the University and of Research (*Ministero dell'Università e della Ricerca*)²¹⁵. On 15 December 2020, the National Research Program 2021-2027²¹⁶ was approved at CIPE, as result of a broad and in-depth discussion initiated by the Ministry of University and Research with the scientific community, with the administrations of the State and regional entities, and extended, through a public consultation, to public and private stakeholders and civil society.

Under the Italian law 150/2000, the *Consiglio Nazionale delle Ricerche* (CNR)²¹⁷ was established with the aim of enhancing information provided by scientific Departments, research Institutes and offices by issuing press releases and notes and handling the overall media communication. The office of CNR releases the web magazine *Almanacco della Scienza* and makes available a daily press review operated in collaboration with a specialized service, monitoring thousands of newspapers, magazines, journals, as well as television and radio programs: a collection of the most relevant press platforms is also provided by email.

The CNR, in its webpage, shows the qualifications whose ISSN has been definitively validated, grouped by topics according to a Dewey scheme for macrodiscipline, adapted and simplified. Regarding:

- (1) Information science, data processing, computer science:
 - ISSN 2421-129X, Data value [txt] Bimonthly www.editricetemi.com
 - ISSN 2283-5997, The great software of Win Magazine [txt] Monthly edmaster.it
 - ISSN 2283-5717, Win Magazine. The great guides [txt] Monthly edmaster.it
 - ISSN 2421-2810, Libraries today trends [txt] Semiannual www.editricebibliografica.it
 - ISSN 2421-4663, EmergingSeries Journal [online] <http://www.emergingseries.net/index.php/es-journal>
- (2) Media, Topical Journalism, Publishing:
 - ISSN 2421-3675, Il Giornale della Provincia [Rome, txt] Newspaper www.ilgiornaledellaprovincia.it
 - ISSN 2420-8671, Front page Reggio [Reggio Emilia, txt] Newspaper www.primapaginareggio.it
 - ISSN 2421 -3217, Il Corsivo [txt] Weekly www.facebook.com/ilCorsivoasettimanale
 - ISSN 2421-6666, L'Occhio indiscreto [txt] www.locchioindiscreto.it
 - ISSN 2465-1036, Saturday evening [online, <http://www.sabatosera.it/digital/>]
 - ISSN 2465-1095, Novara today online, <http://edizioniidigitali.netweek.it/dmedia/books/151127novara/>

Among the most important organizations in Italy, the Communications Regulatory Authority (*Autorità per le Garanzie nelle Comunicazioni*, AGCOM) stands out. In particular, the *Osservatorio sul giornalismo* of AGCOM, that is “a privileged and direct tool for comparison with Italian journalists. In fact, within the Observatory, a series of questions are addressed aimed at bringing out the point of view of information professionals regarding the evolution of the profession, the quality and criticalities of their role in the current phase; the effects induced by technological innovation; the critical issues, challenges and opportunities associated with the current change of scenario; the need to search for new identities and new visions in response to the generalized crisis of the traditional communication sectors”²¹⁸.

²¹⁵ Web page of *Ministero dell'Università e della Ricerca*: <https://www.mur.gov.it/it/aree-tematiche/ricerca/programmazione/programma-nazionale-la-ricerca>

²¹⁶ PNR (2021-2027). *Programma nazionale per la ricerca*: <https://www.mur.gov.it/sites/default/files/2021-01/Pnr2021-27.pdf>

²¹⁷ Web page of National Research Council (CNR): <https://www.cnr.it/en>

²¹⁸ Website of *Osservatorio sul giornalismo*: <https://www.agcom.it/osservatorio-giornalismo>

Proof of its commitment to the current situation after the pandemic, AGCOM recently published a study about the journalistic profession and journalists: *“La professione alla prova dell'emergenza Covid-19”*²¹⁹. In this report, the AGCOM commission underlines the phenomena as the disinformation, the changes in the relationship between journalists and their informative sources and media system, and the new working conditions of journalists.

Although there are no official records of professionals dedicated to communication in all its fields (including journalism and media), in addition to these institutions of the state there are other associations, organizations and professional institutions related to the journalistic and related areas:

- Federazione Nazionale della Stampa Italiana (Fnsi)²²⁰.
- Consiglio Nazionale Ordine dei giornalisti²²¹.
- Aeranti-Corallo, Le imprese radiotelevisiva locale, satellitare e via internet²²².
- USPI - Unione Stampa Periodica Italiana²²³.
- Dipartimento per l'informazione e l'editoria. Presidenza del consiglio de Ministri²²⁴.
- ARTICOLO21²²⁵.
- Ossigeno Informazione²²⁶.
- Centro di Studi ed Iniziative Culturali²²⁷.
- Giornalisti Italia²²⁸.
- Associazione Carta di Roma²²⁹.
- Centro di Documentazione Giornalistica²³⁰.
- Fondazione sul giornalismo italiano “Paolo Murialdi”²³¹.
- Stampa del Consiglio Nazionale delle Ricerche²³².

As we anticipated in this report, universities and faculties of communication (and related fields) play a fundamental role in the specialization of professionals in these fields and the dissemination of research in Italy:

Degrees:

- ◆ Corso di laurea in comunicazione (Padova): Università degli Studi di Padova.
- ◆ Corso di laurea in comunicazione d'impresa, marketing e pubblicità (Roma, Lumsa): Libera Università “Maria Ss. Assunta”.
- ◆ Corso di laurea in comunicazione e dams (Arcavacata di rende): Università della Calabria.
- ◆ Corso di laurea in comunicazione e marketing (Modena): Università degli Studi di Modena e Reggio Emilia.
- ◆ Corso di laurea in comunicazione e psicologia (Milano): Università degli Studi di Milano.

²¹⁹ Link to this report: <http://bit.ly/3hbf1An>

²²⁰ Website <https://www.fnsi.it/che-cose-la-fnsi>

²²¹ Website <https://www.odg.it/>

²²² Website <https://www.aeranticorallo.it/chi-siamo/>

²²³ Website <http://www.uspi.it/Home.html>

²²⁴ Website <https://informazioneeditoria.gov.it/it/>

²²⁵ Website <https://www.articolo21.org/contatti>

²²⁶ Website <https://www.ossigeno.info/>

²²⁷ Website <http://www.piolatorre.it/>

²²⁸ Website <https://www.giornalistitalia.it/>

²²⁹ Website <https://www.cartadiroma.org/contatti/>

²³⁰ Website <http://www.cdweb.it/cosa-facciamo>

²³¹ Website: <http://www.fondazionemurialdi.it/>

²³² Website: www.almanacco.cnr.it

- ◆ Corso di laurea in comunicazione e relazioni pubbliche (Catania): Università degli Studi di Catania.
- ◆ Corso di laurea in comunicazione e società (Milano): Università degli Studi di Milano.
- ◆ Corso di laurea in comunicazione interculturale (Torino): Università degli Studi di Torino.
- ◆ Corso di laurea in comunicazione interculturale e multimediale (Pavia): Università degli Studi di Pavia.
- ◆ Corso di laurea in comunicazione internazionale e pubblicitaria (Perugia): Università per Stranieri di Perugia.
- ◆ Corso di laurea in comunicazione linguistica e multimediale (Firenze): Università degli Studi di Firenze.
- ◆ Corso di laurea in comunicazione nella società della globalizzazione (Roma): Università degli Studi "Roma Tre".
- ◆ Corso di laurea in comunicazione, innovazione e multimedialità (Pisa): Università degli Studi di Pisa.
- ◆ Corso di laurea in comunicazione, lingue e culture (Siena): Università degli Studi di Siena.
- ◆ Corso di laurea in comunicazione pubblicitaria (Urbino): Università degli Studi di Urbino Carlo Bo.
- ◆ Corso di laurea in comunicazione scientifica (Torino): Università degli Studi di Torino.
- ◆ Corso di laurea in comunicazione sociale (Messina): Università degli Studi di Messina.
- ◆ Corso di laurea in culture per la comunicazione (L'Aquila): Università degli Studi dell'Aquila.
- ◆ Corso di laurea in filosofie e scienze della comunicazione e della conoscenza (Arcavacata di Rende): Università della Calabria.
- ◆ Corso di laurea in informazione, media, pubblicità (Urbino): Università degli Studi di Urbino Carlo Bo.
- ◆ Corso di laurea in linguaggi dei media (Milano): Università Cattolica del Sacro Cuore.
- ◆ Corso di laurea in lingue e comunicazione (Cagliari): Università degli Studi di Cagliari.
- ◆ Corso di laurea in lingue e cultura per l'impresa (Urbino): Università degli Studi di Urbino Carlo Bo.
- ◆ Corso di laurea in lingue per la comunicazione internazionale (Catania): Università degli Studi di Catania.
- ◆ Corso di laurea in media e giornalismo (Firenze): Università degli Studi di Firenze.
- ◆ Corso di laurea in pubblicità, marketing e comunicazione aziendale (Teramo): Università degli Studi di Teramo.
- ◆ Corso di laurea in relazioni pubbliche (Udine): Università degli Studi di Udine.
- ◆ Corso di laurea in scienze dell'informazione: curriculum in editoria e giornalismo (Messina): Università degli Studi di Messina.
- ◆ Corso di laurea in scienze della comunicazione:
 - BARI: Università degli Studi di Bari.
 - BERGAMO: Università degli Studi di Bergamo.
 - BOLOGNA: Università degli Studi di Bologna.
 - CAMPOBASSO: Università degli Studi del Molise.
 - CASSINO: Università degli Studi di Cassino.
 - CATANIA: Università degli Studi di Catania.
 - GENOVA: Università degli Studi di Genova.
 - LECCE: Università degli Studi del Salento.

- o MACERATA: Università degli Studi di Macerata.
 - o MILANO: Università degli Studi di Milano-Bicocca.
 - o MODENA: Università degli Studi di Modena e Reggio Emilia.
 - o NAPOLI: Istituto Universitario “Suor Orsola Benincasa”.
 - o PERUGIA: Università degli Studi di Perugia.
 - o ROMA LUMSA: Libera Università “Maria Ss. Assunta” and Università degli Studi di Roma “Tor Vergata”.
 - o SALERNO: Università degli Studi di Salerno.
 - o SIENA: Università degli Studi di Siena.
 - o TORINO: Università degli Studi di Torino.
 - o TRIESTE: Università degli Studi di Trieste.
 - o VARESE-COMO: Università degli Studi dell'Insubria.
- Corso di laurea in scienze dell'informazione: comunicazione pubblica e tecniche giornalistiche (Messina): Università degli Studi di Messina.
 - Corso di laurea in scienze della comunicazione e dell'amministrazione (Teramo): Università degli Studi di Teramo.
 - Corso di laurea in scienze della comunicazione e dell'animazione socioculturale (Bari): Università degli Studi di Bari.
 - Corso di laurea in scienze della comunicazione e delle relazioni istituzionali (RomaLuiss): Libera Università Internazionale degli Studi Sociali Guido Carli.
 - Corso di laurea in scienze della comunicazione e giornalismo (Sassari): Università degli Studi di Sassari.
 - Corso di laurea in scienze della comunicazione: editoria e giornalismo (Verona): Università degli Studi di Verona.
 - Corso di laurea in scienze della comunicazione per i media e le istituzioni (Palermo): Università degli Studi di Palermo.
 - Corso di laurea in scienze della comunicazione per le culture e le arti (Palermo): Università degli Studi di Palermo.
 - Corso di laurea in scienze della comunicazione pubblica e d'impresa (Roma): Università degli Studi di Roma “La Sapienza”.
 - Corso di laurea in scienze della comunicazione politica e sociale (Milano): Università Cattolica del Sacro Cuore.
 - Corso di laurea in scienze e tecniche dell'interculturalità (Trieste): Università degli Studi di Trieste.
 - Corso di laurea in scienze e tecniche della comunicazione (Viterbo): Università degli Studi della Tuscia.
 - Corso di laurea in scienze e tecnologie della comunicazione:
 - o FERRARA: Università degli Studi di Ferrara.
 - o MILANO IULM: Libera Università di Lingue e Comunicazione.
 - o ROMA: Università degli Studi di Roma “La Sapienza”.
 - Corso di laurea in scienze e tecnologie multimediali (Udine): Università degli Studi di Udine.
 - Corso di laurea in scienze umanistiche per la comunicazione (Milano): Università degli Studi di Milano.
 - Corso di laurea in tecnica pubblicitaria:
 - o ROMA LUMSA: Libera Università “Maria Ss. Assunta”.
 - o TRIESTE: Università degli Studi di Trieste.

- Corso di laurea in tecniche della comunicazione e della web economy (Viterbo): Università degli Studi della Tuscia.
- Corso di laurea in teoria e tecnica dell'informazione (Sassari): Università degli Studi di Sassari.⁷

Universities, however, have an unequal role in this area of research, depending on their researchers and communication departments²³³:

Best Communication and Marketing Universities of 2022 in Italy: Bachelor's Degree

1. Università di Milano Bocconi, 109,5 punti
2. Università di Trento, 106,5 punti
3. Università di Bologna Alma Mater Studiorum, 106 punti
4. Università di Trieste, 104 punti
5. Università di Bolzano, 103 punti
6. Università di Roma Tor Vergata, 103 punti
7. Università di Firenze, 98 punti
8. Università di Siena, 96,5 punti
9. Università di Roma LUISS, 95 punti
10. Università di Genova, 93,5 punti
11. Università di Pavia, 93 punti
12. Università di Parma, 92,5 punti
13. Università di Milano Bicocca, 91,5 punti
14. Università di Perugia, 91,5 punti
15. Università di Milano Statale, 91 punti
16. Università di Padova, 91 punti
17. Università di Milano Cattolica, 90,5 punti
18. Università di Ferrara, 90,5 punti
19. Università di Insubria, 88,5 punti
20. Università di Torino, 88,5 punti

Specialized Degree in Communication and Marketing (2022 ranking)

1. Università di Roma Tor Vergata, 102 punti
2. Università di Padova, 99 punti
3. Università di Venezia Ca' Foscari, 97 punti
4. Università LUISS Roma, 96 punti
5. Università di Bologna 95,5 punti
6. Università di Milano 94,5 punti
7. Università di Macerata 93,5 punti

²³³ Webpage of Censis: <https://www.censis.it/>

8. Università di Siena 93,5 punti
9. Università di Pavia 93 punti
10. Università di Torino 90,5 punti
11. Università di Palermo 90 punti
12. Università di Roma LUMSA 90 punti
13. Università di Perugia 89,5 punti
14. Università di Trento 88,5 punti
15. Università di Milano Cattolica 88 punti
16. Università della Calabria 87,5 punti
17. Università della Campania Luigi Vanvitelli 87 punti
18. Università di Roma - Link Campus 86,5 punti
19. Università di Verona 86 punti
20. Università di Milano IULM 85,5 punti

As far as journalism is concerned specifically (reform of the 2000s), the *Ministero dell'istruzione, dell'università e della ricerca* included 13 types of degrees in publishing, multimedia communication and journalism. And the Order of Journalists (2022) recognizes 11 in Italy²³⁴:

- Master Biennale in Giornalismo a Stampa, Radiotevisivo e Multimediale Università Cattolica Sacro Cuore (Milano).
- Master biennale di I livello in Giornalismo della Libera Università di Lingue e Comunicazione IULM (Milano).
- Master biennale di I livello in giornalismo dell'Università degli Studi di Milano/IFG - (Scuola di giornalismo "Walter Tobagi") a Sesto San Giovanni (Milano).
- Master in Giornalismo "Giorgio Bocca" dell'Università di Torino (Torino).
- Master biennale di I livello in Giornalismo – Alma Mater Studiorum Università di Bologna (Bologna).
- Istituto per la Formazione al Giornalismo di Urbino (Urbino).
- Scuola di giornalismo radiotevisivo di Perugia (Perugia).
- Scuola Superiore di Giornalismo "Massimo Baldini" dell'Università LUISS Guido Carli (Roma).
- Master biennale di I livello in Giornalismo della Libera Università SS. Assunta (LUMSA) (Roma).
- Master biennale di I livello in Giornalismo dell'Università di Bari (Bari).
- Scuola Post Laurea in Giornalismo dell'Università di Salerno (Salerno).
- Master biennale di I livello in Giornalismo dell'Università Suor Orsola Benincasa di Napoli (Napoli).

In Italy there are several journals focused on communication and its related fields, but only seven are indexed in Scopus: *Journal of Science Communication* (Q2), *Qwerty* (Q3), *Comunicazione Politica* (Q3), *Comunicazioni Sociali* (Q4), *Reti Saperi Linguaggi* (Q4), *Visual Ethnography* (Q4) and *Languages Cultures Mediation* (Q4)²³⁵.

²³⁴ Webpage of Ordine Dei Giornalisti: <https://www.odg.it/wp-content/uploads/2019/05/Q.I.-scuole-autorizzate-27-settembre-2018.pdf>

²³⁵ The rest of the information about these journals in the appendices.

6.3.3. Individual researchers in the domains related to deliberative communication

The **legal and ethical regulation domain** has been well-researched by Italian scholars over the last twenty years, although we must consider that the legal and regulatory norms determine this domain. Both at the legislative and administrative level (*Costituzione della Repubblica Italiana* and *Codice penale italiano*, *Autorità per le Garanzie nelle comunicazioni*, as main examples) and professional rules (e.g., *Ordine dei Giornalisti*, *Associazione Carta di Roma*). The domain of legal and ethical regulation is more studied at an academic level with regard to freedom of expression (defamation, privacy, disinformation, copyright, among others) and information (access to documents, the protection of journalistic sources, whistleblowing, trade secrets and transparency in media ownership, among others). One fifth (17%) of the research carried out on the four domains concerning deliberative communication in Italy focuses on this domain.

Although the first legal and regulatory references and studies were raised by the Government at legislative level (Constitution) and professional regulatory norms (*Ordine dei Giornalisti*), academic studies have been taking on greater relevance since 2013, becoming more noticeable in the last two years - A growth trend in research that is maintained in the four domains studied due to the greater number of high-impact publications that have been published in recent years. Not only at the national level, with special relevance to universities located in Milan (Pierri, 2020; Splendore, 2016, 2017; Mazzoleni, 2006), Rome (Grisolia, 2020; Martino, 2021; Bentivegna, 2020), Turin (Scamuzzi et al. 2021), Bologna (Razzante, 2005), Perugia (Mancini, Mazzoni, Barbieri, Damiani and Gerli, 2021), among others; but also at international level as Lugano (Porlezza, 2019; di Salvo, 2020; Puppis, 2007), Dublin (Cornia, 2016), Edinburgh (Craufurd Smith, 2021), New York (Molé, 2013).

The best researcher domain in Italy is the **Journalism field**. Specifically, in areas such as market condition, production, public service media, working conditions, organization, professional culture and journalistic competencies. More than half (56.4%) of the studies carried out on the four domains concerning deliberative communication in this country focuses on this domain. Although the reports that establish the professional regulatory standards in journalism published by journalists' associations (*Ordine dei Giornalisti*, *Carta di Roma*, AGCOM) stand out, academic studies have been taking on greater relevance in the last twenty years, especially since the beginning of the second decade of this millennium, for their constant growth and international relevance within the academic community.

In the study of journalism, notable universities located in Italy include Milan (Mazzoleni, 2006; Splendore, 2016, 2020; Carlo and Mazzanti, 2020; Mattoni and Ceccobelli, 2018; Calliandro and Airoldi, 2016; Rega, 2017; Vigevari; Curini, 2020; Garusi and Oller, 2022), Rome (Cultrera, 2006; Grisolia, 2020; Giglioni, 2004; Bentivegna and Marchetti, 2018), Perugia (Mancini, Mazzoni, Barbieri, Damiani and Gerli, 2021; Gerli, Mazzoni and Mincigrucci, 2018), Naples (Bifulco, Tirino and Castellano, 2022; Marrazzo, 2020; Avvisati, 2015), Pisa (Bracciale, 2020; De Gracia, 2013; Martella, 2016; Mattoni and Ceccobelli, 2018), Siena (Bentivegna and Rega, 2020), Florence (Sorrentino, 2002, 2022), Parma (Ferrandi, 2011), Udinese (Fortunati, 2010), Ferrara (Gardini, 2004, 2008), Catania (Nicolosi, 2019), Bologna (Barbieri, Campus and Mazzoni, 2019), Venice (Azzalini, 2015), Piemonte (Pogliano and Ponzio, 2019), Udine (Fortunati, 2021), among others.

However, other universities are in different countries, in cities like Lugano (Portezza, 2016; Richeri and Prario, 2016; Corchia and Bracciale, 2020; Prario, 2005; Evens, 2012), Zürich (Humprecht and Esser, 2018; Humprecht and Büchel, 2013; Zerback, 2020), Dublin (Cornia, 2016; O'Sullivan, Fortunati, Taipale and Barnhurst, 2017), Oregon (Russ-Mohl, 2012), Hamburg (Engesser and Brüggemann, 2016), Louvain (Standaert, 2021), Oxford (Örnebring, 2013) and London (Dalpiaz and Ravasi, 2010; Markova and McKay, 2013).

This is mainly due to two aspects. First, because there are Italian researchers who study the journalistic context in Italy who work in universities abroad. Second, and gaining increasing prominence, the interest of universities from other countries and international comparative studies (WJS, Journalistic Role Performance, ECREA, PHARM, among others) have offered an external and comparative perspective of Italian journalism that has opened other interesting fields of study. At international level, the role of Switzerland stands out; Switzerland has a not insignificant research production due to its language parity, geographical proximity, and its professional link because a considerable number of Italian researchers work in Swiss universities (something that is reproduced in all analysed domains in this report).

The **domain of Media usage patterns** is well-researched in Italy since the second decade of this millennium, especially regarding access to media and diversity in the media system in universities in Rome (Mingo, 2009, 2015, 2018), Milan (Splendore, 2020; Mosca, 2017), Pisa (Bracciale, 2018; Andretta and Bracciale, 2017) and Bologna (Valeriani, 2018). The second variable most highlighted is the relevance of public service media, especially in universities located in Ferrara (Gardini, 2004, 2008) and Milan (Orofino, 2011).

For its part, functionalities of media (Torald, Vergari and Torald, 2015 from University of Salento; Calenda and Mosca, 2007 from University of Florence; Tosoni and Tarantino, 2013 from Catholic University of Milan; Fortunati and Vaccari, 2016/2021 from University of Southampton), trust in media (Splendore and Curini, 2020 and Ricci, 2021 from University of Milan; Memoli, 2014 from University of Catania; Lovari, 2020 from University of Cagliari; Stefani, Cavicchi and Romano, 2008 from University of Florence; Pogliano, 2015 from University of Piemonte; Bordignon and Ceccarini, 2020 from university of Urbino), and relevance of news media (Mosca and Quaranta, 2016 from University of Florence; Curini, 2020, Ceron and Splendore, 2018 from University of Milan; Bentivegna and Marchetti, 2019 from University of Rome; Steppat, Castro Herrero and Esser, 2021 from University of Zürich) according to users have matured in the last decade.

Other fields of study such as quality of news media (Corchia and Bracciale, 2020 from university of Pisa), media literacies policies (Doni, 2015 from university of Rome; Cappello and Rizzuto, 2020 from University of Palermo; Ranieri, Fabbro and Nardi, 2019 and Tirocchi, 2017 from university of Turin; Silva, 2017 from university of Verona) and access to media and channel preferences (Mosca and Quaranta, 2016 from university of Florence; Curini, 2020 from university of Milan) are incipient in Italy.

One fifth of the research carried out in the four domains concerning deliberative communication in Italy focuses on this domain (20.66%). Although the reports published by the *Autorità per le Garanzie nelle Comunicazioni* (AGCOM) stand out, academic studies have been taking on greater relevance since 2016. In the study of media usage patterns, featured universities located in center/north of Italy (Milan, Rome, Florence, Pisa, and Bologna). As in the rest of the domains studied, the Universities of Lugano (Richeri and Pario, 2016; Cola and Prario, 2012) and Zürich (Humprecht and Büchel, 2013; Castro-Herrero and Nir, 2018) maintain a strong link with Italy, systematically producing publications focused on this country in a comparative perspective.

The domain of **media usage related competencies** is analysed in a partial and unbalanced way, constituting itself as the least investigated research area. Only slightly more than five percent (5.9%) of the investigations carried out around the four domains concerning deliberative communication in Italy focus on this domain. Although there are some publications at the beginning of the second decade of this century, the truth is that it was not until 2017 when there began to be a certain systematization of these publications, mainly by a small group of researchers who work, mainly, at the Universities of Pisa (Andretta and Bracciale, 2017) and Rome (Mingo, 2018).

Similarly, some of the longitudinal data that exists for Italy around media usage related competencies comes from reports published by international institutes, mainly European (Bauer & Clemm von Hohenberg, 2021 from Mannheim Centre for European Social Research and European University Institute; Lessenski, 2021 from Open Society Institute; European Commission, 2012).

7. Conclusions

The extent to which these data are produced and properly analyzed may be an undeniable sign of the wealth of the *ROs sub-field* of deliberative communication in terms of both capabilities to regulate itself and propose policies able to exploit opportunities at the expense of risks. We can confirm based on our meta-analysis that this sub-field (ROs) in Italy maintains three different characteristics in terms of deliberative communication related to the four main domains (Legal and Ethical Regulation, Journalism, Media Usage Patterns and Media-Related Competencies):

1. It is characterized by a low level of collaboration: The actors involved rarely implement common strategies to reach the goal. A lack of collaboration that is increasing between academic training and research institutions, public bodies, specialized and statistical centers and institutes, and professional media and journalistic associations.
2. The work of those actors, except for public bodies, has a low level of recognition (e.g., scholars may gain their awards in terms of prestigious publications, but not in terms of publicity to a broader audience).
3. The data and analyses from universities, research institutes, professional associations, among others, rarely become attention when addressing public policies.

The Italian team of MediaDelCom assumed in the introduction of this report that the extent to which data is produced which is able to measure risks and opportunities for deliberative communication is a sign of the wealth of the ROs sub-field. As mentioned in the previous paragraph, the lack of data production does not seem to be a problem in the Italian ROs sub-fields. Accordingly, we can affirm that this peculiar Italian sub-field retains both the capability to monitor itself and to propose solutions to enlarge opportunities to the detriment of risks.

This wealth related to the ability to analyze ROs in the Italian context is essentially due to the definitive institutionalization in Italian universities of the communication disciplines (political communication, media studies, and more recently journalism studies). The academic sphere has ensured that the attention to these issues remains high. The little impact that these analyses have on the legislative process has been already discussed above. Of course, the production of data and reports in the ROs field does not depend only on academia.

In recent years, institutes or observatories have been created (and sometimes rapidly disappeared) that monitor the performance of the media in relation to the proper functioning of democracy. In this scenario, there is probably a lack of decisive help from the news media themselves. Newspapers that at least offer media critics capable of rekindling the debate on ROs are rare. A commendable example is the weekly newsletter “Charlie” published by the digital newspaper *Il Post*.

Beyond the availability of data and reports, it is necessary to note that those who produce them are unlikely to be connected/associated. In short, there is a parallel production between academia on the one hand and other private organizations on the other; this double-track leads to the incommunicability between the two.

As already we have discussed in this report, a weakness of this production of data and documents is the evident prevalence of the legal discourse about the production of policies. The con-

textual wealth and conflict (or in any case the non-existence of dialogue) results in the production of further risks.

By briefly reviewing the four domains it can be stated that:

About the (1) legal domain, the future of evaluations of ROs should take into account the conflict between open data vs privacy protection. Another aspect only mentioned and not dealt with in-depth, is instead that linked to the excessive production of laws (the already-mentioned domain of the legal context) which makes it more difficult to analyze, but above all to realize, the opportunities that the media transformation opens.

In the (2) journalism domain, beyond the ignored work of the academia, there is an evident conflict between actors who try to define the field of ROs. Journalists and their representative bodies on the one hand, and publishers on the other, try to increase their authority not so much to strengthen the democratic opportunities of media transformation but to survive the economic crisis. The result is the offer of divergent analysis and solutions that in practice risk transforming opportunities into risks (think of clickbait practices or reader loyalty in terms of polarization, or the proliferation of soft news).

Regarding the (3) media usage domain, it can be said that it is the context where the production of analysis and data is most present. Considering the characteristics of the network, we are witnessing an adaptation of the production of information content to the logic of the new media. In this situation, however, academic research and stakeholders see a weakening of the deliberative public debate. The debate around political misinformation is gaining increasing relevance among the general and academic audience. If a large body of work is devoted to understanding the mechanisms of diffusion of inaccurate/fake news contents (especially on social media), few studies have focused on the individual mechanisms by which people believe in that news (Vegetti and Mancosu, 2020). In a recent publication²³⁶ of Marco Gui, professor at the Department of Sociology and Social Research, University of Milan, highlighted the phenomenon of inconsistency in the choice of media, especially regarding the dissatisfaction towards of the contents. An example is talk shows where verbal attacks between politicians take place²³⁷.

Finally compared to the (4) media-related competencies domain, it can be said that it is the field in which Italian academic research intervenes least and in which the interventions of other actors are absent. The hypothesis is that these would be long-term structural interventions.

²³⁶ Gui, M., Shanahan, J. & Mina Tsay-Vogel, M. (2021). Theorizing inconsistent media selection in the digital environment. *The information society*, 37, pp. 247-261.

²³⁷ Interview made by Martín Oller Alonso (August, 2022).

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LATVIA

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive summary

Analysing the scientific publications dedicated to the development of journalism and media in Latvia during the twenty years from 2000 to 2020, this article presents conclusions about the research basis that could affect the state of deliberative communication. Academic studies content that reflects the situation of journalism, media use, legal and ethical regulation and media-related competencies, describes the research environment, research issues and their scientific quality.

Analysis of the bibliographic data (317 publications) shows that the media and journalism landscape in Latvia has been studied in a fragmented manner. The quality of media studies and communication research in Latvia is low. Due to a lack of resources, the number of studies is limited, and the scale of internationally referenced publications is small, as well as the studies cover a limited range of media and journalism problems.

The risks of deliberative communication are related to the gaps in knowledge and lack of impact of the research on both media policy and the public. This is a result of the low level of research, small number of experts, sporadic and non-continuity of data, lack of original and creative approaches in the research field, weak international networking, and exchange. The recent developments in the field (more structured science funding system, requirements for scientific publications, young doctors in the field) are indicating opportunities to diminish the risks. However, this is not possible without strengthening research in the areas of media law, media economy and management as well as regarding new challenges for journalism caused by technological development. Limited research opportunities mean that Latvian media researchers, if possible, follow the current trends in research, but are unable to make an in-depth contribution to the development of communication and media theories.

1. Introduction

According to the tradition of social sciences research in Baltic states, communication and media studies mostly focus on each country's unique experience and analyse different ways of solving similar problems in the development of the media and journalism (Vihalemm, 2001; Balčytienė, 2012). Latvia is as a part of Eastern Europe, and this fact automatically assumes that the country belongs to the part of the world associated with 20th century history and its aftermath, identifying the countries as a post-communist and post-soviet space with all the consequences thereof. This status helps in contrasting Eastern Europe (EE) (often Central and Eastern Europe or CEE) and Western Europe, judging such by the quality of democracy, political culture, and level of economic development. Media environment studies are dominated by this contrast, and it also

identifies the unstable status of CEE communication and media studies (Demeter, 2020, Harro-Loit, 2015; Stetka, 14 June 2015), highlighting the compliance of Baltic and/or CEE with the principles of Western media practices among analytical criteria.

Context 1: Latvia in numbers

Population: According to the data of the Statistical Yearbook of Latvia, in 2020, Latvia (64,500 square kilometres) had a population of 1.9 million (Central Statistical Bureau of Latvia, 2021).

Minorities and languages: Latvia is not ethnically homogenous: 62% of the population is Latvian, 25% Russian, 3.2% Belarusian, 2.2% Ukrainian, 2.1% Polish, and 4% other. Sixty-one percent of the Latvian population speaks Latvian as the first language, 36% – Russian, 3% – other (Central Statistical Bureau, 2018). The largest historical regions of Latvia (Kurzeme, Zemgale, Vidzeme) speak Latvian most in the family (75%-91%). However, the Eastern region of Latgale paints a different picture: 60% of the population speaks Russian in the family, 39% speaks Latvian (Central Statistical Bureau, 2020). In the capital city Riga, more of the population speaks Russian at home (56%), whereas 43% use Latvian.

Context 2: Latvia's media landscape and media system

To understand the development of Latvia's media environment and public service media (Public Service Media, PSM), the analytical approach of the media system is mostly used. On the one hand, it offers an internationally acclaimed structure and stable tradition (Hallin & Mancini, 2004), on the other hand, it has led to the conclusion that criteria characteristic to Western countries are only partially usable for CEE or EE media systems (Dobek-Ostrowska, 2015, Gross, 2004). Moreover, in this approach, Latvia (or the Baltic states) is analysed together with other CEE countries without focusing on the historical specifics and context of their media culture. Adapting the principles of Western media practice to the new, independent CEE media environments has highlighted difficulties related to media practice and journalism quality principles defined in normative theories (McQuail, 2010). Among other problems on the list compiled by several authors, political influence on the media, insufficient financing of public service media, clientelism in the relationships with information sources (Balčytienė, 2012; Balčytienė, 2015, Örnebring, 2012, Bajomi-Lazar, 2015), problems in journalism ethics (Dimants, 2018) can only partially describe the Baltic media environment in the transition from a centralised, state-controlled system to independent media activity in a free market.

Karol Jakubowicz (2004) has criticised the 'idealisation' based approach of Western media criteria usage for the evaluation of CEE media systems. Analysing the road of media systems and PSM transformation, he focuses on 'imitation' and 'mimetic development' so that CEE media can come close to the Western PSM level. These attempts mean copying the practice models of Western European and North American PSM (Jakubowicz, 2004), which is comparable to a moving target (Gross, 2004). In fact, copying the Western approach in media policy, as per Jakubowicz, has not helped to escape the 'atavistic' direction of the media system development, which means that CEE countries, including Latvia, have often attempted to conjoin the 'new' and 'old' system when creating a new media structure and new PSM, and these PSM still represent the hegemonic and guardianship functions as the new political elite try to preserve the paternalistic orientation in media regulation.

In the analysis of Latvia's media system development, the peculiarities of small countries' media systems are rarely considered (Puppis, 2009), nor is the coexistence of PSM and the powerful commercial media system battling for resources and users compared (Sehl et al., 2020; Nielsen, 2014), and on the political level and audience discourse, the necessity of PSM funding and efficiency is doubted. At the same time, PSM, just like other media, must continue developing in the environment of technology and social change, where PSM are still assessed by Western criteria.

Four criteria have traditionally been employed to characterise media systems (Hallin, Mancini, 2004): the role of the state, the influence of politics, regulation level, and the professional quality of journalism. The liberal structure of Latvian media regulation allowed a diverse media system to develop; at the same time, the media environment is characterised by oligopolistic competition and a high level of concentration (Jastramskis et.al, 2017). Using Hallin and Mancini's (2004) media system models, the authors of the Democracy Audit of Latvia (2014) described the Latvian media system as hybrid, as it lacks a dominant paradigm (Skudra et al., 2014). The important role of the market in media landscape regulation and the lack of support for professionally competitive and cultural media, are, according to the authors, indicative of a liberal model. Democratic corporate model features are evidenced by the efforts to strengthen public service media (PSM) and a few media professionalisation activities in the country. The presence of political parallelism in the media environment and the great influence of political public relations on media content mark the signs of a polarised pluralistic model.

The three models of media systems developed by Hallin and Mancini describe Western European and United States media systems and have always been difficult to adapt for the analysis of the media environment of Latvia and other Central and Eastern European (CEE) countries.

Media market and audiences: Media choice in Latvia is largely determined by ethnic group and geographical factors. Representatives of different ethnical groups in Latvia acquire their daily information from different sources; Latvians generally trust and use the media in Latvian, whereas the Russian-speaking prefer the TV channels controlled by the Russian government (Nacionālā elektronisko plašsaziņas līdzekļu padome, 2017, 2018, 2020). Survey data show that the population of Latvia still prefers television over other media (89% of respondents) (Nacionālā elektronisko plašsaziņas līdzekļu padome, 2020). 83% of the population listen to the radio, 79% read news on the internet, 72% use social media, and 71% read the press in print or online.

The Latvijas Fakti (2018) study shows the influence of the Russian media in Latvia, as 38% of the respondents use Russian media. Latvijas Fakti (2018) analysis of the most popular media reveals that commercial media are the most popular, followed by public and regional media.

According to Eurobarometer data (Standard Eurobarometer, 2014, 2015, 2016, 2017, 2018; Statista 2019) data, the population of Latvia trusts the radio and television the most. Moreover, the average level of trust in traditional audio-visual media among Latvian respondents is higher than the EU average by 6%-12% (from 58% in 2010 to 63% in 2016). Trust in printed press in Latvia is similar to the EU average (approx. 41%). Since 2010, the population of Latvia has trusted internet media more than the EU average (from 46% in 2013 to 34% in 2018, as compared to EU 35%). A similar trend can be observed with social media use: Latvia's respondents reveal a higher level of trust (21%-27%) than the EU average (around 20%).

The liberal structure of Latvian media regulation has not only facilitated the development of internet media, but also poses problems with the responsibility of players in the digital sphere. The definition of internet media is general in media laws in Latvia, and media founders are not obliged to register with the media registry. This is the main reason why information providers who offer different hybrid media and hybrid journalism formats without identifying their goals, sources of revenue, and owners, have also developed their activities in Latvia's digital environment (Polis, 26 May 2017).

This has caused various problems, such as the rapid development of fake news sites, and regular copyright infringement as internet media republishes content by other media. As with traditional media, the content available on the internet is influenced by political public relations and communication aimed at ruining the reputation of political competitors and interfering in their privacy. At the same time, Latvia is improving the regulation of the monitoring of political advertising in the internet environment.

While some internet news portals have formulated user rules, only a few have codes of professional ethics. Although user-generated content is monitored and edited by internet media organisations, the environment of internet media users is characterised by aggressive communication, verbal attacks and hate speech. Law enforcement institutions in Latvia are gradually developing practices to prevent hate speech in the digital environment.

Analysis of digital environment pluralism indicators of Media Pluralism Monitor (2020) show that the basic protection indicator data reflects low risk. The society of Latvia can use universal reach to media and access to the internet; up to eighteen per cent of the population use the internet on a regular basis. General Laws protect freedom of expression; this is clearly defined in law and the norms apply to the online environment.

Latvia has adequate regulation to guarantee net neutrality, and in recent years there has been no violation of net neutrality by the government. According to Media Pluralism Monitor 2021 (MPM) data in 2020, in Latvia a low risk is still preserved in the field of Fundamental Protection that refers to the protection of freedom of expression, protection of right to information and access to the internet, independence and effectiveness of media authority, and journalistic profession, standards and protection. The data show that access to information and freedom of expression in the country are guaranteed by a legal framework. In Latvia, access to information is enshrined in the constitutional laws; the government has accepted international agreements regulating access to information and the right to information. In 2020, a new law on Public Service Media and Its Governance was adopted, which is intended to reduce the political influence on the public media authority. The law entered into force on 1 January 2021.

MPM Market Plurality indicators constitute a high-risk situation (75%) due to increasing news media and online platform concentration, according to MPM2021 data. The highest increase in concentration is in the digital news media field. Although Latvia has a sufficient level of media viability, media regulatory measures do not envisage sufficient concentration restrictions in the small media market (for example, there are no restrictions on horizontal or cross-media concentration). The high risk of market plurality is determined by the commercial and ownership influence on media content, as well as the lack of transparency of media owners. In 2020, when advertising investments decreased during the pandemic, the continued existence of small, independent media companies was endangered. In this group of indicators, only media viability data indicate a medium risk situation. This shows that Latvian media organisations are gradually adapting to market changes and restructuring their revenue structure, offering both new services and products and introducing modified subscription services.

1.1. Main traditions and turns in the 21st century and current situation of the media research and monitoring system

The Mediadelcom data analysis illustrates the development of quality criteria for scientific publications and research in the social sciences, which includes both the peer review process and the status of national publications. In the second stage of this study period, Latvian researchers started to take part in EU level or global research projects. This increases the number of publications and makes more research data available for open access. The strong focus on the rankings of international higher education institutions requires universities to increase the quality requirements for the publications of the academic staff, therefore the number of internationally indexed publications has been increasing since 2016.

The funding structure of journalism and media research provides an opportunity to understand the quality and the spectrum of research problems selected. It shows that at the national level, most of the media studies projects are small-scale research initiatives carried out by individual researchers, as no stable and successive media/journalism/communication research system has been established during the period covered by the Mediadelcom project. A larger number of

publications were available a few times during this period, when researchers received public institutions or international donor funding. Few high-quality research studies on media and journalistic environments have been promoted by comparative projects initiated by the European Commission or other international institutions.

The literature analysis is based on the following information resources: databases of research institutes of Latvian higher education institutions for internal use, database of experts of the Latvian Council of Science, resources of the National Library of Latvia, international academic databases (SAGE Publications, EBSCO, Erich Plus and others).

In the second stage of the period covered by the Mediadelcom project, researchers from Latvian academic institutions have been involved in major EU-level or global projects. However, the lack of research capacity has prevented representatives of Latvian media studies from gaining the status of a leading partner in important research programmes such as Horizon2020, Cost Action and others. This means that there is a lack of data on important issues of deliberative communication at two levels: first, there is no regular data monitoring and data analysis, and secondly, Latvian data cannot be found in comparative studies that provide insight into the regional, EU or global context. This means that the knowledge gap applies both to the time period covered by Mediadelcom and to the topics and issues included in the project.

1.2. Explanations of any other structural peculiarities that may be important for the report

There are some structural peculiarities influencing the research of communication, media, and journalism in Latvia. First, the lack of clear, concentrated focus caused mainly by the small size of the country, its media audience, number of institutions and individuals involved in research and monitoring, small amounts of funding, individual interest led projects and lack of a strategic plan envisioning development of the media system in the country and need for monitoring/research of the field. In addition, the historical background made conceptualising the field of study, research and administration of media complicated. In post-socialist Latvia, the role of the media in democratic society had to first be re-established. After regaining independence in 1991, the study and research environment for communication, media and journalism was also restructured. New actors typical for civic society (public representative bodies, NGOs, new professional associations) were introduced and contributed to the change of focus. During the Soviet period, the only academic unit for the study direction and research of journalism and communication was the Department of Journalism of the Faculty of Philology at the University of Latvia (former Pēteris Stučka State University of Latvia). It was moved to the newly established Faculty of Social Sciences in 2000, where now the research activities in communication are a part of the focus of the Institute for Social and Political Research.

Main bodies of research and media education

Since 2000, the Faculty of Social Sciences of the University of Latvia has been one of the leading institutions in the field. It only issued research periodicals on the Latvian media research scene – *Daudzveidība* [Diversity] focused on media and democracy, *Agora* was a collection of research papers of projects, *Domino* was a publication of student research works. But all these periodicals only had a couple of issues and were not peer reviewed. The longest-running edition focusing on media and communication issues is the peer reviewed Communication Volume of the *Acta Universitatis Latviensis*, but not all the articles here have issues relevant for the Mediadelcom project. Few relevant research studies (on media-related competences, legal and ethical issues) have been created in other faculties and institutes of the University of Latvia.

At the beginning of the 21st century, there were no doctoral level communication study programmes in Latvia and no doctoral level researchers with a Latvian degree in this specific field –

the first communication science doctors had to defend their theses in other countries and universities. Nevertheless, starting from the last years of the 1990s, study programmes and departments of communication emerged in other universities in Latvia: Riga Stradiņš University, Applied Business university “Turība”, Vidzeme University of Applied Sciences. This list can be continued by two regional higher education institutions – Liepāja University and Rēzekne Academy of Technologies – where researchers of media and journalism work in several departments of university and for some years journalism/communication study programmes were implemented). The Centre for Media Studies at Stockholm School of Economics in Riga has a more concentrated focus on media business and investigative journalism. Along with universities there are institutions for sociological research or political study (for example, Baltic Institute for Social Sciences) as well as NGOs (for example, Providus or Delna) that have contributed to research on media and journalism in the form of study projects on possible risks for civil society and deliberative communication (e.g., minorities, and social integration, hidden political advertising etc.). The commercial research companies (TNS/KANTAR Latvia, Gemius Latvia, SKDS, Latvijas Fakti etc.) involved in regular surveys of media audiences and public opinion must also be mentioned.

However, even if the number of institutions and persons involved in research on media and journalism may seem significant for a small country like Latvia, the lack of proper and continuous funding did not allow one to cover all areas of the media field and build up a network of expertise centres, each specialising in different areas. The National Network of Science at the Academy of Science that is issuing expert rights of the Latvian Council of Science to the researchers based on their applications, is currently counting 13 experts in the field of media and communication (LZP, 2022).

1.4. Funding system of media research and monitoring (public, private, project-based, etc.)

Rather sporadic research is a result of both short-term grant provision and lack of a proper strategy in organisation and planning in the media research field. The fact that there was never funding for an academic journal for media and communication studies in Latvia, and the publishing opportunities are rather poor, is an important factor influencing both the national and international competitiveness of media scholars of Latvia. Even if some government funded research programmes (VPP – State Research Programme, LZP – Latvian Council of Science Programme) allowed the inclusion of media and journalism study, this field of research virtually “disappears” between humanities and political science/sociology on the landscape of science in Latvia.

The research of media usage patterns is more regular than in other domains. Here, the main players are commercial companies creating data mainly for the commercial interests of media outlets and advertisers (TNS/Kantar, Gemius). However, parts of the quantitative surveys relevant for audience research are performed on a regular basis by both domestic and European statistical data providers and public opinion monitoring bodies (CBS, Eurostat, Eurobarometer). Quantitative research is also performed by commercial companies specialising in national representative surveys (for example, Latvijas Fakti or SKDS) on the basis of contracts with research and monitoring bodies (e.g., universities, ministries etc.) within the framework of particular (differently founded) projects.

Other areas of media and journalism research, especially if the research involves qualitative methodology, are mainly studied on the bases of particular projects funded by EU, Open Society Foundations and several other NGOs, with sporadic support by state institutions (such as, for example, Ministry of Culture, Ministry of Education and Science, National Electronic Media Board) and universities and with no additional support (by scholars who are part of the aca-

demographic staff in universities and higher education institutions). The existing funding system implies a lack of a targeted, regular and well-organised funding for the monitoring and research of all main important domains of communication, media and journalism in the context of deliberative communication and democracy. No areas are sufficiently covered. The gaps in the research scope(s) are based on no or lacking project funding or no (or lack of) researcher personalities, because particular project calls and particular personal research experiences and interests are the main factors having an impact on project-based fund-raising and following that – developing research areas.

1.5. National research database and most important journals

There is no separate academic journal in Latvia dedicated to journalism and media studies, nor is there a regular and high-quality publication focusing on media regulation, media ethics or media policy. Issues of media regulation or freedom of expression are occasionally discussed in the journal “Jurista Vārds” (“Voice of Lawyer”), but this publication, although prepared by high-level experts, is not peer reviewed and does not meet basic academic criteria. Academic research papers on communication, media and journalism are mostly published in university journals for social sciences (or other related sciences – humanities, pedagogy etc.) – Latvijas Universitātes Raksti (Acta Universitatis Latviensis), RSU Zinātniskie raksti (Scientific Papers of RSU), conference collections and in collective or individual monographs. The libraries of universities are collecting articles by associated researchers and there is the National Information System of Scientific Activity containing data on researchers, projects and publications (<https://sciencelatvia.lv/#/pub/home>). Some of the latest state financed research results are published in the Data Base for Publications and Research Papers (<http://petijumi.mk.gov.lv/>) sustained by the Cross-Sectoral Coordination Centre of the Republic of Latvia. However, there is a lack of a coordinated system for data collected in the beginning of the century and communication, media and journalism are not very well covered in those data bases, because mostly communication research are about the mass information means in a very general way.

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

2.1. Freedom of expression

Freedom of expression (FoE) in the Latvia is guaranteed by a legal framework. The regulation of the Latvian media is liberal; it consists of some basic media laws, the content of which complies with international human rights documents and the transnational agreements signed by Latvia. There are no high legal barriers and thresholds to enter the media market in Latvia.

Access to journalism as a profession in Latvia is free, not limited by educational requirements, and active journalist status does not require registration or licensing. It gives anyone who wants to work in journalism the opportunity to join this profession and increase diversity within journalism practices. However, a lack of education and willingness to adapt to the demands of the commercial media environment leads to breaches of professional ethics and to the development of an instrumental culture of journalism (Dimants, 2018).

Bibliographic data that corresponds to the legal and ethical regulation domain of the Mediadecom project make up the smallest share of the journalism and media studies research in Latvia over twenty years – 18 percent or 69 publications, the content of which in 113 cases corresponds to one of the domain subcategories (Appendix No. 1, Chart No. 1).

The short list of research shows that the representatives of Latvian legal sciences have little interest in the right to information and communication, and especially a lack of interest in me-

media regulation and self-regulation is observed. The authors of the selected publications only include four members of the legal profession.

According to bibliographic referencing quantitative data, the highest number of occurrences in this domain (60 cases) is in the Freedom of expression category (FoE): 21 publications refer to the subcategory of media ownership/transparency and all criticise the lack of media ownership transparency in Latvia; in 20 cases the publication corresponds to the subcategory of prominence of audio-visual media services of general interest. In the other subcategories, the number of publications is very small: four of them concern the protection of journalistic sources and the same (4) access to information, 2 publications respectively refer to disinformation and defamation, one to whistle-blower protection, one to copyright protection. Scientific publications on hate speech have not been found. Hate speech is explained for the public on the civic rights website “Human Rights Guide” (Cilvēktiesību Gids, n.d.) as well as in various media publications.

Data and publications on defamation in Latvia are available in separate international databases, the purpose of which is to monitor cases of defamation or to analyse the compliance of Latvian regulations with international standards. As already mentioned, there is a lack of academic research on this issue. For example, several cases of defamation have been recorded in the International Press Institute database (see example here: <https://tinyurl.com/4nw6emk3>). The European Commission against Racism and Intolerance (ECRI) fifth monitoring report on Latvia (the first conducted in 1997) was available during the study period. The report praises the work on the recognition and investigation of hate crimes, the authors of reports admit that integration of refugees and asylum seekers has been carried out, but the report highlights serious shortcomings, pointing to the following (ECRI, 2018): Latvia's criminal, civil and administrative law is not yet fully in line with ECRI's General Policy Recommendation No. 7 on national legislation to combat racism and racial discrimination; despite previous recommendations to this effect the ECRI notes that the State Police does not have a dedicated team tasked with reaching out to vulnerable groups in the context of combatting hate crime. There is also a lack of promotion of counter-speech among high-level political representatives and other public figures in response to racist and homo-/transphobic hate speech. ECRI also notes that the support activities for refugees and beneficiaries of subsidiary protection (alternative status) are not sufficient, especially in the areas of language training and integration into the labour market. Furthermore, the ECRI is seriously concerned about incidents of alleged discrimination against refugees/persons with alternative status when trying to access health care services.

No academic research on the SLAPP problem in Latvia was found during the research.

2.2. Freedom of information

Similarly to the FoE regulation on the protection of the right to information in Latvia is guaranteed by a legal framework, which generally is in line with international standards. A new regulation has been developed for the adaptation of personal data protection and GDPR in Latvia (White & Case, 13 November 2019); however, there is a lack of academic research on these issues. Educational information on data protection and GDPR is offered to the public by news media and several state institutions, and the in-depth analysis of these issues is provided by the Ombudsman on its website (Tiesībsargs, n.d.).

Trade secret protection in the Baltic states has been analysed to assess the adoption of the Trade Secrets Directive in Latvia, Lithuania, and Estonia (Birstonas et al., 2019). The authors of the article explain that in Latvia there are at least two laws, which provide the definition of a trade secret. One version is defined by Art. 7 of the Freedom of Information Law, and the Commercial Law defines the status of a commercial secret in relation to the following criteria:

- 1) “it is contained in the undertaking of the merchant or is directly related to it;

- 2) it is not generally accessible to third parties;
- 3) it is of an actual or potential financial or non-financial value;
- 4) its coming into the disposal of another person may cause losses to the merchant;
- 5) the merchant has taken reasonable measures to preserve secrecy” (Birstonas et al., 2019, p. 352). To implement the EU Trade Secrets Directive in Latvia the brand new Trade Secret Protection Act was enacted. However, the authors of the study conclude that the Trade Secret Directive has not been properly implemented in Latvia, as section 5 of the Latvian Trade Secret Protection Act “does not strictly distinguish between illegal acquisition on the one hand and illegal use and disclosure on the other” (Birstonas et al., 2019, p. 356), although such a difference can be found in the Directive. According to the authors, such an interpretation may create additional problems in the application of this law.

2.3. Accountability system (codes(s) of ethics; media/press councils; other instruments of media accountability)

Publications discussing the ethics of journalism and relating to the category Normative perspective are found in 35 cases, ten publications mention codes of ethics. There are very few publications in the other categories of this domain: three articles mention other instruments of media accountability, two - media/press councils, one publication covers the media ombudsperson issue.

There are only a few publications in this domain that offer in-depth analysis of media regulation or professional ethics. Among the various issues, more attention is paid to the transparency of media owners, which has been a serious issue in the selected period of the Mediadelcom project, as data on media owners and beneficiaries have not been available in Latvia for a long time. Since the beginning of 2020, data on the current owners of the media are available free of charge in the Lursoft database of the Latvian Company Register.

Due to the interest and research of some of the authors, a relatively larger number of research publications address the ethical issues of media and journalism. The most serious publications in this field have been written by Skaidrīte Lasmane, a senior researcher at the University of Latvia. This author's publications explain current cases interpreted in the context of media and journalistic ethics, as well as communication ethics. Other publications identify the structure of media and self-regulation in Latvia. In several cases, data on the state of media regulation and self-regulation have been used in international comparative data research projects, such as the EU Media Pluralism Monitor (MPM, 2016, 2017, 2018, 2019/2020). MPM data show that the first self-regulatory institution of media ethics, the Latvian Media Ethics Council, was established in December of 2018, and it is acting since spring of 2019. Until then, no system for the protection of the interests of the audience has been established in Latvia. The number and content of academic publications on media ethics reflect the absence of self-regulation in legal documents, i.e., professional ethics is not mentioned in the media regulation, it only appears in Article 24 of the Electronic Mass Media Law and is only applied to the requirement to observe generally accepted ethical principles of journalism for news programmes.

Publications compiled in the regulation domain mostly analyse the situation in Latvia; only six out of 63 offer data from other countries. The data show serious research quality problems – only nine publications are indexed in the WoS/Scopus databases, half are open access, 39 publications are peer reviewed. A third (24) of the publications selected in this domain belong to the group of international scientific publications, 32 publications are in English or German. Most of the publications and data refer to the last decade (2011-2020).

The data show that the issues of media and journalism regulation are not sufficiently analysed, there is a lack of serious research and national level data on both of the basic issues (freedom of

expression, protection of journalistic sources, defamation, professional ethics, trade secret protection etc.) and modern problems such as the digitisation and regulation of audio-visual services.

In summary, the regulation of freedom of expression and information accessibility is generally in line with international standards, but additional risks are posed by quality problems and the lack of academic research (and high-quality regulation) on the legal issues of modern public communication and media landscape phenomena.

Experts interviewed agree that research in the legal domain is lacking. Artūrs Kučs, judge of Constitutional Court of Latvia, associated professor at the University of Latvia stresses that only a small number of researchers are interested in the related issues and there are no resources in universities; therefore, students are also not choosing this direction of study. The expert states that this lack of monitoring capacity created a dangerous gap in the context of introduction of new laws and regulations, for example: “More detailed research shall be focused on freedom of expression in relation to amendments in the law that facilitated the closure of Russian internet resources”²³⁸. He also underlines the lack and urgency of disinformation regulation. Ieva Andersone, attorney-at-law of Sorainen bureau adds to the list of understudied issues “media regulation, self-regulation, disinformation, status of journalists and their protection, journalists’ perception of pre-election agitation period sensitivity; alternative media regulation – podcasts etc.”²³⁹

3. Publications, data sources and main monitoring actors of the journalism domain

In Latvia, three rivalling journalism cultures that can be distinguished by their attitude towards accountability have been defined (Dimants, 2018). First, the ethnic minority media are represented by the traditional Russian journalism culture. Secondly, the instrumental and authoritarian (post-Soviet) journalistic culture characterises the media that are not independent from political and economic subsystems of the society. Thirdly, a professional media culture, orientated towards high professional standards and editorial autonomy from the publisher and owners, can also be identified.

3.1. Market conditions (size and concentration)

Bibliographic data analysis of publications that belong to the journalist domain shows that one fifth (19%, 75) of the papers fall into the Market conditions category (29). These are publications that analyse the relationship between journalism and the media structure, focusing on the study of ownership diversity (18) and local/regional journalism (14). There are very few publications in the other subcategories: 6 refer to the labour market; 4 – foreign interests, 3 – news media interests.

Liberal media regulation has helped to develop a diverse media system characterised by many players in each media segment, oligopolistic competition, and a high level of concentration (Jastramskis et al., 2016). The quality of journalism, its autonomy, and the level of editorial independence in the Latvian media are influenced by the high degree of commercialisation (Rožukalne, 2013); some of the Latvian media operate under direct or indirect political influence, but the political influence is decreasing (Rožukalne, 2020).

²³⁸ Interview with Artūrs Kučs conducted on 20 September 2022.

²³⁹ Interview with Ieva Andersone conducted 18 on September 2022.

The highest concentration is observed in the newspaper market, the lowest - in the digital media segment. MPM data (MPM, 2018; MPM, 2020) show that the concentration of the internet media news market is increasing. This situation is partially offset by direct state support for the creation of high-quality media through the Media Support Fund (MPM, 2020).

At the beginning of the research period, national owners mainly operated in the Latvian media environment. Some media organisations represented Scandinavian media groups (Modern Time Group, Bonnier AB) that established the principles and standards of Western European media operations in Latvian journalism. From 2008, after the economic recession, when Bonnier AB, the owner of Diena, the largest publishing house in Latvia at the time, left the Latvian market, significant changes took place in the structure of Latvian media owners, with new media owners coming to Latvia under a “neighbour” basis (Salovaara & Juzefovičs, 2012). Within a few years, the owners representing Russia bought several commercial radio channels, but digital media (Apollo.lv and Tvnet.lv) and the national news agency LETA became the property of Estonian media companies (Ekspress Grupp, Eesti Media). The news agency BNS (Baltic News Service), owned by Finnish entrepreneurs, left the Latvian market. At the end of the second period of the study, the share of national media owners in the electronic media segment of the Latvian media market is gradually decreasing, and influential local media owners still control the newspaper and magazine publishing market.

In Latvia, there are no precise data on the impact of global platforms on the advertising market, nor are there any regulatory measures that would restrict competition between global platforms (especially, social networking platforms) in the national media and advertising market.

Media viability situation analysis shows contradicting results (MPM, 2020). The fundamentals of the economic existence of the media are becoming increasingly precarious, but part of media organisations have been able to adapt to changes in their business models in a short period of time and are looking for new forms of income generation both inside and outside the media business. Part of the professional media in Latvia have adapted to the new business models and are more or less successfully struggling for new revenue sources.

The most unstable are the existence of local and regional and local media, mainly newspapers, as even before the COVID-19 crisis their advertising revenues were very low and retail revenues declined. According to Ivonna Plaude, a representative of the Latvian Journalists' Association, without government support, many regional media companies would be forced to close down. Paradoxically, the number of visits and audience of regional media websites increased rapidly during the COVID-19 crisis, but media organisations did not have the resources to monetise the growing audience and increase revenue from regular digital information provision.

The evaluation of commercial and ownership influence over editorial content is one of the most complicated tasks within MPM activities (MPM, 2020). There are some explanations that illustrate the situation in Latvia. Analysis of legal acts shows that there are no mechanisms granting social protection to journalists in the case of changes of ownership or editorial line of media companies in Latvia. The regulatory safeguards, which seek to ensure that decisions regarding appointments and dismissals of editors-in-chief are not influenced by commercial interests do not exist in Latvia. Likewise, there are no regulatory safeguards or self-regulatory measures stipulating the obligation of journalists to not be influenced by commercial interests.

Interviews with editors and journalists of various media organisations (national, local, print, TV and radio, online) identify that media owners' commercial interests are the main factor that limits editorial independence and causes self-censorship. Nevertheless, there are few media firms that build their business activities in collaboration with political parties or politically influential individuals. Research project (Rožukalne, 2020) on internal and external sources of self-censorship in various media (national/local, commercial/public) organisations identifies that in many editorial offices, the interests of advertisers were named as the dominant external

factor encouraging self-censorship. This is followed by political pressure; almost half of the journalists (49%) felt that they had to take into account the interests of their business owners and the political allies of the latter. When comparing political and economic pressure, the political influence was mostly described as 'moderate' and 'subtle', whereas the demand to serve economic interests was defined as 'powerful' or 'routinised'.

Journalists accept the dual character of their professional activities as inevitable. Serving certain political interests is not merely a reaction to external factors in the media environment but is the essence of these media companies. In fact, journalists consider themselves to be responsible for contributing to their medium's profit goals. Media firms merge the existing editorial values with collaboration, adaptation, and business thinking. They regard the merger of editorial and commercial departments as undesirable, yet as an inevitable part of professional practice in Latvia. The limitations of professional autonomy are compensated for by the possibility of defending the medium's economic sustainability.

Self-censorship no longer only means the exclusion or reduction of professional values, but rather their dispersal and displacement. Thus, while maintaining a clear understanding of the principles necessary for the existence of the profession, journalists either deliberately or unwittingly adapt their daily practices to meet the expectations of their media owners.

The number of media outlets is slowly decreasing in 2020. One of the national dailies *Neatkarīgā Rīta Avīze* (Independent Morning Paper) ceased to be a paper edition, becoming only a digital edition. The largest national daily *Latvijas Avīze* (Latvian Newspaper) sold its digital medium *la.lv* to the commercial television company RigaTV24. The regional newspaper (*Kursas Laiks* (Kursa Time)) was merged with its competitor *Kurzemes Vārds* (Voice of Kurzemes) in Kurzeme region (Western part) in Latvia. The TV channel LNT and its news department have been closed at the end of 2019; now there is only one commercial TV news service in Latvia (TV3 news service).

3.2. Public service media

The other subcategories in the journalism domain form one-sixth of the total bibliographic reference analysis. 14% or 54 publications are devoted to the analysis of the situation of public media journalists, 10 discuss the autonomy of public media, 8 cover PSM funding issues.

The situation of Latvian public media within the research period is characterised by similar problems: public media funding is insufficient; it is one of the lowest in the European Union. The supervision of Latvian public media is combined with the general regulation of the electronic media structure, which means that the functions of the regulator of the media and the supervisor of public service media is performed by one institution, the National Electronic Media Council (NEEMC). The selection process of its members and its activities have been associated with political influence on PSM (Beitika, 2016). The difficulties in the existence and independence of PSM do not directly reflect public perceptions. Latvian PSM maintains a high level of audience trust.

The level of trust in Latvian PSM, i.e., Latvian Television (LTV), Latvian Radio (LR) and LSM.LV, has been studied in a fragmented manner. According to the public remit test, the trust index is 72% for LTV and 82% for LR. This increased slightly for LTV between 2014 and 2016. The difference in the trust level of those who watch LTV at least once a week compared to those who do not is rather startling – 72% and 35%, respectively. The trustworthiness of LTV among respondents who watch television at least once a week has increased slightly (from 69% in 2014 to 71% in 2016). The level of trust by those who do not watch LTV is much lower: 37%-40%.

In 2018, 63% of the LTV target audience trusts public television, a decrease of 67% since 2016. In 2018, 72% of the respondents who watch LTV at least once a week trust public television. Among those who do not watch LTV at least once a week, 44% trust the channel.

In Latvia, younger media users (under the age of 35) consume public media less frequently. The losses among the younger audience are caused by the lack of sufficient youth-orientated content on PSM. Since 2016, trust has decreased slightly. There is less trust among those aged under 45, students, respondents with average incomes and those who rarely consume media, especially TV news (LTV/Civitta 2018). Trust and satisfaction with LTV remain stable and have even improved among audiences with lower education, who prefer relatively light media content, as well as those aged 25-34. Trust has decreased among those who tend to rely on LTV, are interested in more complex topics, and are better educated.

The level of trust in Latvian PSM has been continuously high. The viewership of LTV and listenership of LR continues to decrease slightly (1-4% per year), but 80% of the population consume PSM and the popularity of the LSM.LV digital platform is increasing (LF 2020).

As with media generally, the trust in PSM is also highly impacted by the differences in the attitudes of various ethnic groups. There are obvious differences in the trust evaluations of Latvian speakers and non-Latvian speakers regarding LTV. Among Latvian speakers 70% trust LTV, whereas a mere 35% of non-Latvian speakers do.

The situation has changed a great deal in five years. Data from 2020 (LF, 2020) shows that 90% of Latvian speakers and 63% of non-Latvian speakers consume Latvian PSM. To a large extent, the respondents who consume PSM content trust it. 88% of Latvian speakers and 81% of non-Latvian speakers trust Latvian Television, 85% of Latvians and 77% of non-Latvian speakers trust Latvian Radio, and 80% of Latvians and 63% of non-Latvian speakers trust LSM.LV.

Other research data (Juzefovičs, 2019) compare the respondents' trust in Latvian-language PSM stations (LTV1 and LR1) and Russian-language ones (LTV7 and LR4) (2019) based on 2008 data. The level of trust in LTV1, which was 77% in 2008, dropped to 63% by 2019. Although LTV7 provides information in Russian and its viewership in 2019 was three times smaller than for LTV1 (LTV 9.6%, LTV7 2.8%) (Kantar 2019), both stations have similar trust levels. This could be related to the fact that LTV7 only provides specific programming in Russian (news, discussions), whereas the rest is comprised of educational documentaries, series, sport broadcasts in Latvian.

The trust level for the Latvian radio station LR1 dropped by more than 10% but remains much higher than that of the Russian language radio channel LR4 (as of 2019, 50% and 35% respectively).

Latvia's media policy is characterised by long-term indecisiveness about whether to increase the Russian-language content in Russian of Latvian PSM (LR Saeima 2018). This could be one of the reasons why PSM has been unsuccessful in addressing Russian-speaking Latvians (Juzefovičs, 2019).

Although the data is fragmented and not always comparable, we can conclude that Latvian society's confidence in public media institutions is stable. The level of trust is related to two indicators – media use in general and the familiarity of the audience with the content of a specific medium or channel.

In summary, Latvian PSM has failed to attract two significant audience segments – young people and Russian-speakers. However, the small percentage of Russian viewers and listeners could result from political decisions that have prevented the production of more Russian-language content. Interestingly, recent data suggest that the LSM.LV news site, which offers content in Latvian, Russian and English, could change the attitudes of various generations and ethnic groups towards PSM. All the generations agree that PSM helps to strengthen democracy in Lat-

via and promotes the development of Latvian culture (Juzefovičs, 2019). However, there are strong differences in the assessment of these factors among the various ethnic groups. Russian speakers have less faith in the potential of the PSM as a democracy-reinforcing institution (73% Latvians, but only 47% Russian speakers, believe so). However, regardless of ethnicity, the population unanimously believes that PSM plays an important role in strengthening and advancing Latvian culture (88% of Latvian speakers and 70% of Russian speakers agree).

3.3. Production conditions

The production issues of journalism work are covered in 12% or 45 publications, of which 35 talk about production conditions, 4 about digitalisation, 3 about investigative resources, and 3 about foreign offices.

The commercialisation of the media environment influences the practice of journalism. Although individual cases point to the influence of political interests on media content, Latvian journalists recognise that their work and professional values are to a greater extent determined by the commercial interests of media organisations (Rožukalne, 2020). Keeping the business interests of media companies in mind means combining professional journalistic values with collaboration and adaptation to the requirements of not only creating professional content but also taking responsibility for media firms' business results. Thus, journalistic practice is influenced by the commercial interests of individuals and organisations. This increases the level of self-censorship and conformism (Schimpfössl et al., 2020; Rožukalne, 2020) in Latvian journalism.

Ilze Šulmane, representing the Faculty of Social Sciences of University of Latvia, is a researcher who has conducted the only longitudinal study dedicated to the culture of Latvian journalism. She is interested in the roles of the values of journalists, and professional identities of journalists since the 20th century; 90 years (Šulmane, 2012). Ilze Šulmane also focuses on the differences between the approaches of journalism in the Latvian and Russian language press (2007).

After 2000, several more researchers turned to journalism. Sergejs Kruks is mostly interested in the sociology of journalism, stereotypes in media while Ainārs Dimants conducts research on censorship and self-censorship in newspaper editorials. During this period, part of the research on journalism is initiated and funded by the Open Society Foundation in Latvia and the National Electronic Media Council (public service media news quality reports) (Kruks et al., 2007).

At the beginning of the second decade of the 21st century, the largest part of research on journalism is carried out at the Department of Communication Studies of Riga Stradins University. Part of these studies fall into the category of research reports; they are not indexed.

From 2010, Latvian researchers are involved in international research, such as the Worlds of Journalism Study and Media Digital Mapping, which collect data on the state of journalism. Since 2015, data on Latvian journalism are compiled in the EU Media Pluralism monitor database. During more than ten years since doctoral studies programmes in communication sciences have been available in Latvia (from 2006), there are still less than ten doctoral dissertations defended, and only a few cover journalism and media issues.

Given the lack of resources for media and journalism research a few projects should be noted, the results of which led to an increase in scientific publications.

In 2006, Inta Brikše as the editor published the book "Information Environment in Latvia: beginning of the 21st century", which analyses various aspects of the change in the information environment and the interaction of media, politics, state, law, politics, religion, art. This is the only book published in the first phase of our research period that comprehensively assesses trends in the communication and information environment, highlighting the links between media and political culture.

The publication of this book affects Mediadelcom overall publication data, showing a significant increase in the number of publications in 2006. The book is supported by the Chancellery of the President of Latvia.

The second book, which describes the Latvian journalism and media field is a collection of research papers “Diversity of the Latvian media environment”, edited by Vita Zelče (2018). The research projects in it and the book itself came out thanks to the support of the project of the Media Policy Unit of the Ministry of Culture of Latvia.

3.4. Working conditions

According to data of the Worlds of Journalism Study (WJS) research (Ozolina, 2016), journalists of Latvia are nearly unanimous in the opinion that they act as detached observers. Altogether, journalists are confident of the importance of professional ethics. However, a fraction of WJS data shows the presence of double standards. Nearly half of the interviewed journalists claim that ethical decisions depend on personal evaluation, whereas a third agree that they could disregard moral standards if extraordinary circumstances required it (Ozolina, 2016). These data refer to conclusions made by Ilze Šulmane (2012), who elaborated a longitudinal research project and concluded that the professional identity of journalists is unclear and lacking a shared universal set of professional values. Instead, the journalists in Latvia are used to adapting to the political logic of media owners, as opposed to professional logic.

The journalism domain contains information on 164 publications that are in some way related to the categories of analysis defined in the Mediadelcom study. Significantly, a small proportion of research is devoted exclusively to the study of journalism, and journalism and media studies in this domain usually address other issues, such as media system or media structure.

Publications in the field of journalism domain (Annex No 1., Chart No. 2) are mainly concerned with journalistic competences (43%, 164 publications). This category summarises media content research conducted using qualitative and quantitative content analysis, as well as some projects surveying journalists' self-perceptions of professional roles and values.

In this category, most publications (44) include a discussion of the discrepancy between normative ideals and the practice of journalism values (31), journalism competencies (28) and skills and practices (24). There are far fewer publications on journalistic knowledge and ability (9), or journalistic roles (3).

12% or 48 publications analyse the working environment of journalists: 30 are related to the working condition, 12 publications are a clear manifestation of commercialisation, 3 publications are devoted to employment condition and satisfaction; 2 publications are about education and training.

Almost half (72) of the publications in the domain of journalism are published in foreign languages (English, German, French, Russian), and a third (51) are published internationally. Most or 96 out of 164 publications have been peer reviewed, and half of the publications (80) are open access. Only 14 publications (7%) are indexed in WoS/Scopus databases, showing serious quality issues, and describing limited international research opportunities.

The publications in the field of journalism in most cases cover many issues on the Mediadelcom category list. This means that there are a few in-depth and focused research studies in this section of the project, thus, the situation of journalism in Latvia is mostly analysed superficially and descriptively.

There are several gaps; the main ones according to one of the experts Ainārs Dimants include “lack of both research on media effects using a longitudinal studies approach and the combination of research methods, as well as in-depth research on communicators, for example, on media

usage of the journalistic environment and to what extent in the selection of news, journalists are led by abstract (idealistic) values and beliefs. The last-mentioned problem especially relates to the research of the media agenda and the situation of press freedom”.²⁴⁰

4. Publications, data sources and main monitoring actors of media usage patterns

Media usage and audience research has been one of the relatively popular research directions in Latvia during the first 2 decades of the 21st century - 149 of the publications selected for analysis here were related to the domain of Media Usage Patterns. A significant part of media usage studies originated for commercial purposes, and there are two main directions of data gathering – opinion polls and uses of media. For quantitative research there are datasets on media usage and audience preferences available from both commercial and non-commercial providers, collected with relative regularity on both the national (CSB, 2020; Latvijas Fakti, 2017; 2018; TNS/Kantar 1991-2020; Gemius, 1999-2020) and international comparative (Eurobarometer, Eurostat) level that are used for commercial and academic research. More focused quantitative data are collected by social research companies such as SKDS in Omnibus surveys and used for academic research projects (for example, Rožukalne & Skulte, 2016; Rožukalne et. al, 2020). Qualitative research is more irregular, carried out almost exclusively by individual academic and – to lesser extent – non-academic (NGO based) researchers and research groups, and therefore depends on the interests of researchers or goals of particular projects. In-depth analysis is often lacking. Longitudinal research approaches using media usage data sets available for longer periods of time for analysis, are rare. Most of the publications are open access.

Due to the mostly short-term and fragmented research on media audiences, not all areas that are interesting in the context of the Mediadelcom study are evenly covered in the corpus of research articles.

52% (95 of all 181 items analysed) contained one or several elements listed as indicators characterising the media usage conditions and structure, whereas 48% (or 86) were partly of only (13%, 23 from 181) devoted to the analysis of media users' preferences. However, because of the lower described reasons (in particular, interest in research community about minority issues in media usage) some research areas from the media usage conditions and structure field are more developed than all the others – the biggest number of articles analyse access to media and diversity in the media system – 72 out of 181, followed by functionalities of media (55). The access to media and channel preferences (44) and quality of news media (37) follows in this list (See Annex, Chart 3).

Less, but certainly some researchers described the relevance of public service media (28), relevance of news media (25) and only some studies touch the subject of trust in media (6), one of them being Eurobarometer public opinion research on a regular basis. This analysis shows that the choice of topics, goals and objectives of the research was strongly influenced not only by personal interests of researchers, but also by funding available for the study of democratic structures of society and independent media in the service of citizens and commercial interest for the usage of media in the context of a developing market. In-depth analysis including trust in media and relevance of news media, as well as role of public service media, is strongly needed.

The majority of those publications are published in Latvia (152); however, a lesser part is in Latvian (88). Only a small part takes the context of several countries into account (26) and only some (20) are referred in collections of WoS, Scopus or similar (meaning consequently a small

²⁴⁰ Interview with Ainārs Dimants, conducted 21.09.22.

international impact). Similarly, a small number of studies take a longitudinal approach (34). Most of the articles describe the contemporary situation in media usage. However, there has also been some interesting and important work in the history of Latvian journalism and media audiences (Zelče, 2009; Chakars, 2010). For analysis of political aspects of media usage, the work of O. Skudra (2018a, 2018b) is important, as well as I. Brikše's and A. Dimants' work on public service media and developing the journalism and media field after the 1990s.

4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in the media system

Even if media access, usage preferences and diversity of viewpoints in the media system is a topic emergent in various research sources throughout the period in question, only a small part of these studies mainly focus on media usage; the majority treat it as an additional aspect in, for example, studies on media and journalism or on the role of mass media in political discourse or social integration. The main research topics that included media usage research have been a matter of change ranging from negative stereotypes of the Russian ethnic group in Latvia to the role of public service media and media system as such, while the audience divided by a linguistic and ethnic aspect has been one of the biggest problems driving interest by researchers.

This is especially important in the early period from 2000 to 2013. Researchers such as I. Šulmane and S. Kruks (Kruks, 2001; Šulmane, & Kruks, 2006, Šulmane, 2012) have written several articles on the (ethnic) diversity and risks of rising intolerance. However, the topic gained great interest again when in 2014, the outburst of the problem of Russia's propaganda on TV channels viewed by wide audiences in Latvia, created both public and expert discussion on minority media usage patterns followed by some publications. The beginning of the 2010s is characterised by attempts to grasp media usage issues more in terms of their complexity, especially, thanks to individual researchers such as, for example, Anda Rožukalne who has published several articles, a dissertation and books on different aspects of the audience and media system (Rožukalne, 2010, 2013) and the collective work of researchers from the University of Latvia that allowed a multi-faceted insight into media system, content and access, as well as audience choices and usage patterns (resulting in publications such as "The diversity of media environment in Latvia" (Zelče, 2018).

The first decade of the 21st century was important for the development of Latvian media research because it was characterised by the first doctors in the field – several researchers completed and defended their dissertations on Latvian media in universities outside Latvia (Dimants, 2003, Dupuis, 2000, Kruks, 2003) as well as in Latvia (Rožukalne, 2010), followed in the second decade by other researchers' work whose insight in particular topics resulted in a number of defended doctoral dissertations in both – local universities (University of Latvia and Riga Stradins university) and abroad – and number of related articles. Among them was I. Beitika (2015), with her work on PSM, J. Juzefovičs (2014), with his work on Russian speaking audience, J. Buholcs (2013), with analysis of developing the blogosphere and R. Šmite (2011), with her autoethnographic analysis of creative online communities. Perhaps the most important and most relevant researcher for media usage and audience research in this line is A. Rožukalne, who has written her theses using a mainly qualitative approach, seeking to understand the uses of magazines (most used printed media by Latvian speaking Latvians) by the audience in the context of editorial understanding of their audience. A. Rožukalne has published extensively on this, and a number of other issues related to audience analysis and journalism, as well as social media; she is also a researcher involved in the international study of media pluralism, responsible for the country report of Latvia from 2015 (Media Pluralism Monitor. Latvia. CMPF, 2016, 2017 etc.) It is interesting to note that in the last decade the Latvian media audience outside Latvia has also become a matter for study in, for example, L. Sūna's doctoral thesis (Sūna, 2013).

4.2. Relevance of news media

Research on the relevance of news media is not very well developed in Latvia. It was only discussed in 25 of all sources selected for bibliographical analysis. Typically, this indicator is regarded as important in the analysis of Latvian society in the sources describing media in Latvia in the context of developing democracy. So, in the first decade of the 21st century, the two editions of “How democratic is Latvia? Monitoring of democracy” by the collective of authors from the University of Latvia (Rozenvalds, 2005, 2007) take into account the relevance of news media. It is respected as an important factor in several articles in the collective monographs describing the status quo of the media landscape in Latvia (Brikše, 2006; Zelče, 2018) as well as Latvian parts of international comparative studies (Šulmane, 2007, Rožukalne, 2017; 2018). At the beginning of the 2000s, the relevance of the news media was discussed in the research on media diversity (Kruks, 2001a, 2001b, Šulmane, Kruks, 2002) and especially in articles devoted to the understanding of uses of media, social integration and political orientation or the Russian speaking minority (Šulmane, Kruks); this research later continued in the work of Jānis Juzefovičs (Juzefovičs, 2012, 2013, 2017, Juzefovičs, Kaprāns, 2019). The last mentioned works by authors such as Ilze Šulmane, Sergejs Kruks and Jānis Juzefovičs also form a tradition to involve the aspect of relevance of news in the context of the research of journalism and journalistic content (See Section 3).

The relevance and importance of news media is also discussed in the historical research on Latvian media and journalism. (Chakars, 2010, Zelče, 2009).

4.3. Trust in media

Only a small number of sources from all those analysed took into account indicators regarding trust in media. Data are available from Eurobarometer (EC, 2021); however, data for trust in media were mostly used when characterising the media audience or particular part of the media audience (Russian minority) in Latvia from a certain point of view such as, for example, formation of their political priorities and sympathies (Bērziņa, 2018). In several articles by researcher Jānis Juzefovičs (Juzefovičs, 2012, 2013, 2017; Vihalemm, Juzefovičs, Lepik, 2019, Juzefovičs, Vihalemm, 2020) trust in media in general or, in particular, news or public service media is taken into account as one of the indicators, including comparative Latvian – Estonian research of media users from the Russian speaking minority and other comparative projects (Tejkalová et al., 2018). One can see growing interest in using trust in media data for their analysis and conclusions among Baltic researchers in the end, and after the time frame of research included in this research (Juzefovičs, Vihalemm, 2022, Jōesaar, Rožukalne, Jastramskis, 2022).

In general, all experts agree with the conclusions that the media environment in Latvia has been studied in a fragmented manner, that there is a lack of comparative studies and continuity of research. This is evidenced by the fact that some of the existing studies are not of high quality, and important issues regarding media development have not been studied. For example, Līga Ozoliņa, (university lecturer, Latvian editor of EJO and Worlds of Journalism researcher for Latvia) underlined that recent trends (after the period of time included in the Mediadelcom research) were showing a growing number (also comparative) of research studies on trust and media usage and a larger number of institutions were involved.²⁴¹

²⁴¹ Interview with Līga Ozoliņa, conducted 13.10. 2022.

5. Publications, data sources and main monitoring actors of the media-related competencies domain

Bibliographic data for the media-related competencies domain comprise 26% (84) of all publications (316) selected for the Mediadelcom project in the case of Latvia. The most common category in bibliographic data in this domain (97 cases) is users' cognitive abilities, which is found in 47 publications, 15 publications are related to the subcategory critical consideration of information and 25 publications are related to the subcategory digital skills and literacy. The second most common category (49 cases) is the social context of media-related competencies in 24 publications. The third most common category (45 cases) is users' skills, which is found in 13 publications and respectively 9 publications are related to the subcategory use of media and media technology. A very small number of publications (2 cases) have the category users' ethical capabilities. The category users' communication competencies (12 cases) is also registered in only 5 publications.

Researchers (29 publications) point out that the scientific articles in Latvia as well as the strategic and visionary documents for national development and education policy (2000-2010) display a wide-ranging terminological and conceptual disagreement about media literacy (Biezā, 2020; Stakle, 2011; Daniela, et al., 2018; Brikše et al., 2014; Rubene et al., 2008). This political and conceptual discrepancy has led to the fact that media literacy was only clearly defined as a mandatory part of digital literacy in Latvia's basic and secondary education standards in 2020.

Academic research on media literacy is mostly initiated by the University of Latvia, and the Ministry of Culture of Latvia, and often the subject of research is based on the subjective interests of researchers. It should also be noted that most studies with representative data on media literacy in Latvia were only conducted after 2010. The comparative data on media literacy are also mainly available from the last decade (The European Commission, 2014; UNESCO Medijpratības katedra, 2017; Latvijas Fakti, 2017; Eurostat, 2020a; OECD, 2021). Dita Rietuma, Dr.art., Director of the National Film Centre of Latvia, expert of the Latvian Council of Science in Humanities and Art Sciences agrees with this conclusion: "These studies have a fragmented nature, excluding the audiovisual field, film literacy, which is an essential part of media literacy". She notes that the further list of academic institutions involved in media literacy activities includes higher education places where film and new media are studied: "Communication and audio-visual communication can also be studied in universities under the control of the Ministry of Culture of Latvia – the Latvian Academy of Culture; visual communication can also be studied at the Latvian Academy of Arts. Cinema-related professions can also be learnt at the private secondary school RISEBA"²⁴²

5.1. Normative sources

The first academic studies in Latvia arguing for the introduction of media literacy into the Latvian education system have only come about in the last twenty years. The Latvian education system in the context of media literacy is in a special situation. Formally, Latvia is bound by the priorities of the leading political institutions of the EU in the field of media literacy and, accordingly, by media literacy education development strategies for the nearest and more distant future. However, the relatively undecided and chaotic education policy has not created a sufficiently open environment for pedagogical ideas that would fully incorporate the content of media literacy into basic, secondary, and adult education (Krumina & Paršova, 2011; Freibergs, 2016; Stakle, 2011; Rožukalne et al., 2020).

²⁴² Interview with Dita Rietuma, conducted 13.10.22.

Researchers of media literacy focus on a broad range of topics. Z. Rubene, A. Krumiņa and I. Vanaga (2008) argue that nowadays the acquisition of media education in Latvia should take place both by including media literacy as a separate study course of the curriculum and by integrating it into the content of other study courses. When using various media in the education process, it is vital to introduce appropriate methodologies for the acquisition of media literacy (13 publications), which in turn contributes to changes in the curriculum, in the design of the study process, the evaluation of study achievements, the setting of the study environment and the objectives of studies (Rubene et al., 2008; Daniela et al., 2018). These changes also affect the process of student-teacher interaction (8 publications), which is no longer merely a teacher-led study process but, by including study forms such as group work, simulations, and problem-based approaches, promotes the co-responsibility of students in the management of the study process (Rubene et al., 2018; Biezā, 2020). Media messages in research studies are based on cultural texts (books, social experiences, music, various human and/or ecological environments, films, games, social media, etc.) and cultural narratives (broad social discourse on ethnic, gender, historical, religious, and other aspects).

At all levels of education, learning and creation of cultural texts is one of the ways in which an individual forms his or her identity and demonstrates it in the social environment. When using a media message, it is important to understand the approaches used by an individual for interpreting a media message to achieve personal study objectives and reflection. The discovery of the reciprocal ways that media messages are linked with cultural texts and narratives is grounds for a reflection and research-based study process. Researchers underscore (22 publications) the relationship between media and media messages and the individual's mental and emotional cognitive processes, which have a direct impact on the individual's thinking, behaviour, attitude formation, understanding of values, the configuration of meaning structures and critical thinking (Rubene et al., 2018; Rubene et al., 2008; Davidsone & Silkane, 2019; Brikše & Spurava, 2014; Alina, 2018; Mirke et al., 2019). It is also emphasised that media literacy ought to be incorporated into all study courses (Rubene et al., 2008; Stakle, 2011).

Concerning the inclusion of media literacy in the learning process, the researchers particularly highlight (4 publications) the language study courses since they involve working with different texts that are nowadays often interpreted in other media narratives (animation, radio plays, films, and television shows, etc.). During the learning process, by simultaneously using written texts and their interpretations in other media, it is possible to promote the understanding of the language of audio-visual signs, of copyright and censorship and the development of research skills (Rubene & Svece, 2018; Spurava, 2018; Stakle & Belousa, 2007). The social science study courses are another set of study courses that allow for the effective incorporation of media literacy into the learning process (Rubene et al., 2008).

The studies (5 publications) highlight the constructed nature of media messages and their connection with institutions representing a variety of cultural, political, institutional, economic, social, and historical contexts. The target audience of a media message is also grounded in various contexts (often different from the creator of the media message). Mutual understanding of meaning and power relationships in the media and media message environment, based on consensus and coherence, are important principles of action and learning, both for the creator of a media message and for its target audience (Stakle, 2011). The link (15 publications) between media messages and the information on policy, culture, economics, and history is emphasised. By integrating media literacy into the study process, it is possible to encourage learners to discern propaganda and disinformation (7 publications), to distinguish valid and invalid information, to expose prejudices and discern facts from opinions (Rožukalne et al., 2020; Spurava, 2018). The interpretation of a media message (17 publications) is always based on both the individual's experience and the environmental contexts (economic, political, social, historical, etc.) in which the media report has been produced and/or deciphered. Media are part of a social

process, which always emphasises social and economic structures as grounds for any media production activities. The studies (8 publications) highlight popular culture as closely linked to the acquisition of media competence. Media messages relate to the construction of an individual's identity, which is a social and communication-based process. Media messages are an essential source for learning the attribution of meaning to images, cultural concepts, and the technological and idealistic discourses of constructing media messages (Freibergs, 2016; Spurava, 2018; Stakle, 2008).

5.2. Assessment of media related competencies among citizens (e.g., research tests, research, monitoring reports)

Comparative research on media literacy levels has been a relatively recent practice in Latvia since 2016, which does not allow one to draw qualitative conclusions about the development and main trends of the media competence level in society. Since 2016, the Plan for Implementation of the Mass Media Policy Guidelines of Latvia 2016-2020 (Cabinet of Ministers, 2016), has been developed, with specific activities focused on comparable and regular studies of the level of media literacy (Latvijas Fakti, 2017; Latvijas Fakti, 2020), establishing of the UNESCO Chair on Media and Information and improving the understanding of media literacy across different social groups, including mentors, librarians, youth and children, specialists in youth affairs of local governments. According to the report of the project "Mapping of media literacy practices and actions in EU-28" (Freibergs, 2016), the 20 major projects in Latvia focusing on the development of media competences since 2010 were mainly related to research (9 projects) and end user engagement (4 projects). The projects mainly focused on strengthening the awareness of issues such as critical thinking and media usage, audio visual content creation, online security risks and the functioning of the media industry across different audiences (professionals – 4 projects, adolescents and students – 2 projects, children – 2 projects, seniors – 1 project, parents – 1 project and society as a whole – 2 projects).

6. Analysis of research and monitoring capabilities and quality

The analysis of research and monitoring of the domains relevant for understanding the risks and opportunities for the development of deliberative communication in Latvia showed that there is a big difference between several research areas among four domains and between them. The most underdeveloped, with the smallest available number of sources and mostly uneven sharing of publications between more popular areas (freedom of expression and normative issues) and less popular areas (connected to media accountability and ethics), is the domain of legal and ethical issues. Research on journalism is more popular; however, only one area of it is highly developed – journalism skills and competences, whereas the areas of production conditions, working conditions and public service media conditions are discussed in the research more than 3 times less than the first area. The domain of media usage is dominated by research of access possibilities, diversity and channel preferences, while areas highly important for the deliberative communication and democracy of relevance of news media and trust in media are relatively underdeveloped (and mostly developed in research on the Russian speaking minority media usage patterns). Similarly, in the domain of media-related competences, the leading position is taken by research on cognitive abilities and critical approaches to information; at the same time audience members' usage of media technology, communication and ethical aspects of competences are discussed in a small number of publications. Thus, there are gaps in media and communication research in Latvia, when speaking about deliberative communication in the last 20 years. First of all, the data from the research on legal and ethical issues are lacking, especial-

ly, when focusing on media accountability issues. Secondly, more interest about the skills and competences of journalists is expressed in research than the conditions of their work, production of content and other conditional aspects of the journalism field. Thirdly, there is more concentration on uses, access to media, diversity and preferences of the audience, while data on the relevance of news and trust to media are lacking. Fourthly, the skills of communication, using media and practising ethical communication are underestimated by media-related competencies research in favour of cognitive abilities and critical evaluation skills. It is important to underline the knowledge gap in the crossing field of ethical aspects of all the domains analysed.

6.1. Comparative analytical overview of other sources and access to these sources

In Latvian situations, there is no equal access to all data sources in all four domains analysed. There was no system of data gathering and storing and no overall strategy of research development on a national level, and, thus, no easily accessible overview of financing, grants and court cases. To the end of the period of time included in this research situation changed with universities caring about their ratings (and giving access to the research results of projects and success of their academic staff), financiers and grant givers requiring dissemination on project websites (or organisational websites or research bodies) and several data bases organised that also include data relevant here. However, even if the data are openly accessible the bad coordination between involved bodies and lack of overall administration strategy does not allow the existing research to have the full impact to be able to develop the professional field and policy. The easiest accessibility is in the domain of media usage with an opinion pool and social and media research companies providing general data on media usage and the attitude towards media, and in some international comparative studies, Latvian researchers participate and provide support in terms of methodology, cross-national comparability of data and the platform for the delivery of data and research conclusions.

6.2. Monitoring capabilities and the quality of data and knowledge

The analysis of quality criteria of bibliographic data confirms the eclectic structure of media studies and journalistic research, as well as identifies serious quality problems.

Data availability and quality are average, but the quality of media studies and communication research is rather low. First, 93% of publications (296 out of 317) are not referenced in WoS or SCOPUS databases. Part of the research papers are mentioned in the other reference sources, mostly in national databases, but due to the unavailability of precise data this cannot be verified at the time of writing this paper.

Secondly, 43% of the publications are not peer reviewed; thus, publications do not meet or partially qualify for the basic criteria of modern scientific publications. A significantly larger part of the high-quality publications that are internationally referenced relate to the second phase of our study from 2010, but most to the recent period, from 2016 to 2020. Thirdly, a large proportion of publications, or 40%, are not available on an open-source basis.

These observations allow one to evaluate trust and reliability level of publications analysed as rather variable – due to a relatively large part of sources not being peer-reviewed or matching the criteria of open science, but also because of conditions and the use of methods in data gathering.

Regarding the complexity of data-gathering, this study showed typical scholarly attitudes. Almost half of the research publications (45%) used mixed methods. Usage of mixed methods refers to two groups of academic publications: media content research employing quantitative and qualitative content analysis, or case analysis, if the media structure or audience structure is

analysed. Quantitative data collection methods (20% of all publications) are mostly used in audience media use studies. Most of this research group is based on secondary data collected regularly by commercial research companies that analyse media consumption habits for media organisations, as this data is needed to attract advertiser investment. Qualitative data collection methods (17%) have been used in media content research using discourse, narrative or framing analysis, as well as in audience and journalism research using the semi-structured qualitative interview method.

Regarding the availability of experts, the analysis of the structure of the authors of the articles complements the data, which shows that the field of media studies and communication in Latvia has not been properly researched. 177 authors are associated with one of the 317 identified bibliographic items. The focus on media or communication research is relatively random, as 133 (75%) of the authors have prepared or co-authored only one publication, and 31 authors created 2-4 articles. 45 (25%) of the authors recorded in the bibliographic data qualify as international authors. However, at the international level, Latvian media and communication processes have not aroused serious interest, as international authors are associated with only 14 (4%) of all publications.

Twelve authors were identified in the bibliographic data, who created 51% (170) of all publications identified in the bibliographic data (each of them published between 7 and 33 articles) between 2000 and 2020; the remaining 49% of the publications were created by 164 authors.

Analysis of the structure of publications over a period of twenty years shows insufficient data continuity and recency. Almost half of all publications (47%) have been published in the last five years (2016-2020), 64% – in the last ten years (2011-2020). Between 2000 and 2005, 19% of all publications in the bibliographic database were published, and 17% were published between 2006 and 2010. These numbers can be explained by the increasing availability of funding from both national and European science support programmes and developing doctoral study post-doctoral projects in communication studies. However, project-based research opportunities are also responsible for the unbalanced development of research in the field, as every project has a narrow focus, leaving gaps of knowledge open and the generalisation of conclusions impossible.

The biggest problem for the continuity of data was and is the lack of nationally based communication research journals. There is no space for continuous discussion on communication, media and journalism and no available data source allowing access to Latvian research for foreign researchers interested in Latvian experience – outcomes that further on damage the successful integration and networking of Latvian researchers in the international communication research area.

7. Conclusions

The analysis of bibliographic data on media and communication environment research in Latvia in the period from 2000-2020 allows one to make the following main conclusions on various analysed aspects:

On the state of media studies and communication research in Latvia. Higher education in media studies in Latvia is available in seven higher education institutions, and two other institutions offer training programmes in journalism. Unfortunately, no separate data are available on the state of communication research, but the overall data on research and development (R&D) in Latvia show that R&D investments depend to a large extent on EFSI (European Fund for Strategic Investments) funding. For instance, in 2018, EFSI funding provided a 35% increase in R&D funding compared to 2017. Latvia's total expenditure on R&D in 2020 represented 0.64% of GDP, which is one of the lowest in the EU (average level is 2.3% of GDP). Latvia also has one of

the lowest figures in the share of science employees from the total national labour force (0.62%) compared to the average of the EU member states – 1.39%. In addition, the average workload per science employee is 0.5. Latvia has both low total R&D investments overall and their amount per one science personnel member (in terms of the FTE), representing 29% of the EU average (Eurostat 2020b; Latvijas nacionālā reformu programma Eiropa, 2020).

On the quantity of studies and publications. The data collected in the study and the number of publications (317) (on average 10 publications per year from 2000-2010, on average 20 publications per year from 2011-2020) show that the field of research on communication is underdeveloped in Latvia. As research in journalism and media are underfunded, a higher number of publications can only be found when the publications are supported by external donors or researchers are involved in international projects at the EU level. Insufficient funding means that the field of media and journalism has been studied in a fragmented manner, with few studies able to cover the key issues. Thus, it can be concluded that the knowledge about the state of the media and journalism in Latvia is insufficient.

The previous conclusion is supported by the small number of academic and applied publication authors (12) who are regularly involved in the research of media and journalism and produce academic publications. Other authors have conducted studies on media or journalism once or a few times, as there are not enough opportunities in Latvia to pursue a research career in this field. Even more, less than ten doctoral dissertations have been defended since (2006) communication science doctoral studies have been available in Latvia.

On quality or publications. The quality of publications evaluated in the study is low: only 7% of publications are indexed in international scientific databases, and less than half are peer-reviewed. Latvia has very limited publishing opportunities, and high-level academic journals in social sciences are not published in Latvia. Research on media and journalism mostly evaluates Latvia's data (81%). Foreign researchers have no interest in the developments in the field of media and journalism, only 4% of analysed publications are written by foreign researchers, and most of them are related to comparative data analysis within the EU countries. The international research community has limited opportunities to get acquainted with the research of Latvian media and journalism, as half of the research publications are available in Latvian. The situation regarding the availability of data can be assessed as average – 60% of research belongs to open-access publications.

On the thematical structure of media and communication research. 43% of publications correspond to the Mediadelcom journalism domain categories, a third are dedicated to media use research, a sixth analyse media-related competencies, and 10% deal with regulation issues in media and journalism. It is important that the content of most publications qualifies for several categories of project domains. This means that media and journalism research lack a clear focus and the opportunity to analyse research problems in-depth. We have found few studies that have contributed to the development of media and communication theory. The data show that it is easier to define areas and fields that have not been explored than to identify those topics and problems for which research data are available. Only data on the use of media have been collected on a regular basis, and some serious research has been carried out to assess the professional approaches to journalism and the state of journalism in Latvia. In-depth analysis is lacking in several topics including trust in media, media management and economy, and there is a need for proper research to understand multimedia, digitalisation processes and social media and diverse practices and phenomena based on technological development in the context of journalistic work. Research on media competence and media regulation is underdeveloped. Especially problematic is the area of legal environment and self-regulation that is not properly studied during the period of time. There is no possibility to understand the Latvian media system as a whole.

Thus, the main risks for deliberative communication identifiable from the analysis of bibliographical data are:

Discontinuity of the research, sporadicity of data, lack of proper focus on the main values of democracy and deliberative communication, do not allow one to have informed, generalised expert insight on the situation. There is no strong tradition of research, with topics of the research mainly adopted from other countries and/or following the tendencies in the field of possible funding. There is little originality and no new paradigms that would allow one to grasp specificity of Latvian experience.

The lack of a national level research journal and the lack of a local, high level and data-supported discussion on changing media, audiences, and democratic society. Local academic research conclusions have no impact on policy, industry and users. There is research on interactions between media and politics, but it does not have the impact to change this relationship.

2. Low internationalisation of the research (a relatively small part of international level publications and participation in international projects) is leaving Latvian media research out of the loop – it is a cause of the low level of financing for media research followed by the low level of research that is a barrier to entering the international scene.

Main opportunities include:

Clearer structure of institutional conditions and requirements for research development (institutional structure, funding system etc.) in the last five years has increased the number of published open access peer-reviewed publications and internationally referenced data bases allowing the more consistent monitoring of the media and journalism field.

Development of doctoral studies in media and communication allowed an increased number of experts and scope of research questions as well as a varied and methodological diversity of research approaches – this signifies the possibility of new ideas and creative approaches in the research field.

Annex 1.

Chart No. 1. Legal and Ethical Regulation Data Domain Structure (69 studies).

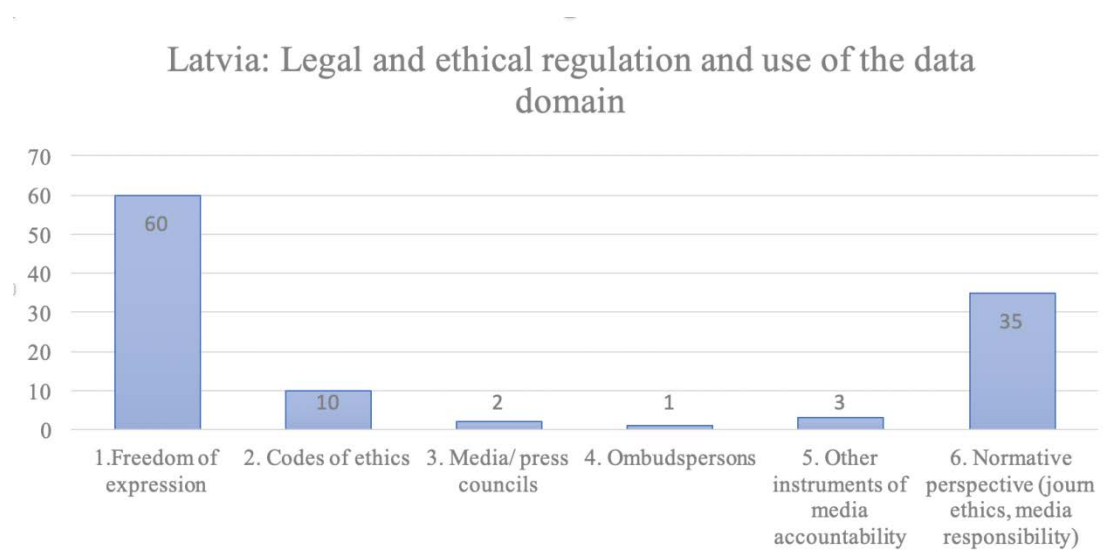


Chart No. 2. Journalism Domain Structure.

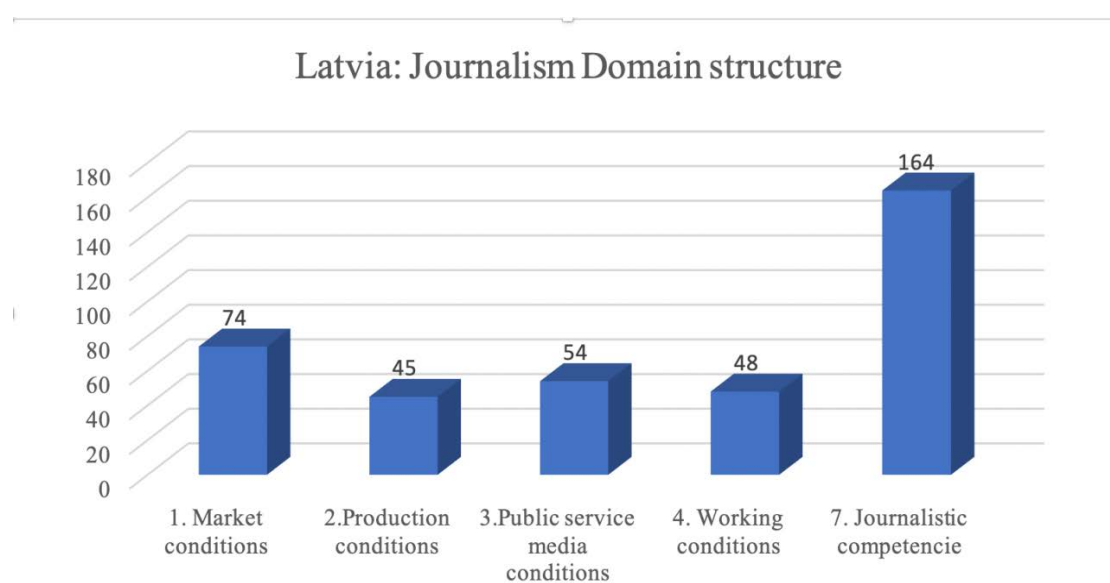
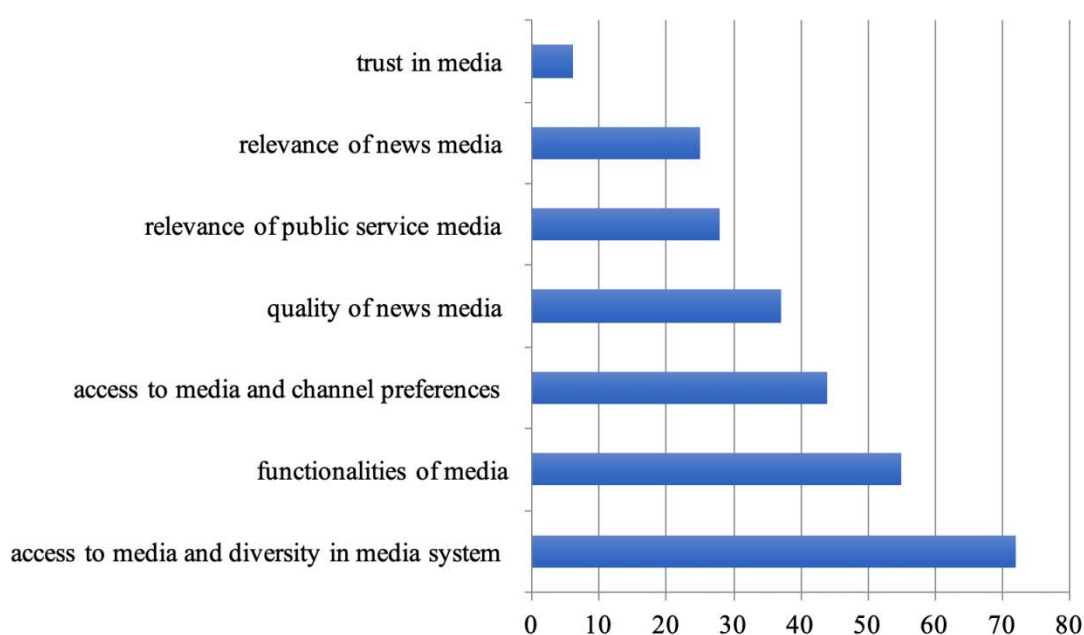


Chart No. 3. Latvia: Media Usage Domain Structure.



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POLAND

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive summary

This report presents findings on Polish media scholarship via researching and disseminating knowledge on media and democracy. By examining four critical Mediadelcom domains (criteria), this report goes a long way in explaining the main areas of researchers' expertise, alongside monitoring capabilities, quality, and findability of scholarly and media-policy-related sources. To this end, we aim to present the key scholarly subjects alongside the potential value of media research and data accessibility for media professionals and industries.

The findings are based on desk research (media regulation and self-regulation) and a scholarly database of 1000 works identified within the EU project research (the Faculty of Journalism, Information and Book Studies, University of Warsaw). This report illustrates that Poland's scholarly studies and media data highly depend on national higher education research conditions, with recent shifts towards a comparative approach in the aftermath of Europeanisation alongside the digital-driven and user-oriented era.

The overall hypothesis is that Polish scholarship is founded on Western-oriented ideas and theories and an urgency to shift towards data-driven media and de-westernisation. With an ongoing need to look at monitoring capabilities via media and research culture.

1. Introduction

This report addresses the state-of-the-art and a critical look at Polish communications and the media databases and studies, alongside a holistic view of the vital actors and publications, something of potential value for monitoring media and democracy capabilities. Following Mediadelcom's criteria, we first look at the thematic focus on Poland's scholarship in four domains: 1) Legal regulations and ethics, 2) Journalism studies, 3) Media usage patterns and 4) Media education and literacy. Findings revealed in all these domains further map the monitoring quality, taking an in-depth look at efficiency, visibility, findability, and cultural scholarly conditions (for instance, separation and an insufficient symbiosis between the media industry and the media industry research, the cultural path-dependencies of science, and so on).

1.1. The Societal and Cultural Context

Poland has longitudinal traditions in media-democracy analyses, primarily when documenting media transformations and the outcomes of democratic shifts in the aftermath of 1989 partly

free elections in the early 1990s (Price et al., 2003; Jakubowicz, 2004). With approx. Thirty-Eight million inhabitants, the country has been regarded as the largest Central and Eastern European (CEE) that transformed from an authoritarian to a democracy. Quoting one of our interviewees, despite the long tradition of non-democratic media regimes, some media outlets managed to develop strong professional journalism culture, which helped to transform towards a free market and free ideas:

“Despite the pre-1989 regimes, some Poland’s media have developed professional standards with high-quality journalism, such as in the case of “Polityka” magazine. For me, back then – it was a window to the whole world” (media scholar, Gdańsk, September 23, 2022).

Poland joined the Council of Europe in 1991 and the European Union back in 2004, hoping that the Western-oriented visions of media and journalism culture would be safeguarded and implemented in line with Western liberal ideas with high adaptation toward media accountability and transparency (Fengler et al., 2014) alongside democratic media culture (Gross, 2014).

Over the last three decades, Poland’s media and journalism experienced dynamic changes in human rights and liberal democracy indexes, with recent drawbacks in the aftermath of the 2015 parliamentary and presidential elections. While the Freedom House’s Freedom in the World (2022) assesses the country as a free semi-consolidated democracy, the reports also highlight challenges for independent media, which has become an active player in societal polarization. Similarly, the Reuters Institute Digital News Report (2022) notes a high level of media politicisation and the failure of public service, with a recent drop in societal trust towards Telewizja Polska (TVP, public service media) from 49% to 24%.

Poland scored 66th in the annual media freedom rank by Reporters Without Borders (2022), compared to 2015, when the country ranked among the global top 20 successful media freedom and plurality. The Polish media market follows the commercial press and the dual broadcasting system, with legacy media searching for adaptation models to adjust to the digital and Data-Driven Age. The World Bank’s GDP annual growth for Poland was 5,7 % (in 2021).

Poland’s current blend of media and democracy – opportunities and risks conditions – needs to be read via the cultural path-dependencies, alongside the recent controversies over multiplications of ‘the political pasts and today’s truths’, reflected in external pluralism of conflicting right-wing and liberal media. The so-called post-communist or post-socialist example of new democracies has further fitted into the global discourse on comparative media studies using the Four Theories of the Press (Siebert, Petersson & Schramm, 1956) or Comparing Media Systems. Three Models of Media and Politics (Hallin & Mancini, 2004; Brüggemann et al., 2014; Castro Herrero et al., 2017) as a point of departure. The multiple ‘West Meets East’ approaches resulted in a wide range of models and systemic comparative analyses, trying to fit the Western schemes and identify variations of media freedom dynamics (see, for instance, Dobek-Ostrowska, 2015; Bajomi-Lázár, 2019).

While a wide range of systemic and cross-country comparisons have successfully identified key differences between the Western and CEE media practices, they might have failed to deliver a full explanation of troubled democratic foundations (Balčytienė, 2015; Połomska & Beckett, 2019). Firstly, global changes in society, journalism and technology must reflect local and cultural conditions. Additionally, looking at media via systems and regulations might not have fully captured cultural path-dependencies, which contributed to the recent decline of media freedom (Bajomi-Lázár, 2015), and the rise of populism rhetoric (Raycheva, 2020) or the ‘rebirth’ of political parallelism (Dobek-Ostrowska, 2019).

For instance, the recent political capture over public service media in Poland has been explained by the conservative government as a successful example of counterparty the progressive and

liberal bias in commercial media and, in so doing, ensuring genuine pluralism in the media (Donders, 2021). One of the interviewees commented that polarisation of Poland's media is multilayered and goes far beyond managing the media and informal – and ideological – media-political relationships;

“Watching the news in Polsat, TVN or TVP, you get the impression that they report from – and on – completely different countries” (media manager, interview in Sopot, September 23, 2022).

1.2. Actors in Monitoring Media and Democracy

1.2.1. Scholarly Institutions and Scholarly Journals

Poland's scholarship has gone a long way in adapting to democratic media visions, with over 70 centres offering higher education and research in communications and the media. Although communications and media studies were recognised as autonomous in 2011, the tradition of democratic media research goes back to the early 1990s. Since societal and political transformations, the university centres, such as Jagiellonian University, Adam Mickiewicz University in Poznań, Silesian University, University of Warsaw, the University of Wrocław and the University in Gdańsk, have widely focused on democratic transformations at many levels, including the societal, economic, and organisational conditions for change (Jakubowicz & Sükösd, 2008; Mielczarek, 2021).

In the 1990s and early 2000s, Poland's communications and media were not recognised as independent research. One cultural path dependency is that they are still attached mainly to other related scientific disciplines, such as political science, international relations, language, philology, or sociology. Therefore, the Polish Communication Association's – established in 2007 – primary goal was to support the recognition of media studies by the Ministry of Science and Higher Education (Głowacki et al., 2022). This goal was completed in 2011 and was successfully followed by the creation of the first-ever Committee of Social Communication and Media Studies at the Polish Academy of Sciences (January 2021).

The Polish Communication Association is a publisher of two scholarly journals, the “Central European Journal of Communication” and “Com.Press” – a journal for PhD students and young communications scholars. Additionally, there are approx. twenty scholarly journals affiliated with universities or private publishers in Poland. For instance, the Jagiellonian University in Kraków runs one of the oldest academic journals, “Zeszyty Prasoznawcze”. The journal, founded in 1960, has published a wide range of disciplinary studies, looking at changing media and communications from the perspective of economy, psychology, language and, more recently, a turn from mass communications towards the user-generated experience of high technologies. Other examples include “Studia Medioznawcze” (University of Warsaw), “Media-Biznes-Kultura” (University of Gdańsk), “Media, Kultura, Komunikacja Społeczna” (University of Warmia and Mazury in Olsztyn), “Komunikacja Społeczna” (University of Rzeszów), “Nowe Media” (Nicolaus Copernicus University in Toruń), “Kultura-Media-Teologia” (Cardinal Stefan Wyszyński University), and “Dziennikarstwo i Media” (University of Wrocław).

Data on scholarly achievements are collected via POLON – an integrated Information Network about Polish Science alongside Polska Bibliografia Naukowa (Polish Scientific Database, PBN) about scholars and their career paths, research interests, publications, participation in research grants, and so on. Polish researchers report on publications through official PBN, ORCID or internal evaluation systems and via social media, such as Academia.edu, ResearchGate, Twitter, Facebook, Instagram or LinkedIn. One of the most recent research projects by Świgoń et al. (2022) has proven that scholarly presence in social media is still in the so-called emerging phase; there is no systemic interplay between the size of research institutions and faculty positions alongside the number of scholars active online.

1.2.2. Founders and Scholarly Research Projects

Among funding institutions for media and communications research in Poland are Narodowe Centrum Nauki (the National Science Center, NCN), Narodowy Program Rozwoju Humanistyki (the National Program for the Development of the Humanities, NPRH), Narodowe Centrum Badań i Rozwoju (the National Center for Research and Development, NCBiR), and the Ministry of Education and Science. There is also the government body Narodowa Agencja Wymiany Akademickiej (NAWA), which supports international academic research and exchange, alongside foundations and projects in partnerships with other countries, such as The Kościuszko Foundation, the Polish American Fulbright Commission, Norway Grants or the Foundation for Baltic and East European Studies.

The National Science Center evaluates communications proposals via a panel for social science. NCN offers several funding schemes such as Miniatura (for starting research), Sonata (for young scholars) and Opus, which is dedicated to advanced researchers. Table 1 (Cf. Annex 1) illustrates the examples of research grants funded by NCN, as laid down in our respondents' reports. Overall, we see an increase in research grants in four Mediadelcom domains after communications and media institutionalisation (from the 2010s onwards). In this period, the NCN has reported on successful grants dedicated to transformations of political communications (see Agnieszka Stępińska, Michał Jacuński, Kinga Adamczewska), digital communication (Mateusz Halawa, Piotr Siuda, Garry Robson), changes of legacy media, such as community media and public service broadcasting (see, for instance, Urszula Doliwa, Aleksandra Galus, Michał Głowacki) or the cross-cultural analysis of media and religion (Marta Dynel, Damian Guzek) and media-politics (Zbigniew Oniszczyk, Agnieszka Stępińska).

1.2.3. Large International Comparative Research Projects

Poland's media and democracy monitoring capabilities include a wide range of more extensive international comparative studies. At the same time, the Polish case study has not been recently investigated via the "Worlds of Journalism" methodology, something of potential value for comparative analysis with other Mediadelcom countries involved. The newest journalism conditions have recently been published in "Journalistic Role Performance" with Poland's team led by Agnieszka Stępińska (Adam Mickiewicz University in Poznań). Additionally, Stępińska served as the project leader for the "Global Journalist in the 21st Century" (2009), "Journalism Students Around the Globe" (2012–2016), "Foreign News on TV" (2007–2011), "Predicting the Shareworthiness of 'Real' and 'Fake' News in Europe" (2019–2020) and the "Threats and Potentials of a Changing Political Information Environment" (2020–2023).

Looking at journalism and self-regulation, Bogusława Dobek-Ostrowska (University of Wrocław) conducted Polish parts of international studies on "Media Accountability and Transparency in Europe" (the European Commission, 2010–2013) and "Professional Journalistic Cultures in Russia, Poland and Sweden" (The Foundation for Baltic and East European Studies, 2011–2014), with attempts to estimate the number of journalists communities in the country. The interplay of media and politics was investigated by Zielonka et al. (2015) in the European Research Council's project entitled "Media and Democracy in Central and Eastern Europe: Qualities of Democracy, Qualities of Media", while the more recent view on the CEE media polarisation and populism under the umbrella of UK Research and Innovation "Illiberal Turn News Consumption, Polarization and Democracy in Central and Eastern Europe" by Štětka and Mihejl with Damian Guzek – local research assistant at Loughborough University.

Finally, different layers of media pluralism are regularly investigated via the methodology of Media Pluralism Monitor – the flagship project of the Center for Media Pluralism and Media Freedom. The state-of-the-art Polish regulatory framework, market plurality, political independence and social inclusiveness are analysed by the country researcher Beata Klimkiewicz (Jagiellonian University).

1.2.4. Professional Associations and Public Opinion

Professional journalistic associations: the Association of Polish Journalists (Stowarzyszenie Dziennikarzy Polskich, SDP), the Association of Journalists of the Republic of Poland (Stowarzyszenie Dziennikarzy Rzeczypospolitej Polskiej, SDRP), the Catholic Association of Journalists (Katolickie Stowarzyszenie Dziennikarzy, KSD) and the Society of Journalists (Towarzystwo Dziennikarskie, TD) widely publish a reference to media ethics.

On the other hand, the websites of professional journalistic associations do not publish recent media developments, which non-governmental organisations further augment. For instance, in 2008, the Helsinki Foundation for Human Rights started the program “Obserwatorium wolności mediów” (Media Freedom Observatory). Other examples include the liberal think-tank Kultura Liberalna launched the “Obserwatorium Debaty Publicznej” (Public Debate Observatory) project (Kultura Liberalna, 2020) and the Batory Foundation (Fundacja Batorego, 2020). Additionally, fact-checking is among the priority activities of organisations, such as the Demagog Foundation or Front Europejski (European Front).

Media changes in societal and technological development are under regular investigation by media outlets, such as “Press” and Wirtualnemedi.pl. On the surface, there are common data across media markets: by Polskie Badania Czytelnictwa (data on readership), RadioTrack (for radio), Nielsen Media Research (for TV) and Gemius online audience research (for online-born media). Public opinion research organisations regularly conduct studies on media users’ attitudes, such as *Ośrodek Badania Opinii Publicznej* (Public Opinion Research – OBOP) and *Centrum Badania Opinii Społecznej* (Public Opinion Research Center – CBOS). Research outcomes by both OPOP and CBOS – including analysing media usage and performance perceptions – are freely available in public reports and websites.

1.2.5. The Government Bodies

The National Broadcasting Council (Krajowa Rada Radiofonii i Telewizji, KRRiT) – a regulatory body for electronic media in Poland, publishes all the relevant information about the existing media regulation, including the Broadcasting Act of 1992 and the European media law. The website of KRRiT offers a special section dedicated to media literacy and education, with basic definitions, a list of publications and an overview of activities since 2000.

1.3. Methodology

In line with Mediadelcom’s methodology, we started with preparing a scholarly database, which would reflect the critical publications on democracy and the media published from 2000–2020. In the first phase of data gathering, we aimed to identify all the universities, research centres, regulatory bodies and non-governmental organisations which deal with media studies, media regulation and journalism quality. The institutional mapping has been further extended by identifying media and communication scholars who have conducted studies in at least one of Mediadelcom’s domains.

Mapping institutions and experts were further followed by addressing an official invitation to deliver information about individual scholarly works, projects, and professional expertise; researchers also collected information about the authors who passed away. In the Fall of 2021, we coded and analysed the data. During this period, each publication went through the coding scheme, addressing publication details (notes on year, publisher, data accessibility, form of publication) which ended up grouping the item into Mediadelcom’s categories (multiple thematic assessments were possible). The analysis phase was finalised on December 7, 2021, with 1000 scholarly publications cross-checked and peer reviewed.

This final version of the report includes findings and quotes from four semi-structured interviews conducted in September and October 2022. The overall goal of retaining the qualitative data for all Mediadelcom countries studied was to comment on the critical media and democracy junctures regarding the state of the art of media regulation, self-regulation, and scholarly contributions. The interviews with two media scholars, as well as representatives from media and policymaking were anonymised and transcribed, with the authors' translation into English.

Considering Mediadelcom's criteria and a potential blend of areas (interdisciplinary and cross-domain variations), we present data referring to the main domains alongside subcategories, such as market conditions, workplace conditions, conditions of public service media and studies on media diversity and inclusiveness. The potential of scholarly expertise is illustrated via the case studies.

2. Description of Publications and Data Sources

The following paragraphs look at the wide range of publications and sources which might be regarded as monitoring capabilities for media and democracy, as defined by the Mediadelcom consortium. Poland guarantees freedom of speech and information in the Constitution of the Republic of Poland, alongside a set of media-related regulations, including the Press Act of 1984 and the Broadcasting Act of 1992. The cultural distinctions between standard setting and implementation have long been discussed. One of the interviewees argued that the challenge of free media goes down to reactive and outdated policymaking:

"The media law is behind recent changes in ethics and technology. One of the reasons for the late digital adaptation of the press is the old-school press law. Then you also have broadcasting regulation which I call regulatory tsunamis. And we are nowhere regarding copyright regulation" (media manager, interview in Sopot, September 23, 2022).

Additionally, interviewees noted that understanding communications and media requires a broader cultural look and multiple narratives in today's democracies. The law, self-regulation and scholarly contribution shall be based on the rule of law and ethics, with all the media stakeholders involved:

"One cannot separate journalism from ethics and regulation. Although the provisions are laid down in official policy or in-house documentation, the reality might be completely different" (media scholar, interview in Gdańsk, September 24, 2022).

"The assessment of monitoring capabilities relies on the quality of democratic checks and balances and the rule of law" (policymaker, interview in Warsaw, October 25, 2022).

2.1. Freedom of Expression and Media Law

Freedom of Expression is guaranteed in the Constitution of the Republic of Poland and in European (and Global) law. Journalistic rights and responsibilities, as well as regulations on legal liability, are laid down in the Press Law which dates to 1984. The document reaffirms that Polish media enjoy the freedom of expression and they "realise citizens' right to reliable information, the openness of public life, as well as social control and criticism" (Art. 1). Additionally, the Press Law offers insights into regulatory definitions of the press, journalistic activities, editors, editors-in-chief, and so on. The Broadcasting Law established the National Broadcasting Council, the Constitutional regulatory body that "shall safeguard freedom of speech in radio and TV broadcasting, protect the independence of media service providers and the interests of the

public, as well as ensure open and pluralistic nature of radio and television broadcasting” (Art. 6.1). The Act also defines the remit of public service media – serving society and its individual groups with diverse content (information, culture, entertainment, which “shall be pluralistic, impartial, well balanced, independent, and innovative, marked by high quality and integrity of the broadcast” (Art. 21).

2.2. Media Accountability and Self-regulation

The media accountability system of Poland dates to the 1990s, with the existence of professional journalistic unions and social gatherings before the democratic turn of the late 1980s. There are several journalistic associations in Poland, namely the Association of Polish Journalists (Stowarzyszenie Dziennikarzy Polskich, SDP), the Association of Journalists of the Republic of Poland (Stowarzyszenie Dziennikarzy Rzeczypospolitej Polskiej, SDRP), the Society of Journalists (Towarzystwo Dziennikarskie, TD) and the Catholic Association of Journalists (Katolickie Stowarzyszenie Dziennikarzy, KSD). The multiplication of professional associations goes back to historical distinctions and the 1980s when the SDP was discontinued. Journalistic unions and associations, including the SDP and SDRP, adopted their codes of ethics and introduced journalistic court systems to hold members to account.

Additionally, under the Conference of Media Ethics umbrella, representatives of journalistic associations, producers, publishers, and television broadcasters signed the Charter of Media Ethics in 1995 and the Journalistic Code of Conduct in 2002. The Charter highlights fundamental principles for journalistic activity, such as the truth, objective reporting, separation of information from the commentary, honesty, respect and tolerance, freedom, and the priority of the public good.

To uphold standards and norms in the Charter of Media Ethics, the Conference of Polish Media appointed the Council of Media Ethics (Rada Etyki Mediów, REM) to issue statements and opinions on journalistic activities, but without legal basis to apply sanctions after a violation of ethical standards laid down in the Charter of Media Ethics. However, the relevance of the Council has been questioned by groups of journalists and further contributed to the multiplication of professional associations' voices. In 2012 former members of the Council of Media Ethics created their own Societal Commission for Media Ethics (Obywatelska Komisja Etyki Mediów, OKEM), to represent their views and counter the statements issued by REM. The list of other accountability systems includes codes of ethics and an in-house ethical commission to support media accountability, as in the case of TVP, TVN, and other media organisations.

2.3. Scholarly Research

Generally, Poland's media and democracy research has been positively evaluated during the interviews, with a call for more impact and collaboration with the policymakers and the media industries. Our interviewees have noted the role of scholars in shaping media regulation, media accountability and media and democracy cultural practices. The analysis of scholarly bibliographical databases (N=1000) proves the existence of crucial areas of interest, with journalism studies as the most widespread Polish scholarship orientation in the period studied (2000–2020); 39% of the items were coded across four Mediadelcom criteria. Scholarly contribution to media usage (25%) alongside media regulation and self-regulation (21%) has less developed to 25 % and 21 %. Studies relating to media competencies and literacies have constituted 15% of Poland's items (See Figure 1 in Annex 1). This study proves that the contribution of scholarly works primarily focuses on the normative and national (local) layers, with a wide range of general theories to advance the media industry in the light of global societal and technological change (see, for instance, Splendore et al., 2016; Szpunar, 2018a).

2.3.1. Journalism Studies

From 2000–2020, Polish journalism studies primarily focused on journalism competencies and changing market conditions (see Figure 2 in Annex 1). Our findings reveal two critical discourses in studying Polish journalism. On the one hand, a vast number of publications (30%) reflect the domain and subdomains of journalism culture (values and norms). These have been widely reflected in studies under professional culture, calling for journalism independence and adapting professional ethics. On the other hand, various academic publications highlight the impact of ownership on journalism roles and performance (foreign ownership included), with a particular emphasis on regional and local journalism. Additionally, a large group of academic literature highlights the importance of accountable and value-based public service media (PSM) (Połomska & Beckett, 2019). Studies on the PSM in the journalism domain (16%) primarily look at independence from the media-political relations, with only a few examples of in-depth investigations of financial autonomy and organisational challenge, adaptation (and change) to date.

Overall, the data in journalism analyses evidence that Polish scholars focus extensively on external journalism (and related media systems) conditions alongside the normative Western-originated journalism models. Studies on organisational needs, such as motivation systems, HR or job satisfaction, are rare. Also, from the media production side, most studies focus on challenges of digitalisation and platform station from the ‘external power’ point of view, with only a few examples of in-depth investigation of the cultural path-dependencies of the press, radio and TV organisational structure – related cultures and mindsets. Only 1% of studies gathered to take diversity management as a critical reference or a point of scholarly analysis departure.

2.3.2. Media Users Studies

Media users’ studies generate approx. 25% of Polish scholarship (see Figure 3 in Annex 1). The scholarly tradition of media usage studies creates new media and communications studies areas. Data published by OBOP and CBOS, alongside more in-depth media sector usage analyses, has become a reference point for Polish audience studies. We observe that a shift from traditional ‘sender → receiver relationships’ resulted in publications, explaining the rise of the user’s generated content and a need for constant online discussions with the digital public. Moreover, there is an observable pattern of the existing studies focusing on theoretical and normative shifts from the classical ‘one to many (for example, Print-First, Broadcast-First, and so on) to ‘many to many’ practices (see, for instance, Jakubowicz, 2009; Johansson & Nożewski, 2018) via the lenses of media convergence and polarisation.

Researchers in the Users Domain primarily analyse societal and technological conditions (74%), with studies on media users’ preferences creating approx. ¼ of the domain database (Figure 3). Among the most popular scholarly media users’ conditions are media functions and the assessment of media quality combined with societal trust in the media. Moreover, many studies analyse media users from the perspective of media systems – and the public as one of the most critical stakeholders (Karmasin and Kraus, 2014).

In line with this, academic research on media users’ preferences focuses on political communication campaigns and the dysfunctions of the democratic model of public service media, which, in turn, has been a subject of political capture and constant polarisation (Jaskiernia and Pokorna-Ignatowicz, 2017; Węglińska, 2021). Empirical studies on technological media users’ preferences have not become a subject of systemic scholarly investigations to date, with examples focusing primarily on the use of social media (Appelberg et al., 2014; Laskowska, 2014).

2.3.3. Legal and Ethical Studies

Studies on media policy and media self-regulation create a group of 21% of all the items coded. Similarly to studies in journalism, the dynamics of democratic media policies and codes of pro-

professional conduct go back to the early 1990s and discussions on the shape of professional journalism culture and media market structure. Therefore, the first phase of legal and ethical studies orientated toward the practical implementation of the Broadcasting Act in 1992 and the Copyright law in 1994. At the same time, the creation of media accountability practices, with the most observable example of the Council of Media Ethics in 1995, contributed to media self-regulation (Murawska Najmiec, 2006; Kononiuk, 2019).

Scholarly works in this domain in the period studied (2000–2020) have widely taken the democratic and Western-oriented models of both regulation and self-regulation, also trying to disseminate the importance of media and independence and freedom of media (expression), laid down in the Polish constitution and related media law. The current generation of Legal and Ethical Studies provides the so-called ‘checks and balances, calling journalists for reunification and decision-makers to safeguard the fundamental principles of a democratic society (Szot, 2010). However, both the media law and codes of journalistic conduct are understood as outdated and not entirely fitting into the requirements of the media change in the digital and data-driven age (Głowacki and Kuś, 2019; Głowacki, 2020).

Media regulation and codes of ethics are widely accessible via the websites of the National Broadcasting Council, journalistic associations and corporate documentation of the Polish media. Moreover, recent shifts in media freedom, independence and pluralism in Poland are available via the Freedom House, The Economist, IREX (Media Sustainability Index) and the European Broadcasting Union. Although most widespread domains in Poland’s Legal and Ethical studies are related to studies on democratic media law and freedom of expression (44%), more than 60% of the items coded reflect practices and normative approaches to media accountability and responsibility (see Figure 4 in Annex 1).

Studies on media self-regulation, combining knowledge shared on media ethical responsibilities and standards, constitute 33% of subjects identified in the scholarly works. Recent analyses, conducted chiefly in collaboration with international scholars, also highlight the potential of new media and technologies for responsiveness and accountability. Due to the low effectiveness of the press councils and the media ombudsman institutions, these accountability practices have been analysed mainly via cross-country and comparative orientations (Jakubowicz, 2008; Dobek-Ostrowska et al., 2018). The most general themes for media regulation analysis are regulations for media ownership and transparency, alongside media law over the PSM, highlighting contribution to the greater good and the public interest – from the normative point of view.

2.3.4. Media Literacy Studies (Users Competencies)

Studies on media competencies and users’ literacy are in the emerging phase in the case of Poland. At the same time, many international organisations, including attempts by the NGOs and regulatory bodies (The National Broadcasting Council), the scholarly examination of media users’ capabilities and skills is rare (15% of all the items coded, see Figure 1). What dominates the discourse is a wide range of academic studies calling for digital skills and literacy alongside understanding the Polish context of media-related abilities in digital and data-driven communications (40%) (Cf. Figure 5 in Annex 1). While most Polish studies draw on the use capabilities of new media and technologies, the perspective of self-expression alongside the ability to be heard in the online and digital space is sadly missing (users’ communication competencies).

Overall, the Polish scholarship in this domain tends to develop the media technology perspective to educate on potentials and the potential pitfalls of being connected online. While research on the media literacy context still primarily uses the institutional, strategic, and legislative contexts of competencies rather than researching individual behaviours and skills, including privacy and data protection, alongside the media competencies of teachers. Media literacy recommendations and tools have filled the knowledge gap in this regard by the National Broadcasting Council, as well as a wide range of non-governmental organisations, such as *Centrum Edukacji*

Obywatelskiej (Center for Civic Education, CEO), Press PressCafe.eu and *Polskie Towarzystwo Edukacji Medialnej* (The Polish Association of Media Literacy – PTEM).

The examples of Polish scholarship in media literacy include critical analysis of the digital and data-driven media (Ptaszek, 2019), innovation (Pokrzycka, 2020), fact-checking (Rosińska et al., 2021) and media users' behaviours via the Fear of Missing Out perspective (Jupowicz-Ginalska et al., 2020).

3. Analysis of Research and Monitoring Capabilities and Quality

There are several approaches to Polish communications and media scholarship regarding research capabilities and quality. In line with the Mediadelcom study criteria, the bibliographical database has been further analysed via additional measures such as data availability, continuity, reliability, and – above all – methodological complexity (theory building vs empirical studies).

3.1. Publication Types and Scholarly Orientation

At the most holistic level, chapters in edited collections (national and international) generate more than 50% of all publications in our database (N=1000). Articles in scholarly journals constitute 35% of the bibliographical database, while edited collections generate 11% of all publications (Cf. Figure 6 in Annex 1). The more in-depth look proves across four domains the academic book chapters' dominance in Journalism studies (53%) and Media Literacy (48%). The most important academic papers in scholarly journals have been published in Media Users' (37%) and Media Literacy (35%) domains.

Theoretical and normative approaches dominated Polish scholarship from 2000–2020; theory-building contributions create 60% of all coded items (see Figure 7 in Annex 1). These approaches are the most significant in the Ethical and Legal studies (61%). Most publications in this domain take the discussion on journalism values, media functions and forms they take, including implementation of media law (Human Rights, media ownership, principles of public service media) to the practice of media transformations (Filas, 2010; Jakubowicz and Gross, 2011).

Similarly, more than 50% of publications in the Journalism studies domain investigate professional roles, cultures and autonomy via best practices or societal expectations. In line with this, investigation of professional journalism cultures and changes in the working conditions focuses on systemic and Western-oriented criteria without looking at organisational cultures, journalism pride, management processes or the mindsets of policymakers and media professionals.

Empirical studies in the Ethical and Legal, alongside the Journalism domain, are rare. Surveys or semi-structured interviews with media professionals or policymakers have become the case mostly when researching local journalism (Szot, 2013; Szymańska, 2016; Węglińska 2021) or Polish media system as a case study in international comparative projects (Klimkiewicz, 2015; Stępińska et al., 2016; Guzek and Grzesiok-Horosz, 2021). Publications classified under the umbrella of Media Literacy have become the only domain in which a percentage of empirical studies exceeded those of theory-first and normative nature (see, for instance, Lisowska Magdziarz, 2012; Ptaszek and Lysik, 2019).

Similarly, approx. 49% of Media Users publications have made attempts to juxtapose theory with empirical and practical validation, with the examples of studies on community media (Doliwa and Rankovic, 2014) alongside digital practices of social media users (Nożewski, 2021) and representatives of Generation Z (Ossowski and Piontek, 2018; Szpunar, 2018b).

Overall, we observe that empirical research in Poland is mainly stimulated by current methodological trends and participation in international research projects. There is also a trend to emphasise practical verification of normative visions, journalism principles and effects of media in all four domains.

3.2. Data Accessibility

One of the critical features of the Polish scholarship in Mediadelcom is that most scholarly works (63%) still need to successfully adjust to open access policies. On the one hand, this is due to the dominance of chapters in edited collections and the business models of publishing companies. Many national publishers have preferred traditional print copy distribution over e-books or Online First strategies to offer scholarly works for free. Moreover, a more in-depth look at the publication types proves an essential correlation between the publication types and data accessibility. Studies on Media Users and Media Literacy with the most publications in scholarly journals are more likely to be offered as Open Access research (cf. Figure 8 in Annex 1).

We identify a noticeable shift in Open Journals strategies regarding scholarly journals in Poland. For instance, “Zeszyty Prasoznawcze” – one of the oldest academic journals – has successfully moved into the digital space and offers all the archives and the most current issues on the journal website. A shift from print policies towards an online free scholarly journals platform has also been the case of “Studia Medioznawcze”, now an online journal only. Similarly, the “Central European Journal of Communication” (CEJC) – a scholarly journal of the Polish Communication Association – has adopted the Open Journals System and Open Access policies; CEJC introduced the publication of ORCID and DOI in Spring 2016.

The transformation from paid to open research strategies has also been the case when applying for national and international research grants. A need to adjust to the European Union’s Open Research policies, call the National Science Center (Narodowe Centrum Nauki) to evaluate research proposals from Open Access and the data findability.

Approximately 75% of Poland’s academic works in four Mediadelcom criteria are in Polish. Our database of 1000 items indicates that English language publications create the group of 24%, while 1% of publications are published in German, Russian and other languages. The tendency to publish communications and media-related works in the national language has been observed across four domains, with the most significant English language publications in the Journalism and Media Users studies (see Figure 9 in Annex 1).

Although the first stage of Mediadelcom research and methodology has not allowed for mapping in-depth correlations between types of publications and the language of publishing, the hypothesis is that the English language publications mainly connect with the outcomes of international research and national journals opened for foreign languages. On the surface, the examples of English language contributions to “Studia Medioznawcze” (University of Warsaw), “Media-Biznes-Kultura” (University of Gdańsk) and an English language “Central European Journal of Communication” (The Polish Communication Association) offer a platform to make Polish research more accessible abroad.

Finally, we want to note that the overall view of data accessibility does not build a holistic picture of online findability; due to a sizeable bibliographical database, our research does not focus on researchers’ knowledge share platforms, such as Academia.edu, ResearchGate or Google Scholar. Although the current regulation of the Ministry of Education and Science highlights the role of PBN (Polska Baza Naukowa) and the ORCID database, the dissemination of academic works via scholarly social media has been a voluntary (mainly: individual and promotional) activity.

3.3. Data Recency and Continuity

The question of Polish scholarship recency and continuity resonates with the general overview of the period studied. While there is an observable research boom and tradition of academic research of the 1990s structural and cultural transformations, the study period of 2000–2020 has different dynamics. The overall observation is that changes related to media convergence alongside the erosion of traditional sender-receiver relationships have increased communications and media research in all four domains by 2007 with two other significant increases in 2010–2011 and 2014–2016 (see Figure 10 in Annex 1).

While a wide range of new approaches and topics were explored in the aftermath of 2010, the increase of Polish scholarship shall be read in a broader cultural context, two critical events mark the integration of media and communications academic communities in Poland: creating the Polish Communication Association (PCA, 2007) and turning communications and media studies into an autonomous scholarly discipline by the Ministry of Education and Science (2011, previously known as the Ministry of Science and Higher Education). On top of that, meetings and conferences under the umbrella of PCA and CEECOM (Central and Eastern European Communication and Media Conference) provided new rooms for knowledge exchange and publishing. We argue that opening to the Central and Eastern European (CEE) communities has widely contributed to cross-country research projects and collaborations involving scholars from Poland, the CEE and beyond.

In addition to this, our database indicates a continuity of media and communications studies. Looking at scholarly publications from the perspective of data gathering, there is a visual representation of studies in each domain. Figure 11 (cf. Annex 1) illustrates that Polish scholars use more recent sources and data when developing publications across different historical periods on top of longitudinal studies in four critical research areas. On the other hand, publishing a more holistic view on media and societal transformations helps to address the cultural, economic and systemic (political and regulatory) path dependencies, including pitfalls of democratic media regulation and late adaptation to the digital and data-driven age (as compared to Western and mature democracies).

3.4. Trust and Reliability

Most of the scholarly journals published in Poland have adopted ethical and double-blind review policies, with more specific editorial guidelines for the editors, authors, and referees. For instance, CEJC has a detailed framework for each stage of the reviewing procedure, including paper submission, review, copyediting, production, and distribution. All the external and double-blind studies shall be anonymous, with the Open Journal System offering an online form for the referees' evaluation (upon creating the users' account). Similarly, edited volumes published by universities or other national publishing companies have at least one publishing review by an expert in each communication and media studies area. As a result, 94% of all the coded publications have been peer-reviewed; the number is similar in each domain (cf. Figure 12 in Annex 1). The no-peer-reviewed publications in our database consist of industry and scholarly reports alongside policy expertise commissioned by the National Broadcasting Council or international research institutes (see, for instance, Garlicki, 2013; 2015; Dzięciołowski, 2017).

There are approx. 8% of Polish communications and media are indexed in international quality scholarly databases, such as Web of Science, SCOPUS, or Social Science Citation Index. The group of publications represented in high-level indexation is low because most national media and communications journals need more citations and international distribution, which are prerequisites in a global quality database. The same applies to national scholarly publishing houses, both when it comes to university-related or commercial publishing activities. The Ministry of Education and Science evaluates literary works in Poland. The list by the Ministry considers the

quality of publishing houses alongside more than 1700 national and international journals published in all the research disciplines. While there is a clear tendency to grant 200, 140 and 100 points for global communications and media publishing, most national journals in the communications and media domain get 20 or 40 points in the Ministry of Education and Science Journal ranks²⁴².

Publications of book chapters in national edited collections and journals generate a group of approx. 90% of all the items were coded. The percentage of publications not referenced in any scholarly database slightly varies between domains – from 88% in Media Users to 90% in the Media Literacy domain (cf. Figure 13 in Annex 1).

3.5. Importance of Experts

The expertise of Polish scholarship in four Mediadelcom domains has been critical for developing the bibliographical database. Therefore, our team gathered information on Poland's communications and media publications by identifying the locations of the universities or a social science research centre. Based on departments' and faculties' websites – alongside our previous formal and informal contacts – we selected a group of experts, who were then asked to deliver a complete list of scholarly achievements (lists of scientific projects, industry reports, and publications). Looking at the academic database, we see several groups of experts and criteria for their selection, which go further than research interests or geographical location.

The first group of experts consists of the seniors of communications and media scholarship, who have been active in scholarly works in the pre-and post-1989 eras. Bearing in mind the number of publications from that period, we identified works by Walery Pisarek, Tomasz Goban-Klas, Jerzy Mikułowski Pomorski, Zbigniew Oniszczyk, Marian Gierula, Iwona Hofman and Maciej Mrozowski. The second group of experts include empirical studies by Bogusława Dobek-Ostrowska, Beata Klimkiewicz, Agnieszka Stępińska and Damian Guzek, whose empirical research methodology has been identified by international research consortium collaboration (the European Union and other international support funds for scholarly research projects). Thirdly – across the international vs national research and normative-first vs empirical-first – we also identify the group of experts supporting the professional media ethics and regulatory developments or commentary to the media. Experts in Ethical/Legal and the Journalism domain, including Karol Jakubowicz, Juliusz Braun, Jerzy Olędzki, Stanisław Jędrzejewski and Paweł Stępka, have successfully integrated academic research with policy and journalism ethics recommendations.

Figure 14 (cf. Annex 1) illustrates the examples of journalism studies by Lucyna Szot, Bogusława Dobek-Ostrowska and Agnieszka Stępińska, whose primary focus has been journalism competencies and the fabric of professional journalism culture within a media system. Most of the recent studies draw on empirical evidence with surveys and semi-structured interviews conducted as a part of broader international research projects, such as “Professional Journalistic Cultures in Russia, Poland and Sweden” (Nygren and Dobek-Ostrowska, 2015), the “Media and Democracy in Western and Eastern Europe” (Zielonka, 2015), the “Journalistic Role Performance” (Mellado, 2020) and the “Illiberal Turn” (Štětka et al., 2021) project.

The most widespread contributions in the Legal and Ethical domain go back to scholarly and policy contributions by Karol Jakubowicz. Dr Jakubowicz (1941–2013) remains one of the lead-

²⁴² For recent Ministry of Science and Higher Education Journal ranks, see <https://www.gov.pl/web/edukacja-i-nauka/komunikat-ministra-edukacji-i-nauki-z-dnia-1-grudnia-2021-r-w-sprawie-wykazu-czasopism-naukowych-i-recenzowanych-materialow-z-konferencji-miedzynarodowych> (Retrieved December 1, 2021) and <https://www.gov.pl/web/edukacja-i-nauka/komunikat-ministra-edukacji-i-nauki-z-dnia-21-grudnia-2021-r-o-zmianie-i-sprostowaniu-komunikatu-w-sprawie-wykazu-czasopism-naukowych-i-recenzowanych-materialow-z-konferencji-miedzynarodowych?fbclid=IwAR0MQDxZwyzuPchuOYGfPo7YhIn-qwllKg1Qyx5LrXY2nCD7rHEdmBjj0E> (Retrieved December 21, 2021).

ing media freedom advocates in Europe and one of the most recognised Polish media policy scholars and practitioners in Europe. His professional involvement in the work of UNESCO, the Council of Europe, the European Union, the European Broadcasting Union, and the Organisation for Security and Co-operation in Europe makes his legacy a constant reference point, with studies juxtaposing media law (32%) with values, ethics, and responsibility (39%). On the surface, research conducted by Beata Klimkiewicz and Stanisław Jędrzejewski emphasises healthy public service media regulation and the importance of media ownership pluralism. While works by Jędrzejewski (2013; 2017) identify the extent of regulatory shifts and practices for public service media progression, the scholarly contribution by Klimkiewicz brings the international perspective for researching media plurality in traditional and new media; with a methodology of international projects, such as the Media Pluralism Monitor and, more recently, The Media Freedom Act in 2022 (for specific media policies domain, see Figure 15 in Annex 1).

4. Conclusions

This report has aimed to address critical orientations and the potential accessibility and findability of scholarly academic achievements in communications and media over the last two decades (2000–2020). By examining four Mediadelcom domains, namely Journalism studies, Media Users' studies, Ethical and Legal studies, and Media Literacy studies, our goal has been to indicate critical tendencies in the research expertise alongside the scope, availability and quality of Polish research, something of potential value to assess the potential blends of media and democracy academia.

On the one hand, the findings from the media regulatory and self-control of journalists have proven the democratic standard setting with challenges of the digital and data-driven turns alongside the call for Poland's media democratisation. In line with this, the database of 1000 scholarly items included in Poland's bibliographical database reveals both potentials and pitfalls of young democracy scholarships, struggling to adopt democratic visions, Western media ideas and research tendencies while also being put on hold due to the cultural, systemic (political and regulatory) and academic path-dependencies.

The ongoing public service media governmentalisation alongside journalism and social polarisation have a significant impact on shanks in global media freedom and a call for a reorientation of media studies and their evaluation. In line with this, we have argued that the case study of Poland needs de-westernisation and more empirical evidence to argue against the normative understanding of Human Rights, journalism culture and related Legal/Ethical and economic surroundings.

Firstly, the findings presented in this report prove the dominance of Journalism research (39% of the items coded) over Media Usage, Legal and Ethical and Media Literacy domains. Among the most popular subjects investigated by communications and media, scholars have been media systems, market structure, journalism roles and values, and professional culture, with a particular emphasis on public service media. These subjects are among critical research interests also by scholars from the West. However, we observe that studies on Poland's journalism and media users' competencies are still emerging, developing Media Literacy theoretical foundations. While there has been an observable growth in the number of communications and media studies in the aftermath of the 2000–2010s digital and new media revolution, most of the Polish scholarship (60% of publications in four domains) has widely focused on theory-building and visions on how journalism should look like.

The normative-first approach mostly looks at the importance of media autonomy, responsiveness and healthy media ethics and law from the external systemic conditions. On the one hand, findings across the domains prove the dominance of systemic (economy–politics–technology)

conditions, with only a few examples of empirical evidence of production culture, working conditions, diversity in the newsrooms, etc. On the other hand, the dominance of the systemic approach limits the potential of examining media's cultural path-dependencies and media professionals' mindsets, something that has become a subject of longitudinal investigation in Western scholarship.

Secondly, the blend of West vs East traditions in the Polish case also relates to the value of communications and media research, with different dynamics (and dichotomies?) in terms of quality dimensions. For instance, Polish scholarship follows the global standards of ethics and academic work production. Approx. 94% of all Mediadcom domains have been peer-reviewed, with the national journals being transparent about the double-blind procedures and the authors' and editors' accountability. Both academic journals and regulatory and public research opinion authorities have successfully moved their operations online, providing easy access to data for free. On the other hand, there is also an observable policy of paid access derived from traditional publishers' business models. The fact that book chapters and edited collections dominate the Polish scholarship might negatively impact data accessibility.

Moreover, publishing scholarly works in the national language (75% of publications in four domains) limits international dissemination and research findability. Only a few Polish researchers have successfully published their academic achievements in the top global journals, indexed in the Web of Science, SCOPUS or Social Science Citation Index database (8% of publications in four domains). While publications in international journals and publishing houses, such as Cambridge University Press, Routledge or SAGE, are rewarded by the Ministry of Education and Science Journal ranks 200, 140, and 100 points, the most widespread national publications (both edited collections and edited collections) get approx. 20-40 points in the process of quality evaluation. Bulletin of the most recent Journals' rank by the Ministry has resulted in criticism of underestimation of the potential of media studies research.

Thirdly, Poland's communications and media scholarship has not sufficiently addressed the current societal and technological change. Although our research findings illustrate the growing number of empirical verifications of Journalism via international projects and collaborations, several research gaps need further exploration. For instance, studies on ethics and regulations have broadly addressed the conflicting visions between journalism unions, policymakers and media users while – at the same time – not sufficiently responding to societal and (social) media.

What has been missing in the age of algorithms and Big Data are practical recommendations towards organisational change, media usage by Generation Z or fighting against the global phenomenon of misinformation and fake news. Finally, looking at the Polish tendencies, the critical areas for a further explanation would be to explore the cultural management and policy-making conditions and room for more in-depth collaboration with the media industry via research projects or joint acceleration to mentor or commissioning activities.

Overall, we observe a research dichotomy in the communications and media scholarships, which corresponds to the blend of West vs East democratic media and academic research development. Western orientations and publishing standards play a significant role in fostering quality and research recency. On the contrary, both the focus on the national legacy media and the university/research centers' evaluation procedures, are still deeply rooted in the past and might need to sufficiently respond to the Western research trends (quality and methodology). The cultural lenses call for further investigation, alongside the cultural investigation of the critical junctures and the cultural path-dependencies, regarding society, politics and scholars of media and democracy.

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Annex 1.

Table 1. Selection of research projects on media and communications in Mediadelcom's domains (The National Science Center)

Researcher, affiliation	Title	Study Period
Kinga Adamczewska, Adam Mickiewicz University in Poznań	<i>Wzory przepływu informacji w komunikowaniu politycznym - na przykładzie wyborów w Polsce w latach 2015-2020</i>	2019-2023
Urszula Doliwa, University of Warmia and Mazury in Olsztyn	<i>Transformacja systemu medialnego w Polsce w kontekście radiofonii niekomercyjnej</i>	2020-2022
Dorota Hall, Polish Academy of Science	<i>Mniejszości i media. Komunikatywne konstruowanie tożsamości religijnej w czasach głębokiej mediatyzacji</i>	2018-2022
Marta Dynel, University of Łódź	<i>"FUNGRESSION": Humor i niegrzeczność w mediach społecznościowych</i>	2019-2023
Aleksandra Galus, Adam Mickiewicz University in Poznań	<i>Rola polskich organizacji pozarządowych we wspieraniu rozwoju mediów na Ukrainie</i>	2018-2022
Michał Głowacki, University of Warsaw	<i>Kultura organizacyjna mediów publicznych w ekosystemach cyfrowych: ludzie, wartości i procesy</i>	2015-2019
Damian Guzek, Silesian University in Katowice	<i>Media wobec idei świeckiego państwa</i>	2015-2019
	<i>Autorytet papieski w przekształceniach komunikacji</i>	2020-2023
Mateusz Halawa, University of Warsaw	<i>Nowe media jako technologie JA. Socjologiczna analiza tożsamościowych konsekwencji upowszechnienia się interaktywnych, cyfrowych i sieciowych technologii komunikowania</i>	2011-2013
Michał Jacuński, University of Wrocław	<i>Transformacja modelu komunikowania politycznego w Polsce poprzez nowe media: longitudinalne badanie wybranych narzędzi internetowych</i>	2011-2015
Garry Robson, Jagiellonian University	<i>Negocjowanie różnic kulturowych w erze komunikacji cyfrowej</i>	2012-2014
Piotr Sitkowski, University of Łódź	<i>Pozasystemowe sposoby użytkowania nowych technologii medialnych w okresie schyłkowego PRL</i>	2013-2017
Alicja Stańco-Wawrzyńska, Nicolaus Copernicus University	<i>Terroryzm i media: modelowanie komunikatu przez interakcję jako element mediatyzacji terroryzmu w telewizji amerykańskiej</i>	2016-2018
Agnieszka Stępińska, Adam Mickiewicz University in Poznań	<i>Prezydencja Polski w Radzie Unii Europejskiej i Euro2012: rola wydarzeń medialnych w procesie kształtowania wizerunku państwa</i>	2012-2013
	<i>Populistyczne komunikowanie polityczne: przekazy polityczne, relacje medialne i reakcje społeczne</i>	2016-2020
Michał Wenzel, SWPS University of Social Sciences and Humanities	<i>Wpływ mediów na postawy polityczne</i>	2016-2019

Source: Database by NCN (<https://www.ncn.gov.pl>)

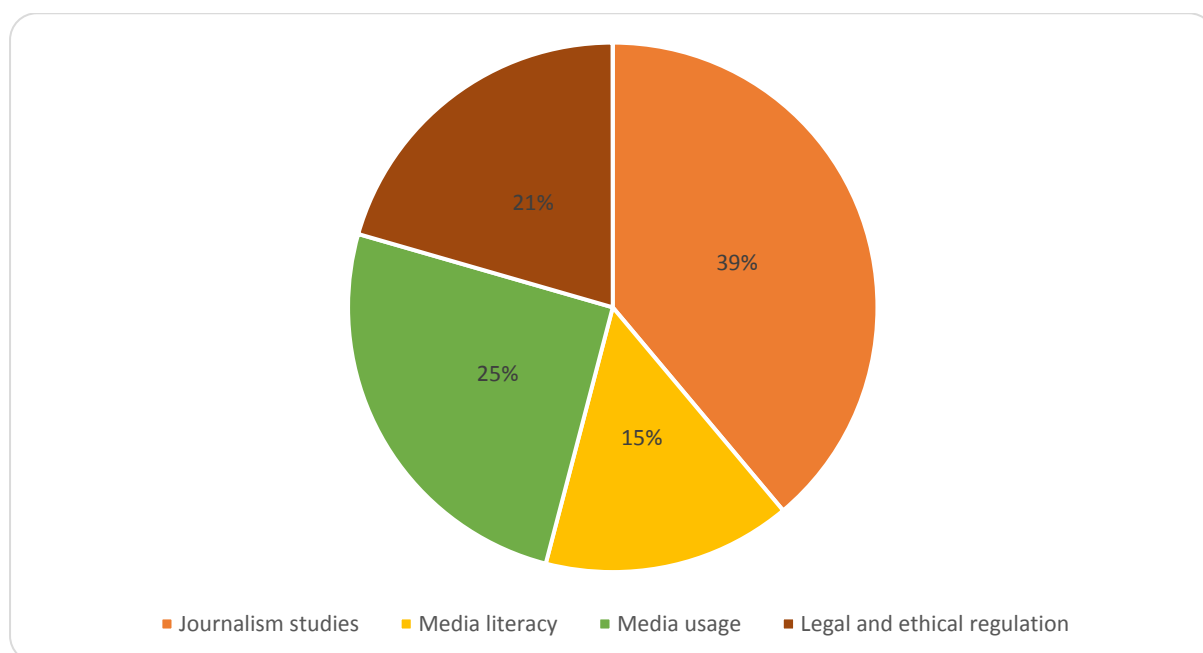


Figure 1. The general interest of Polish scholars in four Mediadecom domains

Source: Authors.

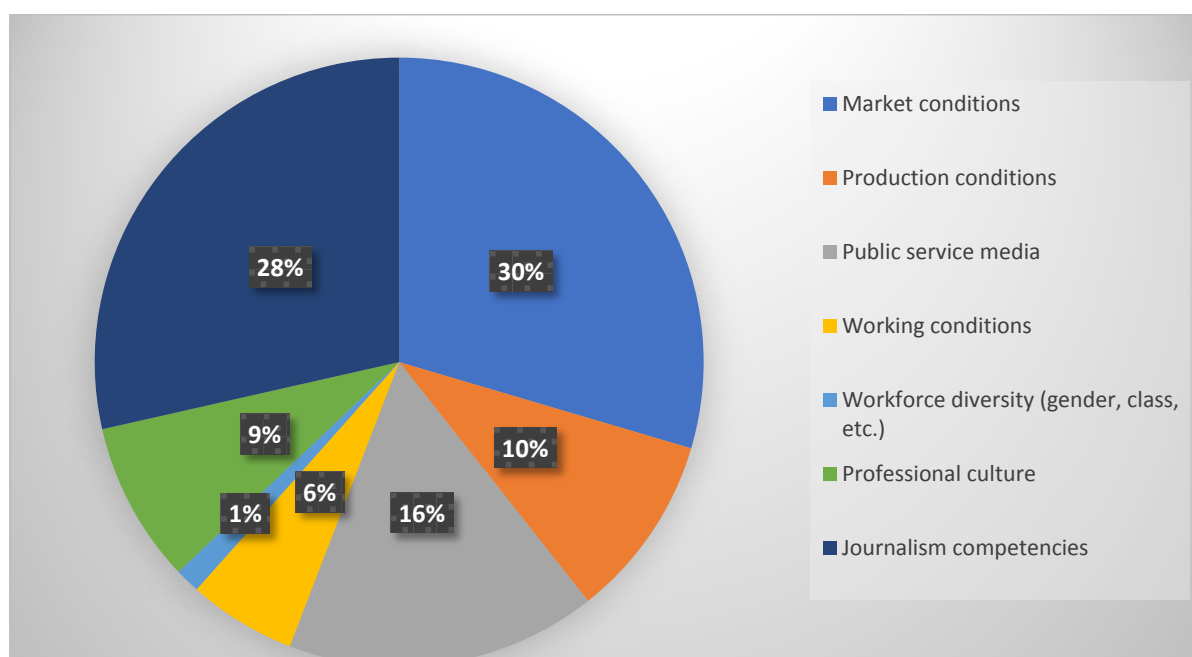


Figure 2. The general interest of Polish scholars in Journalism Studies domain

Source: Authors.

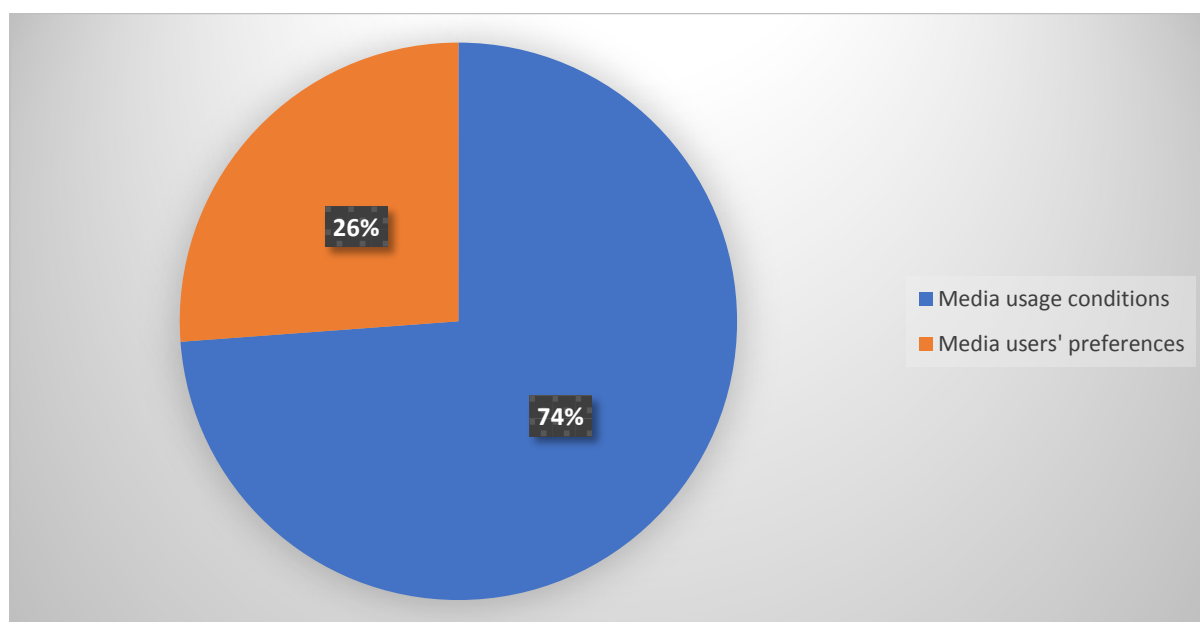


Figure 3. The general interest of Polish scholars in Media Users domain

Source: Authors.

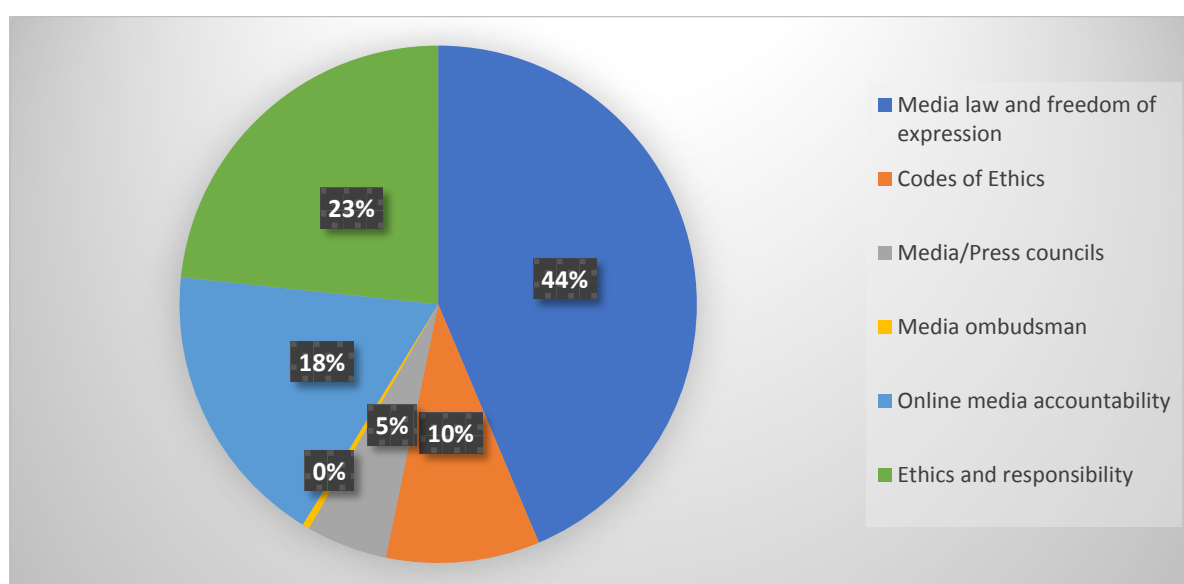


Figure 4. The general interest of Polish scholars in Legal and Ethical domain

Source: Authors.

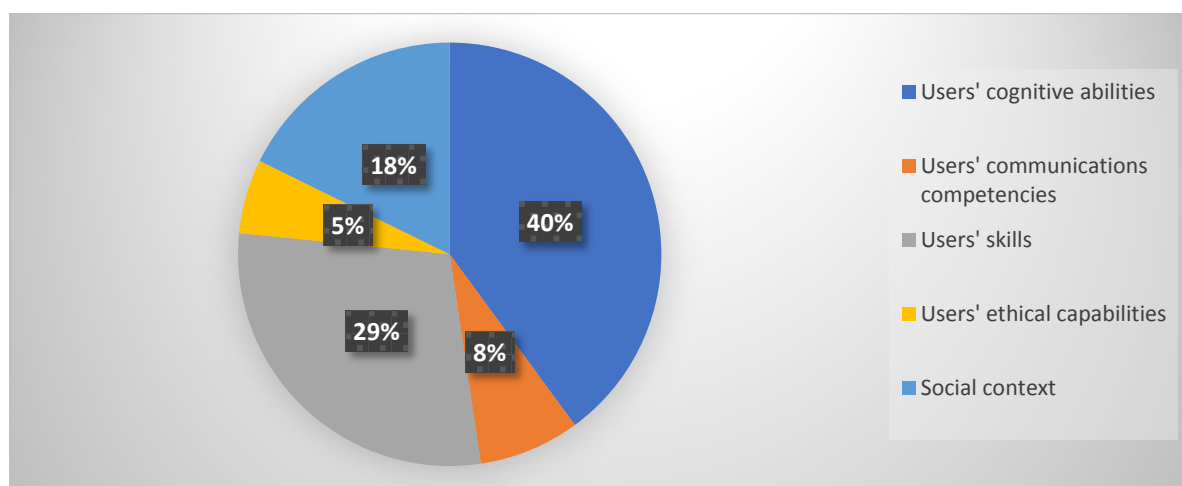


Figure 5. The general interest of Polish scholars in Media Literacy domain.

Source: Authors.

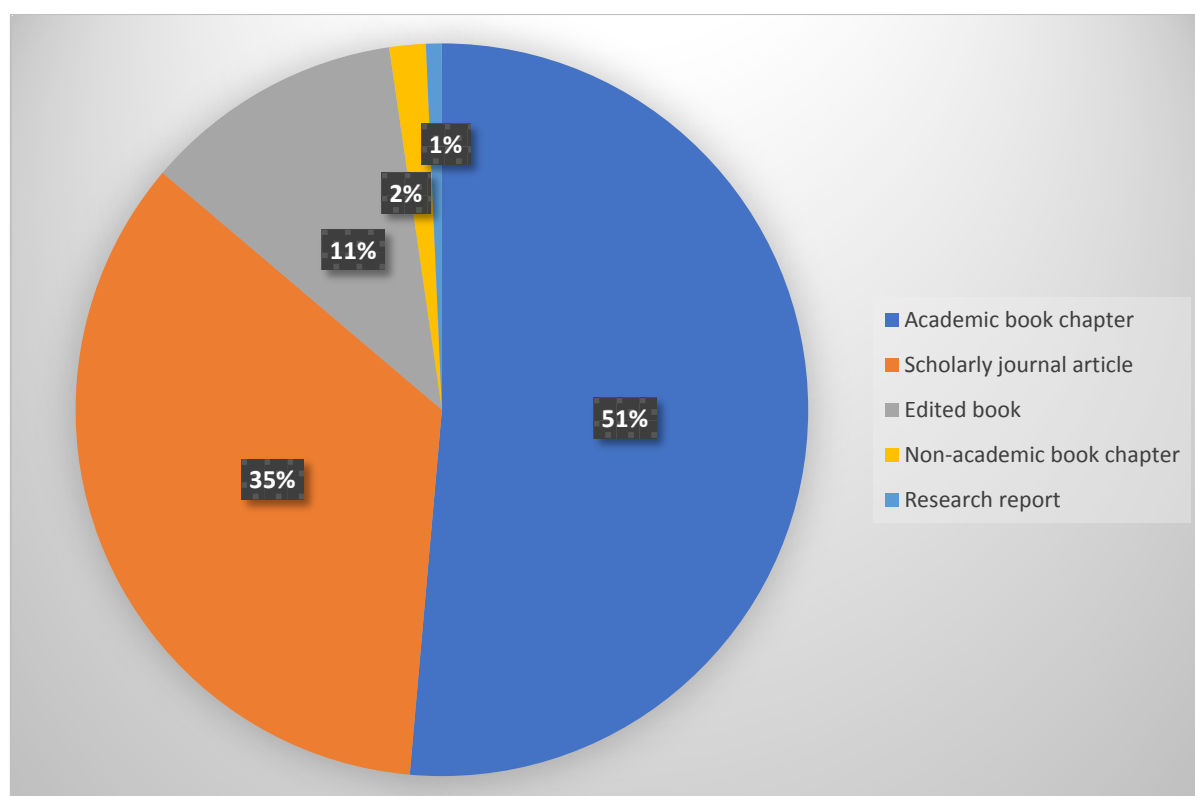


Figure 6. Type of publication (% in four domains).

Source: Authors.

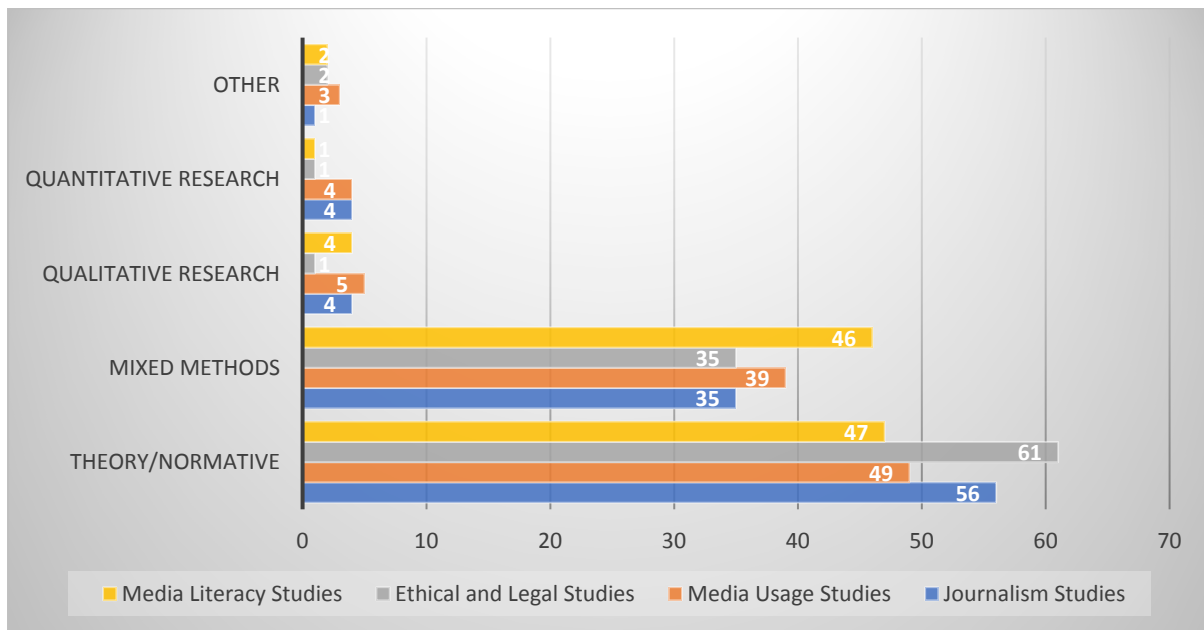


Figure 7. Scholarly orientations (% in four domains).

Source: Authors.

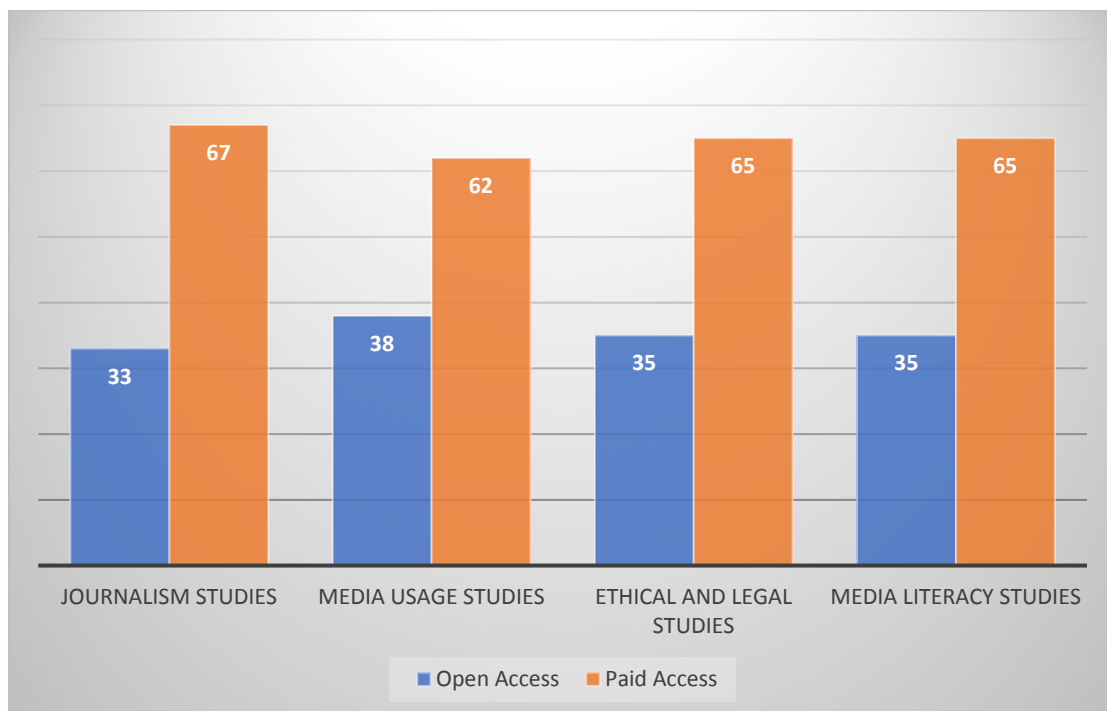


Figure 8. Open vs. Paid access (% in four domains).

Source: Authors.

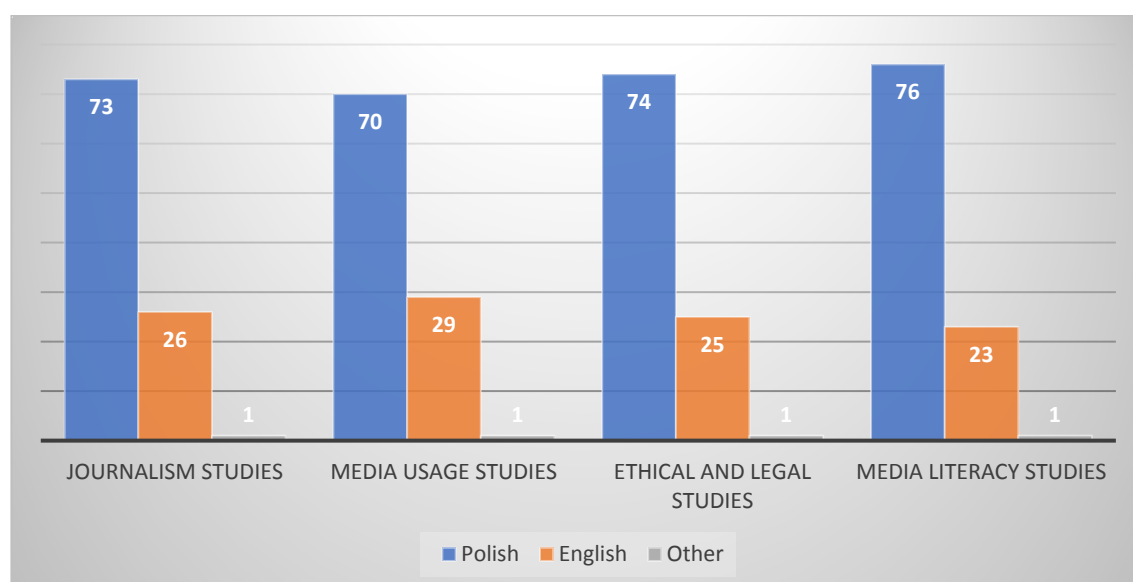


Figure 9. Language of publications (% in four domains).

Source: Authors.

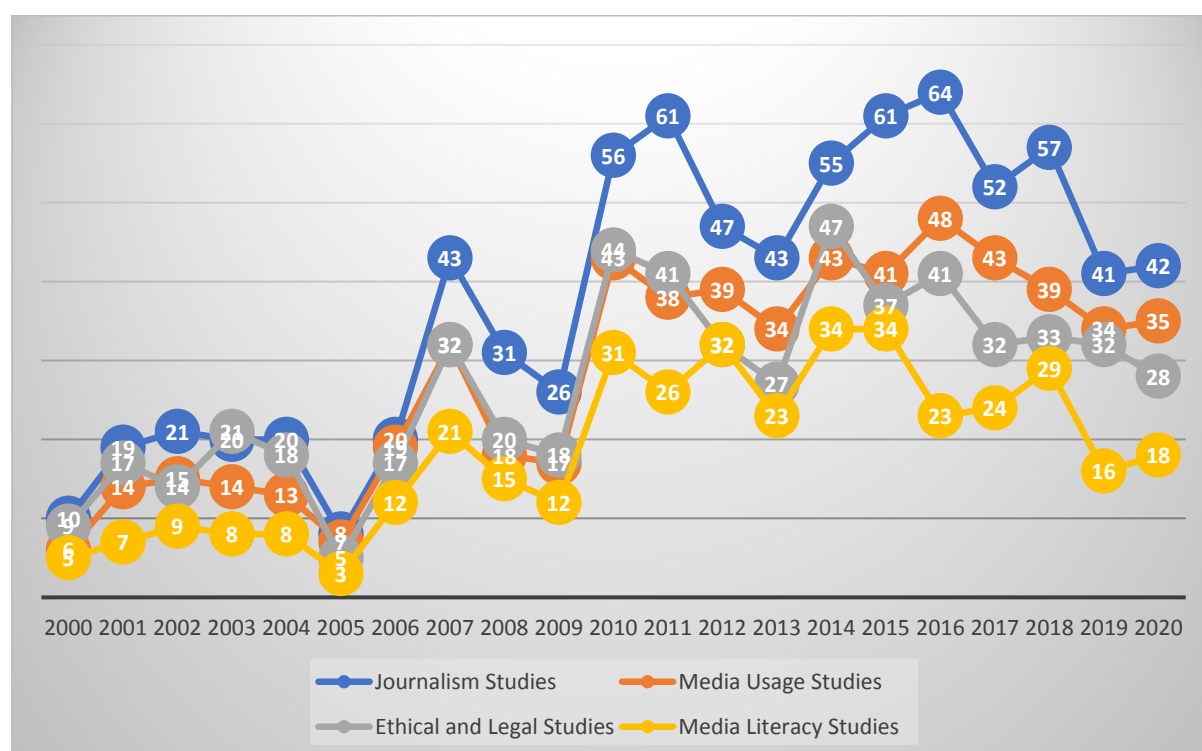


Figure 10. Year of publication across four domains (N).

Source: Authors.

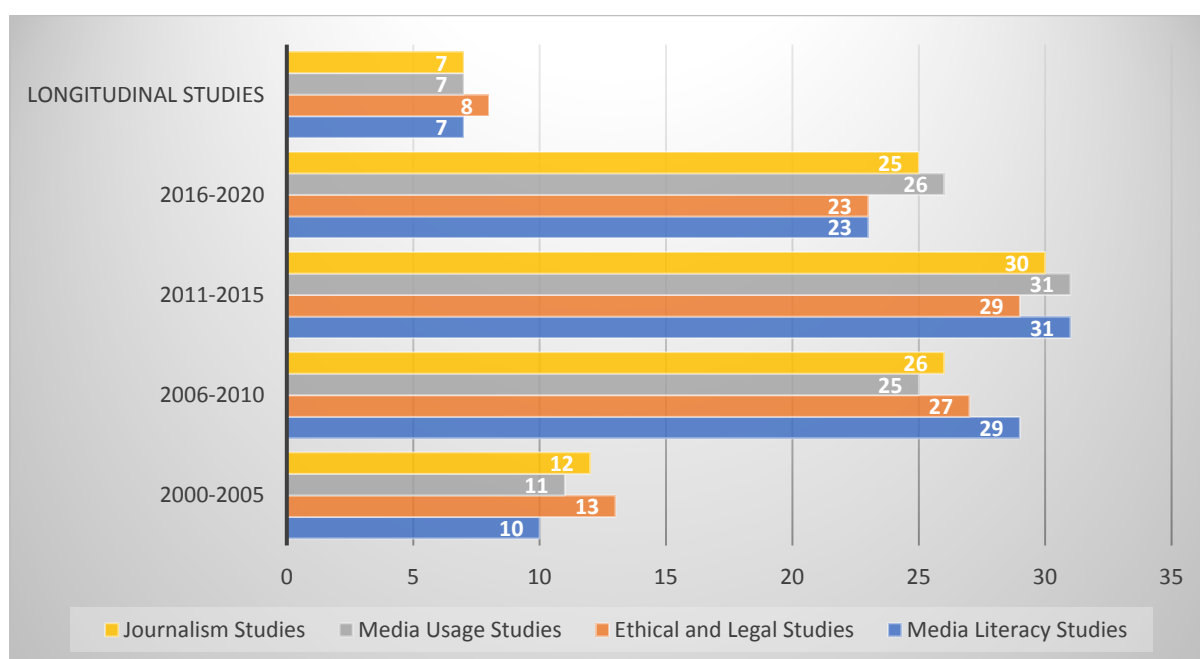


Figure 11. The period of data gathering (% in four domains).

Source: Authors.

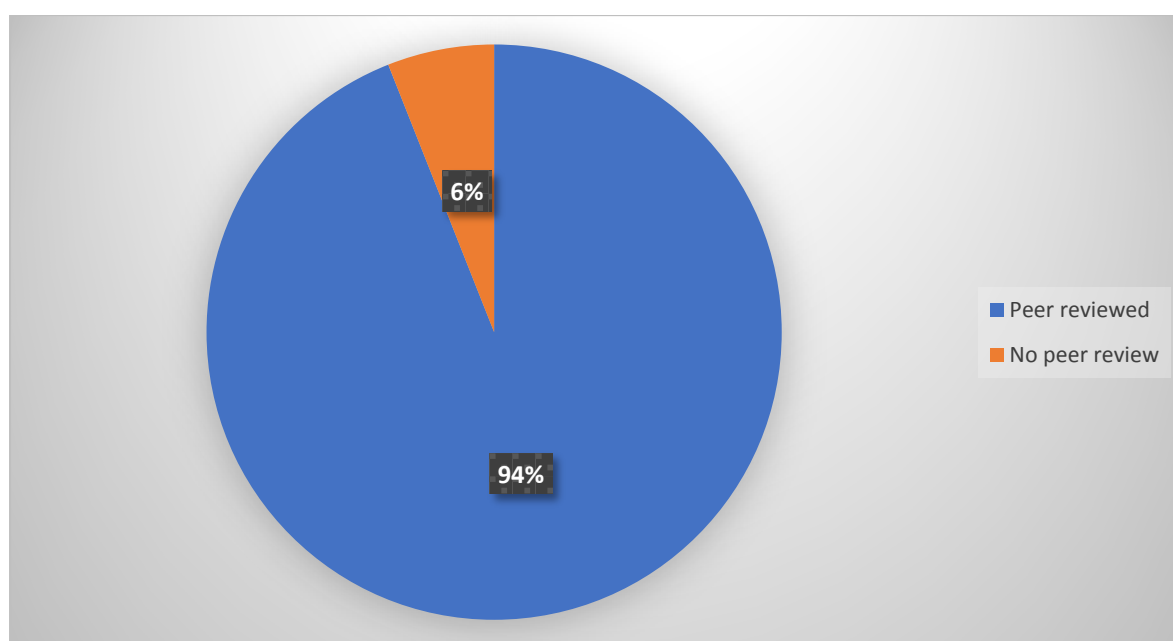


Figure 12. Peer review of publications (% in four domains).

Source: Authors.



Figure 13. Peer reviewing of publications (% in four domains).

Source: Authors.

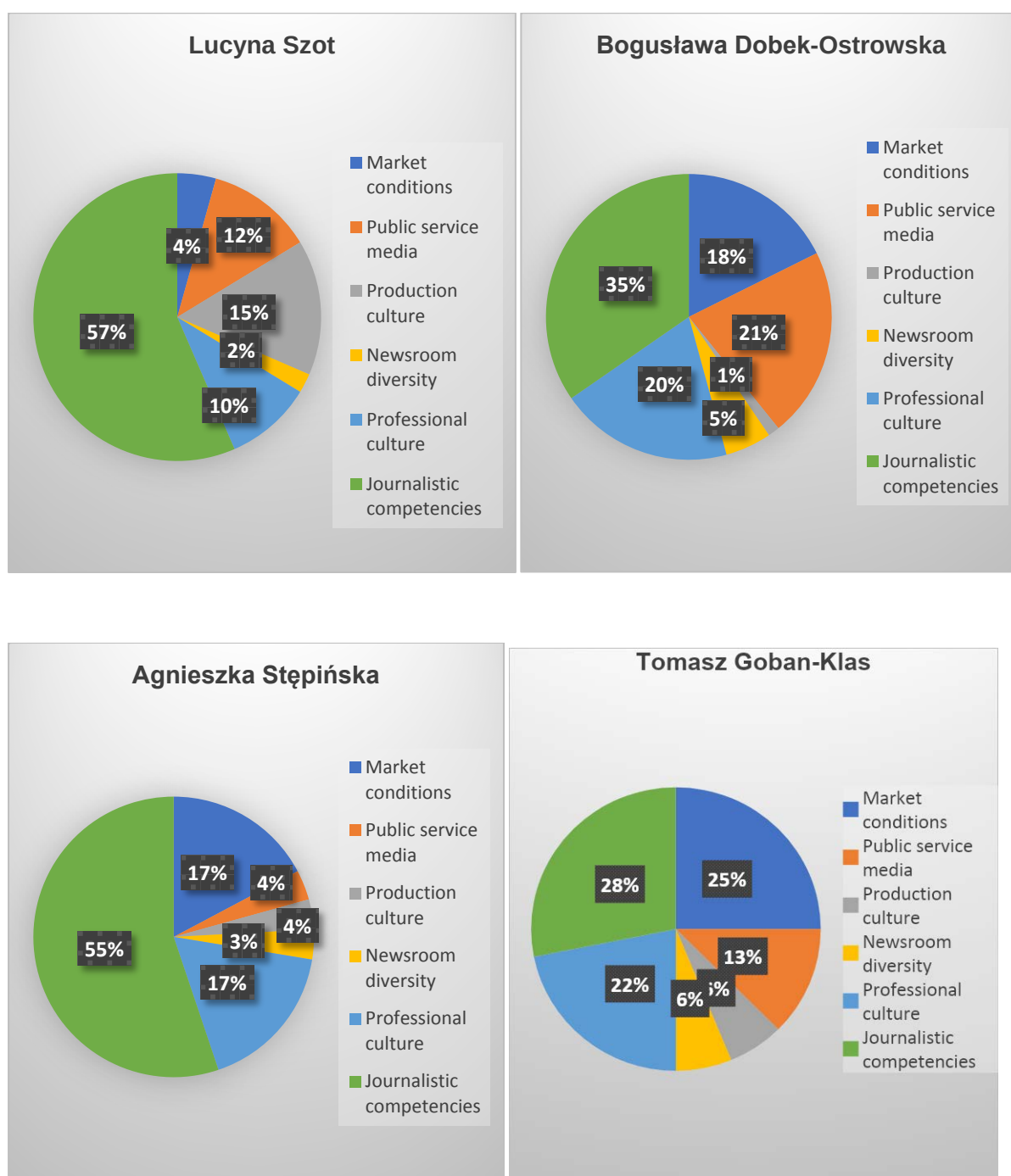


Figure 14. The general interest of selected Polish scholars in Journalism Studies domain.

Source: Authors.

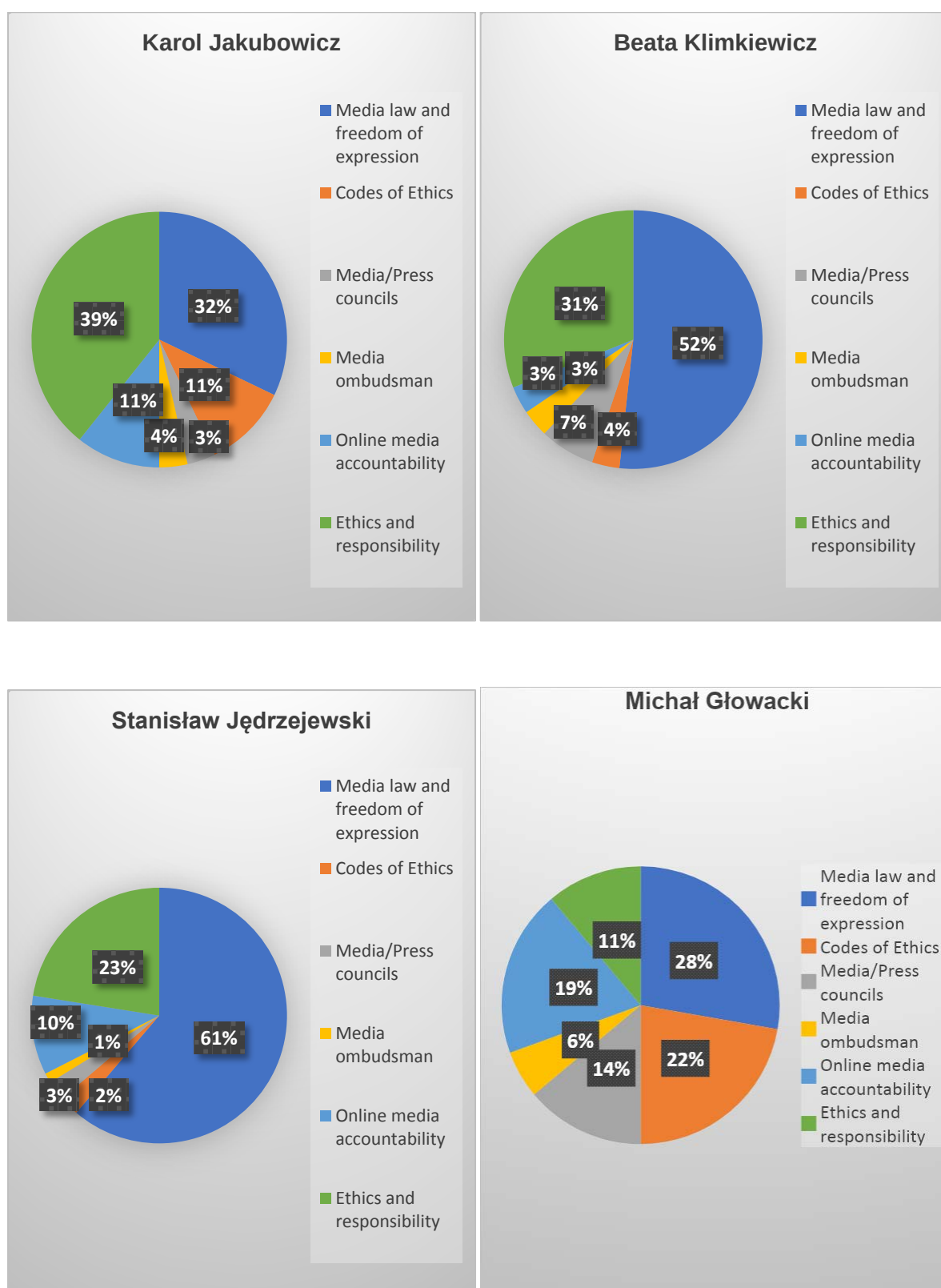


Figure 15. The general interest of selected Polish scholars in the Legal and Ethical Studies domain.
Source: Authors.



ROMANIA

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

By Ioana Avădani – Centrul pentru Jurnalism Independent

Executive Summary

The scope of the current paper is to review the existing documentary and scientific sources and literature that may enable the researcher to thoroughly examine the media field in Romania in four domains: legal regulation and accountability systems, journalism, media usage patterns and media-related competences. Such an analysis should enable the researcher to identify the risks and opportunities that the four domains provide for the development of the deliberative democracy in Romania.

We found an impressive quantity of data, information and knowledge, but a lack of structure and some inconsistencies that makes research difficult and time-consuming. In some domains, such the legal and journalistic, there is an abundance of sources, while in others, such as the media-related competences, there is a scarcity. In between, the domain of media usage patterns offers a variety of data, collected or produced by various actors, with different methodologies and scopes. Such data is only partially available outside the business sector and is seldom comparable, which hampers the research.

We identified a series of actors active in documenting and researching the media field: the state, the academics, journalists, businesses, including those involved in new technologies that are game changers. These actors take turns in one domain or another, but they do not coordinate or cooperate.

It appears that the data and information distribution follow the “plum pudding model”²⁴³: valuable information needs to be scooped out of volumes of irrelevant one.

In conclusion: some domains are barely documented at all, it is difficult to navigate the existing information and identify the relevant information and there is a lack of cooperation between actors that generate data and information as well as public policies. The major risk we identified is the lack of evidence-based policymaking and for the research works and findings to go unnoticed and unapplied by the practitioners and policymakers and for the new knowledge to be wasted.

²⁴³ The plum pudding model is one of the oldest atomic models imagined by physicist J.J. Thompson in 1904, according to which negatively charged electrons were surrounded by a volume of positive charge, like plums in a pudding.

1. Introduction

1.1. Media research and monitoring system and its current situation

Mass media is one of the domains that explosively expanded when Romania transitioned, in 1989, from a totalitarian Communist regime to a full-fledged (but imperfect) democracy. In 1989, Romanians only had access to two hours of TV programs a day, deeply infused with party propaganda and a huge Ceaușescu personality cult. Almost overnight they moved to a mushrooming media ecosystem, with the vital force but also with the lack of predictability and consistency of “new lands”. Freedom of expression was frequently considered the right Romanian enjoyed most and of which they are most aware (APADOR-CH, 2015). In the years after 1989, the media business was dynamic in times of prosperity, but seriously affected in times of crises, be they economic, as in the financial crisis of 2007-2009 or health-related as in the pandemic of 2020-2021.

Despite these dynamics and the importance of mass media in the information diet of Romanians, the field has seen insufficient research and holistic studies, via comprehensive, diachronic trans-sectorial research. With the birth of journalism education, in 1990, academic research started to speed up and literature dedicated to the media field began to accumulate. It consists mainly of articles and book chapters, on narrow topics, mirroring the interests of the respective researchers rather than a broader vision and the strategic preoccupation of a given research hub. Topics such as the legal environment, the market evolution or the media competences are studied in more depth outside academic circles, by the business or non-governmental sectors.

The first part of the papers overviews the types of sources available, detailed for each of the four domains identified as relevant for this report: legal and accountability, journalism, media usage patterns and media-related competences. It also looks at the funding available to Romanian media researchers and data processors, be they academic or non-academic. It reveals a multitude of sources, generated by a variety of national and international actors, from academia, business and civil society. The academic literature is particularly rich in the journalistic domain, including numerous published articles, numerous authors, and diverse topics addressed, thus indicating a high interest from researchers. Less covered are the topics of the legal domain and media-related competences. The area of media usage is dominated by data generated by non-academic actors, most of which have a commercial interest.

The second part assesses these sources from the point of view of their availability, continuity, reliability and availability of experts. It found the sources are freely available and experts are accessible, but the overall data corpus is fragmented and methodologies inconsistent or incomparable, which makes research time-consuming and results subject to methodological limitations.

The last part is dedicated to the main findings of the analysis and conclusions.

1.2. Main institutions and actors in media and communication research, monitoring and education

Romania enjoys a multitude of data sources regarding the media, generated by a multitude of actors, different in their nature and areas of expertise. The state is not actively involved in media research, and its role is rather normative, as it is visible in the legal domains and in market regulation. It also generates primary data via the public authorities. The international governmental or transnational organisations are also active in generating and processing data about media and democracy, such as the European Commission, the US State Department, OECD and the Council of Europe. Other important local actors include scholars and research groups in national universities, who are involved in international research projects. Romania is included in large comparative research projects, such as the *Media Pluralism Monitor* (conducted by Center

for Media Pluralism and Media Freedom), the *World of Journalism Study* (coordinated by the Ludwig-Maximilians Universität in Munich) and the Reuters Institute for the Study of Journalism's *Digital News Report*. International NGOs such as Reporters sans Frontières or Freedom House also include Romania in their media status reports or indexes. National and multinational companies active in Romania or with an interest in the local market also provide data through their own research, as individual entities or via industry bodies (such as those for auditing of circulation or calculating the broadcast audience). Local NGOs are also involved in studying the media sector, the legislation that standardise the sector and the journalistic practices in the country.

This large array of actors produces an important volume of raw data, studies and research, but they are scattered and disconnected, which makes cross-reading and comparative analysis time-consuming.

We grouped the main types of resources available to researchers as follows:

- Primary sources: legal texts, activity reports of the public authorities, open data offered by the authorities, statistical reports
- Research projects, international or national
- Academic sources: journals and papers (including university annals), doctoral theses
- Non-academic resources: books, studies by NGOs, other sources such as online publication dedicated to the media sector, articles in the news and cultural media and professional associations magazines; privately generated data (such as market research, audience measurement or studies into consumer habits).

When it comes to primary sources, there is an important corpus of legal texts pertaining mainly to freedom of expression and freedom of information, which are freely available. All public authorities must publish yearly activity reports and access to information reports. There is a coherent body of laws on privacy and data protection. Whistle-blowers enjoy protection under specific legislation. The audio-visual sector is also regulated by law, both in terms of content (in line with the EU regulation) and in terms of dominant market position and restrictions thereof. Included in this category the reports issued by the US State Department and the European Commission's reports under the Mechanism for Cooperation and Verification (CVM)²⁴⁴. Statistic bulletins or European barometers also fall in this category of sources, mostly useful when analysing trust in the media or consumption patterns. Reports of the state bodies are also included in this category. The national telecom regulator (Autoritatea Națională pentru Administrare și Reglementare în Comunicații - National Authority for Management and Regulation in Communications, ANCOM) issues half-year reports regarding the connectivity capability of Romania. The national broadcast regulator, Consiliul Național al Audiovizualului (The National Audiovisual Council, CNA) issues reports on broadcasters, including the type of licence and ownership information. The ANCOM and CNA reports use standardised methodology and provide consistent data year after year. They are one of the very few data sets produced and published by the Romanian authorities in the field of media. This category also includes the audience and circulation figures measured by professional or industry bodies (see details about these resources in *Section 4. Publications, data sources and main monitoring actors of media usage patterns*).

Non-academic sources include a limited number of studies conducted by NGOs with an interest and expertise in media, especially in journalism practices, accountability and employment. Such reports are sporadic, and their publication depends on the availability of resources, but they

²⁴⁴ The Cooperation and Verification Mechanism (CVM) is a transitional measure set up by the European Commission to assist Romania to remedy shortcomings registered at the moment of its EU Accession in the fields of judicial reform, corruption. European Commission, available at https://ec.europa.eu/info/policies/justice-and-fundamental-rights/upholding-rule-law/rule-law/assistance-bulgaria-and-romania-under-cvm/cooperation-and-verification-mechanism-bulgaria-and-romania_en, accessed 18.11.2021

bring valuable information that would otherwise be missing. There are also international NGOs such as Reporters sans Frontières and Freedom House, that issue annually media freedom indexes. There are no reputable professional magazines for media professionals, and only two online publications dedicated exclusively to news and developments in the media (paginademedias.ro and mediaexpress.ro). Marketing or other commercial companies conduct infrequent market research or studies regarding media consumption or media content creation habits of media users, but they are also opportunistic and often not comparable, given the different methodologies. Reputable publishing houses publish books pertaining to media and one of them, Polirom, has a collection dedicated to books in this field, which are mostly manuals.

In the following sections, I discuss the academic literature and the research organisation and reports.

1.3. The funding system of media research and monitoring

The academic research of the media sector has been generated by journalism and communication programs active in Romania. The media education history in Romania re-started in the 1990s, with the creation of the first post-communist Journalism school in the country, in the University of Bucharest. In 1977, Romania eliminated journalism as an academic domain (together with other fields such as sociology and psychology). Students could study journalism only as part of the politically controlled “Stefan Gheorghiu Political Sciences Academy”, a factory of indoctrinated party cadres, trained to become *apparatchiks* and disseminators of the Communist Party ideology. The Faculty of Journalism and Communication Sciences in Bucharest (FJSC) was the first of many others, as media became an attractive field for young people. At its peak, in 2008-2009, Romania entertained as many as 40 journalism and communication programs (Armanca, 2019). Some of them vanished, as the media labour market shrank, due to the economic crisis.

According to the Agenția Română pentru Asigurarea Calității în Învățământul Superior ARACIS [Romanian Agency for Quality Assurance in Higher Education], 31 accredited academic programs in journalism were active in 2022, plus ten specialised in advertising and seven in digital media. 39 other programs were devoted to communication and public relations, and four to “information and documentation sciences”. Journalism, communication and digital media tracks were available also in Hungarian (the largest linguistic minority in Romania), German and English. The most prominent programs are those offered by the University of Bucharest, through its Faculty of Journalism and Communication Sciences (FJSC) and the Cluj-based Babes-Bolyai University, through its Political, Administrative and Communication Sciences. Also, well-regarded journalism programs exist in the A.I.Cuza University in Iași and Lucian Blaga University in Sibiu. Equally active in media research is the National School for Political and Administrative Studies (SNSPA) in Bucharest, with a well-developed Communication Faculty. Universities located in 14 out of the 42 counties of Romania offer journalism, communication or other media-related programs, thus providing good access for students across the country to higher education specialised in journalism and the media.

As the journalism education had to be reinvented after 1989, the schools had to recruit their staff from wherever it was available. A report on the state of journalism education in Romania writes: “Only a part of the Journalism schools in Romania function in the context of solid higher education institutions. All the schools have a heterogeneous faculty, [with staff] coming from diverse backgrounds – social sciences, humanities, and even technical education. This translates into a lack of cohesiveness and low similarity between the schools, which in turn leads to divergent approaches in terms of curriculum development and teaching strategies” (Meza, Prundaru, Mogoș, 2012). (More details about the research communities are provided further down in Section 6.3 *Monitoring capabilities and the quality of data and knowledge*)

Romanian Journalism faculties and departments are involved in international consortia which conduct research projects focusing on journalism and media. None of these projects has a Romanian university as a lead. Results and proceedings of these research projects are published in international academic journals and have a relatively low visibility in the country outside of academic circles.

Journalism schools have set up own research centres. Thus, FJSC has set up and manages The Centre for Research of the Role of Mass Communication in Developing the Public Space, for Analysis of Reception and of Advanced Technologies – SPARTA²⁴⁵. Created in 2009, it is meant to make up for the “unsatisfying status” of the studies and solutions for improving the mass communication (journalism, public relations, advertising) advanced by the academic experts at that time and end the domination of private research bodies in the field of media.

The University of Craiova runs the Center for Scientific Research in Communication Sciences, Media and Public Opinion (CCSCMOP)²⁴⁶. The faculty of Sociology and Social Assistance of the University of Bucharest set up and ran the Research Center for Media and New Communication technologies, that functioned between 2000-2015, and ceased to exist afterwards.

The Faculty of Communication and Public Relations of the National School for Political and Administrative Studies (SNSPA) in Bucharest manages a quite active Centre of Communication Research, with a pronounced interest in media phenomena and their impact on public discourse in Romania. Topics related to disinformation and the impact of digital technologies on the media and communication have been on the rise over the last years.

National media research projects are few and far between. The main funding for research comes from the Executive Unit for the Funding Higher Education, Research, Development and Innovation (Unitatea Executivă pentru Finanțarea Învățământului Superior, a Cercetării, Dezvoltării și Inovării, UEFISCDI), based on the National Plan for Research, Development and Innovation. The plan provides for four major programs: development of the national research and development system (P1), increasing the competitiveness of the Romanian economy through research, development and innovation, (P2) international and European cooperation (P3) and exploratory end frontier research (P4). The media research projects may find financing under P1 and P4, that provide funding for research in social and humanist sciences. Funding instruments include funding for post-doctoral research (PD), support for small teams of researchers (TE), various mobility grants for researchers and scholarships. Over the last three rounds of competitive calls (2016, 2019 and 2021) only one project pertaining to media²⁴⁷ was retained for funding. “While the funding opportunities, the application routines, the needed documents are all publicly available, I think that the funding mechanisms for the media research are accessible only to few people, knowledgeable of their bureaucracy, specific vocabulary and requests. Based on my experience and observations, but also discussing with my colleagues, I believe media is unfortunately not of interest for the funding decision makers. As a bitter joke: if we don’t innovate in green energy, we do not count”, said Minodora Sălcudean, an academic teaching Journalism at the University in Sibiu.²⁴⁸

Romania is part of international research projects dedicated to media and democracy, such as *Worlds of Journalism* (<https://worldsofjournalism.org/>), whose main objective “is to help jour-

²⁴⁵ Centrul de cercetare a rolului comunicării de masă la dezvoltarea Spatiului Public, de Analiză a Receptării și a Tehnologiilor Avansate – SPARTA, available at <http://www.fjsc.unibuc.ro/cercetare>, accessed 18.11.2021

²⁴⁶ Centrul de Cercetare Științifică Comunicare, Media și Opinie Publică (CCSCMOP), available at <http://ccscmop.sserr.ro/>, accessed 18.11.2021

²⁴⁷ The project *Stabilirea agendei publice în noul peisaj mediatic* [Setting up the public agenda in the new media landscape], code PN-III-P1-1.1-PD-2019-0034, National School for Political and Administrative Studies has received 244,598 RON (approx. 55,000 EUR) under the 2019 call.

²⁴⁸ Interview with Minodora Sălcudean, lector at the Journalism, Public Relations, Psychology and Sociology, Department, Faculty of Socio-Humanistic Studies, University Lucian Blaga, Sibiu, conducted 26.10.2022

nalism researchers, media practitioners and policymakers better understand the worldviews and changes that are taking place in the professional views of journalists, the conditions and limitations under which journalists operate, and the social functions of journalism in a changing world". Another major international project is *Media Pluralism Monitor* (<https://cmpf.eui.eu/media-pluralism-monitor/>), which is a "tool to assess the risks for media pluralism" in each participant country. A third is *Varieties of Democracies* (<https://www.v-dem.net/>), a study that produces "a multidimensional and disaggregated dataset that reflects the complexity of the concept of democracy as a system of rule that goes beyond the simple presence of elections". Romania is also part of the *Digital News Report* study (<https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2022>), conducted by Reuters Institute for the Study of Journalism and of the *Global Kids Online* (<http://globalkidsonline.net/>), "an international research project that aims to generate and sustain a rigorous cross-national evidence base around children's use of the internet by creating a global network of researchers and experts".

1.4. The national research database and most important journals

There is a limited number of academic journals dedicated to media, but academic articles on this topic are published in journals dedicated to communication, sociology or political sciences issues in general.

University Babeş-Bolyai in Cluj publishes two journals dedicated to media and communication and addressing the topics specific to the media domain.

The *Journal of Media Research* (JMR) is a scientific research journal focusing on the field of media and communication. It is a peer-reviewed academic publication for interdisciplinary social sciences quantitative and qualitative inquiry. The JMR focuses on research on both traditional and social media and encourages submissions on the topic of public relations and advertising. The Journal has a section dedicated to book reviews.

The second journal is called *Studia Ephemerides*, focusing on journalism, media and communication.

The University Lucian Blaga in Sibiu publishes *Saeculum*, first founded in 1943. New series started in 1995 and publish articles in the area of Social Sciences and humanistic studies—media and communication included—in Romanian, French, English and German. Also in Sibiu, the scientific journal *Revista Transilvania* (a scientific publication indexed in Scopus, as well as in other international databases), in the field of humanities, has a constant section dedicated to media studies.

Social Sciences and Education Research Review (SSERR) is an international, bi-annual, print and online academic journal published by the Center for Scientific Research in Communication Sciences, Media and Public Opinion (CCSCMOP) and the Department of Communication, Journalism and Education Sciences of the Faculty of Letters, in the University of Craiova.

The *Romanian Journal of Communication and Public Relations* is published by the Centre of Communication Research of the Faculty of Communication and Public Relations of the National School for Political and Administrative Studies (SNSPA) in Bucharest. The Journal first appeared in 1999 and features research in communication, mass-media, public relations and journalism.

Revista de Studii Media [Journal of Media Studies] was founded in 2012 by the Faculty of Journalism, "Hyperion" University, Bucharest, as an annual print publication. It has been available in both print and online versions starting with the year 2018. *Revista de Studii Media* publishes articles in the field of communication sciences (Journalism, Public Relations, Advertising, Social Communication) as well as in other connected areas: Political Sciences, Sociology, the Sociology

of Communication. Until the year 2017, the Journal published mostly in Romanian. Starting with the year 2018, they publish in Romanian, English and French. The journal features three main sections – opinion articles, research articles and book reviews – and accepts only original articles.

The doctoral theses and the proceedings of doctoral schools' activities form an important body of the research studies and new knowledge in the field of media.

There are three doctoral schools specifically dedicated to media and journalism in Romania.

The [Doctoral School in Communication Sciences](#) of the FJSC in Bucharest started in 2008. It focuses on a multi-disciplinary approach of communication and includes, among other areas of interest, media and public space, media semiotics, media discourse, media economy, cultural industries and ethics. Between 2010 and 2022, 74 theses have been defended by graduates of this school.

The [Doctoral School in Communication, Public Relations and Advertising](#) (SDCRPP) of the Babeş-Bolyai University in Cluj-Napoca focuses on communication sciences, political sciences, and marketing, with areas of research around the common field of communication analysis. Their scientific interests include public communication, advertising communication, political communication, religious communication, strategic communication, public relations, advertising, social media and branding.

The [Political and Communication Sciences PhD Program](#) of the same university was launched in the 2009-2010 academic year. They aim at creating a “school of the history of journalism and communication” and make use of the valuable journalistic heritage of Romania. Between 2012 and 2022, the graduates of both doctoral schools of Babeş-Bolyai University have defended 43 theses in journalism and communication sciences.

Topics related to media, especially the journalistic domain, appear in other doctoral thesis in specialisations such as philology, history and national security, depending on the faculty which hosts the journalism department. Given this scattering, it is difficult to have a clear and updated image on the stage of the research in the journalism field.

The topics of risks and opportunities in the four domains of interest for this paper are not specifically treated, and are not explicitly addressed in the vast part of the academic literature. For example, terms such as “risk” or “opportunity” do not appear in the keywords of any of 117 in the defended journalism and communication doctoral thesis of FJSC and Babeş-Bolyai Universities between 2000-2030.

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

The sources in the legal and ethical regulation domain related to the media field are mainly primary sources, which means legal texts. There are also publicly available regular reports of public authorities and a database of case law. NGO reports and occasional media reports are also relevant sources for this domain. Less frequent are the academic studies and articles, as well as legal analyses.

The main actors involved in the legal domain are state institutions and politicians, as the initiative to regulate is an almost exclusive privilege of the Government and MPs. The European Union, through its own legislative process, plays an active role in regulating the media field. Journalists, other media professionals and civic activists are less active, and they play mostly the role of watchdog, preventing abuses through the legislation or signalling them when they hap-

pen. The scholars are less present in this domain, the academic literature analysing the regulatory framework is rare and is generated mostly by the law studies or NGO environment.

In the sub-domain of accountability, the agency is more uniformly distributed, with the prominence of the state duly decreased and the presence of academics increased. Also of note is that the journalists themselves are rather inactive in this respect, as their activity is limited to the adoption of codes, without vigorous implementation.

2.1. Freedom of Expression

There is a significant body of primary legislation guaranteeing or pertaining to freedom of expression in Romania.

Romania has enshrined the freedom of expression as a fundamental human right in its Constitution (Art. 30 – Freedom of expression, but also in its Civil Code (Art. 70 and 75).

There are laws dealing specifically with:

- **defamation** - Civil Code provides for appropriate protection of the non-patrimonial rights such as dignity, reputation, privacy and the right to own an image.
- **protection of data and privacy** – apart from the Civil Code, the protection of privacy is also secured via the Criminal Code, art. 226 - Violation of the private life and art. 227 – Disclosing the professional secret (defined as private information acquired in the line of duty) (Penal Code, 2009). Romania has also implemented the GDPR.
- **hate speech** – is provided by the Criminal Code, art. 369 Incitement to hate and discrimination as well as Ordinance 31/2002 on prohibition of organisations, symbols and acts of a fascist, legionary²⁴⁹, racist and xenophobic nature and of the promotion of the personality cult of persons guilty of genocide against humanity and war crimes.
- **copyright** – is provided by Law 8/1996 on author's rights and related rights. At the time of this report, amendments to this law were being discussed in parliament to harmonise it with EU Directives 2019/789, laying down rules on the exercise of copyright and related rights applicable to certain online transmissions of broadcasting organisations and retransmissions of television and radio programmes, and amending Council Directive 93/83/EEC and Directive 2019/790 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC.
- **protection of whistleblowing** – is provided by Law 571/2004 on the protection of the employees of the public authorities, public institutions and other entities that signal law violations. Romania was one of the first European countries to have a dedicated law in this respect. A law to transpose the Directive (UE) 2019/1937 on the protection of persons who report breaches of Union law was under parliamentary procedure at the time of the writing of this article.
- **trade secrets** – is provided by Governmental Emergency Ordinance 25/2019 on protecting the know-how and the undisclosed business information that classifies as trade secrets against illegal acquiring, use and disclosure, transposing the EU Directive 2016/943 on the protection of undisclosed know-how and business information (trade secrets) against their unlawful acquisition, use and disclosure.

The functioning of the broadcasters is regulated via the Audiovisual Law 504/2002, amended several times to harmonise with the various versions of the EU directives in the field. At the time of the writing of this article, draft amendments were being discussed at expert levels to bring it

²⁴⁹ The Legionary Movement (aka Legiunea Arhanghelului Mihai/The Legion of The Archangel Michel and Garda de Fier/Iron Guard) was a nationalist-fascist party created in Romania in the late 1920s. They shortly acceded to power in September 1940-January 1941, creating the National-Legionary State, that promoted a strong anti-Semitic policy, marked by persecutions, expulsions and pogroms.

in line with the EU Directive (EU) 2018/1808 amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) in view of changing market realities. The law has specific and detailed provisions regarding the compulsory transparency of the ownership over the broadcasters down to individual shareholders (art. 48-49). There is no similar obligation for other types of media companies, but the broadcasters must list and publicly announce the name of the publications they publish or the other media services they offer (art. 48).

The protection of journalistic sources is dealt with in the Audiovisual law (Art 7), the Law 41/1994 on the organisation and functioning of the Romanian Radio Society and Romanian Television Society (Art.14 (11)) and the Law 19/2003 on the organisation and functioning of the National Press Agency AGERPRES. The three laws offer different degrees of protection for the journalists' sources.

Disinformation, as such, is not regulated. The Penal Code adopted in 2009 sanctions the communication of "false news, data or information or of falsified documents", provided that the perpetrator is aware of its false character and only if such communication endangers the national security (Art. 404). The previous Code, adopted in 1968, had a similar provision (Art. 168¹), but made no exception for the lack of awareness of the perpetrator and was used by the Government as a tool to stifle anti-Communist criticism. The article 168¹ was abrogated in 2006. Since June 2020, disinformation is included as a threat in Romania's National Defence Strategy. Several attempts have been made to adopt anti-disinformation legislation in the current context (mainly targeting fake news), but they have not been successful.

It is difficult to identify the local case law pertaining to freedom of expression, even if all the judged cases are online, because they are not segregated based on the grounds or merits of each case. So, one has to know what they are looking for when they interrogate the online database - either the name of the persons involved or the number of the file. The Center for Independent Journalism (CJI) has produced an analysis of the legislation governing freedom of expression, and also a collection of relevant case law, in 2013 (Hatneanu, 2013). Another NGO, ActiveWatch, has produced annually (since 2000) a freedom of expression report, *FreeEx*, combining critique of newly adopted legislation, the violation of existing laws, case law, and also the violation of journalistic ethics and professional standards. It is the longest-lived periodical activity aimed to keep track of modifications and events in the field of freedom of expression in Romania. SLAPP is not properly documented as a phenomenon. The only available references are media articles that cover when newsrooms are aggressively sued by politicians.²⁵⁰

2.2. Freedom of information

Romania has enshrined the freedom of information as a fundamental human right in its Constitution in Art. 31 - Access to information.

There are also specific laws that regulate the exercise of this right.

- access to information of public interest – is provided by Law 544/2001 on access to information of public interest; Law 109/2007 on the reuse of the information of the public institutions (transposition of the Directive 2003/98/CE on the reuse of public sector information). Laws on institutional transparency, public procurement and state secret have relevant provisions that support or legitimately limit the access to information.

²⁵⁰ See the schedule of lawsuits filed by mayor Daniel Băluță against *Libertatea* newspaper, in Tolontan, C. (2021, 4.11), Cum arată agenda unor jurnaliști de investigație, cu termenele de judecată în procesele intentate de politicieni [How looks the agenda of the investigative journalists with law suits filed by politicians], *Libertatea*, available at <https://www.libertatea.ro/opinii/cum-arata-agenda-unor-jurnalisti-de-investigatie-cu-termenele-de-judecata-din-procesele-intentate-de-politicieni-3818051>, accessed 12.06.2022.

- protection of personal data – is provided by Law 190/2018 on implementation of the EU General Data Protection Regulation of 2016 (GDPR), but also more specific legislation such as data protection in electronic commerce and in electronic communications and prosecution of criminal offences.

Research regarding the legislation on freedom of expression is mainly present in the field of law studies and addresses issues such as the importance of access to information (Predescu, 2010), legitimate limits to media criticism (Mihalcea, Paraschiv, 2012), the right to one's own image (Matefi, 2018) or the protection of journalistic sources (Moldova, 2012). Various authors discuss the relevant case law of the European Court of Human Rights related to Article 10 (Popescu, 2018).

While the corpus of legal texts is solid and harmonised with the European *acquis*, the information about the implementation of these laws is rather scarce and scattered, and analytical articles on these topics are rare. For example, the public authorities must file annual reports of the implementation of the access to information law, but they are rather formal, providing data on how many requests they have received and solved. NGOs (such as Pro Democrația, the Institute for Public Policies, the Center for Independent Journalism) have conducted studies regarding the implementation of the law and its impact on the democratic process and good governance, but such reports are only occasional and are not the result of continuous or periodic monitoring. The National Audiovisual Council issues an annual report, summarising the council's work on implementing the broadcast legislation, the number of licences issued or withdrawn and the number of sanctions applied to the broadcasters for violation of the law. Protection of freedom of expression and of the right to information are also assessed in the *Media Pluralism Monitor* reports (2014-2022).

2.3. Accountability systems

Romania does not have a unique code of ethics for journalists or one that is generally accepted by a critical mass of media workers. The professional and associative movement is weak, and so is the genuine preoccupation with ethics in journalism. Civic, professional and business organisations tried to stimulate the adoption and implementation of media ethics codes, at different points in time, with limited practical results.

In 2011, the National Audiovisual Council, the broadcast regulator, adopted together with the broadcasters and civil society organisations, via a co-regulatory process, a Regulatory Code Regarding Audiovisual content, including provision related to the protection of minors, of human dignity and the right to one own's image, the right to reply, cultural diversity obligations and rules for the commercial communication. The document has been updated regularly, and the last time was in 2019.

The Convention of Media Organisations (COM), a loose alliance of over 30 media professionals' organisations, coordinated by the Center for Independent Journalism and Active Watch, two NGOs active in media development field, produced a Unified Code of Conduct, in 2009. The Code has never been jointly implemented, but it was adhered to and used separately by organisations, newsrooms and individual journalists.

Other organisations – such as the Union of Professional Journalists, the Romanian Association of Audiovisual Communications (ARCA - broadcasters' association) and the Union of Hungarian Journalists in Romania (MURE) have developed their own codes.

Based on a decision from 2011 of the National Audiovisual Council (CNA), the broadcasting regulator, each provider of audiovisual media services must publish on its own website its code of professional conduct.

The public broadcast media have their own self-regulatory documents available on their websites: the public television (SRTV) has a Procedure of ethical conduct, while the public radio (SRR) has a Code of ethical conduct. They also have Ethics commissions, for their employees and TVR has an ombudsman office where people from outside the institution can address their complaints.

The Romanian Advertising Council has its own Code of Practice in Advertising, as well an array of other self-regulatory documents on specific topics (such as advertising for alcohol, beer, products for children and cosmetics).

The accountability systems of Romanian media and the way the journalists relate to them have made the object of quite a number of studies. Romania was part of consortia in studies such as MediaAcT, and AntiCorrp that have resulted in articles and studies discussing the structures, the work and the adherence accountability and self-regulation in the country (Radu, Popa, 2013). The MediaAcT research revealed that in terms of respect of the professional standards, most Romanian journalists act according to the impulse dictated by their own conscience. A similar conclusion was reached by the research made under AntiCorrp, that found that the agency in applying ethics in journalism stays mainly with the individual journalist (Avădani, 2017). The topic was also addressed in PhD theses such as “*Media self-regulation and the professional activity of journalists in Romania*” (Popa, 2013). A consistent body of research published in Romanian and international journals relates to the ethics applied to new technologies, for example on the influence of the digital media in communication (Surdu, Teodor, Ivan, Chiru, 2021) or the ethics of the AI and neuromarketing (Iorga, Pop, 2019).

3. Publications, data sources and main monitoring actors of journalism domain

The topics associated with journalistic domains, as defined under the current project, form the bulk of the media-related scientific literature in Romania, both academic and non-academic.

The dynamics of the profession and the changes it underwent through the years, as well as the transformation of the media market and ecosystem are topics strongly represented in academic literature. They were addressed in both large, cross-countries, cross-topic research studies and in small-group or individual papers, printed internationally or in national journals.

The main actors in researching the journalistic domain, especially the practices and roles of journalists, come from academia, with a large volume of literature (studies, articles, book chapters) published. The main topics are the evolution and transformation of media landscape (Coman, 2013; Drulă, 2014), the market structures (Țimbolschi-Preoteasa, 2011; Rudnițchi, 2013, Ghibanu, 2018) and the journalistic practices and their impact of the media users (Vasilendiuc, Șuțu 2021). Noteworthy, in the recent years the impact of online and social media dominates the academic literature (Momoc, 2018; Dumitrache, 2019; Buf, Ștefăniță, 2020; Corbu Bărgăoanu, Buturoiu, Ștefăniță, 2020; Corbu, Bărgăoanu, Durach, Udrea, 2021). The Covid epidemic and its effects on the public communication, especially via media, also attracted the interest of the academics (Buturoiu, Udrea, Dumitrache, Corbu, 2021; Reisz, Crișan, 2022; Buturoiu, Voloc, 2021, Mureșan, Săcludean, Pinte, 2021).

The NGO sector has paid attention especially to media market evolution and the way this has affected media freedom and independence. Regular reports such as the *Media Sustainability Index* by IREX, *FreeEx* by Active Watch, the *State of the Media* or the monitoring of state advertising reports issued by the Center for Independent Journalism provide valuable longitudinal information. There also international reports and studies already mentioned such as *Worlds of Journalism*, *Media Pluralism Monitor* or the *Digital News Report*. The state is virtually absent from this domain.

3.1. Market conditions

There are reliable studies describing the Romanian media market and ecosystems, in their evolution. The first such a study, *Television Across Europe: Regulation, Policy, and Independence* described the situation in three sectors: broadcasting regulators, public service broadcasting, and commercial broadcasting until 2005 (Open Society Institute, 2005). In 2008, a follow-up study was published - *Television across Europe: More Channels, Less independence* (Open Society Institute, 2008). Three years later, a new seminal study, *Mapping Digital Media* (Comănescu, 2011), examined the global opportunities and risks created by the transition from traditional to digital media. This trio of reports present a very detailed image of the media ecosystem dominated by big commercial broadcasters, enjoying little if any real competition from the public media service and disrupted by the effervescent development of online media.

One important analysis of the evolution of the Romanian media ecosystem was provided under the *MEDIADEM - European Media Policies Revisited* project in which Romania was part and that resulted in a series of articles looking into the media policy-making processes and the opportunities and challenges posed by new media services for media freedom and independence (MEDIAEM, 2013).

Other cross-country comparative studies include the above-mentioned *Media Pluralism Monitor* study conducted by the Center for Media Pluralism and Media Freedom, the Freedom House *Nations in Transit* and *Freedom and the Media* reports. *Media Sustainability Index* (MSI) is a study coordinated by International Research and Exchange Board – IREX and conducted locally by The Center for Independent Journalism (CIJ). MSI, developed in 2000, has been conducted yearly and provided in-depth analyses of the conditions for independent media in 80 countries across the world. It is considered an important benchmark study to assess how media systems changed over time and across borders. The Romanian edition was stopped in 2020 due to lack of funding and no replacement is in sight for the time being.

Other studies also tackle the issue of the evolution of the Romanian media in the last 30 years: *Journalistic Culture and Social Transformations at the Beginning of the Third Millennium in Romania* (Mogoș, 2011), *The Romanian Press after the Transition: Institutional and Discursive Developments* (Danciu, Mogos, 2010), *Journalistic Elites in Post-Communist Romania - From Heroes of The Revolution to Media Moguls* (Coman, 2014) or *Forms of Media Convergence and Multimedia Content - A Romanian Perspective* (Drulă, 2015).

The market structures and agents active in media are analysed in PhD theses such as *The Evolution of the Ownership Structures of Mass-Media in Post Communist Romania* (Țimbolschi-Preoteasa, 2011), *The Romanian Online Generalistic Media. Structures, Actors, Practices* (Rudinschi, 2013) or *Impact of Media Convergence. Newsrooms and Journalists in an Ever Changing Environment* (Șuțu, 2014).

Reports about the state of the media in Romania have been published by the Center for Independent Journalism (Avădani, Lupu, 2015, Lupu, 2020, 2021), alongside more opportunistic analysis such as the one of the rise of the illiberal discourse in Romania during electoral year 2020 or the effects of the COVID 19 on the freedom of expression of citizens and journalists (Holdiș, Lupu, Pop, 2020). More specialised reports by the same organisation were dedicated to the distribution of the public money advertising. The Freedom of Expression Report (FreeEx), mixing a review of the changes of the legal framework and presentation of significant journalistic case studies have been issued annually since 2000 by the ActiveWatch/Media Monitoring Agency.

3.2. Public service media

The topic of public service media (PSM) seems to be very poorly covered. The institutions – public television TVR, public radio SRR and the state news agency Agerpres – have their own functioning laws and are subordinate to the Parliament. They submit annual activity reports that are discussed in the media committees of the two chambers, and submitted for approval to the plenary of the Parliament. The rejection of the reports attracts the automatic dismissal of the board of the respective entity. The mechanism was used as an instrument of political control over the PSM and sometimes the reports remain undiscussed by the Parliament for years, so that the board members can stay in their positions for as long as the political majority wants. Apart from these reports, there is little analytical literature related to public media in Romania. According to the National Bibliography, there were just a handful of PhD theses dedicated to the topic: three on public radio, (Pospai, 2006; Păiuș, 2012 and Racz, 2018) and two on public TV, (Nicolau, 2009, Budacia, 2009). Also of note, four of the authors of the cited theses have worked in public media, including Valentin Nicolau, who was the President-General Director (PDG) of public television between 2002-2005.

Other sources on PSM include content monitoring performed by ActiveWatch (an NGO) and reports dealing generally with the media in Romania, such as the Media Sustainability Index (until 2020) or State of the media (produced by the Center for Independent Journalism). Media covers sporadically incidents involving the public media (work conflicts, claimed abuses, financial status).

3.3. Production conditions

There is no consistent literature dedicated exclusively to the content production conditions in Romanian media (multiplatform journalism, digital resources, investigative resources; foreign correspondents). References to some of these aspects are included in the general media reports such as the Media Sustainability Index, the State of The Mass Media and Freeex. This situation may illustrate, on one hand, the disconnection between the academia and the practitioners of the profession. On another hand, such research would require extensive – in time and space, given the atomization of the newsrooms in Romania (small operations, with just a handful of journalists) – efforts, that me beyond the reach and the resources of individual researchers. The lack of transparency of the newsrooms may also be a probable cause. The solution to this may be a joint action of academia and media NGOs, better connected with the profession and with already established links across the country.

3.4. Working conditions

The working conditions of journalists are covered by various documentary sources. Romania is included in all the three editions of the *Worlds of Journalism Study*: 2007-2011, 2012-2016 and the ongoing one for 2021-2023. The reports provide data about journalists' employment (full-time, part-time, permanent employment, short-time employment, freelancing). The *Media Pluralism Monitor*, in its turn, provides information about "continuous professional and financial uncertainty" of the journalists and the way this affects the performance of their role. The employment of journalists and their relationship with their employers have also been addressed in papers such as *Of Journalists and Money: The Employment of Journalists in Romania and Its Influence on Media Freedom and Quality* (Avadani, 2017) and *Journalism Graduates Versus Media Employers' Views on Profession and Skills. Findings From a Nine-Year Longitudinal Study* (Vasilen-diuc, Șuțu, 2021).

The Romanian trade union, the Federation for Culture and Mass Media (FAIR) issues reports on the abuses of the labour rights of its members. Even if they don't have the continuity and con-

sistency needed for proper research, FAIR releases are a good empirical indicator of the employment practices in newsrooms across the country.

3.4.1. Intra-organisational diversity

The reports of the WJS also provide information about in-newsroom diversity. They reveal the fact that Romanian newsrooms are populated with young people, that women journalists are better educated and more specialised in their work and that usually Romanian journalists enjoy a high degree of professional autonomy.

The gender balance in the newsroom and in the news in general are the object of the *Global Media Monitoring Project*, in which Romania has been part since 2015. Every five years, researchers measure the presence of women in the news and newsrooms. The last edition of the report (2020) signals “gains in quantity, loss in quality”. The same topic is addressed in a PhD thesis titled *Profesionalism and Gender in The Work of Women Journalists in National Media in Romania After 1989* (Apostol, 2015).

3.4.2. Journalistic competencies, education and training

Efforts have been put in assessing the level of the media competences of the journalists or other media professionals, as well as in developing a coherent and update set of skills for the future professionals. *NEWSREEL* project (which first run in 2017-2020 and its second wave is underway in 2020-2023) has grounded its activities on an assessment of “the state of journalism education regarding new skills and tools of journalism, the spread of journalistic performances based on new skills and tools”. The first report (NEWSREEL, 2018) takes stock of the status in fields such as data journalism, collaborative journalism, business models and ethical challenges in the four participant countries (Romania, Hungary, Germany and Portugal). The second wave (NEWSREEL 2021) expands the research to nine other fields such as storytelling in social media, graphic journalism, journalism for voice-activated assistants and devices or AI and journalism, robot journalism and algorithms. The project also offers syllabi and teaching tools meant to help the journalism schools and educators refresh their teaching and better prepare the young journalist for the current challenges of the profession.

3.4.3. Professional culture and role perception

The self-recognised roles and the professional culture have been addressed in articles and thesis such as *The Professional Culture of Journalists in Romania* (Bădău, 2011), *New Technology, New Professional Practices: A Study on Romanian News Media* (Vasilendiuc, Gross, 2012) and *Perceived Roles of Online Journalists in Romania* (Popescu, 2021). These works reveal significant changes in the perceived roles of journalists, from the “gatekeepers of information”, specific to the early post-communist generations of media workers, to the one of “public interest agents”, embraced by the generations who entered the profession after 2000. Moreover, the development of online media brings another wave of change, pushing the journalists to embrace new, unfamiliar roles such as promoters of their own work.

4. Publications, data sources and main monitoring actors of media usage patterns

There are two main sources of data regarding the media usage in Romania: the quantitative ones, often produced by commercial actors or for commercial purposes, and the qualitative, academic ones, looking more in-depth at the causes and effects of the consumption patterns. Marketing or IT players issue sporadically their own reports on the main source of information of Romanians, or the time used on various platforms or media products. Such examples are Statista²⁵¹ or SES Astra Romania. As such reports are using different methodology and parameters, it can be hard to measure them in a comparative analysis, and they can only give indications of trends.

4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in media system

Circulation (for print) and traffic (for online publications) figures are measured by the (Biroul Român de Audit Transmedia, BRAT [Romanian Trans-Media Audit Bureau], an industry body. They employ an auditing company, selected via a competitive procedure. Their figures are public and freely accessible on their website for the current exercise, but figures from the past are available at a cost. The audience for main TV stations with national coverage are measured by the (Asociația Română de Măsurare a Audienței, ARMA [Romanian Association of Audience Measurement]. They too employ a competitively selected auditing company. Their monthly reports featuring general data is also public, but more detailed and segregated data is available only to subscribers. For radio broadcasters, the measurement is done, in a similar way, by the Asociația pentru Radio Audiență ARA [Association for Radio Audience]. ARMA and ARA measurements are the official base for the calculation of the “editorial influence power” by the National Council for the Audiovisual in establishing a dominant position on a given market. It includes only the big TV and radio networks and stations, as it is costly and thus prohibitive for the smaller broadcasters.

The usage of internet and communication services data is released periodically by the Romanian telecom regulator ANCOM. The reports have been published bi-annually ever since 2003-2004, which allows for a consistent diachronic analysis.

4.2. Relevance of news media

A study published in 2021, included Romania in the group of countries with a high level of news “hyperconsumers” (17%), and “online news seekers” (44%) (Castro and al, 2022). A more recent one, conducted only in Romania (Buturoiu, Corbu and Boțan, 2022), found that, in the space of two years (2019-2021), the number of media avoiders in Romania increased. Beyond the differences in methodology, the decrease of interest in the media can be explained by a news fatigue and is worrying for the deliberative communication.

Data regarding Romanians’ media consumption habits, including the news prevalence and the consumers’ trust in media, are included in the regularly conducted standard Eurobarometer. Starting with 2017, Romania is included in the Reuters Institute for the Study of Journalism’s *Digital News Report* and became one of the most cited sources of information in this respect. According to RISJ, the methodology used online samples so the results “tend to under-represent the consumption habits of people who are not online and makes comparisons between countries difficult.

²⁵¹ Statista, available at <https://www.statista.com/aboutus/>

Various poll operators conduct opportunistic (by request) studies identifying the main sources of information of Romanian consumers and their trust in the said sources. For example, in 2022, a broad study regarding trust and mistrust in Romania was conducted (INSCOP, 2022) and included questions regarding the news sources. The study was initiated by Strategic Thinking Group, who defines itself as “an avant-garde think tank that aims to provide an active civic platform dedicated to encouraging reflection and strategic thinking through in-depth analyses, studies and research” and was supported by The German Marshall Fund of the United States and financed by the Black Sea Trust for Regional Cooperation via the True Story Project. Another poll operator, IRES, conducted a series of polls during and after the pandemic years and revealed the correlation between people’s attitude to vaccinations and news media consumption patterns.

Data about more specific media consumption habits are provided by studies such as EU Kids Online, which provides empirical evidence on children’s, young people’s, and parents’ online experiences. This includes large scale comparative surveys, such as a 2010 study in 25 European countries, and smaller studies with a specific focus on particular questions. Now in its fourth wave, EUKO includes 33 countries. Data about the online habits and experiences of young people are also available from sporadic studies conducted by NGOs, such as the Center for Independent Journalism study *Connected to Media* (2020) or the more recent analysis *Who Or What Influences Our Youth Online?* (2022) or Save the Children, with studies on the incidences of violence on the internet and Internet usage by children.

The above-mentioned *Media Sustainability Index*, the IREX annual study, included information about the prevalence and the relevance of news media. The data covers the years 2000-2020.

4.3. Trust in media

The issue of trust in the media has been relatively well documented, even if methodologically inconsistently, which makes comparative analyses difficult. There are sources that provide quantitative data, mostly generated by polling companies or non-academic bodies, as well as analysis of this data, via academic literature.

Quantitative data source includes the Eurobarometer, RISJ *Digital News Report* and private data aggregators such as Statista.

The academic sources reflect more on the qualitative aspects of the media usage and link it with other social practices, such as democratic or citizen participation, as in *Who Trusts The Media in Post-Communist Romania? The Effects of Media Politicisation and Consumption* (Tătar, 2018). Noteworthy, the topic of trust has become more frequent in academic literature with the expansion of the digital media – much more so than in relation to the traditional media. The rise in public interest in disinformation has also stimulated research on this topic. To quote just a few of the most recent articles published: *Does Fake News Lead To More Engaging Effects On Social Media? Evidence From Romania* (Corbu, Bargaoanu, Buturoiu, Stefanita, 2020), *Uses and Gratifications of YouTube: A Comparative Analysis of Users and Content Creators* (Buf.,; Stefaniță, 2020), *Media Exposure to Conspiracy vs. Anti-conspiracy Information. Effects on the Willingness to Accept a COVID-19 Vaccine* (Buturoiu, Udrea, Dumitrache, Corbu, 2021). In general, such contributions are rather the result of a personal interest of the researchers than the output of comprehensive research endeavours, which makes the literature difficult to compile and cross-read, despite its abundance in numbers, competent authors and compelling topics.

5. Publications, data sources and main monitoring actors of media-related competencies domain

As per this project, we defined the media-related competence domain as encompassing cognitive abilities (people's capacity users to communicate rationally, offering and receiving reasoned arguments), communication competences (the capacity to formulate clear, concise statements, adapted to the context and their intended audience), user skills (the capacity to access and create media content via traditional and new platforms) and ethical capabilities (the capacity to participate freely, responsibly and on equal conditions in the public communication).

In Romania, there is no comprehensive state strategy to address the issue of media-related competencies and recognize their importance as life skills. Still, elements of them can be found spread throughout a variety of sources, especially in education.

This is apparently also one of the least studied domain of all the four, with very little evidence-based or theoretical literature. According to *Media Pluralism Monitor*, "it is difficult to know its [i.e. disinformation] scope and impact because of a lack of high quality research on this" (Toma, Popescu, Bodea, 2022). The report also shows that "the lack of state policies systematically designed and implemented to foster digital and media literacy is a major contributing factor to very high risks in the area of media literacy".

With a virtually absent state in the field of media-related competences, the civil society took the upper hand in developing programs aimed at measuring and cultivating them. The fact is observed by the *Media Pluralism Monitor* report and by the 2016 Council of Europe study *Mapping of Media Literacy Practices and Actions in EU-28* (Chapman, 2016).

5.1. Normative sources

Romania has no policy whatsoever in media literacy or other démarches aimed at measuring or educating the media-related competences of consumers. The issue has only lately made its appearance in public debate, following the spread of the mis- and disinformation aggravated by the COVID-19 pandemic and the war in Ukraine. The response of the state was to control the flow of information rather than rely on and educate the critical reception of a free-circulating information. It imposed restrictions to some media, paid ad money to all media to disseminate its messages and insisted on "official news" as the only trustworthy sources. It appears that, out of the three approaches to media education – protectionist, promoting, and participatory (Pérez Tornero and Varis 2010), the Romanian state is leaning toward the protectionist one.

The *National Defence Strategy*, adopted in 2020, includes as a required activity increasing the capacity of a series of actors, education system among them, to identify and fight disinformation promoted by hostile state and non-state agents. For this, educational curricula should include "at a large scale" the development of critical thinking and digital skills, especially those related to cyber-security.

The only programmatic move in the direction of media literacy as such is a project started by the Education Ministry and the Center for Independent Journalism, under which 100 pilot schools will have 600 teachers (in Romanian and foreign languages) trained in media literacy and how to infuse it in their teaching. The Faculty of Letters in the University of Bucharest also introduced an Introduction to media literacy course in its master's program in Didactics of Philological Disciplines and an optional course, open to undergraduates. The courses are taught by CIJ experts and started from the analysis of the regular high school curricula to identify existing elements of media competences or places where they can be inserted.

Despite the lack of interest in media literacy, there are elements of media-related competences embedded in the formal education, in a scattered manner. Another study (Rotaru, 2019) identi-

fied elements of media-related competencies present in 12 national curricula for both primary, gymnasium and high school level. The study did not look to the Languages curricula, very rich in elements of comprehension of written and multi-modal texts and communication skills, nor in the ITC curricula, rich in digital skills development. Still, it pinpoints an important feature: media are present as a “soft source”, meaning just an alternative source of information.

Even the academic milieux seem rather sceptics regarding the speedy ascension of the media education: “[...] in a country where the plain literacy is declining sharply, it is questionable whether ML can be seen as anything more than a luxury.” (Ciurel, 2016).

5.2 Assessment of media related competencies among citizens

There is no sufficient, consistent data on this topic developed in Romania. The little data available is provided partially by the *EU Kids online* study (mentioned above), as it contains questions about the self-perceived ability of children to use various digital skills or functions. An effort in this respect made UiPath, a private company, that created “the first standardized digital literacy assessment accessible, free of charge, to over 2.8 million students in Romania, from 1st to 12th grade.” (UiPath Foundation, 2021).

Some opportunistic surveys, into subjects such as the ability or the appetite of Romanians to use digital services including online banking or online shopping, do offer indications on the level of competencies. Even so, such data refer more to digital skills, mostly needed in accessing media, not to skills needed to critically receive and interpret media content. The academic literature on this topic is equally absent.

Other sources of data include the *Media Literacy Index* (MLI) (Open Society Institute-Sofia, 2021), which assesses Romania. The scores moved down from 38 points in 2018 to 34 points in 2021. As a composite index, the MLI does not measure the actual skills of Romanians, but illustrates a worrying trend that reflects the lack of state interest and action in this respect.

Another source of partial information is the *Digital Economy and Society Index* (DESI) that compares digital skills of citizens in the EU, mainly in internet usage.

6. Analysis of Research and Monitoring Capabilities and Quality

6.1. Comparative analytical overview on available primary sources, academic literature and research

There is an abundance of data on Romanian media that may serve as a basis for research, but each type of source and each of the four interested domains have their particularities.

Primary sources (legal texts, activity reports of the public authorities, open data offered by the authorities, statistical reports) are generally available online, free of charge, on dedicated portals. Legal texts are also available in Hungarian (the largest linguistic minority in Romania). The reports of public authorities vary in terms of quality and timeliness, with some institutions lagging far behind the legally prescribed deadlines for publishing. Open data is fragmented, and public institutions are generally reluctant to share their processable sets of data with the public.

In terms of media accountability systems, as mentioned, Romania does not have a single or generally-accepted code of ethics for journalists. All broadcasters have the legal obligation to make public on their websites the ethical norms they commit to abide by. Various broadcasters give different visibility to their codes, and some of them require scouting skills to unearth on their websites. Therefore, accessing and retrieving the information regarding the ethical norms media organisation abide by may be time-consuming.

The information about research projects is on the site of each participating university, therefore collecting the information is laborious. The information is also available on the site of the national implementation unit UEFISCDI, but media projects are not segregated as such. So, once again identifying them requires time and effort. The project results do not generally enjoy too much publicity outside academic circles, and they do not reach even the policy-making levels that may be interested.

The academic literature sources (journals and papers, including university annals, doctoral theses) are abundant, but fragmented. There are six journals mainly focusing on media and communication, regularly published. Articles with similar topics are also published in more general academic journals. They are mostly available online (except for some older editions), as open access journals, and publish articles in Romanian, English, French, German or Spanish. The academic journals have strict standards in terms of publishing. They are peer-reviewed and are indexed in various scientific databases.

All doctoral theses are supposed to be submitted, under the legal deposit legislation, to the National Library and University libraries. The National Library has composed and curates the National Bibliography that includes doctoral theses. By 2021, the National Library published online 11 volumes, covering years 2009-2014. The section dedicated to doctoral thesis include the name of the defender, the University to which they belong, the title of the thesis, the number of pages and the name of the coordinator, as well as its bibliographic index. Theses related to media can be found under a vast array of indexes: Journalism (070), Advertising/Information (659), Psychology (159.9), Religion (2), Sociology (316). The volumes in the National Bibliography can be searched by keywords – journalism media, television, radio internet etc. The theses that are not available online, and can only be accessed at national and university libraries' HQ. PhD Thesis after June 2016 until today are fully available online on a portal dedicated to education – *Registrul Educational Integrat* (Integrated Education Register). The section dedicated to PhD thesis lists 12,738 documents, searchable by title of the thesis, name of the author and university, but not by topic.

The websites of the doctoral schools are also a source for identifying the titles and authors of the doctoral thesis. Once again, the granulation of information available varies from school to school. They also post announcements regarding the scheduled defence of the theses. During the Covid-19 restrictions, defences have been made online, and it was open to all those interested.

6.2. Comparative analytical overview on other sources

Non-academic sources (books, studies by NGOs, other sources such as online publication dedicated to the media sector, articles in the news and cultural media and professional associations magazines) are also scattered and are usually available on the websites of the organisations that produced them, in Romanian and sometimes in English. As the local NGOs do not have an abundance of resources, the websites may be obsolete and hard to navigate, with the possibility of broken links to the desired documents. Non-academic reports, with their qualitative approach, are closer to the “grassroots”, reflect more flexibly and more promptly the reality of the media field. In order to keep their relevance and comparative value, they standardised and formalised their methodology, and tended to emulate the academic rigour. Also, given the fact that they are closer to the media community and address issues that affect it directly, they tend to get more visibility in the media. The availability of studies or market data compiled by commercial companies also varies. Some data is available via press releases, and some companies provide access to more extensive presentation of results. Mostly, the data with an impact on the business activities (such as detailed ratings and demographics) are not freely shared.

Most of the data available is reliable, as it is generated based on transparent methodology and clear criteria. The primary documents that form the core of the sources in the legal domain stem out of official and authoritative sources. *Monitorul Oficial* and *Portalul Legislativ* publish legal texts that serve as a reliable reference for activities in or related to media and communication. Given their nature of self-regulatory documents, the codes of ethics have to be trusted and abide by the entities that produced and adopted them. For those outside, the respective entities, they have only informative value.

Summary: Data sources are abundant and generally available. There are information gaps in the domain of media-related competences, as data is almost absent. There is a high degree of fragmentation and scattering, and comprehensive diachronic research is missing. Compiling data requires time and a previous knowledge of actors, channels and sources.

6.3. Monitoring capabilities and the quality of data and knowledge

The data available to the researcher interested in media field in Romania is generally up-to-date and has not significant gaps in the last 20 years, but it varies from domain to domain.

In the legal domain, the Official Monitor and the Legislative Portal update their collection daily.

Thanks to the web portals such as Official Monitor and Legislative Portal, the legislation relevant for the freedom of expression and journalism can be traced back to at least 1989, in various technical formats. The Legislative Portal offers the possibility to trace the version of a certain text in force on a given date, which is of great help for any chronological research.

In the Journalism domain, academic journals are published regularly, with no significant gaps in their flow. When some of them failed to publish their biannual editions, they compensated by issuing double-issue volumes. The oldest, *Saeculum*, started its publication in 1995, and the newest is the *Journal of Media Research*, which appeared in 2008. The doctoral theses are regularly signalled by the respective schools when publicly defended, but for a part of them only basic information and summaries are easily accessible. We could say that information about them is regularly and continuously updated, with various periodicity, the main challenge being finding what one is interested in if they do not know the authors.

International studies and research tend to gain traction as they are issued with a certified regularity. But as some are project-based (such as *Media Literacy Index*) it is difficult to predict how they will fare in the future.

The non-academic resources, with their wealth of information, tend to be opportunistic and highly dependent on the financial resources available. For example, the *Media Sustainability Index* has been produced between 2000-2020, but stopped when the funding from the US State Department to IREX was reduced and Romania was no longer included in its target countries. All the same, FreeEx report has been produced and released since 2000, being a central feature of the May 3rd World Press Freedom Day celebrations in Romania. It was last released in 2019, due to the subsequent lack of resources of its publisher, ActiveWatch. The same goes for the data created by commercial actors, especially that related to media consumption, who are rather opportunistic.

Gathering and compiling data may prove to be difficult, given the rather big volume, the fragmentation of topics and the scattering of data. On the plus side, most of the data, including the academic literature, is available online, which eases the research. Still, the researcher must be familiarised with multiple resources, organised differently. Identifying desired data in a given website may take some scouting, as sometimes their structure is not intuitive. The lack of data in the media-related competences domain makes the research quasi-impossible.

It is not the experts in media research field that are missing, but they certainly lack inter-connections and synergies. There are few experts in legislation affecting the media. All major

media companies have their own legal department, but they are not involved in media analysis and commentaries. There are just a couple of lawyers specialised in media and/or freedom of expression, most of whom are affiliated to human rights NGOs, who are offering public comments and interpretations of media legislation or author non-academic studies regarding the legal framework of media freedom and independence. The analyses conducted by experts affiliated to Law schools are mainly normative and theoretical and are not known to the journalistic community.

When it comes to the *journalism domain*, the wealth of literature testifies to the existence of a multitude of experts in the field. As Brândușa Armanca (2019), a working journalist and an academic herself, remarked there were two "waves" of journalism educators: the "founding parents", academics more concerned with creating schools and consolidate education models and the "new wave", young academics more interested in building academic careers and investing time in research and publishing. This preoccupation for research and publishing is not only a matter of generations. According to the Romanian legislation, the number of published articles and the h-index are indicators considered in the allocation of funds to each university and in career promotions, hence there is an increasing pressure on academics to publish in order to preserve the state allocation for the school or advance their scholarly career. They publish in both national and international journals, join consortia and research groups and participate in the global academic conversation. Unfortunately, this expertise is often kept to the academic circles and does not translate into actionable policies or generate public debate. "While the academic research in the media and communication sciences has developed lately (more articles, more publishing in journals with international exposure), the academic literature is read overwhelmingly strictly in academic context. I think there is not a sufficiently developed culture of evidence-based decision making nor sufficient bridges over the gaps between the Romanian academic community and those who design or decide on the public policies in Romania. I believe that research reports aimed at the general public (in Romanian and with open access) have better chances to be taken into consideration by the decision makers than the academic article published by the most prestigious academic journals", said Radu Meza²⁵², associate professor with the Journalism and Digital Media Department of the Babeș-Bolyai University in Cluj.

The generation of "school creators" is represented by figures such as Mihai Coman, the founder of the first journalism school after 1990, Daniela Frumușani, a lead figure in gender issues in media, also with FJSC in Bucharest, Ilie Rad, one of the founders of the Journalism school in Cluj, Alexandru Grad, the creator of the school in Sibiu, and Daniel Condurache, the mastermind behind the school in Iași. The new generation of academics populating the journalism schools is formed of graduates of their early years classes. They completed their formation, stayed as young faculty and started to climb up the academic ladder as the previous generation retired. This new(er) generation includes names as Raluca Radu, Romina Surugiu, Manuela Preoteasa-Țimbolschi, Emilia Șercan, Georgeta Drulă, Natalia Vasilendiuc and Antonio Momoc (currently the dean of the faculty) with FJSC, Andreea Mogoș, Cristina Nistor-Beuran and Radu Meza in Cluj, Minodora Sălcudean, Raluca Mureșan in Sibiu and Lucian Bălănuță, Oana Olariu and Andrei Stipiuc in Iași. The National School for Political and Administrative Studies (SNSPA) in Bucharest emerged lately as a hub for research on disinformation, especially after the dean of the Communication Faculty, Alina Bărgăoanu, was elected as one of the members of the High Level Expert Group on Fake News and Online Disinformation of the European Commission. Noteworthy, the younger generation is strongly feminised, as is the journalism students' community and the media profession, especially at entry level. The trend was also revealed by the *Worlds of Journalism* study.

²⁵² Interview with Radu Meza, associate professor in Journalism and Digital Media Department, Faculty of Political, Administrative and Communications Sciences, Babeș-Bolyai University in Cluj, conducted on 24.10.2022.

Media experts from the non-academic sphere are few and far between, but some of them have over 20 years of experience in working with the media in Romania, therefore they are the depositories of a “lived history”, informal or undocumented as it is, but which can be of use to academic research. Romanian legislation requires a doctoral degree for those interested in a teaching career at university level, which created a sort of barrier between academia, on the one hand, and the profession and civil society activists and expert, on the other. They are sometimes included in academic research, as interviewees or research partners. The powerhouses in this respect are the Center for Independent Journalism and Active Watch – Media Monitoring Agency (both organisations have an uninterrupted activity of over 25 years), and the Association for Internet and Technology (ApTI), specialised in digital rights. Association for the Protection of Human Right – Romanian Helsinki Committee and the Center for Legal resources are active in legislative matters and provide legal advice in freedom of expression matters.

Summary: Primary sources vary in their continuity: fluent in the legal domain, but with gaps or delays when it comes to data produced by some public authorities. Academic literature is mainly continuous and up-to-date, even if the topics are fragmented and narrow. “What we teach and what we research is interdependent, therefore there is an interest for certain directions or niches, may be them narrow. This is how expertise is built. It is also a matter of resources available for research work. If there are just one or two authors, with a small budget – if there is a budget at all – the research will be narrower, maybe local or regional. This does not make it less valuable. If there is a big interdisciplinary team, with all the needed budget and logistics, the research will have a completely different dimension and can cover time and space in a less segmented way”, said Minodora Sălcudean, an academic in Sibiu²⁵³. There is a significant media research community, active in the journalism schools across the country.

Non-academic sources are usually project-supported (related to certain events or projects) but may bring valuable information. The community of the non-academic researchers is small, but they have a direct connection with the media community and their work is more accessible outside the academic circles.

7. Conclusions

7.1. Main risks and opportunities regarding the media monitoring capabilities

We have analysed the monitoring and research capacity of the media field in Romania, following the data sources segregated into the four domains of interest as defined under the current project: legal regulations and accountability systems; journalism, media usage patterns and media-related competences. We have looked at data sources based on their type – primary, research, academic literature and non-academic studies and data – and have analysed them based on five criteria: availability, recency and continuity of data, complexity of data-gathering, trust and reliability and availability of experts.

What we found was an impressive quantity of data in some domains – such as the legal and journalistic, and a severe scarcity in others, such as the evaluation of the media-related competences. In between, the media usage patterns domain enjoys a variety of data, collected or produced by various actors, mostly commercial, with different methodologies and scopes. Such data is only partially available outside the business and is seldom comparable. While the abundance of documentation resources clearly provides an opportunity to research, the difficulties in navigating it and the limited access to the full information created by private actors qualifies as a risk.

²⁵³ Interview with Minodora Sălcudean, lector at the Journalism, Public Relations, Psychology and Sociology, Department, Faculty of Socio-Humanistic Studies, University Lucian Blaga, Sibiu, conducted on 26.10.2022

When it comes to academic literature, the official definition of the “media field” (used in defining curricular areas and research works) is outdated and is hampering both research and education. For example, media-related works can be registered under various domains in the classification of academic specialisations – “ziaristică” (an older equivalent of “journalism” that relates only to print newspapers), “media”, “communication” and “information”. Such key-words do not account for the dynamics and changes in the field. This leads to overlaps and grey areas, which makes data gathering and compilation difficult. All the same, this poses the risk of missing important, relevant data.

The data is available in a multitude of sources, with different structures, in non-standardised formats, so that identification and retrieving of data requires research skills by itself.

Nonetheless, Romanian academics have published an impressive number of articles and book chapters on a multitude of topics related to media, some of them very narrow, in the country and internationally. There is a significant number of works concentrating on the history of the media or anthologising the journalistic works of historical cultural figures. Another significant number of works is dedicated to the way media reflects politics and politicians, especially electoral campaigns. In recent years the number of papers addressing topics related to new media, digital media products (including video games), social media and their usage has visibly increased, which testifies to the interest of the academic world in the disruptive evolution brought about by the digital revolution.

Most of the data is available online, free of charge, as open source but not always in open formats, which again creates difficulties for researchers.

A series of actors are active in documenting and researching the media field, and they take turns in dominating one domain or another. The state is the main agent in the legal domain, regulating the media and securing the harmonisation with the EU directives. Via the harmonisation mechanism, EU itself becomes an actor in the media field, for better or worse. For example, the impact of GDPR was negatively felt by journalists, as the state used it to restrict access to information. The state is also the major actor in funding research. It created the structures and the mechanisms and holds the ultimate decisions in what it funds. Last but not least, the state serves as a “rapporteur”, as the public bodies provide periodical reports on access to information, whistleblowing, data protection, internet infrastructure and broadcast licensing. Journalists are, in theory, dominating the accountability and self-regulatory domain, but their activity is weak and their practices even weaker. The journalism domain is dominated by academic actors and their national and international research. The NGO sector is also active in this domain. The media usage patterns domain is mostly monitored and documented by commercial actors, as data thus collected is used for marketing purposes. Still, the diachronic analysis of the domain is undertaken mostly by the NGOs. Data on media competences is almost completely missing, and the initiative in this domain belongs to NGOs. Newcomers appeared recently on the list of actors with an influence in the media field. There is a notable increase in academic literature on how technologies – especially digital – affect journalism practices, the self-recognised roles of journalist, the media usage patterns and the media market. The legal domain is lagging behind in dealing with the effects of the new technologies (such as the spread of disinformation) and is still looking for appropriate, operational solutions to mitigate the risks of the technologies while preserving the freedom of expression.

We have identified a risk posed by the way information, data and knowledge about media in Romania is gathered and publicised. The data and information seems to follow the early atomic model of “plum pudding”, where valuable information has to be scooped out of volumes of irrelevant data. We also found a disconnection between the actors, and a lack of joint action, support or coordination. The state disregards other actors and the media field, in general. Instead, it adopts legislation impacting the media without proper consultation and underfunds media research. The academic and non-academic resources and experts, including in business, are not

cooperating and seem to operate on parallel tracks. As rich as it is, the academic literature on the media ecosystem is virtually unknown outside academic circles. Even the well-established academic journals dedicated to media and communication and who publish regularly articles treating current topics of interest are ignored outside their primary audience – other academics. This poses the risk that research works and findings go unnoticed and unapplied by the practitioners and policymakers, and new knowledge will be wasted.

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SLOVAKIA

Risks and opportunities related to media and journalism studies (2000–2020). Case study on the national research and monitoring capabilities

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Executive Summary

Slovakia with a population of 5.3 million is one of the smaller countries in the Mediadelcom project, so the authors were able to identify and describe almost all relevant publications that contributed to the scholarly reflection on the four media domains in 2000 – 2020. The researchers mapped 865 publications, which included 707 academic and 159 non-academic outputs. Within the academic outputs, the project participants found that the most represented are academic articles, then academic books and finally academic book chapters. Most publications are written in Slovak and then in English. A smaller part of the body of literature is indexed in WoS or Scopus databases. Within the non-academic outputs, the project participants found that non-academic articles, books and research reports have the largest representation. Most outputs are published in Slovak and without indexing in WoS or Scopus databases. Based on these findings, the authors claim that the media studies field has a well-established tradition in Slovakia, which is constantly evolving.

1. Introduction

In Slovakia, today's transition of print media toward online journalism and the heyday of social media expand the sphere of the 'traditional' mainstream media. One of the important junctures in the development of Slovak media environment was also the economic crisis in 2008, which caused financial problems experienced by all major media outlets; some of them eventually fell into the hands of multinational corporations. These tendencies deepened due to the major political corruption case (called 'Gorilla') which became publicly known in 2011 and involved both media moguls and prominent political figures. The affair was related to the Penta Investment Group, which wanted to improve its public image, so its representatives started to acquire important media outlets, such as the daily newspaper SME. The assassination of the investigative journalist Ján Kuciak and his fiancée in 2018 had severe political consequences (the resignation and replacement of the Prime Minister of the Slovak Republic) as well, shocking the media scene and general public. At present, i.e., since 2020, the COVID-19 pandemic has represented an unprecedented global event with a major impact on the life of society, including the media. All these events are the point of bifurcation of the media development; in other words, they pose both an opportunity and a risk to Slovak media and society.

Considering the Slovak media system in the context of legal norms, it should be noted that Slovakia did not have its own media law until 1993 but was governed by the laws of the then joint Czechoslovak Republic. Important changes took place within the federation's legislation frame-

work after the Velvet Revolution in 1989 and the subsequent end of the communist regime. More than two decades of Slovak media legislation can be characterized by the gradual adoption and regulation of new types of media such as cable television and the Internet. At the same time, the digitalization of television broadcasting was completed in 2012 (full transition to digital radio broadcasting should be carried out by 2026, but it is already known it will be impossible to meet this deadline); the latest amendments had to reflect these changes as well.

The internationally recognized inquiry conducted by the Reuters Institute for Digital News included Slovakia in its scope in 2017. The institute regularly evaluates various parameters regarding media monitoring and media credibility, which means that annually updated data on Slovak digital news production and reception are available. However, Slovakia did not participate in the Worlds of Journalism Study (WJS) led by Hanitzsch prior to 2019, unlike other V4 countries. This shortcoming may pose a risk that complicates continual and accurate evaluation of Slovak media environment as a whole.

The critical transformation of academic studies and research in the field of media and communication studies began in 1989. The Center for Independent Journalism was established in 1993 and operated as a training facility with the assistance of American journalists and media theorists until 2004. Journalism research has developed mainly in the academic environment since the mid-1990s. University departments focused on training of media professionals began to emerge, especially at faculties specializing in humanities and social sciences. Key works in the field were realized by departments or faculties specializing in media studies and journalism – i.e., the Department of Journalism at the Faculty of Arts of the Comenius University in Bratislava, the Department of Journalism at the Faculty of Arts of Constantine the Philosopher University in Nitra, the Institute of Slovak and Media Studies at the Faculty of Arts of the University of Prešov, the Faculty of Mass Media Communication at the University of Ss. Cyril and Methodius in Trnava, or the Faculty of Media at the (privately financed) Pan-European University in Bratislava, founded in 2004.

In 1990s, the capacities of media research were considerably underestimated in Slovakia, and democratically elected governments did not pay enough attention to this area, which led to a gradual slowdown in the activities of the then most prominent publicly funded research and monitoring body, the Journalism Study Institute and, eventually, to its demise. The competencies of the Journalism Study Institute were briefly taken over by the National Center for Media Communication, which, however, ceased operations in 2001. At present, there is no publicly funded research institution in Slovakia which would focus on media and/or journalism research. The public broadcaster Radio and Television of Slovakia (RTVS) does not operate any research bodies. The notable absence of publicly funded research on journalism and media is partially substituted by privately owned agencies, particularly Median SK, which was established in 2002 as a local branch of the Czech agency Median CZ (est. 1996), the license partner of the worldwide survey Target Group Index (TGI). The non-governmental organization INEKO (the Institute for Economic and Social Reforms) which evaluates the media and their ability to contribute to democracy is important as well.

Academic inquiries related to media studies and journalism at the national level are supported by publicly funded research agencies, similarly to other fields of domestic scholarly research. These institutions are Cultural and Educational Grant Agency of the Ministry of Education, Science, Research and Sport of the Slovak Republic (KEGA), which provides research grants focused on education, the Grant Agency of the Ministry of Education, Science, Research and Sport of the Slovak Republic and the Slovak Academy of Sciences (VEGA), which supports academic research activities, and the prestigious Slovak Research and Development Agency (APVV) supporting research and development projects. Non-academic publications and research activities are less numerous and in specific subdomains even scarce or non-existent. In particular, there

are no research studies that would make it possible to compare the media system in Slovakia with other countries of the European Union.

The most important domestic periodical is the Slovak academic journal *Questions of Journalism* (in Slovak *Otázky žurnalistiky*), which is published jointly by Comenius University in Bratislava and the Catholic University in Ružomberok. The Faculty of Mass Media Communication at UCM in Trnava is the only faculty in Slovakia (regardless of specialization and academic field) publishing four scholarly journals registered in the prestigious citation database Web of Science, all of them focused on media and communication studies: *Communication Today*, *European Journal of Media, Art and Photography*, *Lege Artis: Language Yesterday, Today and Tomorrow* and *Media Literacy and Academic Research*.

The total number of published works focused on media and communication studies related to the examined domains includes 707 academic bibliographic records. The largest number was recorded in 2020. The recent influx in publication activities in the field of journalism, media and communication studies is probably caused by the natural development of the given spheres of interest and is also closely associated with the increasing need to reassess the existing terminological axis due to significant systemic changes within the media market driven by the Internet and digital media and their increasing social importance and economic prominence.

2. Publications, data sources and main monitoring actors of legal and ethical regulation domain

In the legal and ethical domain, there are totally 211 outputs which were published during the last 20 years (from 2000 to 2020), most of them were published during the last 10 years, with the most outputs coming from 2020 (40). Based on those numbers, we can assume that the legal and ethical domain is a relatively young in the field of scientific research.

Most publications is in domain No. 6: Normative perspective (journalistic ethics, media responsibility), a total of 152 outputs. In general, there is greater public and media interest in these topics in 2020, which naturally reflects the academic environment and rise of the academic articles in this field. It can be considered positive that the authors address these issues in the context of traditional media (Rončáková, 2020; Bajanič, 2020; Hatala & Greguš, 2020), as well as new media (Hacek, 2020).

The second highest number of outputs is in domain No. 5: Other instruments of media accountability, a total of 44 outputs and domain No. 1.3: Disinformation, also 44 outputs. The second one is consequence of the rising attention to the misinformation, especially in the context of the pandemic. The domain No. 2: Codes of ethics, a total of 37 outputs and the domain No. 1: Freedom of expression, a total of 36 outputs, also had a more significant representation compared to other domains.

Most of the outputs come from an "academic article" category but only a minimal number of studies are published in the Web of Science or Scopus journals. Only one research report was found while the majority concerned theoretically oriented research on the dominant news sources for Slovaks. Of the total number of outputs, almost 57% were theoretical or normative studies.

Access to individual outputs is relatively limited. We found open access to 40% of outputs. Individual sources were searched through university libraries, the central register of records of publishing activities and on the website of the Slovak Academy of Sciences. Most sources contain only the name of the outputs (article, book, etc.) and it was not possible to click to this output and read the study (or book). The reason might be, that mostly of sources are still available not online or only in libraries.

Regarding the representation of areas: opportunities and risks, the largest number of studies covered both areas (opportunities and risks) - almost 70% of studies. On the contrary, the opportunities included the fewest studies (6.6%).

2.1. Freedom of Expression

The scholarly attention is paid to the issue of disinformation, especially in the context of the COVID-19 pandemic. Several authors have focused on the occurrence of false news reports, the possibility of their identification, prevention against hoaxes, such as media literacy (Višňovský & Radošinská, 2021; Mičuda, 2020; Kapec, 2020; Bulganová, 2020b; Kačinová, 2020; Graca, 2020). Some authors also point to modern phenomena associated with media responsibility, such as deepfake (Greguš, 2020), debunking (Kvetanová, Kačincová Predmerská, & Švecová, 2021), gatekeeping (Greguš & Budová, 2020) and fact-checking (Bulganová, 2020a).

In the context of the current situation, which is characterized by a massive spread of disinformation and hybrid threats, a key role play also non-academic sources. The most important sources include the final report from the research Perception of Conspiracy Theories by Generation Y (Median SK, 2019) and two books: Infodemic in Slovakia 2020. Disinformation-Conspiracy Scene in the Era of COVID-19 (Mesežnikov & Bartoš, 2020) and False Reports and Internet Threats – A Manual (Not Only) for Seniors (Zajac, 2020).

2.2 Freedom of Information

In the field of media legislation, it is mainly the media system, legal regulation of media operating (broadcasting, retransmission, etc.) and selected issues in the field of media law, such as freedom of speech, the right to information, or the regulation of television broadcasting from the perspective of national and European law. In this regard, we need to mention publications written by scholars affiliated with the Faculty of Mass Media Communication UCM in Trnava, where special attention is paid to media legislation issues (Botík, Miščíková & Vojčík, 2004; Chovanec, 2015). These outputs can be considered as the first systematic and comprehensive works in the field of media legislation research in Slovakia. The publication by Zemková et al. (2018) can also be considered key, as it contains court verdicts concerning media law, broadcasting and retransmission, as well as an analysis of verdicts imposing sanctions for violations of legislation regulating broadcasting in the Slovak Republic.

2.3 Accountability system

In this section, most of the information comes from non-academic sources (made up of laws and codes of ethics) which have not been reviewed and most of them had open access. These resources are valuable documents because they directly influence the activities of the media.

The sources were found in institutions such as the Broadcasting and Retransmission Council, the Slovak Radio and Television, the Advertising Council, the Slovak Broadcasters' Association, the Independent Media Association, the Slovak Journalists' Syndicate, the Association of Periodicals as well as publishers' websites. All sources were national in nature and published in the Slovak language. One of the most important documents in the field of ethical self-regulation is the so-called Codes of Ethics issued by the Slovak Syndicate of Journalists (SSN, 2011), but also by Radio and Television of Slovakia, which relate to communication on the Internet (RTVS, 2018). In this regard, the basic source is the monograph Ethics in the Media (Hradiská, E.), which comprehensively deals with the issue of media ethics. This publication is followed by the work of other authors who, in independent scientific studies, examine other specific areas of ethics in media practice.

3. Publications, Data Sources and Main Monitoring Actors of Journalism Domain

3.1. Market Conditions

The most important fact that changed the whole media legislation was the creation of a dual system of broadcasting – efficient coexistence of private media companies and public service media within the national media market. New media outlets, which were operated and financed by domestic or foreign investors, began to appear on the market. The first democratically passed legal act related to media was Act No. 468/1991 Coll. on Operation of Radio and Television Broadcasting (1991), which was later preserved by the independent Slovak Republic after the dissolution of Czechoslovakia. Basically, we can say that during the 1990s, media legislation was focused on ‘opening’ the free, pluralist media environment and thus enabling privately owned media to operate on the market and, more importantly, ensuring free access to information. The contemporary Slovak media market is marked by the presence of foreign capital, especially in terms of electronic and online media. At present, private media players have a dominant position on the media market in terms of television and radio broadcasting. In the case of print and online media, these are exclusively privately owned entities.

Several significant changes took place on the press market after 2015. As mentioned above, back in 2014, the Penta Investment Group bought a 50% stake in the Petit Press publishing house from the German shareholder Rheinisch-Bergische Verlagsgesellschaft. This course of events led to departure of 50 journalists working in the editorial office of the elite daily newspaper SME; they subsequently founded a new elite daily newspaper titled Denník N. The Penta Group definitively left Petit Press in April 2021, when its remaining 34% minority stake was bought by the New York-based Media Development Invest Fund (MDIF). The remaining shares are still owned by the original domestic shareholder Prvá slovenská investičná spoločnosť. The most widely read Slovak dailies include Nový čas (FPD Media), Plus jeden deň (News and Media Holding), Pravda (Our Media SR), SME (Petit Press) and Hospodárske noviny (Mafra Slovakia). Most of these companies (FPD Media, News and Media Holding, Our Media SR) are domestic. Foreign capital and activities of multinational publishing companies based outside Slovakia have reduced significantly, the major Slovak online news media outlet Aktuality.sk operated by Ringier being an exception.

As for the segment of commercial television, the most watched commercial television, TV Markíza, also manages the secondary television channels Doma and Dajto and the TV Markíza International station (since 2016). The channel has maintained its leading market position since its foundation in 1996. In 2020, it was bought by the late Czech billionaire Petr Kellner, the chief executive officer of the PPF Investment Group.

The radio market in Slovakia is quite stable. The commercial Rádio Expres has been the most listened-to radio station for a long time, followed by the first circuit of the public RTVS, Rádio Slovensko, and the commercial broadcaster Fun rádio. In August 2021, Expres, after obtaining the necessary consent of the Slovak Council for Broadcasting and Retransmission, bought the competing radio stations Európa 2 and Jemné (now called Radio Melody) and their online products. These radio stations now represent the newly formed domestic company Bauer Media Slovakia, together with their online platforms. It can be said that due to this, the radio market in Slovakia is horizontally concentrated.

In terms of social networking, Slovak media market is shaped and saturated by major foreign conglomerates based (mostly) in the U.S. In 2021, research conducted by the Go4insight agency involving 1,000 Slovak citizens aged 15 – 79 claimed that the most popular social networking site in the country is Alphabet’s streaming platform YouTube (78% of the adult population visit YouTube at least once a month), followed by Meta’s Facebook (76% of the adult population visit

Facebook at least once a month) and Instagram (45%) and the most prominent Slovak social networking site, Pokec (24%). Social media services such as Pinterest, TikTok, Snapchat or Twitter are significantly less popular, visited at least once a month by less than 20% of the respondents.

3.2. Public Service Media

One of the most significant changes in the public media sector in Slovakia was the merger of previously autonomous institutions – Slovak Television and Slovak Radio – into one public media organization called Radio and Television of Slovakia (RTVS). This transformation was realized on the basis of Act No. 532/2015 Coll. on Radio and Television of Slovakia, as a result of which several organizational changes took place in this institution. The transformation of the Slovak media system in the context of the ongoing social changes and Slovak media and their functioning within democratic society were negatively influenced by government lead by the Prime Minister Vladimír Mečiar (Olekšák & Kravčák, 2008; Kravčák, 2008; Kerecman, 2009).

Regarding the financing of Slovak public radio and television, the current mechanism is unsustainable and a new model of financing the public media needs to be considered as soon as possible. The contract with the state guarantees Radio and Television of Slovakia (RTVS) an annual subsidy of at least 15 million euros, which, however, does not cover the costs of the broadcaster's basic annual activities. According to Media Pluralism Monitor, the Political Independence area in Slovakia shows a large discrepancy between the private sector and the public service media (PSM). For the most part, private media have shown to be surprisingly resilient to political influence.

The public broadcaster RTVS's revenues in 2020 amounted to more than 113 million euros, of which 81.7 million were revenues from payments received from citizens (payments for public media services), 26 million were provided by a subsidy from the state budget and 5.9 million euros were obtained from advertising and commercial activities. In 2021, the state subsidy was expected to increase to more than 31.5 million euros. The public agency the News Agency of the Slovak Republic's revenues in 2020 were at the level of 5 million euros, of which the subsidy from the state budget amounted to 2.2 million euros.

In Slovakia, professional news and information services are provided by the public News Agency of the Slovak Republic (TASR) and the privately owned Slovak News Agency (SITA) which started operating in 1998. Since 2000, the private news agency has begun to gain significant clientele in the field of media business. While disseminating information, the public news agency TASR functions as a free and independent organization; its services must not support or act against any political, economic, religious, ethnic or other interest groups.

3.3. Production Conditions

Slovak media scholars and researchers express their rising interest in the Internet and social media. Becoming more and more significant publishing platforms and journalistic sources, these media are discussed from various points of view. The existing sources focus on different problems resulting from the complex relationships between 'traditional' (especially print) media, journalism, social media and digital and information competencies of media professionals (Poláková, 2007). Security issues associated with online communication and ethical aspects of the journalistic profession in terms of the digital environment are important as well. As a profession, journalism is defined as an essential driving force of today's media culture (Radošinská & Višňovský, 2013). Instead of applying this approach drawn from media and cultural studies, other theoretical works offer different perspectives of understanding the given problems by discussing philosophical (phenomenological and hermeneutical) aspects of processing and disseminating media content (Gálik & Gáliková Tolnaiová, 2015). Some authors underline the fact

that journalism is, in many ways, losing its core values (Sámelová, 2019; Sámelová, 2020). Another important line of research is represented by authors interested in the processes of shaping journalistic content (Tušer, 2010; Tušer, 2012) and various aspects bound to creative ways of processing information that is to be disseminated via different communication platforms (Tušer, 2010; Rončáková, 2011; Rončáková, 2015).

As for investigative journalism, it has gained society-wide importance after the murder of the investigative journalist Ján Kuciak and his fiancée. Kuciak's work published by the online news media outlet Aktuality.sk gained public attention and recognition after his untimely and violent death on 21st February 2018. The following criminal investigation confirmed that the murder was associated with the young journalist's investigative work. As a result, the NGO Investigative Centre of Ján Kuciak was established later in 2018.

3.4. Working Conditions

Researchers affiliated with FMK UCM in Trnava are currently evaluating data from the third wave of the Worlds of Journalism Study research (2021–2022). 244 respondents (journalists) filled in the questionnaire, while almost 60% of them work in Bratislava, the capital of the Slovak Republic, as editors. Considering the dominant forms of employment, 41.8% of research participants have a full-time employment contract and almost 39% of respondents are self-employed or freelancers. The results of the inquiry did not confirm any significant changes of the situation of journalists before and during the pandemic. As many as 84% of respondents stated that they were not affiliated with any professional journalistic organization. Even though the questionnaire did not monitor the average wage, the answers showed implicitly that for most respondents, journalism is the main source of income. And as for the salaries in the journalistic profession, the average gross salary of a Slovak journalist is currently 1,530 euros, the highest gross wages being located in the Bratislava Region (1,730 euros). However, the salaries of journalistic professions working outside the capital are incomparably lower. Recently, the NGO Transparency International has indicated that staff reductions in RTVS concerning media professionals specializing in news making might have been excessive and unnecessary, but no misconduct of either director-general Jaroslav Rezník or other managers has been proven so far.

It may be stated that the generally low acceptance of the journalistic profession in Slovakia is inadequate, resulting in social (mis)recognition, low social prestige and worsening economic conditions of Slovak journalists. However, a focused discussion about the opportunities and risks related to this fact was established in Slovakia, especially in 2018, after the murder of the investigative journalist Ján Kuciak. The event brought a wave of protests and drove a significant political change. It also raised the issue of supporting investigative journalism and the urgent need to increase its social and cultural prestige.

3.4.1 *Intra-Organizational Diversity*

The number of journalists employed by private media companies (and other data regarding their education, gender and forms of employment) is not publicly available. The latest available data on PSM was recorded in 2020. In RTVS's annual economic report, it is stated that in 2020, RTVS employed 1,556 people in total, 41.2% of them women. Compared to 2019, RTVS's employees included more people categorized as 'artists'. Moreover, in 2020, RTVS employed more college-educated people than in 2019; in contrast, the number of employees possessing high school education without GCSE decreased. The average age of RTVS's employees was 46.73 years of age.

3.4.2 *Journalistic Competencies, Education and Training*

University education centered on journalism and media studies is highly developed and provided by publicly funded as well as privately owned universities, predominantly by Comenius Uni-

versity in Bratislava, University of Ss. Cyril and Methodius in Trnava, Constantine the Philosopher University in Nitra, Catholic University in Ružomberok, Pan-European University (private university). Various courses and workshops focused on specific abilities and the development of professional journalistic competencies are also offered by NGOs. According to the third wave of WJS, 63.9% of respondents completed their university education in the field of journalism. However, data on the competencies of professional journalists in Slovakia has not been systematically collected.

3.4.3 Professional Culture and Role Perception

Research on professional culture and perception of the roles of journalists does not have a long and continuous tradition in Slovakia, which is also conditioned by the late historical and democratic development of the media system (after 1989), and by clear, unwelcome state interference in the functioning of the media and the work of journalists in the 1990s. Some studies have focused, for example, on the profession of a journalist and their desired independence from economic and political influences. Research within more specific areas of professional culture and perception of roles is notably absent.

4. Publications, data sources and main monitoring actors of media usage patterns

4.1. Research and monitoring that reflects access to the media and diversity of viewpoints in media system

Several university departments have been working intensively on the topic of media usage patterns since 2000 in Slovakia. The most important academic institution in this area is the Faculty of Mass Media Communication, University of Ss. Cyril and Methodius in Trnava. It is the only public faculty that offers study programs which focus on media communication and media education. Other important workplaces are established at the Faculty of Arts, Comenius University in Bratislava, the Faculty of Arts, Constantine the Philosopher University in Nitra, and the Catholic University in Ružomberok. Rončáková (2020) and Izrael (2015) from the Catholic University also deal with the topic of media education, examining it from the point of view of the socializing and desocializing influence of the media on the family environment, ethics and Christian morality.

The largest number of non-academic sources consisted of nationwide surveys, which have been publicly available on the website of the research agency Median SK since 2012. The surveys are carried out quarterly. Median SK conducts three regular surveys:

- MML-TGI® (Market & Media & Lifestyle – Target Group Index ®),
- RADIO PROJECT,
- The Most Objective Television News.

The national MML-TGI® survey (Market – Media – Lifestyle-Target Group Index ®) has been implemented in Slovakia since 1997. The average sample size is 4,100 respondents, citizens of the Slovak Republic aged 14-79. The research's goal is to find data on television viewing, radio listening, print readings and Internet using. RADIO PROJECT is a radio market survey in Slovakia. The results are published monthly. The data contains basic information about radios, reception opportunities, last week's and yesterday's listening rates with detailed ATS and share indicators. The data is used to optimize MML-TGI. The data from this survey is the most comprehensive description of the Slovak radio environment and enable analysis of target groups. Median SK also carried out the survey Slovakia Online 2015; it was an Internet user survey. Ad-

vertising agency MARK BBDO conducted a survey of online habits of the Slovak population in 2018.

4.2 Relevance of news media

News interest can be determined from peplemeter measurement. The peplemetric measurement of viewership is the largest continuous research in Slovakia. It is conducted through the PMT. PMT was founded in 2002 with the aim of giving TV stations and media agencies access to correct TV market data. PMT members are RTVS, TV Markiza, TV Joj, TA3 and the Association of Media Agencies

The TV companies have the results of the viewership available the day after the measurement day in the morning. They can analyse the data in minute intervals and use it for commercial sales and programme planning, explained Ivan Šimek, one of the directors of TNS Slovakia.

He added that the measurement is carried out on a representative panel of 1,200 households, which is roughly 3,500 individuals. These meet demographic criteria to represent the entire population of Slovakia. One quarter of the panel is rotated annually. Currently 120 television stations are included in the measurement.

In 2021 increased public interest in information provided by audiovisual and internet media, driven by the pandemic. News channel TA3 saw its viewership rise significantly. Aktuality.sk, a paywall-free, digital-born news website associated with murdered investigative reporter Ján Kuciak, remains the most widely read online brand. 64% of respondents admitted difficulty finding a credible news in 2021.

4.3 Trust in media

Through the data presented in the annual reports and other materials concerning the public service media and their operations that are published online, it is possible to understand the public media activities thoroughly and complexly. Such documents are mainly based on internal information that these media obtain for their own needs and they are processed by the relevant departments/organizational units existing within the given media organizations.

In the case of non-academic sources, the reliability and credibility of sources and research results obtained in the field of Media Usage Patterns is guaranteed by the expertise of authors who have been interested in the domain's key topics for a long time. Regarding academic sources, multiple lecturers affiliated with the Faculty of Mass Media Communication of UCM in Trnava are academic researchers who specialize in the relevant areas of interest. The detailed description of the research methods followed by the sources, from which definitions, categorizations and insights were drawn, is thus complex and accurate.

According to results from the research agency Fokus in 2019, percipients considered RTVS as the television provider with the most reliable information. It is followed by private television channels. The credibility level of print and online media was comparable.

Only 26 percent of Slovaks trust the media. According to an international survey conducted by [Reuters Institute for the Study of Journalism](#) (2022) this is four percentage points less than a year ago. The Slovak part of the survey was conducted on a sample of 2007 respondents. RTVS and TA3 are perceived as the most trusted media. It is a public channel and news channel, and should base their contributions on materiality, objectivity and impartiality, or on tabloids, which is also confirmed by their placement in the rankings.

5. Publications, data sources and main monitoring actors of media-related competencies domain

5.1. Normative sources

The media education in Slovakia context is defined as a multidisciplinary concept that integrates knowledge and scientific apparatus of the wide range of social sciences (in particular mass media communication, sociology, psychology, pedagogy, information and library science, etc.) and that contributes to their application in the process of lifelong learning and the current needs of social practice. The main legal document framing media education policies is the Concept of Media Education in the Slovak Republic within the context of lifelong learning valid since 2009 (Ministerstvo kultúry SR, 2009). The document presents the main goals and strategies for media literacy policies and media education activities within the lifelong learning process.

Media education became part of the curriculum for the first time on the basis of school content reform implementation, which began in 2008 – 2009. In relevant school legislation, it is defined as a compulsory part of education, and individual schools have the right to decide about the form of its implementation into the curriculum. They can choose from three primary forms of integrating media education into educational programmes:

- (A) Media education as a cross-cutting topic integrated into the curriculum of suitable study courses;
- (B) Media education as independent subject;
- (C) Media education implemented in the form of a project, course and other practically aimed activities. (Vrabec, 2016, Kačinová & Kolčáková, 2013a, 2013b).

Slovakia has media literacy programs implemented in formal education, but they are not widely applied. This phenomenon is mainly due to the lack of qualified and motivated teachers who could teach media education. In addition, there is no pedagogical faculty in Slovakia that has an accredited teacher's study program focused on media education. Teacher education is present in Slovakia, but in most cases, it is not provided by public institutions but rather by NGO activists and academic institutions focused on media studies.

The obligation to submit reports on the state of media literacy was, in conditions of Slovak republic, transposed to the Act No. 308/2000 on broadcasting and retransmission, as amended, while Art. 5 Sect. 1 (j) thereof establishes the obligation for the Council for Broadcasting and Retransmission to submit documentation related to evaluation of the state and level of media literacy in the Slovak Republic. In Slovakia, there are roughly 18 parties involved in media literacy. Seven of these significant stakeholders are academic institutions, with a primary concentration on media and information studies and pedagogy. Two stakeholders are classified as public authorities, while the other two are classified as audiovisual content suppliers. The Broadcasting and Retransmission Council is a stakeholder in the category of media regulators. Other stakeholders fall under the umbrella of civil society organizations (Nikoltshev, Cappello, Blázquez & Valais, 2016). The opportunity concerning deliberative communication is that several non-profit organizations operating in Slovakia deal with various aspects of the development of media competencies. This is especially the prevention of the spread of hate speech and extremism in the online ecosystem (Gregussová, Drobný & Milo, 2013; Velšic, 2017); the development of media and information competencies as an essential part of critical thinking (Filo, Ivanič & Luppová, 2011; Makroš, 2019; N-Magazine, 2017) and the development of media competencies with a focus on disinformation, false reports and conspiracy theories (Slovak Security Policy Institute, 2017; Slovak Security Policy Institute, 2018; Mesežnikov & Bartoš, 2020; Kačinová, 2019, Čavojová, Panczová & Závacká, 2020; Zajac, 2020). A relatively wide range of participants, especially NGOs, deal with media competencies and media literacy in Slovakia. On the other hand, the activity of state and public institutions, which pay relatively little attention to the de-

velopment of media competencies, is deficient. Therefore, as part of our analysis of non-academic resources, we perceive media competencies as an integral part of media and information literacy development.

The thematic categorization of this group of resources includes various structured projects and publications devoted mainly to the following topics:

- Safety and preventive aspects of the Internet and digital media use, primarily focusing on the target group of children and adolescents (eSlovakia, 2010; Drobný, 2013; Drobný, 2014; Gregussová & Drobný, 2014).
- Prevention of the spread of hate speech and extremism in the online ecosystem (Gregussová, Drobný & Milo, 2013; Velšic, 2017).
- Psychologically oriented research focused on behavior of children and adolescents on the Internet and their use of digital media (Gregušová, Tomková & Balážová, 2010; Madro et al., 2015; Tomková, 2015).
- Teachers' education in the field of media education and the development of media competencies (Čuvalová, 2014; Šándorová, 2013; Haberová, 2012; Králik, 2018; Janková, 2020; Biziková, 2015).
- Development of media and information competencies as an essential part of critical thinking (Filo, Ivanič & Luppová, 2011; Makroš, 2019; N-Magazine, 2017).
- Development of media literacy and media competencies of parents (Langerová, 2014; Velšic, 2015).
- Digital literacy and development of digital competencies of adult Internet users (Velšic, 2014; Šnidl, 2017; Velšic, 2012).
- Digital literacy and the development of digital competencies of children and adolescents (Velšic, 2016).
- Development of media competencies focusing on issues of disinformation, false reports and conspiracy theories (Slovak Security Policy Institute, 2017; Slovak Security Policy Institute, 2018; Mesežnikov & Bartoš, 2020; N-Magazine, 2017; Čavojová, Panczová & Závacká, 2020).
- Legislative and conceptual documents and meetings related to media literacy (Ministry of Culture of the Slovak Republic, 2009).

As part of the analysis of the participants involved in the issue of spreading awareness of media competencies and media literacy, we identified the following NGOs:

- eSlovakia (focused on safety and prevention aspects of Internet and digital media use, primarily focusing on the target group of children and adolescents).
- Institute for Public Affairs (focused on digital literacy, the development of digital competencies and the spread of hate speech on the Internet).
- Research Institute of Child Psychology and Pathopsychology (focused on research on children's and adolescent behavior on the Internet and in the use of digital media).
- OZ Žabky (focused on the development of media literacy and media competencies of parents and teachers).
- Slovak Security Policy Institute (the development of media competencies with a focus on disinformation, false reports and conspiracy theories).
- Institute of Strategic Policies (the development of media competencies focusing on issues of disinformation, false reports and conspiracy theories).
- Slovak Center for Communication and Development (the development of media and information competencies as an essential part of critical thinking).
- OZ IPČKO (research on the behavior of children and adolescents on the Internet and interest in their use of digital media).

- Denník N (development of media competencies with a focus on critical thinking, issues of misinformation, false reports and conspiracy theories).

The state and public institutions sector is represented only by the following institutions:

- Ministry of Culture of the Slovak Republic (legislative and conceptual documents and meetings related to media literacy).
- State Pedagogical Institute (teachers' education in media education and the development of media competencies).
- Methodological-pedagogical centre (teachers' training in media education and the development of media competencies).

5.2. Assessment of media related competencies among citizens (e.g. re-search tests, research, monitoring reports)

As an opportunity in the context of deliberative communication, we can see that research focused on media competencies in the educational context has a strong tradition. IMEC – Centre of Media Literacy at Faculty of Massmedia Communication UCM – conducted two surveys targeted on the scale and the form of the representation of media education in the educational system in Slovakia. These surveys focused on comparing the level of media education strategies at different schools in the country. The main aim was to map the current status of the implementation of media education into the curriculum in elementary and secondary education in the Slovak Republic. The first survey carried out in 2011 was focused on the current status of media education teaching at secondary schools. The research team collected data from 631 schools – this represents 82% of all schools in Slovakia (Kačínová & Kolčáková, 2013a). The second survey was conducted in 2012 on the representative sample of 567 elementary schools from different municipalities and regions in Slovakia. In both surveys, data collection was carried out by the method of a telephone interview with teachers or school directors. This method was combined with curriculum analysis (Kačínová & Kolčáková, 2013b).

Further research has focused on various aspects of teacher education in the field of media literacy and the development of media competencies (Biziková, 2015; Kačínová, 2015; Magová, 2016; Kačínová, 2016; Vrabec, 2017; Petranová & Burianová, 2014, Vrabec, Graca & Mazáková, 2015, Hekelj, 2017). Another part of the research in this area focused on the media competencies of the students themselves (Vrabec, 2017; Prostináková Hossová & Košťálová, 2021; Hladíková, 2019). After 2016, we record a shift in Slovakia from the risks and prevention aspects of the Internet and digital media to the research of disinformation, fake news and hybrid threats (Slovak Security Policy Institute, 2017; Slovak Security Policy Institute, 2018; Mesežnikov & Bartoš, 2020; N-Magazine, 2017; Kačínová, 2019, Čavojová, Panczová & Závacká, 2020; Bulganová, 2020; Kvetanová, Kačincová Predmerská & Švecová, 2021).

We also consider the fact that a relatively wide range of research has focused on the media competencies of the senior population to be a positive factor regarding this issue (Petranová, 2013; Petranová, 2014; Velšic, 2014, Petranová, 2016; Švecová, Kaňuková & Kačincová Predmerská, 2019; Jurczyk-Romanowska et al., 2019; Švecová & Kaňuková, 2019). The risk factor in terms of deliberative communication is the fact that in Slovakia, there is no research on disadvantaged groups. The only exception is research focused on examining the media competencies of visually impaired citizens (Vrabec & Petkáčová, 2014). However, a wider spectrum of empirical examination of the media competencies of other disadvantaged groups (e.g., Roma, migrants, etc.) could be both a challenge and an opportunity for research in this area.

According to the findings of a new edition of the Media Literacy Index for 2021, Slovakia ranked 22nd among the 35 monitored European countries. The index evaluates the resilience potential to fake news in 35 European countries by utilizing variables for media freedom, education, and

trust in people. Because the indicators are of varying importance, they are given varied weights in the model. The media freedom indicators (Freedom House and Reporters Without Borders) have the most weight, followed by the education indicators (PISA), with reading literacy having the most weight among them. The indicators of e-participation (UN) and trust in people (Eurostat) have a lower weight than the other indicators. (Lessenski, 2021).

In 2021, Slovakia achieved the following Media Literacy Index results in individual indicators:

- ◆ Freedom of the Press (Freedom House): 26
On a scale from 0 to 100 (best to worst)
- ◆ Press Freedom Index (Reporters without Borders): 22.67
On a scale from 0 to 100 (best to worst)
- ◆ PISA score in reading literacy (OECD): 458
The higher score the better; 500 is very good and below 300 is a very poor result
- ◆ PISA score in scientific literacy (OECD): 464
The higher score the better; 500 is very good and below 300 is a very poor result
- ◆ PISA score mathematical literacy (OECD): 486
The higher score the better; 500 is very good and below 300 is a very poor result
- ◆ Share of population (%) with university degree (Eurostat): 22
In percentages from 100% to 0% (higher is better)
- ◆ Trust in others (Eurostat, EQSL): 4
On a scale from 10 to 0 (highest to lowest)
- ◆ E-participation Index (UN): 0.7024
On a scale from 1 to 0 (highest to lowest)

Slovakia ranks 22nd of 27 EU Member States in the 2021 edition of the Digital Economy and Society Index (DESI). The country stays at the same position as in 2020. Across the human capital dimension indicators, Slovakia is just below or close to the EU average. In comparison to the EU average of 56 percent and 31 percent, 54 percent of Slovaks have at least basic digital abilities and 27 percent have above-basic digital skills. Slovakia's overall improvement in the examined sectors is limited. So far, public money used to promote digital transformation have not always had the expected effect. Education's digitalisation is falling short of its promise due to a shortage of skills and resources among schools, teachers, and students.

One of the primary pillars of the Slovak Recovery and Resilience Plan (RRP) is digital transformation, with an emphasis on public services, skills, and business digitalization. Slovakia is strongly connected to the major European digital efforts, and the RRP will support various multi-country projects.

The COVID-19 pandemic highlighted existing gaps in Slovakia's digital economy and society, including as connectivity, digital skills acquisition, and digitalization of schools, households, businesses, and public services. Slovakia has pledged to improve its DESI score and position. The Ministry of Investments, Regional Development, and Informatics published a thorough strategy and action plan¹ with actual initiatives to resolve deficiencies indicated by DESI indicators. This document reflects the core DESI elements and intends to achieve significant improvements by 2025. (Digital Economy and Society Index (DESI) 2021: Slovakia, 2021).

6. Analysis of Research and Monitoring Capabilities and Quality

As can be seen from resource research and monitoring, there are significant differences between the individual domains. The education of journalists is developed in Slovakia, which is the reason why a large part of the sources related to the Journalism Domain originate from the academic environment. After 2010, sources are also available in electronic form. Other materials

include publicly available documents issued by the government bodies, public service media and other publicly operating actors. However, the continuity of research and data is limited, as many studies only address partial problems and are not carried out continuously. For this reason, data comparison and prediction are challenging. Most of the analyzed material represents academic sources elaborated and published by Slovak journalism experts affiliated with domestic universities.

It can be stated that specific research focused on the risks and opportunities of deliberative communication does not exist; however, some outputs mention selected aspects of deliberation. These include the relationship between the media and politics or the financial aspects of journalism. Numerous studies have addressed the position, functions and problems of public service media; results of quantitative surveys of viewership, listening, readership, etc. are also available. Research into the working conditions of journalists is not systematic and thus relatively fragmented, overlooking numerous important aspects (gender, income, etc.). The assessment of risks and opportunities for deliberative communication in this area is therefore austere and relatively vague. Research results of this kind are important for the advertising and marketing industry. However, they tend to focus on nationwide media and do not monitor regional and local media outlets. Much data related to private media outlets is not publicly available. There is also a lack of relevant data on the demography of the journalistic profession in Slovakia, which makes it very difficult to monitor developments in this area.

7. Conclusions

Based on the collected data and its quantitative and qualitative evaluation, it can be stated that in 2000 – 2021, the issues included in the four examined domains were continuously investigated in Slovakia. We mapped a total of 865 publications, of which 707 were academic and 159 non-academic. However, in the first five years (2000–2005), publication activities of this kind occurred only sporadically, which was due to the fact that digitalization in Slovakia was just beginning and social media did not yet appear in the online communication space. After 2005, but especially in 2010, this situation improved significantly. Despite this improvement, the domains are not covered evenly. The most complex coverage is represented by publication outputs produced at universities. Non-academic publications are less numerous and in specific subdomains even scarce or non-existent. In particular, there are no research studies that would make it possible to compare the media system in Slovakia with other countries of the European Union. Slovakia, for example, did not participate in the Worlds of Journalism Study led by Hanitzsch prior to 2019, unlike other V4 countries. This shortcoming may pose a risk that complicates continual and correct evaluation of Slovak media environment. Another risk is related to the situation caused by the pandemic, which has decreased trust in the media and created significant polarization of opinions and ideologies in Slovakia. These are risks for deliberative communication and democracy at the same time. The given gaps in media research in Slovakia will be possible to fill through interviews with experts in the given media field.

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SWEDEN

Risks and Opportunities Related to Media and Journalism Studies (2000–2020). Case Study on the National Research and Monitoring Capabilities

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Executive Summary

In this report, we present available data about Swedish media development during the period 2000–2020, but also relevant context to understand the production and availability of these data, and the main monitoring actors. To be precise, in accordance with the theoretical framework of the Mediadelcom project, we focus on data about legal and ethical legislation, journalistic production, media usage, and media competencies. The overall conclusion is that, in the Swedish case, there is in most instances no lack of reliable data about media development, which also means that there are good prospects for mapping such development. Instead, the challenge in this context is often how to select data, and a combination of different data, to give an objective overview of the media development in relation to topics such as deliberative communication and deliberative democracy.

Keywords: media development, Sweden, data, journalism, media use, competencies, legal and ethical regulation

1. Introduction

This report analyses the availability of relevant data in Sweden for the Mediadelcom project. It is structured as follows. First, we will introduce the Swedish context and how it may influence this report and the Mediadelcom study in general (1.1 and 1.2). We will then move on to describe the institutional system in the field of media research and information production, as well as its main stakeholders – actors who produce and finance information about the Swedish media landscape (1.3–1.5). We then look into the specific situation in each of the four domains: ‘Legal and ethical regulation’ (2), ‘Journalism’ (3), Media Usage (4) and ‘Media-related competencies’ (5). Finally, we make an overall assessment of the research and monitoring capabilities and gaps in the Swedish media landscape (6 and 7).

1.1. Explanations of structural peculiarities of importance

If there is anything ‘peculiar’ about the Swedish case, it is the relatively rich availability of data on media development. This does not necessarily mean that there are no data gaps to be found, but that usually the problem may be how to de facto cover all available data and how to select data for a research project such as this one.

In general, the availability of data concerning media development in Sweden is very good. Quite often, this makes it difficult to pinpoint which are the ‘main’ publications for each domain, and/or, as might be the case with some of the other country reports, to list them in an appendix (i.e. why some publications are selected instead of others). Therefore, we have decided to present relevant contributions in the body text below, i.e. in connection to the presentation of the four domains. The publications relevant for understanding media development in the four domains are also presented in the reference list. Due to the extensive size of the Swedish data set, the bibliographical lexicon for the Swedish data is still under development and will be concluded later in 2022.

We have also conducted interviews with 16 leading experts on Swedish media development in the period 2000-2020. These experts were carefully selected and include many of the most prominent and influential names in the Swedish media landscape during the past two decades, evenly divided over four categories: i) academia, ii) industry, iii) politics, iv) administrative authorities and NGOs. They include leading politicians, general directors of public authorities, CEOs of private and public service media, institute directors, professors, and editors-in-chief. This data will be analysed and used in coming reports within the Mediadelcom project, either complementing or triangulating literature-based insights into Swedish media development.

1.2. The main traditions and shifts in the 21st century and current situation concerning the media research and monitoring system

1.2.1. Context: Sweden, the media landscape and its monitoring

Historically, Sweden has been seen as a sparsely populated and linguistically and culturally homogenous country. According to the World Values Survey, it is also the world’s most secularized nation. However, Sweden is also changing – immigration to Sweden has been significant – 19.7 % of the 10.4 million population was born abroad,²⁵⁴ it is one of the fastest growing and fastest urbanizing populations in Europe.²⁵⁵ Official minority languages include both immigrant and indigenous languages Yiddish, Romani chib, Sami, Finnish, and Meänkieli. Descriptions of the Swedish media landscape are by necessity based on history, but should also acknowledge the changing social and demographic context.

Politically, Sweden is a multiparty and consensual democracy historically dominated by The Social Democratic Party, but with a much more fragmented party landscape in recent elections, not least following the increased voter support for the right-wing populist party the Sweden Democrats. Sweden is considered a mature liberal democracy and ranks highly in international comparisons of democracy and freedom of expression:

- Freedom in the World 2021: status “free” (Score: 100/100, stable since 2017).
- Liberal Democracy Index 2021: Sweden scores highly in the top 10% bracket – ranked 2 of 183 countries (Varieties of Democracy Institute, 2021).
- Freedom of Expression Index 2018: ranked 10 of 183 countries, down from 7 in 2016 (Varieties of Democracy Institute, 2017, 2019).

1.2.2. The media landscape

The Swedish media system has traditionally been a mixture of classical liberal notions of the press as an independent and monitoring ‘fourth estate’, and ideas of social responsibility involving necessary relationships between the political and media systems to maintain diversity and public service in broadcast media. From a historical perspective, the prospects for independent journalism could not be better. Sweden was the first country in the world to include a Freedom

²⁵⁴ www.scb.se, 2020

²⁵⁵ CIA Factbook, 2020

of Information Act in its constitution, as early as 1766, and since then, freedom of expression and freedom of information have been embedded in the Swedish constitution, which provides stronger protection than common law. However, this liberal media approach has co-existed with numerous state regulations of the media sector and a reactive media policy.

It could be argued that the tradition of high newspaper readership, high Internet penetration and maturity of digital media markets, and the relatively small broadcasting sector, is a trait shared among the Nordic countries (Sweden, Norway, Finland, Denmark and Iceland). These similarities also extend into the relationship between the media industry and the state, in what has been characterized as a democratic corporatist model (Hallin & Mancini, 2004). Historically, in this view, a well-functioning system for provision of news and information to citizens has been viewed as a responsibility of the state that cannot be left to market forces alone. The manifestation of the media policy side has resulted in rather extensive regulation of the private broadcasting and advertising sector, large investments in public service broadcasting, and broad support of newspaper journalism as part of what has been characterized as the Nordic cultural policy model (Duelund, 2008) and a “media welfare state” (Enli, Syvertsen, & Mjøs, 2018; Syvertsen, Enli, Mjøs, & Moe, 2014). Regulators have experienced the need to continuously monitor the development of the media sector and the effects of implemented policies via monitoring bodies. Authorities therefore source and analyse data and insights on media development, often in collaboration with other actors in the media environment. This interest in the media sector from a policy-making perspective has also been highly visible in academic research interests in Sweden and the Nordic countries (Krumsvik & Ots, 2016).

1.3. The main media monitoring actors

It is fairly well-known that Sweden, in comparison with many other countries in Europe and across the world, is equipped with rich research data about media development. This data comes from a great variety of sources, such as public authorities, academia, media-monitoring institutes, stakeholder organizations and NGOs.

1.3.1. Government authorities

Government authorities provide a form of governance that is particularly concerned with the implementation of legal regulations (McQuail, 2003). The *Swedish Press and Broadcasting Authority (MPRT)*²⁵⁶ was specifically created to monitor the development of the media market and to govern the implementation of media policy tools, including the issuing of broadcasting permits, administration of press subsidies and execution of industry governance such as public-service value tests, and the ethical reviews conducted by the Swedish Broadcasting Commission (Granskningsnämnden). MPRT regularly collects, analyses, and publishes reports on media market developments, media policy, media economy, media consumption and media trends. The majority of the raw data is derived from various measurement institutes. Other public institutions of relevance include the *Swedish Post and Telecom Authority (PTS)*²⁵⁷, which monitors markets for mobile and broadband and associated public access to these services. *Statistics Sweden* monitors a vast range of issues of relevance to the media sector, including population growth, labor markets, democracy, pricing and culture²⁵⁸. *The Swedish Media Council* monitors media habits of young citizens in order to identify and pre-empt negative media effects.²⁵⁹

The *Swedish Civil Contingencies Agency (MSB)* is a public agency that produces regular reports and books on media performance and newsroom work during societal crises and disruptions.

²⁵⁶ <https://www.mppt.se/>

²⁵⁷ <https://www.pts.se/>

²⁵⁸ <https://www.scb.se/en/>

²⁵⁹ <https://www.statensmedierad.se>

The agency also takes a particular interest in threats to journalists and the ability of the media sector to handle fake news and disinformation. Over the years, the agency has proved to be one of the main funders of research of crisis journalism outside of the traditional scientific councils.

In order to guide media policy-making, the *Swedish government* installs parliamentary and/or expert commissions with the task of making inquiries into various aspects of the media market. In Sweden, most commissions relevant to the media market come administratively under the Ministry of Culture. The reports of the commissions are published as so-called *SOU (Public Inquiries of the State)*.²⁶⁰ The production of public inquiries related to different media issues is very extensive and concerns most types of media and the functioning of their respective markets – commercial TV and radio, public service media, newspapers, minority media, digital platforms and Internet from a usage perspective. Between 2000 and 2020, Swedish governments (of different political colors) appointed a total of 102 public inquiries in this field, ranging from very limited aspects of the media and communication sector to more general overviews of the current digital media landscape (Nord & Wadbring, 2021).

1.3.2. Trade press and mainstream media

The media themselves also play a role in monitoring the media system, ensuring the accountability and performance of actors within the system, and making the functioning of the system transparent to a wider audience. One such area is the different legal acts that protect the media sector, including violations of freedom of speech and abuses of data privacy by international tech platforms. Court cases and rulings are some of the primary sources of information regarding the functioning of media legislation, enforcement of laws by authorities, and ethical/legal behaviors of media firms and journalists. However, court rulings are not easily accessible or transparent to a general audience. Therefore, this monitoring and deliberation of the Swedish media system relies to a large extent on the media itself – the trade press (Dagens Media, Resumé), union publications and forums (Journalisten, Publicistklubben), but also editorial columns and op-eds in quality dailies (DN Debatt, SvD Brännpunkt). These forums frequently publish and debate court rulings on issues like press freedom, slander and source protection. All of these media channels naturally also discuss many other aspects of the media industry.

1.3.3 Commercial research institutes

All media markets require verified and reliable measurements and metrics, whose key role is to guide advertising pricing. These measurements, which to a large extent focus on media consumption but also aspects of media access and distribution, are conducted by commercial research firms and auditing institutes. These institutes typically audit a specific media type and regularly (often quarterly) publish their data in time series and reports which tend to remain largely descriptive in their analyses.

When it comes to broadcasting markets, TV consumption in Sweden is currently (2021) measured by *MMS (Mediemätningar i Skandinavien)*, whereas radio consumption is tracked by *Kantar Sifo*. Newspaper circulation is traditionally audited by *TS Mediafakta*,²⁶¹ whereas the largest newspapers have tended to rely increasingly on Kantar Sifo. Kantar Sifo also publishes the *Orvesto survey* that focuses on audience reach for all types of media – printed, broadcasting and digital media,²⁶² which is why Orvesto has become the most important source for understanding broad media consumption patterns and trends.

²⁶⁰ available at www.riksdagen.se

²⁶¹ <https://ts.se/digitalnordic/news/>

²⁶² <https://www.kantarsifo.se/rapporter-undersokningar/rackviddsmatningar>

In terms of the Internet, the *KIA Index*²⁶³, administrated by the Swedish National Association of Advertisers, claim to be the measurement standard for Internet sites. KIA monitors all types of domains that are affiliated to the service. As opposed to Kantar Sifo's Orvesto index, KIA measures unique web browsers (rather than studying a representative panel of users). Whereas a number of rural news media and many magazines are affiliated with KIA, most of the larger news media publishers are missing from the index.

Finally, *The IRM Institute for Media and Advertising Market Statistics*²⁶⁴ has monitored advertising investments on the Swedish media market for decades, including which business sectors are investing in media advertising and which media sectors are the beneficiaries. The entry of international social media tech giants on the Swedish media scene has blurred the IRM data over the past decade.

1.3.4. Academic institutions

The media sector and its development is studied at several universities in Sweden – both within the fields of Journalism and Media and Communication Studies (which is represented as a scientific discipline at 14 universities in Sweden), but also within business, political science, education, history of science, etc. There is a continuous stream of research coming out of these institutions in books, reports and international journal publications covering media in the Swedish context. A relatively large amount of scholars from Sweden have been, and still are, successful in publishing their research in the most important international publications and are part of the international research community.

Most notably University of Gothenburg hosts some of the most longstanding and important studies of the Swedish media landscape and relations between citizens and public institutions. The research environment is associated with particular publications, not least the classic course literature book, *Massmedier: Press, Radio & TV i förvandling*, [Mass media: Press, Radio & TV in transformation] for many years co-authored by professors Stig Hadenius and Lennart Weibull (1998). Most Swedish media and communication students are familiar with this book, which is still generating new editions. The research center *Nordicom*, associated with the university, has been collecting and publishing statistics, books, reports and newsletters on various aspects of the media market since the 1970s. Nordicom also conducts the annual survey *Mediebarometern* [The Media Barometer] on media use and reach. The neighbouring *SOM institute*, also associated with University of Gothenburg, conducts some of the most well-known and used studies on “society, opinion and media”, including annual reports on media usage and media trust, political opinions, institutional trust, political trust, and public attitudes towards diverging societal phenomena. The continuous work of Nordicom and SOM has resulted in extensive time series on numerous aspects of Swedish society²⁶⁵, including a vast database of publications based on the surveys²⁶⁶. Nordicom also publishes the leading academic journal on media and communication studies in the Nordic countries, *Nordicom Review*, and previously the Scandinavian language-oriented *Nordicom-Information*.

The predominantly statistical, (often) descriptive and nationally oriented approaches at University of Gothenburg, which developed from the 1970 and onwards, also gave rise to the need for other, often more international and/or theory-driven, outlooks and contributions in the research field, which have then been explored and developed at other universities over the last four decades. To a great extent, the varying approaches that developed at different universities and university colleagues were connected to different, and often conflicting, views on science and how best to conduct research. For example, in the wake of the decreasing influence of Marx-

²⁶³ <https://www.kiaindex.se/>

²⁶⁴ <https://www.irm-media.se/>

²⁶⁵ <https://www.gu.se/en/som-institute/publications/results-from-the-som-surveys>

²⁶⁶ <https://www.nordicom.gu.se/en/publications>

ian historical materialism of the 1970s, in debates for or against a more positivistic understanding of scientific practices, positivism was instead challenged in the 1980s and 1990s by emerging approaches such as critical theory, cultural studies, postmodern theory, but also other influences which were often derived from the new research milieus around Sweden. Furthermore, the debates also concerned method preferences, in terms of quantitative/statistical vs. qualitative approaches.

In this respect, the media and communication and journalism research at Stockholm University (at JMK), became associated with pioneering scholars such as K. Nowak, which even forty years ago focused on topics such as globalization and media (J. Ekecrantz), media and national identity or media and youth culture (J. Fornäs). This culture studies-oriented tradition is still very much alive today (and was prevalent during the 2000-2020 period) through the focus on research areas such as media and cosmopolitanism or the visual (K. Becker) and discursive dimensions of media and journalism.

The media and communication research and the journalism research at Södertörn University is to a large extent associated with research collaborations with Baltic/Eastern European Russian institutions and scholars. This is very much due to the implementation of a particular state-funded research fund, *Östersjöstiftelsen*, restricted to research for Södertörn University and established in 1994 following the fall of the Berlin Wall, with the purpose of strengthening and deepening the academic and research cultural infrastructures across the Baltic Sea and between Sweden and Eastern Europe. For several decades, the Media and Communication Department has been producing research influenced by the cultural studies, critical theory tradition and continental theory, while the Journalism Department is more geared towards journalism as a profession (G. Nygren) and technological development (E. Appelgren).

The Media and Communication Department at Mid University Sweden is associated with research about the relationship between media, journalism and democracy (L. Nord, J. Strömbäck, and others), and is also running a program in Journalism. This is also the case at JMK (Stockholm), JMG (Gothenburg) and Linnéuniversitet (in Kalmar). The research program DEMICOM seeks to combine studies about political communication, risk communication, organizational communication and media development.

For a long time, media and communication research at Uppsala University has been associated with a focus on ICTs and thus the role of technology, internetization and digitalization in media development (for instance, O. Finndahl's research), but this picture has been changing lately with more diversified influences.

Lund University has traditionally produced media and communication research about media and democracy, media and politics (P. Dahlgren) and gender and media (G. Jarlbro), while its offshoot (Campus Helsingborg) is associated with contributions to strategic communication research (J. Falkheimer, M. Heide, and others).

Over the last decade, the media and communication department at Karlstad University has developed quite a strong research environment, not least in the field of journalism, including projects about media practitioners' working conditions (H. Örnebring); robot journalism and technology (C. Clerwall); development of journalism in a European context (H. Örnebring); and transparency in journalism (M. Karlsson), to mention just a few examples.

The Media and Communication Department at Örebro University has a long tradition of international conflict, risk and crisis communication research, represented by the work of SA Nohrstedt, and B. Höijer, as well as discourse analytical approaches to media and journalism studies (M. Ekström). A rather important work in the Swedish journalism context emanating from Örebro University is Ekström & Nohrstedt's ethnographic study (1996) *Journalistikens etiska principer* (*The ethical principles of journalism*).

Traditionally, media and communication research at Jönköping University has, to begin with, been focusing on media development, public service and press history (LÅ Engblom, and others), but for the last decade there has been a shift towards a sustainability communication perspective on media, journalism and other organizations, which was introduced and developed by U. Olausson. The Media and Communication Department research belongs to the School of Education and Communication. Secondly, Jönköping University is endowed with the research center MMTC (Media, Management and Transformation Centre), located at Jönköping International Business School). MMTC is for the past 20 years an important research hub for studies on the management of media organisations and the business side of media production (R. Picard, L. Küng, L. Achtenhagen, M. Ots). The center is home to the Journal of Media Business Studies.

Media and communication education and research is also provided at Malmö University, Halmstad University College, University College of Gävle, Umeå University and Luleå Tekniska Högskola. When it comes to the four domains of the Mediadelcom project, one could say that Swedish media and communication and journalism research has primarily contributed to the journalism domain, followed by the media use domain, and less to media legislations/accountability and media literacy, which have been more reliant on individual contributions (i.e. particular researchers' long-term research rather than the production of a critical mass of research emanating from several directions/research environment).

1.3.5. Trade associations and NGOs

Additionally, there are several sources that are neither arms of the Swedish government nor commercial market-research companies or academic institutions. Though a private non-profit foundation, the *Swedish Internet Foundation* (Internetstiftelsen) is responsible for the .se and .nu domains and monitors the internet habits of the Swedish population.²⁶⁷

Industry/philanthropic and labour market financing has supported the establishment of independent think tanks such as the *Institute for Media Studies* (IMS), which both orders academic inquiries and publishes reports on the professional conduct, economic situation and policy of journalism in Sweden. For example, they produce annual reports on the state of the Swedish media, mapping journalistic coverage of, and presence in, local municipalities all over the country.²⁶⁸

Of course, there are also other organizations, institutions and NGOs that conduct research or publish research that may serve to enlighten certain perspectives or agendas in the media landscape, such as *The Union of Swedish Journalists – SJF*. This organization has supported regular research on Swedish journalists' working conditions and role perceptions in collaboration with academic institutions. The *Swedish Enterprise Media Monitor* has been funded by Swedish Free Enterprise Foundation but is now a private company whose objective is to scrutinize and discuss the quality of Swedish news journalism. International monitoring efforts that cover Swedish development include WACC's focus on gender and minorities in the Global Media Monitoring Project²⁶⁹. Interestingly, major think tanks like Timbro and high-profile lobbying organizations have so far not been particularly active in shaping the discourse on the media market arena.

1.3.6. International and transnational institutions

Several databases exist to monitor ownership and economic performance in the media sector. At EU level, there are numerous (often comparative) initiatives that can be useful for monitoring the Swedish media context. International academic efforts that cover Swedish development

²⁶⁷ <https://internetstiftelsen.se/en/>

²⁶⁸ <https://mediastudier.se>

²⁶⁹ <https://whomakesthenews.org/>

include the Media pluralism monitor MPM²⁷⁰, Reuters Institute Digital News Report²⁷¹, and the Media Democracy for Monitor project²⁷² conducted within the Euromedia Research Group²⁷³.

The EU itself produces a vast number of reports every year about media, democracy and digitalization in its member states,²⁷⁴ for instance the Eurobarometer. The EU is consistently developing its capability to monitor and share information on media development. This can be conducted via coordination of national authorities in the member states, such as the European Platform of Regulatory Authorities²⁷⁵, the European Audiovisual Observatory²⁷⁶ or via EU-sponsored projects such as the Media Pluralism Monitor²⁷⁷. Other examples include the database *MAVISE*, that contains data about transnational ownership structures in the audiovisual industry²⁷⁸. Though the Nordic collaboration has been accused of being gradually weakened over past decades, the Nordic countries have a tradition of collaborating in the fields of media and culture with initiatives, projects and publications sponsored by the Nordic Council of Ministers²⁷⁹. Nordicom²⁸⁰ is one such initiative.

1.4. The funding system of media research and monitoring

1.4.1. Scientific councils for funding projects about journalism and media

In a Swedish context, funds for media research primarily derive from the *Swedish Research Council* (Vetenskapsrådet); *Riksbankens Jubileumsfond*; *Forte*, *Formas*, *Vinnova* (innovation-oriented research), *The Wallenberg Foundations*, *Hamrin-stiftelsen*, *Anderstiftelsen*, and EU-funded programs such as *Horizon2020*. In this respect, a relatively widespread opinion among media and communication scholars is that, among Swedish research councils, the very discipline of media and communications is disfavoured in relation to more established disciplines such as political science. It is, of course, difficult to estimate whether negative results in the number of accepted applications (acceptance rate is usually approximately 10%) has to do with structural discrimination or instead a lack of quality among too many media and communication applications. The scientific councils remain important as a possible source of funding as conditions for basic research at universities vary and senior professors are in many cases more or less expected to finance their own research through the funding they attract from external funding sources.

During the examined period (2000-2020) we find several large projects or programs funded by some of the above-mentioned councils, or some other funders. For example, the YES program on youth and media use (M. Ekström) (see more information below) and a project about emotional/civic engagement in journalism (H. Örnebring). Here are some (limited) examples of projects – described here in terms of their topical focus – which have been, and/or still are, funded by the Swedish Research Council and Formas during the twenty-year period; journalism and political accountability (M. Djerf-Pierre, M. Ekström & B. Johansson); journalistic epistemologies in a digital context (M. Ekström & O. Westerlund); journalism and transparency (M. Karlsson, L. Nord and others), journalism and cross-professional, hybridized relations in the case of every-

²⁷⁰ <https://cmpf.eui.eu/media-pluralism-monitor/>

²⁷¹ <https://reutersinstitute.politics.ox.ac.uk/>

²⁷² <https://euromediagroup.org/mdm/>

²⁷³ <https://www.euromediagroup.org/research/>

²⁷⁴ <https://op.europa.eu/en/home>

²⁷⁵ <https://www.epra.org/>

²⁷⁶ <https://www.obs.coe.int/en/web/observatoire/>

²⁷⁷ <https://cmpf.eui.eu/media-pluralism-monitor/>

²⁷⁸ <http://mavise.obs.coe.int/>

²⁷⁹ <https://www.norden.org/en>

²⁸⁰ <https://www.nordicom.gu.se/en>

day social media communication (P. Berglez, U. Olausson, M. Krzyzanowski); media and trust (F. Stiernstedt) and digital media and human rights (K. Andén-Papadopolous); media/journalism and climate change (B. Höijer, P. Berglez & U. Olausson).

It is difficult to estimate the importance and extent of externally funded research in relation to the available internal resources of each university, as it is usually embedded in the employment (e.g. 10-30 % time for research for an employed full-time lecturer, or 40-70% set aside for an employed full-time professor).

1.5. The national research database and most important journals

Here, there is no particular media-oriented research database for media research to use. However, when searching for media research, the national database *SwePub*²⁸¹ is of essential importance. The database collects publications (articles, books, doctoral dissertations, reports, artistic work, patents, etc.) from all Swedish universities, but also a wide range of other authorities such as the Swedish National Museum and Naturvårdsverket (The Swedish Environmental Protection Agency). The database enables bibliographical data management and analyses. The database is constantly updated and coordinated by KB, the National Library of Sweden. It mainly concerns scientific/academic work, while data from privately owned institutions is not accessible in this context. A related effort is the Digital Academic Archive (Diva), which is a joint effort by 50 Swedish academic institutions to systematize and disseminate all academic publications from the affiliated universities, including graduate and undergraduate student theses²⁸².

In the Swedish and Nordic context, the most important publication is *Nordicom Review*, in which much Swedish media research is published. However, this is also an international journal that publishes research from outside Sweden and the Nordic countries.

2. Publications, data sources and main monitoring actors in the legal and ethical regulation domain

There is good availability of information (sources and data) to map and understand media-related legal and ethical regulation during the period 2000-2020, including central monitoring actors. For relevant publications and other data in connection to this domain, see the text below (2.1, 2.2 and 2.3).

2.1. Freedom of expression

The current key Swedish media laws include The Freedom of the Press Act (SFS, No. 105/1949) and the constitutional law on Freedom of Expression (SFS, No. 1469/1991), which largely protect the fundamental democratic functioning of the press. There are also laws on the functioning of media markets such as the Radio and TV act – outlining who can broadcast, what content and what advertising (SFS 201:696) – and the press subsidy act (SFS 1990:524). Laws such as the intellectual property rights act (SFS 1960:729), competition law and electronic communication act (SFS 2003:389) are increasingly being harmonized with EU legislation. Whereas legislation governs the functioning of the media system, the monitoring and production of information concerning the ‘legal domain’ is a more complex issue. It involves ‘the legal text’ and the court system, but beyond that media policymaking at large. That includes questions about what the purpose and intent of the law is, what it should be in the future, how it is currently interpreted

²⁸¹ <https://swepub.kb.se/>

²⁸² <https://www.diva-portal.org/>

and enforced, how media actors behave in relation to the law, and the consequences of the designs of legal acts for the functioning of the media system.

Freedom of expression is a concept often addressed in academic articles, and one common conclusion is that this freedom can't be taken for granted but needs to be in line with peoples' understanding of its meaning in the digital society, and the challenges posed to the concepts by the increasingly blurring lines between journalism and other forms of media content (Carlsson & Weibull, 2018; Maria Edström, Kenyon, & Svensson, 2016; Kenyon, Svensson, & Edström, 2017; Svensson & Edström, 2017).

Research on freedom of expression that specifically concerns the media sector is quite limited, but there are exceptions (Maria Edström et al., 2016; Kenyon et al., 2017; Svensson & Edström, 2017). With the world's oldest Freedom of the Press Act (celebrating 250 years in 2016) and a strong Freedom of Expression Act, the protection of journalists is very extensive in Sweden. This may explain some lack of monitoring in this area. Nevertheless, there are related areas of inquiry that may merit future attention, including regulation of freedom of expression in social media and increasing hate and threats against journalists (Bladini & Svensson, 2022, personal interview).

2.2 Freedom of information

Sweden has a very old tradition of open government, and the default status for governmental documents since 1766 is for them to be public. They are open to anyone, not just to journalists, although journalists are more experienced than ordinary citizens in gathering and using public documents. During the past 50 years, secrecy clauses have become increasingly common in legislation. The motives for this are said to be privacy concerns due to the openness of digital documentation, protection of personal privacy, and protection of commercial and state interests. Swedish citizens and journalists still have very good access to most kinds of governmental documents.

2.3 Accountability system (media sector legislation and code of ethics)

When it comes to monitoring the relationship between media and the state, there tends to be a wider interest in policy than in pure legislation. 'Policy' is in this sense a broader term that indicates the overall direction and intent of political actions and debates used to create a functioning media sector (beyond what is institutionalized in legal acts). There are many different types of legislation that have the potential to affect the production and consumption of journalistic news in a country, including areas of culture, taxation, competition, digital infrastructure, data storage and personal integrity (Nord & Ots, 2019). *Academic research* has mainly been concerned with the policies and regulations that directly and specifically target the media market, for example in terms of providing financing via subsidies (further discussed in the domain of Journalism) (Krumsvik & Ots, 2016). Media policy making and particularly the issue of press subsidies (paradoxically) are an issue of waning public and political interest (Ohlsson, 2014).

Policy developments of concern for the media sector are monitored and compiled by the Swedish Media Authority (MPRT, 2021). The reports, which are released annually, include overviews of recent debates and changes in Swedish, Nordic and EU perspectives and policies in the media sector. Other government institutions such as the Authority for Cultural Analysis also produce (less regular) policy overviews (Myndigheten för kulturanalys, 2022).

Media-related issues are regularly addressed in public inquiries appointed by the government. The latest *parliamentary inquiry* of Press Freedom and Freedom of Speech, initiated in 2018, discussed the possibility of giving public service media legal protection in the constitution but could not reach the requisite broad agreement (SOU 2020:45). Consequently, conditions for public service media remain the same as before and it is possible for the political system to alter

basic conditions, such as financing, from one year to another via a single decision in parliament. In the press domain, several inquiries have tried to adjust the press subsidy system to a digital environment (e.g. SOU 2016:80). The deliberation of such inquiries regularly continues in op-eds in daily newspapers. Overall, there is a growing theme in the commentaries that the Swedish media policy seen as progressive 50 years ago when the press subsidies were created are now seen as rigid and passive. Media policy is largely seen as caught between an incapacity to reconcile the role of national journalistic media in a fast-moving globalized digital environment (Nord & Truedsson, 2021), and an incapacity to reconcile national policy needs and visions with needs for European harmonization (Ots, Krumsvik, Ala-Fossi, & Rendahl, 2016).

Besides the legal system, with its strong constitutional protection for freedom of information and freedom of speech, Sweden is characterised by a system of *institutionalised self-regulation* in the print market (Hallin & Mancini, 2004). The Swedish Press Council, founded in 1916, was part of this corporatist structure. Although the Swedish Press Council was not affiliated with the government, changes to make it more accountable to the public were encouraged by parliament. The council took decisions on media ethics issues in public and published regular reports with considerations and explanations regarding its policy positions (von Krogh, 2016). In 2020, the council changed its name to the Media Ombudsman and the Media Ethics Council²⁸³ broadened its scope to include radio and television.

The Publicists' Club, which is a member of the umbrella organisation the Press Cooperation Committee, upholds a continuous function of self-criticism with regular panels and debates on key media matters. Top editors at leading national news media regularly comment upon current publicity debates and publishing decisions taken by them. The self-regulation system is frequently the subject of debate in Sweden, but has hitherto shown its strength and is generally respected by media companies.

Media accountability/media criticism and its practice in times of market expansion (Kenyon, Svensson, & Edström, 2019), looser regulation of public service and new technological opportunities for public interaction have been investigated in doctoral dissertations and numerous essays (von Krogh, 2012; von Krogh & Svensson, 2019). To conclude, legal protection of freedom of information is traditionally strong, as is the system for institutionalized self-regulation in the media sector, even if market developments and political polarization may challenge the stability hitherto enjoyed.

3. Publications, data sources and main monitoring actors in the journalism domain

There is good availability of information (sources and data) to map and understand journalistic developments between 2000-2020 in Sweden, including central monitoring actors, although some sub-domains might be richer in data than others (i.e. this domain is endowed with many sub-domains). For relevant publications and other relevant data in connection to this domain, see the text below (3.1-3.4).

3.1. Market conditions

With regard to ownership diversity, foreign interests, and the labor market, the trend of media-market concentration on the Swedish newspaper market is clear and undeniable. Specific data and reports on ownership concentration over time are available via Nordicom's databases²⁸⁴ and the Swedish media authority (MPRT). The issue of ownership has therefore been salient in

²⁸³ <https://medieombudsmannen.se/about-the-media-ombudsman/>

²⁸⁴ www.nordicom.gu.se

the public debate as well as in Swedish media research. A large number of studies have empirically explored and described the decision processes and the various consequences of newspaper mergers on journalistic work, journalistic output and the market consequences for local societies (Alström & Nord, 2000, 2002, 2003). Other studies have described the possible effects of different ownership forms (Achtenhagen, Melesko, & Ots, 2018) and how the effects of ownership concentration stimulate the growth of newspaper chains and networks that initiate various forms of collaboration and coordination of production services (Ots, 2012). This trend is also visible on the broadcasting markets, which were deregulated as late as the 1990s. However, the initial political visions of commercial market diversity (Norbäck & Ots, 2007) have been turned into a more realistic acceptance of a new reality, with large international owners of large radio chains and TV networks focusing on music and entertainment rather than journalism and local content (Engblom & Wormbs, 2007; Forsman, 2011). Recent studies have started to discuss the relationship between market-level structures and the form and shape of journalistic output in specific areas, such as cultural journalism (Widholm, Riegert, & Roosvall, 2021).

One of the core objectives of the Swedish media policy has been to monitor the economic development of the newspaper sector. Consequently, there are both raw data and an annual report series named “Dagspressens Ekonomi” [The Economy of the Daily Press] that has been issued by the Media Authority (MPRT) since 1975 and analyzes the economic conditions of the Swedish newspaper. Based on information from annual statements, the reports describe trends in both profit margins and revenue structures. Recently, the authority has also started to focus explicitly on the editorial expenses of newspapers. On the advertising side, the research institute IRM²⁸⁵ produces quarterly statistics and analyses on advertising income in all different sectors of the media and advertising markets. Together, these incomes provide a comprehensive picture of economic developments on the media market. Additionally, three large parliamentary inquiries since 2000 have investigated the conditions for the press and published extensive reports on the topic (SOU 2006:8; SOU 2013:66; SOU 2016:80).

Regional and local journalism has held a strong position in the Swedish media landscape. Sweden has relied for decades on a few national morning dailies and a strong sector of regional media houses. Information on local media production and consumption is accessed via Nordicom’s databases on media ownership or data from Dagspresskollegiet²⁸⁶ on local media usage. Though the declining income in the newspaper sector, the cost reductions and redlining of operations are not only an issue for the regional media houses (Wadbring & Bergström, 2017), the reduction in local editorial offices has left more peripheral areas without journalistic coverage. The phenomenon was already being discussed two decades ago (Nord & Nygren, 2002) and has since then been revisited in several studies (in particular by Gunnar Nygren) (Nygren, 2019; Nygren & Althén, 2014; Nygren, Leckner, & Tenor, 2018). Recently, the Institutet för mediestudier launched a database on the development of geographical dynamics of local journalistic coverage²⁸⁷.

The broadcasting sector that was deregulated in the 1990s quickly morphed from independent local stations into national networks and has since then had difficulties producing meaningful local journalistic content, thereby not doing anything to moderate the local situation (Forsman, 2011; Norbäck & Ots, 2007). On the contrary, the largest commercial television network, TV4, opted to close all their local news offices as soon as they were given the legal/political opportunity.

Market conditions are generally satisfactorily exposed in academic work and in reports produced by public authorities, which often provide productive inputs to policy making discus-

²⁸⁵ <https://www.irm-media.se/>

²⁸⁶ <https://www.gu.se/forskning/den-svenska-mediepubliken-fd-dagspresskollegiet>

²⁸⁷ <https://kommundatabas.mediastudier.se/>

sions. Still, extensive data in this area is mainly descriptive and focused on economic indicators and may not capture all dimensions of current market developments such as the democratic effects of increased owner concentration and closure of regional and local news offices, for example.

3.2 Public service media

Public service media's autonomy, role and mission are mainly a topic for regular public inquiries, initiated by Swedish governments as the start of a political process that ultimately results in a new charter for public service companies (SOU 2008:64; SOU 2012:59; SOU 2018:50). During this process, there is often a public debate on autonomy issues. Besides the public inquiries, most attention to the relation between public service and politics is given to the issue of partisan programs and whether public broadcasters are remaining independent in their coverage of political issues. Program content has been regularly analyzed by academic scholars in collaboration with the *MRTV Authority* and presented in annual reports, but for some years these studies have ceased to be conducted (Asp, 2017). Public service companies themselves produce annual reports with information on program content and diversity.²⁸⁸ Academic research on public service media conditions in Sweden has to some extent been produced by *Nordicom* in Nordic comparative projects on politics, markets, programming and users, as well as by *The Broadcast Media Foundation* which analyzes the role of public service media in the digital media landscape (Carlsson, 2013b; Carlsson & Harrie, 2010; Jönsson & Strömbäck, 2007; Lowe & Maijanen, 2019; Nord & Grusell, 2012). Doctoral dissertations on public service have mainly focused on content diversity and relationships with the audience (Edin, 2000; Jönsson, 2004). Finally, there are individual articles examining the reporting of public service media during election campaigns, public service television company strategies regarding relationships with politics and markets (Lindén, 2011; Thorbjørnsrud, 2013) and PSB responses to digital change (Widholm & Appelgren, 2020).

The autonomy of public service media is an often-discussed political issue, where a majority of political parties in Sweden have historically supported the arm's length principle of distance and 'firewalls' between media companies and political institutions. In recent years, however, criticism from the political right has increased, accompanied by proposals to monitor public service media's activities to a larger extent.²⁸⁹ The lack of regular academic input in this discussion during this period poses a risk to rational political decision-making, as empirical evidence is replaced by ideological rhetoric. On the other hand, an ongoing and mutual 'politicization' of the issue may result in increased interest to study the topic from academic perspectives in the future.

As with autonomy, the issue of financing models for public service media is mostly analyzed and discussed in the frequent public inquiries. Sweden had a long tradition of the license fee system, but then decided to replace the system with a new model in 2019, in which the public service fee was integrated into the annual taxation of citizens and administrated by the Swedish Tax Authority. The issue was broadly and thoroughly discussed in the latest two public inquiries on public service media (SOU 2012:59; SOU 2018:50). This transformation – and possible market-orientation of media policy – has been discussed in a comparative work on public service in the Nordic countries (Edelvold Berg & Brink Lund, 2012). Scholars have also introduced the idea that financing should be based on general principles of journalism as a public good (Allern & Pollack, 2019).

Financing models of public service media are generally described in academic textbooks and overviews of media systems. In the case of Sweden, in-depth analyses of advantages and disad-

²⁸⁸ SR and SVT Annual Reports.

²⁸⁹ <https://moderaterna.se/nyhet/sverige-behover-en-ny-mediapolitik/>

vantages of different alternatives are most often discussed in public inquiries. The academic input to the societal debate is fairly limited and the issue is most often viewed from diverging political perspectives. Topics related to the conditions of public service media are generally linked to the political decision-making process, while a large amount of data on public service media performance, audiences and trust is provided on a regular basis by research institutes like Nordicom and SOM-institutet. Thus, public service media is an area in which several actors contribute to increased knowledge about current developments.

3.3. Production conditions

Media research on digitalization has been relatively extensive in the areas of online journalistic conditions and news production processes. A number of important studies on the digitalization of journalism have been focusing on how algorithms and audience metrics are influencing newsroom decisions (Widholm & Appelgren, 2020). Comparisons of how commercial media and public service media face digital challenges display important differences, with the commercial sector being more dependent on digital data in news production (Andersson Schwarz, 2016). One three-year-project, financed by the Swedish Research Council, also investigated digital journalism and transparency from different perspectives. A general conclusion drawn by the project was that audience participation in digital news production was not particularly appreciated, either by journalists or by citizens (Karlsson, Bergström, Clerwall, & Fast, 2015). Finally, the digitalization of journalism has been discussed as a main topic in the latest comprehensive media inquiry in Sweden (SOU 2016:30).

The studies on digitalization of journalism in Sweden generally address potential risks for the quality of journalism should news production become more algorithm- or metric driven. Data traffic-related news decisions that increase the number of ‘click bates’ or personalized news are perceived as a problem in the making. However, the results of the studies also indicate some resilience to digitalization effects in news production in Sweden. News processes are not completely digitalized and computerized but to a considerable extent still influenced by independent editorial decisions and based on professional journalistic values, particularly in public service media. Studies also show that journalists often stick to professional guidelines when working with social media (Appelberg, 2019). There is considerable attention paid to the digitalization of journalism within media studies, offering valuable results on the consequences of digital developments for newsroom production.

Investigative journalism is highly valued among active journalists in Sweden, but academic research into this genre of journalism is rather sporadic. One of the most well-known investigative TV programs, “Uppdrag granskning” (SVT), has been explored in a dissertation thesis (Danielson, 2016), and its working methods, such as hidden cameras and recording, discussed in a book (Andén-Papadopoulos, 2003). More comprehensive studies on investigative journalism were mainly conducted in the period 2001-2006, when the Swedish Association of Local and Regional Authorities sponsored a research program on local investigative journalism. The program financed two bigger research projects on the topic and both projects concluded that there were substantial challenges facing local investigative journalism (Ekström, Johansson, & Larsson, 2006). The projects found that investigative reporting at a local level was extremely rare, and that most media outlets lacked the resources for investigative reporting. At the same time, Swedish journalists participating in international surveys such as the Global Journalist Studies, hail this norm of investigative journalism and perceive it as the single most important mission of journalism in a democracy (Strömbäck, Nord, & Shehata, 2012). There is also a national association for investigative reporters (Grävande Journalister) arranging annual conferences at which working methods and current cases are discussed.

The limited number of academic studies exclusively focusing on investigative journalism in Sweden makes it difficult to draw any general conclusions in this area. The few studies available

confirm that the area of investigative journalism is strong. However, a common theme in most studies is the difference between journalists' ideal perceptions of the genre and their actual performance. Even if a few major national news organizations actually have spent more resources on investigative journalism in recent years, the lack of resources is generally a big problem. There is also the risk from a deliberative communication perspective that the normative ideals with strong support from the media industry and journalists seem to be hard to live up to in practice (Nord & von Krogh, 2021). There is undoubtedly a demand for more systematic research in this area in order to understand the status and potential shortcomings of investigative journalism.

There are very few studies of foreign news journalism and the role of correspondents. Most publications in this area are correspondents' books containing reflections on their work and journalists' memoirs. Among the exceptions is a doctoral dissertation discussing the anthropology of foreign news and observing differences depending on regions, spheres on society, gender and skin color (Roosvall, 2005). Another doctoral dissertation focused on international conflict and crisis reporting (Berglez, 2006). There are also articles examining how foreign, domestic and cultural factors appear in climate change reporting from different countries, and there are studies examining increased consumption in Sweden of transnational news, especially among younger generations (Berglez & Lidskog, 2019; Widholm, 2019).

Overall, this journalistic genre is more or less neglected from an academic perspective and very rarely discussed in public debate. Correspondents are highly visible in news reporting, sometimes appearing in specific foreign news programs and documentaries. Still, systematic knowledge about how foreign news is shaped and processed remains very limited.

Conditions for journalistic production are generally observed and analyzed in journalistic studies at Swedish universities, and there has been a particular interest in the consequences of digitalization and its influence on journalists' working processes and news production procedures. Other areas, such as investigative journalism and foreign news journalism, are less researched to date.

3.4. Working Conditions

Working conditions among journalists and media workers have been a relatively prioritized and highlighted issue in Sweden, which can be explained by several factors. These include the fact that working conditions are an important issue in Swedish society generally; and that journalists represent a professional category with the ability to 'raise its voice', including a strong union (Journalistförbundet, or Journalists' Union) with recurrent reports being written and data collection on this issue (Werne, 2016a, 2016b). The Journalists' Union reports could be viewed as research as they conduct surveys and interview media workers, then present data in a relatively systematic way. However, their reports are not particularly well connected to ongoing academic research. When it comes to studies about working conditions for Swedish journalists/media workers between 2000-2020, some data also derives from particular academic studies, often qualitative ones, that made use of interviews (Örnebring & Möller, 2018). Some of them are longitudinal (Örnebring, 2018) and some data derives from international projects and thus cross national comparisons (Harro-Loit & Josephi, 2020). Overall, the topic includes problems such as the trend of outsourcing and stress, as well the challenges of freelancing and the development in which journalists are increasingly considered as "entrepreneurs". It is also possible to find more textbook-oriented contributions with this kind of focus.

Another important aspect is threats/harassment/hate against journalists. In this context, both academic researchers and other actors (organizations) have been quite engaged in collecting and analyzing data. This topic has developed primarily over the last decade, and perhaps primarily during the period from 2015 onwards. However, even back in 2015, the journal *Nor-*

dicom Information produced a special issue on this topic (Wadbring & Mølster, 2015), demonstrating survey data (from Sifo) about the extent of harassment targeting Swedish editorial offices (Broberg, 2015) and threats and hatred toward journalists (Löfgren-Nilsson, 2015). In the wake of this special issue, quite a lot of new data is to be found from various sources.

3.4.1. Intra-organizational diversity

Some tend to link employment conditions to the issue of *newsroom diversity* and, for example, gender equality concerning wages (M. Edström, 2015).

3.4.2. Journalistic competencies, education and training

With the exception of the recurring survey study at Gothenburg University – Journalistundersökningarna (for overview, see Andersson, 2012) – studies of journalistic competencies are not systematically conducted. However, as an academic area of inquiry it is quite well covered. Both the Institutet för mediestudier (a privately-funded NGO) (e.g. SIM(O), 2013) and the Journalists' Union (Journalistförbundet) have participated in several attempts to map the skills, competencies and values of Swedish journalists. For instance, the Journalists' Union contributes annually to the Worlds of Journalism study, but also publishes its own reports on the state of the profession and the vocational and academic training provided for journalists (Werne, 2018). On the academic side, we can mention studies by Örnebring (Örnebring, 2016), Strömbäck et al (Strömbäck et al., 2012) and Nygren (Nygren, 2012a), who have contributed quite extensive knowledge about the changing character, skills and priorities of journalistic work. On the notion of creativity as a journalistic competence in relation to challenging topics, see Berglez (2011).

3.4.3. Professional culture and role perception

This concerns research about Swedish journalists and/or media workers' perception of what they represent professionally and their role in society. Here, we can mention important research from Södertörn University (Nygren, 2008, 2012b; Nygren & Appelberg, 2013) and University of Gothenburg (Wiik, 2010, 2012). During the period of 2000-2020, the focus is on aspects of de-professionalization of journalistic work and professional identity, and is rooted in more fundamental discussions about 'What is a journalist? Is journalism a profession?' The latter is then influenced by social media development and the rise of alternative forms of journalistic practice (citizen journalism, micro-blogging, blogging, podcasting, etc.)

4. Publications, data sources and main monitoring actors of media usage patterns

There is good availability of information (sources and data) to map and understand media usage patterns during the period 2000-2020, including central monitoring actors. For relevant publications and other data in connection to this domain, see the text below (4.1-4.3).

4.1. Access to the media and diversity of viewpoints in the media system

Knowledge about media usage structures and audience preferences is systematically gathered every year in annual surveys. *The Media Barometer* is produced every year by research documentation center *Nordicom* and is often referred to in public debate (Mediebarometern 2021). The Barometer covers areas such as 'The Media Day' (how much time people spend on different media during the day), reach and average consumption time for text media, sound media and image media. Other sections of the annual report describe the reach and usage of social networks, news, access to media technology and household money spent on subscriptions to different media.

Commercial audience institutes like MMS and SIFO also produce frequent reports on the audience figures and demographics of broadcasting channels, programs, newspapers and webpages. Some of this is openly available whereas other data has to be purchased.

In another annual report, *The Swedes and the Internet* produced by *The Internet Foundation*, focus is on the digitalization of the Swedish data, and extensive survey data is presented for areas such as Internet use and social media use, digital divides among groups of citizens and peoples' worries about digital integrity and hate content on the net.²⁹⁰ Overall, it is noted that digitalization and convergence has made it more challenging to monitor and understand media usage patterns in the media landscape (Andersson, 2014). Increased media mobility and availability have paved the way for low-intensity usage, audiences moving seamlessly across platforms, and multitasking. Such new usage patterns may also affect media's role in citizens' personal lives and collectively at a societal level. Digitalization has also opened up for users' opportunities to engage with journalistic content, to comment on articles, influence journalists, or influence other users' perceptions of journalistic content (Bergström, 2008; Holt & Karlsson, 2015; Ots & Karlsson, 2012),

A third project that deserves attention in this category is the *SOM Institute* publications from University of Gothenburg, which provide annual overviews of public opinion in Sweden and always carry sections on media consumption and media preferences among the public²⁹¹ and/or related to different factors, such as trust in media (Weibull, 2007). The national SOM survey also deals with citizens' perceptions of media trust and other media-related topics that may vary from year to year. Further, worth noting are studies based on longitudinal examinations of news media consumption (Westlund & Weibull, 2013).

When it comes to important longitudinal studies, it is important to highlight the interdisciplinary YES program (Youth & Society), funded by the Swedish Treasury Fund (Riksbankens Jubileumsfond), which has also given rise to a database consisting of data about adolescents' development of political identities and engagement with media consumption. In the longitudinal study, 1,200 individuals are followed over a period of 6 years (Amnå, Ekström, Kerr, & Stattin, 2009). From a deliberative communication perspective, the focus of YES – led by Prof. Erik Amnå at Örebro University but which also included media scholar Prof. Mats Ekström at University of Gothenburg – is quite important. The program focuses on the impact of social media use as well as traditional media including news (see e.g. Shehata & Amnå, 2019).

Hence, media usage patterns and media usage preferences are definitely areas in which accurate and reliable data is regularly produced and made available to the public. Facts from the annual studies are often used in public debate and changing trends in usage behavior are addressed and sometimes inspire further research in related areas. Thus, knowledge about media consumers' activities and preferences is generally robust due to a long tradition of systematic and comparable data. As there is an almost complete domination of survey data, it could be argued that a greater number of qualitative studies would perhaps give more in-depth knowledge about motives and rationales for media consumers' decisions.

The democratic risks and opportunities in media usage patterns have been analyzed in government reports, by research institutes and academic publications. For example, the *Swedish Future Commission* highlights media usage trends and technological access in a digital media landscape as particular democratic challenges (Ds 2013:19). In a media landscape in which public service broadcasting and wide coverage of regional morning dailies was seen as the backbone of the "media welfare state" (Syvertsen et al., 2014), research today points to the fragmentation of media consumption as a democratic risk. Empirical analyses of this fragmentation entails aspects of audiences' social class (Lindell & Hovden, 2018), age generations (Lindell & Sartoretto,

²⁹⁰ Svenskarna och Internet, 2021.

²⁹¹ <https://www.gu.se/en/som-institute>

2018), media channels (Bergström & Jervelycke Belfrage, 2018) and engagement with news (Stromback, 2017).

4.2. Relevance of news media

Here, the recurrent surveys from SOM-Institutet (see above) are particularly valuable.

4.3. Trust in media

In this context, too, the SOM Institute plays an important role. The Gothenburg-based non-profit consortium Medieakademin has published structured measurements of public trust in private and public institutions (including media) since 1997, and since 2017 they also evaluate power and dominance in the digital media landscape²⁹². However, there could also be opinion polls produced by companies such as Novus, and Sweden is at times integrated into international surveys, for example by the Pew Research Center (Pew Research Center, 2018a, 2018b). In terms of domestic research, there is a recently launched project at Södertörn University (F. Stiernstedt) primarily examining the pandemic period.

5. Publications, data sources and main monitoring actors in the domain of media-related competencies

There is good availability of information (sources and data) to map and understand media-related competencies during the period 2000-2020, including central monitoring actors. For relevant publications and other data connected to this domain, see the text below (5.1-5.2).

5.1. Normative sources

Normatively speaking, the development of the idea that media competencies (literary) serve as an essential cornerstone for fostering democratic values and citizenship is primarily prevalent in academic research and curricula (in which the former examines the latter and gives advice about how to improve the media literacy dimension in the school system). Media literacy is thus obligatory within the curriculum for civics. Is there any information about the quality of media literacy programs in Sweden? Since there are no media literacy programs per se in the Swedish context, the answer to this question is not straightforward. In addition, since media literacy is only one of six core aspects in civics, it may be dealt with differently by individual teachers and/or schools, but there are books about teacher perspectives²⁹³.

5.2 Assessment of media-related competencies among citizens

This domain also includes research and data from media and communication studies, but also from other academic disciplines such as education. In the latter case, we find quite a few relevant contributions from Nordicom (Carlsson, 2014), in which a key researcher is Professor Ulla Carlsson (also associated with her long-term engagement in UNESCO). The focus is very much on the concept of media literacy and its essential role for the sustainability of democracy and freedom of speech. Some contributions focus in more detail on the role of the school system for media literacy, especially in relation to the rise and development of the network society (Carlsson, 2013a). In some studies, Sweden tends to serve as a potential role model for other countries, for example in terms of implementing media literacy as a tool in education (Mihailidis, 2005).

²⁹² <https://medieakademin.se/>

²⁹³ https://gupea.ub.gu.se/bitstream/handle/2077/32107/gupea_2077_32107_3.pdf?sequence=3

While some studies look explicitly at citizens' media knowledge with a focus on media and the role of journalism in society (Oxstrand, 2009), it becomes difficult in the relatively broad field of media literacy studies to distinguish where the focus lies in terms of users' specific competencies in using and understanding media in terms of news/journalism and media competencies in a broader sense. Much research is thus focused on media literacy more widely, which could involve journalism/news but also other media. Sometimes, news media and general media need to be integrated into research, for example when focusing on users' ability to distinguish a traditional journalistic source and a source emanating from non-professionals in the digital age (Alexanderson, 2012; Francke & Sundin, 2019). Some Swedish research has been focusing on the generational aspects and how media use could discriminate against senior citizens (Olsson, Samuelsson, & Viscovi, 2019a, 2019b).

When it comes to research outside academia, a very important role is played by the *Swedish Media Council (Statens Medieråd)*, which is 'a government agency whose primary task is the empowering of minors as conscious media users and to protect them from harmful media influences. The agency also coordinates the national effort for a strengthened media and information literacy in the general population.²⁹⁴ The Council annually produces reports about these issues which are available on its website (www.statensmedierad.se). The focus of these reports is on the younger population, where the idea is to contribute knowledge about how to prepare children and adolescents for citizenship and to contribute to deliberative communication, and ultimately deliberative democracy. The data is collected every second year through a particular survey, *Young People & Media*, covering a randomly selected sample of children and young people aged 0-18. The *Swedish Media Council* also coordinates MIL (Media and Information Literacy), which is supposed to strengthen media and information literacy. It consists of a multi-stakeholder network, which is continuously mapping policy initiatives in the field.

A recurrent report is *Unga & Medier (Young people and media)* (Statens Medieråd, 2005), also available in English, which includes data and analyses of young peoples' media consumption; how much time is spent on different media, including news, social media, gaming, etc.; the role of interaction with parents, and what causes anxiety, etc. which means that this data is also connected to the media use domain. However, the work of Statens Medieråd very often focuses on competencies for how to develop better, more meaningful, harmonious, and knowledge-driven media consumption. There are also reports which focus on young peoples' news consumption (Statens Medieråd, 2019b). In this context, the topics – which are mainly examined through surveys – are understandings of what defines news; how news is consumed; what kinds of news primarily interests them; motives for consuming news, and news as a social practice. Other aspects include news and the reliability of sources (see also above in this section); the ability to discern the differences between professional journalism and other types of communication and information, such as influencers' accounts and advertisement-driven media content (or advertisement content); and the demographic and socioeconomic dimensions of news media consumption.

In order to represent the entire (young) population, the research also concentrates on particular groups, such as young people with intellectual disabilities (Statens Medieråd, 2019a). The topics/variables focus on their abilities and capacities to participate in the media-dominated society. Among the examined topics are access to different media; the extent of news consumption; and interaction with parents about media-related activities and consumption.

²⁹⁴ <https://www.statensmedierad.se/ovrigt/about-the-swedish-media-council>

6. Analysis of research and monitoring capabilities

6.1.1. Availability of data

In relation to availability of data for each of the domains, our prognosis is that *there is no emerging lack of data concerning the four domains covered by the Mediadecom project*. The *legal domain* is well discussed in legal texts. Parliamentary inquiries provide information on the implementation, functioning and results of the laws and policies. This could be deemed a sufficient foundation of information, while specific issues, particularly regarding the implementation of certain policies, may also have to rely on single academic studies. *The journalism domain* is well covered in all aspects of markets conditions, production conditions and public service data. The Swedish research tradition, Nordicom and information produced by the media authority MPRT ensures the domain is well covered. The weakest set of information will be in the area of journalists' 'working conditions' – an area that falls outside much of the remit of MPRT and Nordicom's databases. Furthermore, the *media usage* domain is very well covered by both commercial research institutes (where access to data could become an issue in certain cases) and by Dagspresskollegiet and Nordicom. Finally, the *media competencies domain* is perhaps the area with the weakest support from available data. Even though there are academic studies that help us to understand the area, they do not provide the recency and continuity of data found in the journalism and media usage domains that can show complete time series for all years 2000-2020.

6.1.2. Usefulness for media policy

Media policy development relies to a large extent on the investigative work of commissions and parliamentary inquiries to propose legislative changes. The working groups often consist of politicians, experts from relevant ministries, expert academics, a non-political chairman and secretary, as well as invited guests from relevant stakeholders like industry, measurement institutes and monitoring authorities. The overall perspective produced by these commissions corresponds fairly well to the data sources described in this paper. Media literacy perspectives and working condition perspectives have also been relatively marginalized in these policy development processes, and more recent attempts (e.g. SOU 2016:80) to invite the audience as a stakeholder into the policy-making process caused loud protests, particularly from industry stakeholders.

6.1.3. Trust and reliability

It is our assessment that sufficient access to different kinds of data makes it possible to focus on research and data primarily emanating from reliable sources (research institutions, authorities, organizations, etc.), while other data could serve merely as a complement.

6.1.4. Availability of experts and/or specific research structures

There are many experts in Sweden with extensive knowledge of one or several of the domains. Media and communication studies, including journalism, has been a well-established field for the past 50 years with well-renowned research groups at several Swedish universities. When it comes to available research structures, we would again like to highlight the important role of Nordicom Media Institute at University of Gothenburg and its long-term collection, organization and dissemination of data connected to all four domains, although perhaps primarily in the field of media usage.

6.2. Comparative analytical overview on other sources and access to these sources

6.2.1. Complexity of data-gathering

In the Swedish market it is not the lack of accessible data that constitutes a challenge. Rather, it is the abundance of data in relation to the broad scope of *Mediadelcom* and how to select and identify the most appropriate sources. It is challenging in our current world to identify and interpret the relevance of data that was not created with the purpose of addressing the *Mediadelcom* tasks within specific domains. Adding to the complexity is the varying types of data available for the different domains, where for instance media consumption and the economic conditions of journalism are quantitatively monitored over time by various institutions, while other domains rely on more fragmented qualitative data that requires a more subjective assessment to provide some sort of comparable interpretation.

Further, in our overview, we have discussed the increasing complexity of monitoring the domains – largely due to digitalization. This includes, for example, how the advertising market now contains several different competing standards for online media reach and usage, where media houses tend to align to the standards that are most suitable for their interests. Despite rapidly increasing digital opportunities for media producers to measure and track their audiences, there is also an agreement among researchers that measuring the collection and analysis of audience data has become more complex. In summary, a complete, structured collection and comparative interpretation of all material produced in Sweden concerning the four *Mediadelcom* domains, from all sources, including government institutions, commercial institutions, trade associations and NGOs, academic institutions and the media industry itself, not to mention financing bodies and court cases, would be a large-scale project with little hope of succeeding. However, a more selective approach to identify and use the most relevant sources in each domain looks more promising for the purpose of this project.

6.3. Monitoring capabilities and the quality of data and knowledge

In the four domains of *Journalism*, *Media competencies*, *Legal and ethical regulations*, and *Media usage*, our analysis has focused on understanding how suitable current forms of media monitoring are in terms of exercising media governance of media's role in deliberative communication.

In our overview, groups of actors contribute the lion's share of information regarding the media sector – government institutions, commercial institutions, trade associations and NGOs, academic institutions and the media industry itself. It can be noted that none of these institutions aims to specifically monitor media's role in deliberative communication in its entirety. Some have the purpose of monitoring specific areas of deliberative communication in society (like some government institutions), whereas commercial institutions, for example, have the objective to audit and verify the value of news media's products on commercial markets. However, such information can also be useful in trying to understand deliberative communication.

It can also be noted that the different 'domains' in our study are not distinct empirical constructs and that the same stakeholders can produce information of relevance for several domains. Moreover, data collection is not always connected to the act of media monitoring. Stakeholders may collect their own primary data as well as re-purposing available data from other stakeholders for their analyses.

The *Legal and ethical regulation domain* appears well covered at first glance. Laws are clearly described in the Swedish Constitution and a number of *government institutions* (as described in our article) have been created to monitor their enforcement (e.g. MPRT etc.). Also, the process of shaping media policy has been described quite well over the years in both public inquiries (SOU) and in academic research. Institutions like MPRT, Nordicom (and the European Commis-

sion) also produce annual reports on media policy development. However, when it comes to analysing how compliance with media laws and ethics is faring; how media laws are interpreted and to what extent they are enforced by courts; and how ethics are implemented in practice, information is much scarcer. In the monitoring and debating of court cases, court rulings, and their perceived consequences for the industry, we suggest that the media trade press plays an important (yet little acknowledged) role in bringing the information to relevant stakeholders' attention.

The *Journalism domain* has a wide range of different information mechanisms at play. Market conditions in the news media sector are generally well monitored. The monitoring of news media's economic development is part of the Swedish media policy and *government institutions* like MPRT are tasked with monitoring and producing information and analysis on the economic state of the sector. *Academic institutions* like Nordicom have systematically collected information on aspects of media, including ownership and market concentration. This information production relies not least on the availability of annual statements produced by *media companies* themselves and enforced by corporate law. Furthermore, *commercial institutions* and private research institutes like IRM contribute to the overall production of information.

In terms of media production conditions, there are far fewer monitoring bodies and information production relies to a large extent on *academic institutions*. Whereas trade associations and NGOs have a shared interest in illuminating the conditions under which journalists and journalistic organizations conduct their work, their capacity for structured information production and monitoring is limited.

In the *media usage domain*, it can be noted that there are many different stakeholders contributing to the market information regime – particularly various *commercial institutions*. Data on media reach, readership, subscription, page views etc. is abundant. However, many of these information producers (including commercial market research institutes) are primarily there to monitor and verify news media's product-quality performance on the commercial market. In other words, their purpose as institutions and in selecting the information they produce, is to support correct pricing of advertising – not to support deliberative democracy. As a consequence, information about how many people consume news, when, and for how long, is well-monitored by commercial actors. However, information about *what* users learn from, or act on, the news, is of less interest to the commercial information producers even though it could be of relevance for deliberative democracy. As our overview has shown, this gap has instead been filled by *academic institutions* such as Dagspresskollegiet. One risk we see with these audience and usage measurements is that they tend to be subjected to the affordances of the technical platforms and what can be quantitatively measured. Second, in order to ensure comparability over time and also conform to the agreed measurement standards of the information regime, the measurement instruments tend to be quite rigid over time and not particularly receptive to new media usage patterns.

Finally, in the *media competencies domain*, information providers are less distinct. No actor is specifically designated to produce information on this topic. Nevertheless, there are both *Trade Associations and NGOs* that are interested in monitoring, debating and informing society about the skill sets and transformative exercise of journalism. Further, the extensive interests of *Academic institutions* in the field has resulted in both longitudinal data sets (Gothenburg University) and comparative cross-national studies (e.g. Örnebring, 2016). On the audience side, the situation is similar to NGOs such as Internetstiftelsen that produce annual studies on audiences' digital competencies, while the SOM institute at the University of Gothenburg studies audience trust in media institutions and media content. Additionally, the Swedish Media Council, a *Government institution*, has been created to specifically monitor and improve media literacy among young people. While these sources collectively provide a reasonable overview of the competence domain, the overall picture remains somewhat fragmented. With no clear view or institutionalized

rules on how to monitor or measure the field, information production on media competencies is left to the whims and interests of various actors.

6.3.1. Recency and regularity of data

Our preliminary observation is that the recency and regularity of data for the period 2000-2020 is satisfactory. Several institutes, including MPRT, Mediebarometern, and commercial market research institutes produce annual or even quarterly reports, and public inquiries are conducted at regular intervals of around 5 years.

6.3.2. Access to data

In general, as we understand it, public access to data about Swedish developments is relatively good. This is because most data is produced by public authorities, such as universities or governmental institutions, which are publicly funded and thereby obliged to make the results available to citizens. However, whether or not citizens de facto find their way to this data and use it for different purposes is another issue. Furthermore, as in many countries, there is of course data which is less available but is of great interest to the public and for media researchers. The most obvious example is algorithmic data about media use, which is produced by private media organizations.

6.3.3. National databases: functionality and accessibility

In this respect, as already mentioned above (see 1.5), the national and thus publicly accessible database *SwePub* (<https://swepub.kb.se/>) is of essential importance. The database collects publications (articles, books, doctoral dissertations, reports, artistic works, patents, etc.) from all Swedish universities, university colleges, and many others. The database is constantly updated and coordinated by KB, the National Library of Sweden. Consequently, however, this mainly concerns scientific/academic works, while data from privately owned institutions, courts, NGOs and government bodies, for example, are not accessible in this context.

6.3.4. Researchers and their roles

Due to the large number of media and communication studies departments in Sweden, many scholars have, and still are, contributing to knowledge about the Swedish media development during 2000-2020. These include both male and female scholars, although the former gender tends to dominate. First, there is a category of scholar which has explicitly been focusing on media development, referring to it as a field of research. Here, we find researchers such as L. Hedman and J. Ohlsson, I. Wadbring, G. Nygren, E. Appelgren, and several other scholars, although their research does not necessarily relate to the four defined domains of Mediadelcom. Second, there are many scholars who have contributed important knowledge about the particular domains, such as H. Örnebring and his colleagues at Karlstad University in the journalism domain, or Ulla Carlsson at the University of Gothenburg regarding media literacy, but not necessarily always in terms of longitudinal knowledge and/or with a focus on the period 2000-2020. Consequently, it is very much a central task of the Mediadelcom project to generate this diachronic and holistic understanding of the media development in Sweden during these two decades by means of the various research data and other forms of information and sources.

7. Conclusions

Overall, due to the well-developed government institutions, mature commercial markets and strong academic interest in the overall field of journalism and news media, there is a rich landscape of media-monitoring institutions in Sweden. However, the current system is not designed to fully monitor the co-creative interaction between journalism producers and media users in society. As different monitoring agents have different objectives and incentives to monitor the media, clear definitions of deliberative communication are lacking, and there is a plethora of different measurement standards (or lack thereof), there are also challenges or risks to the system.

Although the results are preliminary and data collection remains to be conducted, we would like to point out some potentials and risks concerning the Swedish case here:

An obvious *potential* is the great availability of data, often of acceptable quality, which enables in-depth and full-fledged understanding of Swedish media development. It enables different actors in Swedish society to foresee media development and to conduct deeper inquiries into certain aspects, be they business models for the media sector or increasing hate and threats against media workers. In all domains, there is a variety of reliable data sources from different sectors of society (government, academia, research institutes, monitoring agencies).

However, the vast production of data in all domains, demonstrating good overall economic resources among many actors to contribute to the understanding of the media development, is also associated with a particular *risk*, namely over-production of data, and thus data which is perhaps not innately useful either for the media sector or for wider society. At times, data that is easy-to-measure is over-exposed, while more complex analyses of the media situation in relation to democratic values remain under-investigated.

Here, an assumption is that scarce resources are not necessarily purely negative but could also lead to greater focus and a rational prioritization of what data is essential to produce. Another risk is parallel production of data among several actors with different standards – a risk which has also been identified by other national teams and case studies. We do however note an increasing focus on coordination and collaboration between publishers of media data. For instance, Nordicom, the Swedish Media Authority (and sometimes also international institutions) often collaborate and use the same sources and researchers in their reporting. While we think this coordination and cross-publication of results is good for the quality, prioritization and circulation of information, decision-makers within the media system should also be aware that while the variety of sources appear plentiful at first sight, the underlying basis of research sometimes appears larger than it actually is.

Finally, in Sweden, as in many other countries, knowledge about media development within a particular domain is sometimes relying on the activities of one or a few researchers or other actors.

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Footnotes: Institutional sources and databases

Center for media pluralism and media freedom <https://cmpf.eui.eu/media-pluralism-monitor/>

CIA Factbook, 2020

Dagspresskollegiet <https://www.gu.se/forskning/den-svenska-medi epubliken-fd-dagspresskollegiet>

Digital Academic Archive (Diva) <https://www.diva-portal.org/>

Euromedia group <https://www.euromediagroup.org/research/>

European Union publications office¹ <https://op.europa.eu/en/home>

European platform of regulatory authorities <https://www.epra.org/>

European Audiovisual observatory <https://www.obs.coe.int/en/web/observatoire/>

Internetstiftelsen <https://internetstiftelsen.se/en/>

Internetstiftelsen/svenskarna och internet <https://svenskarnaochinternet.se/>

Institutet för mediestudier <https://mediestudier.se>

Institutet för mediestudier – kommundatabas <https://kommundatabas.mediestudier.se/>

Institutet för reklam och mediestatistik <https://www.irm-media.se/>

Kantar Sifo <https://www.kantarsifo.se/rapporter-undersokningar/rackviddsmatningar>

KIA index <https://www.kiaindex.se/>

Mavise <http://mavise.obs.coe.int/>

Medieakademin <https://medieakademin.se/>

Medieombudsmannen <https://medieombudsmannen.se/about-the-media-ombudsman/>

Myndigheten för Press Radio och TV <https://www.mpr.se/>

Nordicom <https://www.nordicom.gu.se/en/publications>

Nordiska rådet <https://www.norden.org/en>

Reuters institute <https://reutersinstitute.politics.ox.ac.uk/>

Post och telestyrelsen <https://www.pts.se/>

Riksdagen www.riksdagen.se

SOM-Institutet <https://www.gu.se/en/som-institute/publications/results-from-the-som-surveys>

Statens medieråd <https://www.statensmedierad.se/ovrigt/about-the-swedish-media-council>

Statens medieråd <https://www.statensmedierad.se/>

Statistiska centralbyrån www.scb.se

Sveriges radio www.sr.se

Sveriges television www.svt.se

Swepub <https://swepub.kb.se/>

Tidningsstatistik <https://ts.se/digitalnordic/news/>

Who makes the news <https://whomakesthenews.org/>

