



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.

Excerpt:



An option for reference of this particular 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. <https://www.mediadelcom.eu/publications/d21-case-study-1/deu/>



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 MEDIAdelcom 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 DGPuK (*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 (Altmeyen 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 (Brodcz & Schälller, 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 DGpuK’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 Cor-rectiv 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., Mükke, 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 “advertorial” 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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