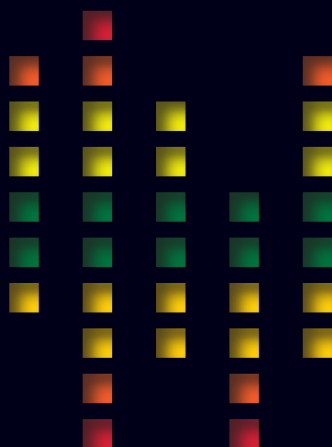


THE MEDIA FOR DEMOCRACY MONITOR 2021

*HOW LEADING NEWS MEDIA SURVIVE
DIGITAL TRANSFORMATION*

2



NORDICOM

EDITED BY **JOSEF TRAPPEL & TALES TOMAZ**

 **EMRG**
The Euromedia Research Group

The Media for Democracy Monitor 2021

Vol. 2

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Josef Trappel & Tales Tomaz (Eds.)

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Belgium (Flanders)

News diversity put under pressure

Jonathan Hendrickx, Pauljan Truyens, Karen Donders,
& Ike Picone

Introduction

Flanders is part of the small European country Belgium, which is located adjacent to the North Sea with Germany, France, the Netherlands, and Luxemburg as neighbouring countries. Belgium has 11.5 million inhabitants, and the country is divided into three regions: the Brussels Capital region (1.2 million inhabitants), Wallonia (3.6 million inhabitants), and Flanders (with 6.6 million inhabitants – the most populated region of Belgium).

After World War II, Flanders was for a long time governed by the traditional parties: the socialists (SP.A), the Christian-democrats (CD&V), and the liberal party (VLD). Since the 1990s, however, these parties started to lose the popular vote. The extreme right-wing party Vlaams Belang increased its political relevance up to roughly 20–25 per cent of the votes, with intermittent electoral downfalls; however, it has never been in government. The Flemish nationalist party (N-VA), which argues for an independent Flanders with an economically right-wing programme, has become the region's biggest political party in the past decade. Since the latest elections in May 2019, the political parties have not yet come to an agreement for forming a Federal government. The Flemish government was formed in October 2019, following a coalition between the N-VA, CD&V and Open VLD. Politically, Belgium is considered a constitutional parliamentary monarchy with different competencies given to the federal and regional governments.

Freedom in the World 2021: status “free” (Score: 96/100, up from 95 in 2018).

Belgium is a stable electoral democracy with a long record of peaceful transfers of power. Political rights and civil liberties are legally guaranteed and largely respected. Major concerns in recent years have included the threat of terrorism,

and corruption scandals that have unsettled the country's complex institutional setting and political landscape. (Freedom House, 2021)

Liberal Democracy Index 2020: Belgium is placed in the Top 10% bracket (rank 11 of measured countries), down from 6 in 2019 (Varieties of Democracy Institute, 2020, 2021).

Freedom of Expression Index 2018: rank 9 of measured countries, down from 3 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 12 of 180 countries, down from 9 in 2019 (Reporters Without Borders, 2020).

Belgium consists of three linguistic communities: one French-speaking, one German-speaking, the other Dutch-speaking. Due to several state reforms, the community authorities were given more powers to regulate the radio and television broadcasting markets. Therefore, the communities have their own media law and media regulators. Distinct media markets exist also from an economic point of view, with media companies usually focusing on servicing one language community. With Belgium already being a rather small country, such a division of the media markets results in even smaller market units, especially compared with the neighbouring France and Germany, although scaling up does happen through both internal consolidation within the Flemish market and outside territorial borders.

Five media companies dominate the Flemish media landscape. The Flemish Regulator of Media (Vlaamse Regulator voor de Media, VRM) asserts and concludes that the high level of concentration is deeply worrying (VRM, 2019a). A couple years ago, Flanders had nine media companies; however, after mergers and acquisitions, VRT, DPG Media, Mediahuis, Roularta Media Group, and De Vijver Media (part of Telenet) are the only five left. Consolidation in the media sector continues to raise concerns about pluralism and media freedom. It continues to be difficult to enter the Flemish media landscape as a new player and be relevant as well as profitable.

The Flemish public broadcaster VRT is the market leader in free-to-air television and radio broadcasting. Its news programmes are also taking the lead in terms of reach, both for television and radio (although youngsters are more inclined to watch commercial television news). On both its main and secondary television channels (Één and Canvas), VRT provides a wide variety of news programmes, viewed by large sections of Flemish people. With five different FM radio stations, VRT tries to reach Flemings across all age groups and has a consolidated market share of approximately 60 per cent.

The public broadcaster's main competitor is DPG Media, operating under this name since 2018 after a take-over of the commercial television player Media-laan by the second largest newspaper publisher *De Persgroep*. Until then, *De Persgroep* owned 50 per cent of Media-laan's shares together with Roularta, a

magazine publisher (cf. *infra*). It is the only company that invests in free-to-air television news, aside from VRT and the regional broadcasters. DPG Media boasts multiple television and radio channels, is active in the newspaper industry (owning the most popular newspaper *Het Laatste Nieuws* and the quality newspaper *De Morgen*), and offers mobile telephony subscription services, while also being active in streaming and pay-TV services as well.

Mediahuis, which publishes four paid-for dailies, is the key player in the newspaper industry. It owns the second-most popular newspaper *Het Nieuwsblad*, the quality newspaper *De Standaard*, and the biggest regional newspapers *Gazet van Antwerpen* and *Het Belang van Limburg*. The market leader concerning magazines is Roularta Media Group, which offers a broad range of magazines ranging from news to lifestyle, sports, and business. It also owns Mediafin, which publishes a newspaper focusing on financial and economic news, *De Tijd*.

These media companies are also active in the digital domain. And admittedly, other and newer Flemish online media initiatives face difficulties obtaining a foothold there. Foreign media outlets reach Flemings mainly through the Internet, but also – although less – via traditional radio and television.

Covid-19

Belgium went into lockdown on 17 March 2020. The Government banned public gatherings and events, closed borders to neighbouring countries, and a majority of the stores were forced to shut down. Working from home became the new normal. Of course, this had an impact on the lives of all Flemish people, including on their (news) media consumption.

The first weeks of the lockdown showed a substantial rise of news consumption. More and more people tuned in, especially to the main news bulletins at 19:00, and the press conferences of the National Security Council attracted record-high audiences. On 27 March 2020, a record 1.75 million people watched the 19:00 news show of the Flemish public broadcaster VRT. The leading news media also noted a rise in subscribers as well as online traffic. This would have been good news if the advertising market had not concurrently collapsed. According to the Union of Belgian Advertisers (UBA), 80 per cent of advertisers postponed their advertising campaigns. The fall of income from advertisements caused, especially commercial media organisations to go into a “crisis mode”.

This had a severe impact on Flemish media companies and therefore also on journalists. According to a survey published in May 2020, freelance journalists in particular were hit hard by the crisis. More than half had less work and income in March and April. 40 per cent asked for governmental support. Salaried employed journalists were less affected, however, 8 per cent had to go

into temporary unemployment. At the same time, the virus changed journalistic working methods. Face-to-face interviews, press conferences, and access to buildings were hindered dramatically. Journalists were compelled to shift to online sources and conducting interviews via telephone.

In its last few weeks, the government began to reverse restrictions and a return to “normal” life now lies ahead. News consumption has been normalising, with more and more people mentioning “corona-fatigue”. However, as the number of Covid-19 infections began increasing again, some of the restrictions have been reinstated as of August 2020. Advertising revenues have not fully bounced back yet. An end of the crisis for the industry is thus not in sight.

Leading news media sample

Our media sample for the Media for Democracy (MDM) 2021 consists of nine leading news media titles, including newspapers, magazines, radio, broadcasting, and online. More specifically, three national quality daily newspapers (*De Standaard*, *De Morgen*, and *De Tijd*), two regional daily newspapers (*Het Belang van Limburg* and *Gazet van Antwerpen*), one news magazine (*Knack*), and two daily tabloids (*Het Nieuwsblad* and *Het Laatste Nieuws*) are covered in the analysis. Our sample also includes information on the two main companies that offer television, radio, and digital news: public broadcaster VRT and commercial broadcaster DPG Media.

We interviewed journalists and editors-in-chief from Roularta Media Group, DPG Media, and Mediahuis.¹ The chair of the journalist’s union (VVJ) was also interviewed. We were unable – largely due to the Covid-19 pandemic and subsequent pressure on newsrooms – to set up interviews with journalists of all leading news media. Necessary information was retrieved on the basis of previous interviews with these news brands on similar subjects.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

All types of media are distributed and available throughout the whole of Flanders, with a broad variety of news offered by diverse media companies.

Flanders boasts seven paid-for dailies. All of them are distributed in the morning, with five of them national and two regional (on one province each, Limburg

and Antwerp). Some of the national newspapers have different versions depending on the region where they are distributed. For example, *Het Nieuwsblad*, the second-largest newspaper in Flanders, has 16 daily editions per Flemish region. It even has an edition with another title: *De Gentenaar*. This edition is essentially *Het Nieuwsblad*, but contains specific news on the city of Ghent. There is also one free daily newspaper, *Metro*, which is mostly distributed in train and subway stations. Two regional newspapers are distributed on a weekly basis, with *Bruzz* focusing on the news in and around Brussels and *Krant van West-Vlaanderen* on the news in the province of West-Flanders. *De Zondag* is the only free weekly newspaper (CIM, 2019).

The paid-for daily newspaper industry is dominated by three publishers: DPG Media, Mediahuis, and Mediafin (part of Roularta Media Group). These companies have the most-read dailies in their portfolio (VRM, 2019a). The average price for a single copy of a newspaper varies from approximately EUR 1.50–2.50 on weekdays. For weekend and special editions, the price is substantially higher. On the whole, the prices of paid-for dailies have risen slightly during the last decade (VRM, 2019b).

95 per cent of all Flemish households are equipped with television. Almost half of them have a television with Internet access. Although television viewing via cable is still possible, nearly all Flemish households have switched to digital television viewing. Most of them are connected through one of the two main Belgian television providers, Telenet and Proximus, both of which offer a wide variety of national and international television channels. Alternative providers are TV Vlaanderen and Orange. In Flanders the main broadcasters are VRT, the public broadcaster, and the commercial broadcasters DPG Media (also market leader for newspapers) and SBS Belgium (part of Telenet). All have several freely accessible television channels, and VRT and DPG Media both offer news programmes, with their most watched news programmes airing simultaneously at 19:00. In addition, VRT offers a wide variety of news shows that provide more background to the news.

Reach of radio is near-absolute in Flanders. VRT has an especially large portfolio of radio channels accessible throughout the region. Apart from nationally available radio channels, VRT has separate channels for the five Flemish provinces, with its main radio station, Radio 2, providing regional programming a few hours a day. All of its radio channels have distinct news broadcasts; for example, the news channel for youngsters, MNM, is usually more accessible than the news bulletins on its more specialised news radio channel, Radio 1. The commercial broadcaster DPG Media also distributes radio throughout Flanders. SBS too offers radio, but not at national FM frequencies (VRM, 2019c).

The Internet penetration in Flanders is very high, with 98 per cent of Flemish households having access to the Internet and more than 90 per cent of Flemish people using it on a daily basis (De Marez & Vandendriessche, 2019; VUB &

RMG, 2020). All Flemish newspaper brands are active online, with VRT offering free access to its news sites, audiovisual player, and audio apps. The sites and apps of the commercial newspaper brands are partially behind a paywall. Most of the Flemish radio channels can be streamed for free via the Internet or DAB+ (Digital Audio Broadcasting +). The penetration of DAB+ is limited, estimated at 10 per cent. Flemish television channels offer possibilities to watch their programmes online, and VRT has an online platform where people can watch live or review programmes for free. The commercial television broadcasters also provide online platforms to view their television programmes. These are mostly free, subsidised through advertising, and sometimes complemented with a subscription model for premium features.

(F2) Patterns of news media use (consumption of news) 2 POINTS

In general, interest in news is high, with a notable decline in interest among the younger generations. Although news consumption via traditional media is still popular, shifts to online media are on the rise.

On the whole, the Flemish are interested in the news: 54 per cent expressed that they are “very interested” in news and just over 25 per cent expressed “extreme interest” in it. The gender gap in news interest appears considerable, with almost 20 per cent of women and 30 per cent of men extremely interested in news. Age also plays an important role in news interest: Flemings aged over forty have a significantly higher interest in news, although among the youngest generation (ages 16–24), 65 per cent are still interested in news (Newman et al., 2020; VUB & RMG, 2020).

News consumption patterns among the Flemish people are rather diverse. On a daily basis, 85 per cent get their news via television, newspaper, or radio. Other popular ways to consume news are via social media (25%) or mainstream Flemish news sites (45%). Younger generations stay away from more traditional ways of news consumption and mostly get their news online. A trend of shifting to online news consumption is noticeable for the entire Flemish population during the past decade (VUB & RMG, 2020).

The largest television news broadcaster is the Flemish public broadcaster VRT. With its news programme on channel Één at 19:00, it reaches approximately 1.2 million people and has a market share of almost 50 per cent in that slot. The second-largest news broadcaster in Flanders is the commercial broadcaster DPG Media. Its news programme on channel VTM at 19:00 reaches approximately 0.8 million people and has a market share of 34 per cent (CIM, 2019).

VRT is also the largest news broadcaster via radio; its main channels Radio 2, Studio Brussel, MNM, and Radio 1 reach 52 per cent of all Flemish people on a daily basis. While the focus of the news is the same, differences across channels are adapted to the needs of the target audience. For example, MNM reaches predominantly Flemish youth and people with lower education levels. The news broadcasts on MNM are more accessible, devote more time to explaining things, and focus a bit less on political news. Radio 1 reaches an older, much more educated audience and is a more specialist, dedicated news channel, evident in the nature and quality of their news bulletins. The most popular commercial radio broadcasters are Q-Music (12.4%) and Joe (9%), both part of the DPG Media group. All these radio stations can also be streamed online and via DAB+ (Digital Audio Broadcasting +) (VRM, 2019b).

Only 22 per cent of Flemish people read print versions of newspapers on a daily basis – and this number is declining year by year. As of 2015, more than 30 per cent still read their newspaper in print. Most Flemish people (67%) consume their news online, on either news sites or via the apps of news media. The most popular newspaper is *Het Laatste Nieuws*, the print version of which has a weekly readership of 36 per cent and the online version 53 per cent of all Flemish people. The second-most popular newspaper is *Het Nieuwsblad*, which reaches 26 per cent weekly with their print version and 35 per cent online. The quality newspapers have a substantially lower reach, with the most read of them being *De Standaard*, with a weekly readership of 9 per cent in print and 14 per cent online. Regional newspapers have a weekly readership of about 10 per cent in both online and print (CIM, 2019).

Flemish public broadcaster's news site (*VRT News*) is the third-most visited news site. This places it just behind the market leaders *Het Laatste Nieuws* and *Het Nieuwsblad*, with 27 per cent, and just ahead of their main commercial competitor *VTM News*, which has an online reach of 24 per cent (Newman et al., 2020). It is to be expected that *VTM News* will be further integrated into the website of *Het Laatste Nieuws* now that the former title has assumed full ownership of the latter.

Consuming the news on social media has risen substantially (52% in 2017 to 61% in 2019). While this mode of news consumption is the most popular in the younger generation, it is also gaining ground among older Flemish people (De Marez & Vandendriessche, 2019). The market leaders are *Het Laatste Nieuws*, with almost 950,000 followers on Facebook, followed by *Het Nieuwsblad*, with 786,000; *VRT Nieuws* has approximately 365,000 followers on Facebook, just behind *VTM Nieuws* with 425,000 (HLN.be, n.d.; Nieuwsblad.be, n.d.; VRT NWS, n.d.; VTM NIEUWS, n.d.).

(F3) Diversity of news sources

2 POINTS

In the news-making process, news agencies are mostly used by the leading news media as a secondary or tertiary source. Internal content syndication is common practice.

In the Flemish news media, journalists obviously try to write and create their own content. Nevertheless, during the interviews, it became clear that news agencies play a significant role in the news-making process, with common practice being that journalists actually rewrite information provided by news agencies. While leading news organisations try to use agencies as a secondary or tertiary source to complement their research, some smaller news organisations count on them as their main source. The free daily, *Metro*, solely publishes articles informed by news agencies. Also, in case of breaking news, journalists sometimes choose to publish first directly from a news agency and only later adapt the article to incorporate their own research.

Belga is the most important Belgian news agency. This national news agency is a cooperation between Belgian publishers and the audiovisual media sector, who are its main shareholders. This news agency is also the primary supplier of photos and images (via Belga Image). Despite this, Belga's importance in Flemish media appears to show a decline, with VRT reporting that they use Belga less frequently. Another national news agency that Flemish journalists use frequently is Inter Press Service Vlaanderen (IPS). The international news agencies Reuters and AP also are important sources of information for Flemish news organisations (VRM, 2019b).

In Flanders, the number of professional journalists shows a decline. In 2019, there were 2,402 professional journalists registered in Flanders, while in 2016, there were 2,686. The Flemish Union of Journalists (VVJ) sees an alarming decline in the number of interns enrolling in journalism. While 138 new interns enrolled in journalism in 2009, in 2019, the number fell to 84 (VVJ, 2020).

The number of Flemish journalists working abroad is also at a staggering low, though the Flemish public broadcaster still has a limited number of reporters residing abroad, for example in China and the US. Flemish journalists with expertise on a foreign country are usually only sent to those countries when there is something really important perceived to be happening. In other cases, Flemish news organisations tend to make use of Dutch correspondents. Resources for journalistic investigation are falling sharply as well, according to a member of the VVOJ (Flemish Union of Investigative Journalism) (VVJ, 2020).

Despite the limited resources for and the decrease in the number of professional journalists, most of the interviewees reported that there was no structural content syndication – one exception was the syndication of content offered by VRT. This service is used by other Flemish media organisations, notably those with no news video in-house (e.g., Mediahuis). Interviewees did, however, admit

that a lot of news is reused inside their own news organisations. The content is then adapted to the needs of the audience of the news brand. Academic research into one of the main Flemish media companies has indeed revealed a vast increase in the copy-pasting of news content between 2013 and 2018 (Hendrickx & Ranaivoson, 2019), whereas sharing content between media groups but across borders (in this case between Flemish and Dutch newspapers) is also increasingly common practice.

The same is true for the use of public relations material. Flemish journalists are flooded by public relations messages, but keep their independence and do not let these messages affect their writing. In most Flemish news organisations, there is a clear divide between advertisements and journalistic content. However, we did observe a rise of advertorials, native advertising, and branded content. Still, as a response, the Flemish Council for Journalism has in 2019 reviewed – and sharpened – its guideline regarding journalistic independence from commercial sources. Furthermore, licensed journalists (holders of a press card, see Indicator C5 – Journalists’ job security) are still prohibited from engaging in any form of non-journalistic content production. More common is the intrusion of politicians in journalism: via spokespersons, they try to get their faces on television and in the newspapers (these matters will be further detailed in Indicators F5 and F6 – Company rules against *internal* and *external* influence on newsroom/editorial staff, respectively).

Regarding the selection of sources, there was a divided response by the Flemish media. While some journalists claimed they write politically neutral content, others asserted that (almost) every article has a clear ideological or normative background. In a survey from 2018, almost 60 per cent of Flemish journalists situated themselves on the left of the political spectrum (Van Leuven et al., 2019). Especially in the newspaper industry, it was evident that many newspapers have left or right leanings. This sometimes originated from the historical background of the newspaper or a few journalists or columnists within them who possessed a pronounced opinion. The newspapers more open about their ideological position put it forward in their branding and mission statement. The television news broadcasts of VRT and DPG Media are obliged to be neutral, as required by Flemish media decree. VRT still receives a lot of criticism, especially from (extreme) right-wing parties, of allegedly being too left-wing, in line with public broadcasters of other regions and countries. However, the *Reuters Institute Digital News Report 2020* confirmed high degrees of trust in the news of the Flemish public broadcaster from all political sides (Newman et al., 2020).

In the case of selecting sources that reflect society in terms of gender, age, and ethnic origin, Flemish news media in general still have a long way to go, with much remaining to be done, especially in the representation of ethnic minorities. VRT is an example for other Flemish news organisations of how a

fully incorporated diversity policy makes a difference, although having a policy is not sufficient. Ambitions must be aspirational and reflect demographical evolution. The quotas for the representation of women and minorities on the screen are, however, rather low (40% for women, 10% for migrant communities) – specifically those for migrant communities do not reflect society at all (De Swert et al., 2019).

(F4) Internal rules for practice of newsroom democracy 1 POINT

Discussions between editors(-in-chief) and journalists take place on a daily basis. The majority of journalists affirm that they are heard in these discussions. Management elects new editors-in-chief, with journalists having no say in these decisions. Meanwhile, a lack of guidelines or legislations to support and promote advancement of female journalists and journalists of minority groups continue to remain.

Journalists report no signs of a lack of formal democracy in newsrooms. Editors (-in-chief) tend to be readily available to discuss and (re)negotiate the portrayal and framing of (political) issues in news articles. In most cases, the interviewed journalists indicated that they know both their brand and their editors well enough to gauge what the right and wrong ways are to go forward, and which ideas or steps may lead to discussions.

Most newsrooms interviewed reported having formal councils which get together semi-regularly to discuss matters. They tend to serve as an officious trade union, acting occasionally as spokesperson for and between the editors and the regular staff. The foundations and stipulations of these councils, as well as their legitimacy and official status, greatly differ per newsroom.

Journalists report having only a limited or no say at all in the election of new editors-in-chief, as this decision is usually made by the media company's management. A panel of journalists is requested to provide inputs, but whether that is taken into account in the decision-making process often remains opaque.

There is a severe lack of legislation and guidelines to support and promote the advancement of female journalists or those from different ethnic backgrounds (for more details, see Indicator F8 – Rules and practices on internal gender equality).

Furthermore, Flemish public broadcaster VRT and quality newspaper *De Standaard* are the only two news outlets to officially have a designated ombuds-person. They both regularly write their own editorials which are published in print, online, or both, and, to some extent, critically reflect on the reporting of journalists of their own brands. Other media organisations either do not have similar functions, or do not let them communicate openly in their own media.

(F5) Company rules against *internal* influence on
newsroom/editorial staff

2 POINTS

The majority of Flemish journalists report a high degree of editorial independence. However, the interviewees mentioned an ambivalent relationship between journalism and marketing sometimes. The line between journalistic content and branded content seems to be blurring.

According to a nationwide 2018 study among 1,302 professional journalists – of which 681 were Flemish – Belgian journalists reported general satisfaction with their degree of editorial independence from commercial and marketing pressure. It is noteworthy, though, that a mere 16.9 per cent of Flemish journalists indicated being “very satisfied”, and the overall satisfaction rate landed at a rather small majority of 56 per cent. According to the researchers, older journalists tend to be less satisfied than their younger peers (Van Leuven et al., 2019).

Our interviewees were more critical of the sometimes-ambivalent relationships between journalism and marketing. In the case of one newspaper, the marketing team had been effectively placed inside the newsroom itself, amongst the journalists. The underlying idea was that cooperations could be fostered in such a way that the marketeers who are supposed to “sell” the journalists’ output could get to know them better, and involve journalists more in the process. The interviewed journalists were hesitant to make pronounced statements in favour of or against this system but expressed a mild degree of unease with the change in the newsroom structure, which was not negotiated or explicitly discussed beforehand.

Furthermore, the line between actual journalistic content and branded content appears to be blurring as well: journalists did not report being forced to write branded content, but noted that there were tendencies to harmonize the news and branded content, done purposely to make it less clear for the average media consumer what news is branded and what is not. That is problematic, as consumers should be made aware what content is editorially arranged and what is influenced by a commercial agenda. The Jury for Ethical Practices in Advertising has guidelines concerning branded content, but the vague description of what is understood as “recognisable as advertising” leaves a lot of room for interpretation.

The Flemish public broadcaster has its editorial independence enshrined in the management contracts with the Flemish government, which are renegotiated and signed every five years. Private news companies in Flanders must fulfil fewer specific requirements regarding editorial independence, but are still bound by the Flemish Journalism Code. In many instances, there are off-the-record examples indicating that newsroom integrity is jeopardised. In recent research by Jonathan Hendrickx, an investigation into self-promotion of news brands

of the same media company revealed that the newly-founded media company DPG Media was indeed boosting its own media, programmes, and celebrities across different news brands (Goyvaerts et al., 2020).

(F6) Company rules against *external* influence on newsroom/editorial staff

2 POINTS

No interference from advertisers or sponsors in their daily news reporting was mentioned by Flemish journalists. Meanwhile, knowledge of income stream of their news brands was limited. Also, it was reported that many politicians tried to influence journalists on a regular basis.

Interviewees unanimously disclosed not having had any experience with interference from advertisers or sponsors in their daily news reporting. At the same time, they only displayed very limited knowledge of the income streams of the news brands or companies they worked for. Income streams are mentioned in the annual reports of private and public news corporations, but figures tend to be deliberately vague. For example, public broadcaster VRT is funded through a combination of direct government funding and commercial activities, of which the maximum revenues per year are capped explicitly in the management agreement with the Flemish government.

Due to the small size of the Flemish media market, large, overt cooperations had for a long time been non-existent, or at least not visible to the mass audience. This has changed in the past year, with the Belgian-Dutch media company DPG Media explicitly stating that both journalistic and branded content is now semi-regularly created at the (financial) request and behest of advertisers, which could turn out to be a slippery slope towards more direct involvement of advertisers in news content.

Regarding interventions by shareholders and politicians, opinions and reflections showed a clear division. Shareholders of Flemish media brands tend to remain mostly anonymous, and there is a robust system of editors-in-chief against them trying to interfere with news reporting. However, the situation appears to be different when looking at politicians. Nearly all interviewees, independent from one another, indicated that certain politicians of parties from both the left and right side of the political range intermittently contacted newsrooms to openly voice their dismay at chosen frames, or the presence or absence of certain quotes or even people in the news output of journalists. Of these, the right-wing Flemish nationalist – and currently the largest – political party, N-VA, was mentioned the most for such interference. As many sources regularly indicated, politicians and journalists tend to be much closer on personal levels due to the Flemish media market and its society's small size.

(F7) Procedures on news selection and news processing 2 POINTS

Every leading Flemish news media has their own procedures on news selection and news processing, with freedom to discuss strategies. Editors have the loudest voice, and most times they decide if an article is ready for publication.

Standard stylebooks on news selection are not used in Flemish news organisations. The news organisations have their own “modus operandi” in selecting and producing news content, and the editor-in-chief checks if it suits the style of the brand. It is common practice to pitch a given subject and angle for an article to the editor-in-chief. After the article is written, it goes through an editing phase, and before publishing, it must be approved by the editor-in-chief yet again. With straightforward articles or breaking news, the process can be accelerated, and sometimes the editing even takes place after publishing. Meanwhile, articles written by early-career journalists are checked in more detail.

The procedures for the news selection and production of content are not rigid. Internally, news organisations regularly discuss which strategies to implement or change, with the higher-ranked journalists having a louder voice in these discussions. It is important to stress that news content is increasingly created at the level of the media company, and then disseminated to be published identically across its various brands. This appears to be the case particularly for sports and celebrity news. For example, *Het Laatste Nieuws*, one of commercial media company DPG Media’s news brands, has more journalists working on news about sports than their other brands. This way, they have an important voice in deciding which sports news will be selected and eventually published.

As stated previously, news content comes together mostly due to journalistic research and information from news agencies. Information originating from social media is very rarely used as the main source. Journalists comment that they always double-check their sources, but in case of information coming from social media, they “double-double-check it”. Although journalists seem to be aware of the possible pitfalls of retrieving information from social media, mistakes are often made, most times due to the urge to publish articles as quickly as possible.

(F8) Rules and practices on internal gender equality 1 POINT

Equal conditions of employment and benefits for both genders are ensured and even enshrined in regulations. However, male journalists earn more and are promoted more often than their female colleagues.

The media sector in Flanders is dominated by men – only one-third of Flemish journalists are female. It is not that women are not interested in journalism,

and in the age group below 35, those interested in journalism is almost 45 per cent. This could be a healthy sign indicating that the gender gap is, albeit slowly, closing one step at a time. Another less positive possibility, meanwhile, is that female journalists end their journalistic careers at a fairly young age. Explanations are the glass ceiling that still exists and the hardship of combining the journalism profession with a family life. Male journalists earn considerably more than their female colleagues. In 2018, male Belgian journalists had, according to self-reported data, an average monthly net wage of EUR 2,439, while this was only EUR 2,147 for female journalists, reflecting a 12 per cent difference. The divide also persists in career opportunities: Over 70 per cent of management positions in news media were observed to be filled by male journalists, with the management of public broadcaster VRT being a notable and visible exception (Van Leuven et al., 2019).

The facts above are in stark contrast with the statements of the interviewed journalists – unfortunately nearly all of whom were male – who all claimed that equal conditions of employment and benefits for both genders were ensured and even enshrined in regulations, codes, and guidelines. However, no existence of specific mechanisms such as gender equality advisors or departments or female journalists’ associations were reported at private companies. There was also no legal framework regarding gender equality at the Flemish or federal Belgian political level. This includes the official Flemish Journalism Code, which only mentions gender once in its entirety, and specifically only at the level of news reporting, and not for journalists. The Flemish public broadcaster VRT similarly has gender quotas for the presence of women in management roles and in viewpoint for diversity on screen, but not for female journalists in their workforce. It also has its own designated diversity unit and ethics officer. VRT joined the BBC’s “50:50 The Equality Project” recently, which is committed to inspiring and supporting media organisations around the globe to consistently create journalism and media content that fairly represents our world. Hence, striving for an equal share of men and women in news is reflected (BBC, 2021).

(F9) Gender equality in media content

1 POINT

No rules or guidelines regarding the promotion of gender equality in media content apply, with only the Flemish public broadcaster imposing gender quotas. Our interviewees seemed to be aware of the underrepresentation of women in media, but none indicated the need for regulation or monitoring.

Flanders neither boasts rules or guidelines specifically regarding the promotion of gender equality in media content, nor is there a legal framework ensuring

this on either the Flemish or Belgian level. The official Flemish Code of Practice of the Council for Journalism only specifies that news reporting should not be stigmatising towards ethnicity, nationality, philosophy, sexual orientation, or gender, without further specifications or ramifications (RvdJ 2010b: §IV, point 27; for the English version, see RvdJ, 2010a). Public broadcaster VRT has gender quotas imposed and must have at least 40 per cent of all appearances on its radio and television stations be from women. However, this is not specified to news content per se, but rather to the entire output. VRT reached the quotas for 2019, but only over its different television brands. Its children's channel performs very well (above the required quotas), while its main generalist channel is a bit below 40 per cent and the channel Canvas – bringing most information programmes – ends slightly above 30 per cent. However, private media does not have any such specific quotas, and this is also not actively researched by the Flemish media regulator or other governing bodies.

Most interviewed journalists, of which the majority were men, appeared to be at least aware of the ongoing criticism that women were underrepresented as actors (e.g., experts) when being interviewed in newspaper articles or television news pieces. However, none indicated the existence of or the need for explicit mechanisms to monitor and guarantee gender balance in news subjects. The commitment to increase the gender balance was of course there; however, most of these journalists noted that continuous time constraints in their daily jobs prevented them from spending too much time looking for female experts in a given field. As a result, they often relied on known and experienced media pundits – who turned out to be, in most cases, male. In a similar vein, some journalists expressed their dismay at the notion of “having women in their articles for the sake of it”. They stressed the fact that, while women were also often asked to contribute to articles, they would often decline to comment publicly on something outside their specialisation. Their male counterparts, however, were far more eager to do so. To counter this, the Flemish Community set up an expert database (Expertendatabank²), to promote the visibility of experts who are still underrepresented in the media.

Women's media have a rich history in Flanders. There have been several weekly magazines aimed at women that still exist both online and offline. Notably, the one online-only Flemish news medium aimed specifically at women and minority groups, *Charlie Magazine*, ceased to exist towards the end of 2019 due to a lack of a sustainable business model, paying subscribers, and structured government funding.

(F10) Misinformation and digital platforms
(alias social media)

3 POINTS

Concerns about misinformation are rising among Flemish journalists. It has become more prevalent on social media. Fact-checking and double-checking of information is seen as part of the job. A few Flemish organisations are specialised in fact-checking.

The spread of disinformation is a growing concern for all journalists. Over the last few years, the Flemish government has also funded several fact-checking projects. All interviewed journalists unanimously insisted that “doing their job” was the best defence against disinformation. They strongly believed in researching and double-checking facts before publishing them as stories, and considered fighting against misinformation one of the integral parts of their daily work. Some journalists noted that checking sources from social media could sometimes be tricky, especially with viral videos allegedly about current events which may already be years old. In particular, senior journalists hesitantly admitted being occasionally overwhelmed by the influx of online information and sources. In general, sources from social media are less relied upon than direct sources in government, politicians themselves and their spokespersons, or established organisations and recognised groups and associations in Flanders’s small, yet very developed and active, civil society.

There are two notable examples of fact-checking and measures dealing with misinformation, predominantly from online sources. First, Factcheck Vlaanderen, an organisation financially and logistically supported by the (defunct as of 2020) Flemish Journalism Fund, public broadcaster VRT, a few universities and colleges contributing with their artificial-intelligence expertise, as well as the Belgian press agency, Belga. They regularly publish fact-checks on their official website, and as of May 2020, heavily focused on reporting the true facts behind the ease of Covid-19 restriction measures in Belgian society.

A second example is the so-called DDT (Data Disinformation and Technology) unit of the above-mentioned public broadcaster. This unit supports all other VRT journalists, specifically regarding disinformation and data journalism, with a highly trained staff active across social media as well as the dark web.

(F11) Protection of journalists against (online) harassment 2 POINTS

Flemish journalists mention a rise of (online) harassment and intimidation, but knowledge about what to do against this and where to go to file complaints is limited.

In a nationwide 2018 survey, 15.3 per cent of Flemish journalists indicated having experienced harassment or intimidation in their function as a journalist by political sources, advertisers, companies, media publishers, and citizens.

These experiences were mostly about their gender (46.7% of said 15.3%), age (30.3%), ethnicity (5.7%), and sexual orientation (2.5%). Notably, female journalists reported having experienced this much more in respect to their gender than their male counterparts (67.2% vs. just 4.3%) (Van Leuven et al., 2019).

Most of the interviewed journalists said that they have followed (mandatory) trainings for how to respond to physical, verbal, and online abuse and aggression, with varying degrees of satisfaction in terms of use and purpose. However, some of the interviewees indicated that instances of abuse and aggression are rising as a part of their daily work. None of the interviewed journalists were able to mention specialised legal services at hand provided by their employers in the case of (online) harassment, indicating that knowledge on what to do and where to go is limited. In the same vein, no specific entities to address instances of gender-based harassment were reported.

No concrete examples or cases demonstrating the degree to which leading news media provide support could be given.

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 2 POINTS

Belgium as a whole has a very diverse multilingual media landscape, with only very few overlaps in brands and company ownership between, notably, the Dutch- and French-language communities and media markets.

Belgium's complex political and linguistic division into two, three, or even four different entities, depending on one's definition, actually ensures that Belgium as a country has a very diverse media landscape, with legacy outlets and public broadcasters in Dutch, French, a mixture of both languages, as well as German. Notwithstanding, the 2017 Media Pluralism Monitor marked Belgium as a "high risk" country regarding (horizontal) media ownership concentration, and a "medium risk" country when it comes to cross-media concentration of ownership and competition enforcement. It is noteworthy that the researchers themselves admitted to having considered the Dutch- and French-speaking media markets as separate entities and did not focus on Belgium as a whole, "which often resulted in high risk assessments due to their limited size" (Valcke et al., 2018: 7).

Partly government-funded public broadcasters operate in three Belgian communities (linguistically divided between a Dutch-, French-, and German-speaking community) and are (among) the key players in their respective small media markets. Most notably in Flanders, public broadcaster VRT is the most dominant in terms of radio and television market share as well as television

news ratings, though it lags behind considerably in online news. In Wallonia, private broadcaster RTL consistently beats public broadcaster RTBF in both overall market shares and television news ratings. Even though the German-speaking Belgians are a tiny minority of just 70,000 people, its dedicated public broadcaster BRF boasts one television channel and three radio channels, with much content delivered by RTBF.

Private media tend to be active solely in their own media market, with little overlap between the Flemish and Walloon sides. Publishing and broadcasting company Roularta, along with its 50 per cent stake in sister company Mediafin, is the only “Belgian” media company, with newspapers (*De Tijd* and *L’Echo*), magazines (*Knack* and *Le Vif*), news websites, and business television news channels (*Kanaal Z* and *Canal Z*) in both main Belgian languages. Flemish media company DPG Media also owns the Walloon news website *7sur7*, but it is mostly active in other countries, as is its direct rival company Mediahuis. The latter is active in the Netherlands and Ireland. DPG Media holds assets in the Netherlands and Denmark – in fact, Mediahuis and DPG Media are the leading newspaper groups in the Netherlands.

Telecommunications companies are still more “national”, with two main players: Telenet (part of LGI, active in many European nations) and the telecommunications incumbent Proximus, active across the nation.

(E2) Media ownership concentration regional (local) level 1 POINT

The Flemish media market is highly concentrated. In recent years, a wave of mergers and acquisitions led to the total number of leading media companies dropping from nine to just five.

The Flemish media regulator VRM has consistently branded the market as “highly concentrated”, with, as of its 2019 report, the so-called “Big 5” media companies owning and controlling 80 to 100 per cent of all Flemish legacy (news) media (VRM, 2019a). Flanders only boasts a population of roughly 6.5 million people, leading to a handful of key players. Of the just seven paid-for daily newspapers, four are owned and published by one company, Mediahuis. Only a few years ago, there were still nine companies present holding the majority of (news) media, but a recent tidal wave of media mergers and acquisitions has brought sweeping changes to the small market.

Most notably, the main commercial television player, Mediahuis, and the second-largest newspaper publisher, De Persgroep, announced their merger in 2018, and as of 2020, they operate as one company called DPG Media, with all their newsrooms grouped together in one building in Antwerp. Other recent cases of media mergers have created previously unseen degrees of vertical and

diagonal integration, with Belgian telecommunications company Telenet not only providing cable broadband services, but in March 2018 also acquiring De Vijver Media. Since then, the company also owns a number of television stations, among which is the second-largest commercial channel.

Amidst the recent changes in ownership structure, the public broadcaster VRT has managed to maintain its dominant position over free-to-air television and especially radio broadcasting, with market shares of over 35 per cent for its three channels and close to 60 per cent for its five radio channels (CIM, 2020). At the time of writing, VRT's new five-year management contract with the Flemish government was being negotiated, with private players having expressed their hope for VRT to limit its online news offering to video and to enter the joint venture of the two main commercial players in setting up a designated Flemish SVoD (streaming video-on-demand) service.

(E3) Diversity of news formats

2 POINTS

Radio, television, and newspaper news maintain a strong dominance in Flanders. Regular online news is catching up rapidly but is nearly all owned by legacy players. Online-only news media only operate in the fringes.

Despite the small size and limited scope of the Flemish media market, there is a vibrant news market in various formats. However, we gauge that it is less developed than in neighbouring countries. Most of the news formats tend to remain very traditional, with a strong dominance retained by radio, television, newspaper, and magazine formats. The two Flemish news broadcasters – public broadcaster VRT and private media company DPG Media – aside, there are also ten mostly privately owned and run regional television channels providing daily news broadcasts for various Flemish regions. VTM provides three daily news broadcasts on television, whereas VRT has four, and also a few daily news (talk) shows on its second free-to-air television channel Canvas. It also has an Instagram account and a YouTube channel to offer news to younger people.

Print circulation figures are dwindling in Flanders, but not as much as elsewhere in Western Europe. This is in part thanks to the rather controversial, yet ongoing, federal government funding allocated to the national post service, which enables it to deliver newspapers and magazines to subscribers, free of charge to the media companies and consumers. This funding was brought to life in the 1990s to maintain news diversity and has a very high value for the post service too, but critics say it has become outdated and not in line with changed ways of news consumption. Not surprisingly, these critics are situated within the online-only news companies and consider the arrangement unfair competition between them and the “big players”.

It is notable that online news too is predominantly dominated by newspaper brands, with the two largest newspapers also owning the two largest Flemish news websites. The commercial news broadcaster VTM lost its own news website, as it was sacrificed to the growing surge of the biggest overall news website *hln.be*, which is part of DPG Media, as mentioned earlier. Online-only news media exist, but operate in the fringe of the legacy media. These online-only initiatives are often overtly left- or right-wing oriented. Even though their relevance and popularity were slightly increasing, there are no mainstream influential online-only news outlets, unlike in many other countries. Having said that, they can impact the news provision of more mainstream media, and in that sense, their impact should not be underestimated.

While most legacy news media are active across all social media outlets, public broadcaster VRT is one of the few Flemish media companies to have a designated Instagram channel devoted to providing news content for teenagers and young adults. With over 46,000 followers at the time of writing, the editors-in-chief themselves recently called the account a success among the difficult-to-reach young demographic. Experiments with artificial intelligence and automated journalism are in very early stages and have only rarely reached the masses as of yet.

(E4) Minority/Alternative media

1 POINT

There are no news outlets directly addressing minority groups. Public broadcaster VRT does offer a portion of its online news in English, French, and German though.

In the small Flemish media market, there is no real minority media (anymore). One notable example was *MVSLIM*, an online news platform started by two young Flemish Muslims, which reported solely in English. The platform became so popular that it was only recently sold to a London-based company. Flanders is a diverse society with people from all countries and backgrounds represented, but this has, perhaps surprisingly, not yet resulted in any form of emergence of minority media geared towards several different ethnic groups.

Public broadcaster VRT offers limited versions of its Dutch-language news website, *vrtnws.be*, in French, German, and English. Notably, the Flemish authorities themselves directly finance the English-language online newspaper *Flanders Today*, published by Mediahuis, the aforementioned media company which owns four of the seven paid-for Flemish daily newspapers. According to its website, its journalists have “full editorial autonomy regarding the content of the newspaper” (*flanderstoday.eu*, 2020).

Politically affiliated news brands do not have a large audience and, therefore, cannot be seen as leaders within the Flemish media landscape. These primarily

extreme-right-wing and extreme-left-wing online news media only exist at the fringes.

(E5) Affordable public and private news media 2 POINTS

The public broadcaster is funded directly through Flemish taxpayers' money, whereas research has shown that Belgians pay considerably more for broadband access than their neighbours.

Since 2001, the Flemish government does not levy licence fees anymore, as is, for instance, still the case today in the UK. Instead, a small portion of Flemish taxpayers' money is used to partially fund the public broadcaster VRT. According to 2019 figures, the average Flemish person paid EUR 40.6 annually (VRT, 2019), with the average household having a monthly income of approximately EUR 2,250.

An average annual subscription for a Flemish newspaper in June 2020 cost around EUR 35 per month, with 31.50 for the biggest newspaper *Het Laatste Nieuws*, EUR 38.50 for quality newspaper *De Standaard*, and EUR 45.50 for business newspaper *De Tijd*. All newspapers offer various formulas to predominantly read online and to receive the print newspaper only once a week or every day, seasonal discounts, and combo packages with other magazines of the same media company.

Broadband access is fairly expensive in Belgium, mainly due to the near-duopoly of providers, Telenet and Proximus. Orange is a third established player but is far less popular. A 2017 study ordered by the then-liberal telecommunications minister Alexander De Croo (Belgian Federal government) indicated that Belgians paid roughly twice as much per month for combined phone, Internet, and television services than the French (EUR 73.52 versus 36.43). Belgians also paid considerably more than their other neighbours (De Standaard, 2018). Endeavours to have a fourth telecom player in the Belgian market have proven unsuccessful as of yet.

(E6) Content monitoring instruments 1 POINT

The Flemish government-owned media watchdog only assesses the media market on economical parameters, but might soon be given the questionable task of assessing the impartiality of the public broadcaster.

The Flemish media regulator, Vlaamse Regulator voor de Media (VRM), provides an annual report on the tendencies of ownership concentration. It

thereby assesses the Flemish media market almost uniquely based on economical parameters, without studying or taking into account news media content. VRM checks if media companies adhere to media decrees and regulations set out by the Flemish government and fines companies that do not do so. While the current Flemish media minister has announced that VRM might be allowed to analyse news media content, no concrete follow-up on this initiative was observed at the time of writing.

In another, perhaps more worrying, trend, VRM could in the near future also be qualified to analyse the impartiality policy of public broadcaster VRT, after right-wing critics consistently remarked that VRT would allegedly lean too much towards the left in offering viewpoints and actors. While no concrete action on this has been taken either, singling out the public broadcaster to ensure fair and balanced representation of (political) opinions could be a worrying stepping-stone towards indirect government control over public broadcasting, thereby damaging its editorial independence. However, this does not necessarily mean that the public broadcaster should not hold itself to the highest standards in this domain.

Looking at gender, no specific regulations to ensure a balance between male and female actors in the news exist. Public broadcaster VRT is the only news corporation to have imposed quotas – requiring 40 per cent of all “appearances” across its channels to be female and 7.5 per cent so-called “new Flemings”, or people with foreign backgrounds – but this is not solely applicable to news. Other Flemish media companies are not obliged to adhere to such quotas, let alone publish or make accessible to the wider public findings of internal studies and analyses. VRT annually publishes its *Diversiteitsmonitor* [Diversity monitor], for which its own research unit collaborates with universities to verify if the variously imposed quotas are achieved. For 2020, they have, with a 41.2 per cent share of all “appearances” for women and 8.3 per cent for “new Flemings” (VRT, 2020).

(E7) Code of ethics at the national level

3 POINTS

There is no code of ethics at the national, Belgian level, but rather at the Dutch- and French-speaking levels specifically. Journalists refer to these codes frequently, and they are taught in journalism studies.

There is no code of ethics at the national, Belgian level. Like the entire media policy and the biggest part of the media market, it is strictly divided along linguistic borders. The French- and German-language on one hand, and the Dutch-language Belgian news media on the other, have their own independently

functioning self-regulating bodies: the Conseil de déontologie Journalistique and the Raad voor de Journalistiek (RvdJ), respectively.

The RvdJ's code is thus applicable for all Flemish news organisations and brands as well as individual journalists; it is taught in journalism studies at colleges and universities and according to the interviews, it is semi-regularly consulted in cases of quarrels among journalists themselves, or with civilians or politicians. The RvdJ's code is divided into four chapters: Faithful reporting, Independent inquiry, Fair play, and Respect for the privacy and human dignity. Most of the 26 articles of the code have their own specific guidelines to be adhered as well (RvdJ, 2010b; for the English version, see RvdJ, 2010a).

(E8) Level of self-regulation

2 POINTS

Most news media have their own editorial statutes, deontological codes, and newsroom council or ombudsperson. In case of unethical journalistic behaviour, citizens can file a complaint with the journalism councils in both regions.

Most Flemish news media have their own editorial statutes, deontological codes, and newsroom council or ombudsperson (Journalistenloket, n.d.). In many cases, these are, of course, heavily influenced by or even identical to RvdJ's above-mentioned code, and it is generally known and accepted that the official code has more "weight" than statutes or regulations per specific brand. This is also related to the fact that all news organisations have committed to adhering to the code and the rulings of the regional councils for journalism. When this self-regulatory body – consisting of representatives from journalists, publishers, and civil society – receives a complaint from a citizen and rules that unethical journalistic behaviour took place, the concerned news organisation commits itself to rectifying the mistake and publishing the ruling of the council on its news outlet.

The interviewees concluded independently that they all did their very best to report in a fair, balanced, and impartial manner with the limited resources and time they have at their disposal, and they conceded that sometimes having more time to check stories and contact sources could enhance the overall quality of their output. They are aware of the criticism of mainly right-wing politicians and civilians who accuse them of too often being too left-leaning in their tone and frames, but disagree with it regardless. Some did indicate it is a challenge to remain "in touch" with the entire audience, pointing to the fact that most journalists are highly educated, male, white, and so on. This too came with challenges in terms of reaching youngsters, less-educated people, and ethnic minorities (see Indicators E9 – Participation & E10 – Rules and practices on internal pluralism).

The journalists we interviewed failed to provide us with specific examples of instances of discussion regarding the output of themselves or their colleagues and interference by an ombudsperson or editorial statutes, even though they all admitted that there are occasional instances.

(E9) Participation

1 POINT

Citizens cannot truly contribute to news reporting, and the option to comment on websites has been scaled back in favour of comments on social media.

No newsroom of a Flemish leading news outlet is open to the public at any given time: all meetings and decisions are taken behind the scenes by editors and journalists themselves. Some media have SMS services or online tools to allow citizens to send in news or press releases, but there is no structured medium or mode for citizen-fostered journalism. Some smaller, online-only news media offer opportunities for viewers to send in articles and opinion pieces, which may or may not be eventually published. They consider this to be valuable acquisitions to their small workforces as a means to receive free content for publication.

The right of citizens to reply to any given news article is not enshrined in the aforementioned Code of Practice of the Council for Journalism. The right of rebuttal is mentioned in Section III, Article 20, which explicitly states that “the journalist offers the other party the option of a fair hearing when his reporting makes serious accusations that may damage the honour and reputation of that party” (RvdJ, 2010a).

Commenting is not possible on most news websites, nor are there active online-news forums. A sole exception is the website of tabloid newspaper *Het Laatste Nieuws*, which also happens to be Flanders’s largest news website. Its comments section has infamously spawned its own designated social media accounts mocking them, due to the frequent appearances of racist, xenophobic, and misogynistic remarks. All legacy news media do offer the possibility of commenting on articles through Facebook, which helps them gain more traction and awareness for their brand online, but due to shortages of staff, and mostly time, in no cases did interviewees report systematically scanning incoming comments, only hiding or removing comments in exceptional cases where “too overtly presented hatred” was seen. This has to do with limited resources as well as priority-setting, and might need more attention; potentially, new technological developments regarding artificial intelligence could help here too.

(E10) Rules and practices on internal pluralism

1 POINT

There is a lack of designated rules and guidelines applicable to presenting opinions of journalists within the same newsroom. Overt diversity in viewpoints is most notable at the fringe, online-only news media.

The interviewed journalists reported partaking in “regular” discussions and debates amongst themselves in the newsroom regarding differing opinions and viewpoints on certain matters. The necessity of having a diverse newsroom in terms of political orientation as well as gender and ethnic background was clear to all interviewees, although they all readily admitted that their newsrooms tended to be more homogenous on more parameters than they would like to see.

No specific rules or guidelines were applied in presenting opinions of journalists within the same newsroom. Some interviewees said that it was often general knowledge who was more left or right leaning across the political spectrum, and that this indeed could partly define the tone and frame in a given article. However, they also imagined and claimed that reporting was made more diverse by the shifting around of journalists writing on specific topics per beat. In a similar vein, no official rules stipulated that all opinions should receive their appropriate weight in reporting. But, as with so many aspects of journalism, it is arguably the single most important of the many tacitly agreed mutual understandings which are so important to the field, without explicitly being enshrined anywhere.

All legacy media houses possess some ideological roots or another, but most have abandoned these over time. Some newspapers still boast of a “progressive” or “free market” ideology, but instrumentally overt diversity in viewpoints is most notable at the fringe, online-only news media. There was a *cordon médiatique* – a French term also used in Flanders – against the far-right political party, in which it was systematically barred equal access to present its viewpoints. However, after the 2019 general election, since this party became the second largest in Flanders, it has been treated more like the others. Some left-wing online-only media, however, continue to refuse working with or reporting on the party. Alternatively, the far-left party, which also gained ground in the recent elections, while continuing to be only the sixth largest party in Flanders as of the 2019 election results, was never held back by the aforementioned cordon. However, it was often excluded from key political debates due to its negligible size.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers”

2 POINTS

Different independent supervisors scrutinise the Flemish (news) media, each of them monitoring a different field in journalism. Most of these “controllers of the controllers” publish their findings and elaborate reports on platforms freely accessible to the public. Self-regulation is also common on the level of media organisations and their brands, with a few media organisations even installing an independent ombudsperson.

The official, independent supervisor of the Flemish audiovisual media is the Vlaamse Regulator voor de Media (VRM). Its main assignments consist of verifying the enforcement of the media decree and assigning admissions and licences. Furthermore, VRM maps media concentration and publishes an annual report on the issue. Another important task is supervising the compliance of VRT with its Management Agreement [Beheersovereenkomst]. VRM has the power to sanction against media organisations, for instance, if they go against commercial communication rules. It can impose fines, even if they are usually not very high, ranging from EUR 5,000 to 15,000, depending on the repeated nature of infringements.

The Council for Journalism [Raad voor de Journalistiek] (RvdJ) is the independent body for self-regulation of the Flemish press. It is a non-governmental organisation, responding to questions and handling complaints from the public about the journalistic conduct of the press. RvdJ was formed in 2002 by Flemish journalist unions, publishers, and media companies, and it is funded, in two equal halves, by the publishers and the audiovisual media companies, and by the journalist union (VVJ). Filing a complaint is possible for every citizen and is free of charge, although the majority of the Flemish people are unaware of its existence. The council aims to provide the public with a free and fast way of redressing possible mistakes by the media. Its decisions are meant to underline the rules of good journalistic practice and to encourage ethical and professional standards of journalism. It also provides a Code of Practice. (RvdJ, 2010a–b; see also Indicator E9 – Participation).

Another independent body for self-regulation is the Jury voor Ethische Praktijken inzake reclame [Jury for Ethical Practices on Advertising] (JEP). Its main purpose is monitoring whether the content of advertisements is in line with the regulations concerning advertisement ethics. Everyone is able to file a complaint free of charge. JEP also works pro-actively by advising advertisers (JEP, n.d.).

Self-regulation is also common for the individual news media brands themselves, and especially the mainstream newspapers have a tradition in publishing rectifications of articles. Via reader letters and social media, the public is able

to criticise media content. The Flemish public broadcaster VRT and the quality daily newspaper *De Standaard* even installed a designated journalist whose main job is scrutinising published media content. These ombudspersons publicly critique and elaborate on mistakes in articles – this way, they explicitly hold up a mirror for their own media organisations.

The Fonds Pascal Decroos, now part of Journalismfund.eu, is a non-profit organisation investing in quality and investigative journalism, but also trying to hold the media organisations to a standard of qualitative, nuanced, and critical journalism. It challenges journalists to think outside the box and facilitates independent (cross-border) investigative journalism in Europe (Journalismfund.eu, n.d.)

Although several different regulatory bodies are installed, the public is rarely aware of their existence and core tasks. Regarding civil media criticism, not many platforms exist. There are some underground and anonymous blogs, but none of them are popular or enjoy widespread reach and appeal.

(C2) Independence of the news media from powerholders

2 POINTS

Flemish media organisations enjoy editorial independence, as set out in the Belgian Constitution and the media decree. Journalists declare being satisfied with the level of autonomy of their redaction. Nevertheless, politicians trying to influence the press is common practice.

As stated in the management agreement [Beheersovereenkomst] and by media decree, the Flemish public broadcaster VRT has editorial independence. They bear full responsibility for internal and external productions and programming of their different channels, and their financial sources have no influence on the content. Addressed in the policy framework of the VRT, this applies to its television and radio channels, as well as its news sites. In the selection and presentation of news and other journalistic content, the content will always prevail over potential influence of financial considerations. In its mission statement, VRT emphasises a guarantee of impartial, independent, and reliable news. The board of directors, politically composed by the Flemish Government, has no influence on the content in any way. However, VRT is obliged to invest in certain types of content, like documentaries, and to be a front-runner in investigative and foreign journalism.

Commercial media organisations also enjoy editorial independence, as set out in the Belgian Constitution. However, for commercial media organisations, it is sometimes difficult to safeguard independence from their powerholders, as selection and programming of content can be influenced by revenue streams.

News shows, on the other hand, must be neutral, as determined by decree – if violated, they can be sanctioned.

For the Flemish newspaper industry, editorial independence is also very important. The chair of the Flemish Journalists' Union (VVJ) indicates there are three kinds of independence. First, there is political independence: journalists are exempt from having to cope with the pressure of politicians. Second, there is judicial independence: the Belgian Constitution and additional media legislation guarantee free journalism; this is also partly ensured by the high degree of self-regulation, in which impartiality and independence have always been important aspects of Flemish journalism (see also Indicator C1 – Supervising the watchdog “control of the controllers”).

Third, and most difficult to maintain, is economic-commercial independence. All newspaper companies in Flanders, other than the public broadcaster, are commercial companies; hence, they depend on revenues. In the volatile and highly competitive media landscape, every newspaper tries to reach as many readers as possible, to convince as many advertisers as possible, and to reduce the costs. The influence of the publisher cannot, therefore, be overlooked. Often, a minimum of journalistic independence is safeguarded by putting this commitment in mission statements and by providing deontological codes on the interrelations between the publisher and the newsroom.

At the same time, our interviewees indicated no significant interference of owners on journalistic daily routines. This was also reflected in the nationwide journalist survey, in which most of the respondents declared being (somewhat) satisfied with the autonomy of their redaction in relation with influence of the marketing and commercial departments (Van Leuven et al., 2019). Politicians trying to influence journalists, on the other hand, is commonplace and almost daily practice. While journalists were ready to admit that this occurred frequently, they also asserted that they do not succumb to this political pressure because they feel protected by their media organisations.

(C3) Transparency of data on leading news media 2 POINTS

Data on leading news media is easily accessible online, with the only difficulty sometimes being unravelling the complex power structures and revenue streams.

Information on Flemish media organisations is fairly simple to consult and to request. Different (independent) organisations publish data on Flemish leading news media. For example, the Centre for Information on Media (CIM) offers reach figures of all media in Flanders, and the Flemish Regulator of Media (VRM) reports on changes in the media landscape and violations against the media legislations.

The Flemish public broadcaster VRT includes in its mission statement to be as transparent and open as possible. Because VRT is financed by the Flemish community, it considers being transparent as its duty too. As previously explained (see Indicator C1 – Supervising the watchdog “control of the controllers”), numerous organisations supervise VRT and publish their findings on freely accessible platforms.

Commercial media organisations are not obliged to share (financial) information with the Flemish people. However, a majority of them are reasonably open concerning power structures and finances. Despite this, unravelling the diverse revenue streams is not an easy task and becomes more difficult as the sector becomes more integrated.

(C4) Journalism professionalism

2 POINTS

The majority of Flemish journalists acquired a degree of higher education. However, less time and resources for professional journalism are available. This contributes to a general decline in overall job satisfaction.

Flemish journalists are highly educated, with 93 per cent acquiring a degree of higher education and nearly 65 per cent possessing a university degree. It is important to point out that especially younger journalists enjoyed higher education. There is also a significant difference concerning gender: three-quarters of female journalists have a university degree, compared with 59 per cent of male journalists (Van Leuven et al., 2019).

Professional integrity is one of their most important ethics, according to Flemish journalists. They consider it to be completely impermissible to receive money from a source or pay for information. Their opinion on how to get information tends to be more nuanced though. Acquiring information by using confidential files without permission or concealing that they are journalists was reported as less problematic. According to the nationwide 2008 survey, it is notable that privacy and ethics are less valued than they were ten years ago.

A possible explanation could be increasing financial pressure. Financial resources for journalists are progressively declining – especially Flemish investigative journalism has seen a substantial cut in resources. Three-quarters of Flemish journalists declare there is no time or budget to do profound research. According to them, this leads to a further “sensationalisation” of news and a shift to soft news. In the selection of topics, the potential click-rate is privileged more often than not.

In addition, a majority of Flemish journalists state an incremental increase of workload (82%) and broadening of tasks (87%) in recent years. Journalists are expected to work more across media platforms and to be more technologi-

cally skilled. As an example, at VRT, about 80 per cent of journalists work for at least two media (combinations of radio, television, and online), and more than 60 per cent even work for all three. Job satisfaction, on the whole, also appears to be declining.

(C5) Journalists' job security

2 POINTS

A lot of Flemish journalists worry about job security, even though professional journalists are protected by law. Due to financial pressure, journalists are more and more forced to work as freelancers, lacking protection measures. Older journalists fear being fired because of their higher wages.

Since 1963, Flanders acknowledges the title “Professional journalist” [Beroeps-journalist]. It is administered to every journalist whose main occupation has been working as a journalist for a minimum period of two years. Licensed professional journalists receive an official press card and additional advantages as well as a statutory supplementary pension. For freelance journalists, protection measures are limited.

The average professional Flemish journalist has worked in journalism for approximately 21 years. Almost half had another occupation before starting to work as a journalist. This is less common among young journalists, as they more often aspire to a journalistic career right after graduation. While it is common for Flemish journalists to work for multiple media brands, still, nearly half remain loyal to one media organisation. The large majority of Flemish journalists have a contract of indefinite duration, and almost 80 per cent work full-time.

A lot of journalists worry about job security. This number has risen from 66 per cent in 2013 to 79 per cent five years onwards (Van Leuven et al., 2019). Older journalists are especially worried they will be fired in the near future. Journalists also declare they are sometimes forced to work as freelancers by media companies – most notably, regional journalists who in Flanders and the Netherlands have filed (and won) court cases against unfair pay on a few occasions.

(C6) Practice of access to information

1 POINT

According to the Belgian Constitution and media decree, every Flemish citizen can request information from committees or boards under the jurisdiction of the Flemish Government. However, Flemish journalists rarely make use of this feature, due to impracticalities and lack of usefulness of acquired information.

In Belgium, Article 10 of the European Convention on Human Rights (ECHR) applies. This law guarantees freedom of speech, freedom of information, and

press freedom. In the Belgian Constitution, freedom of information is also set out in Article 32. Flanders has expanded this law in its Open Government decree [Openbaarheid van bestuur].

Every completed document from a committee or board under the jurisdiction of the Flemish Government can be requested, and the board or committee is obliged to answer the request within 15 days. “Wobbing”, as it is called by Flemish journalists, is not common practice – only 16 per cent make use of this feature. Journalists indicated that the usefulness of the information is rather low, and the procedure for obtaining the documents also takes too long and is often impractical. Some journalists are annoyed that sensitive information is rarely released (Van Leuven et al., 2019).

Flemish journalists gain a press card after being officially acknowledged as professional journalists. This card gives them access to secured places and facilitates getting in contact with official authorities or private companies. It also comes with financial advantages like freely accessing events or reduced fares on public transportation.

(C7) The watchdog and the news media’s mission statement

2 POINTS

Flemish journalists declare being the watchdog of democracy is of utmost importance, with media organisations welcoming and supporting investigative journalism. However, resources and time invested in investigative journalism are declining.

All the leading Flemish news media houses agreed that investigative and watchdog journalism is and remains essential. Both public and private media companies agreed that investigation is the first and noble duty of all journalists. Most of the respondents explained that in their media company and newsroom, investigative reporting is welcomed and supported. The Flemish public broadcaster VRT is even obliged to invest time and money into investigative journalism, resulting in startling reports about corruption in politics, privacy issues, and so on.

Flemish journalists reported that their most important tasks are to bring to the public reliable information, articulating this information in an understandable way, being impartial, and analysing and interpreting complex societal problems. Almost 70 per cent declared that being the watchdog of democracy is of utmost importance (Van Leuven et al., 2019).

(C8) Professional training

2 POINTS

Additional training and education are offered by almost all media organisations. However, they are not obliged to offer this, and journalists cannot be forced to partake.

Most of the interviewees declared that additional training is of significant importance. Especially technological competences concerning the digitalisation of (news) media was reported to be necessary. In-house trainings, therefore, also focused on working with social media and new types of software. The journalists and editors-in-chief both acknowledged that their media organisations offered a wide variety of training programmes; however, journalists mentioned not always having sufficient time to take part in these. The limitations of resources are also a possible explanation for not letting every journalist participate in additional trainings.

It is not obliged by law that journalists partake in additional training or education, and media organisations have no obligation to offer these trainings or education either. At VRT, however, journalists must partake in training concerning coping with verbal and physical aggression. For the news sector as a whole, the Flemish government has funded professional training through the Media Academy³ in collaboration with the sectoral umbrella organisations, but unfortunately, decided to terminate the funding mechanism for this in 2019.

(C9) Watchdog function and financial resources

1 POINT

Resources for investigative journalism have substantially declined. Every leading news media house has tried to do investigative journalism, but the majority do not have journalists working full-time on long-term projects.

As already stated, and emphasised by the chair of the Flemish Journalists' Union, the resources for investigative journalism have substantially declined (figures are not disclosed by the media). Nonetheless, every leading news media house attempts to do investigative journalism. Some media organisations provide additional resources and time to investigate a bigger story of societal importance or the possibility to attract attention to their medium. Only a few media organisations have a specific taskforce for investigative journalism; a "task force" mostly consists of one or two journalists who get the opportunity to work on longer projects.

Participation in international networks of investigative journalists, such as the International Consortium of Investigative Journalists (ICIJ), which had been collaborating in operations such as Offshore Leaks and *Panama Papers*, has come more to the front in a few Flemish media organisations. Because of the small size of the Belgian market, start-ups focusing on investigative journal-

ism, such as Apache, struggle with generating enough revenue to support their work. The Flemish Government is, however, still offering project subsidies for investigative journalism through the Pascal Decroos Fund.

Conclusions

Because of its complex linguistic and political situation, Belgium is often the odd country out. This is no different when looking at its distinct media markets, with little overlap or exchanges between the Dutch- and French-speaking media outlets. Several Flemish media companies have, however, expanded their activities beyond Flanders, most notably holding very powerful positions in the Dutch media market and being active in Ireland and Denmark as well. Both on the company and the newsroom level, there are few formal rules to either promote or prevent internal democracy, internal and external influence on newsrooms, and gender equality. Even though Belgian female journalists have, in comparison with their male colleagues, enjoyed more education, they are still a minority in the workforce and are paid less too.

Belgium's Dutch-speaking media market is small and highly concentrated, with a handful of legacy news brands dominating news consumption. While there is a diverse range of brands, dissemination platforms, and outlets, news diversity is increasingly put under pressure, as articles are ever more copy-pasted across titles under the same company or conglomerate. There is no specific minority media, though in recent years, a few online-only alternatives – and often right-wing – news media have emerged and are increasingly gaining momentum through social media. Citizens' participation remains at a staggering low. Moreover, there are growing fears that government will monitor the impartiality of the Flemish public broadcaster in a way that might jeopardise its independence.

Nonetheless, we assigned higher than average scores to the control/watch-dog dimension because of widely reported large degrees of independence, overall satisfying degrees of professionalism and job security for journalists, and reasonably sound opportunities for them to access information and obtain professional training.

Notes

1. The majority of the journalists and editors-in-chief we interviewed are male.
2. <https://www.expertendatabank.be/nl/over-ons>
3. <https://www.mediacademie.be>

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CANADA

A strong foundation with an uncertain future

Gregory Taylor & Brooks DeCillia

Introduction

From its earliest days, when information often moved at the speed of canoes traversing rivers between villages, communication has played a defining feature in Canada's history. Spanning nearly ten million square kilometres, communication and media remain at the heart of the northern country's ongoing nation-building and cultural efforts. Canada's expansive landmass and its shared border with the US, the world's media superpower, continue to profoundly structure the country's communication and media system. Politically, Canada is considered a federal parliamentary democracy under a constitutional monarchy with different federal and provincial responsibilities (The World Factbook, 2021).

Freedom in the World 2021: status "free" (Score: 98/100, down from 99 in 2019). One point has been deducted in the category of Freedom of expression and belief, justified by the approval of a Quebec law "that prohibited civil servants in positions of 'authority' from wearing religious symbols in the workplace" (Freedom House, 2021).

Liberal Democracy Index 2020: Canada is placed in the Top 10–20% bracket (rank 28 of measured countries, down from 11 in 2016) (Varieties of Democracy, 2017, 2021).

Freedom of Expression Index 2018: rank 19 of measured countries, down from 17 in 2016 (Varieties of Democracy, 2017, 2019).

2020 World Press Freedom Index: rank 16 of 180 countries, up from 18 in 2019 (Reporters Without Borders, 2020).

Canadian media policy has historically focused on attempting to slow the persistent, powerful, and popular flow of American media across the 49th parallel separating the two countries. These concerns persist in the digital age. Ownership rules continue to prevent any Canadian media company from being controlled by foreign companies or people (with some easing of this rule in

telecommunications since 2012), and content regulations try to ensure space for Canadian productions despite the overwhelming presence of American programming. Recently, an independent panel studying Canada's broadcasting and telecommunication legislation, in fact, echoed historical themes of protecting Canadian sovereignty when it implored the federal government to redouble its efforts to ensure "Canadian stories [...] be told and discovered in a world of so many choices" (Canada, 2020: 10). The growth of US-based social media and streaming services such as Netflix and Amazon's Prime Video continue to stoke concerns about protecting Canadian culture during a time when news media in particular faces extensive financial challenges.

These contemporary sentiments echo similar historical worries about cultural sovereignty in the late 1920s and early 1930s, when American radio signals inundated Canada. A Royal Commission charged with studying the problem in 1929 concluded that Canada needed its own national broadcaster, leading to the creation of the Canadian Radio Broadcasting Commission, the predecessor of Canada's current public broadcaster, the Canadian Broadcasting Corporation (*Société Radio-Canada* in French-speaking Canada), or CBC/Radio-Canada. While it is envisioned as an arms-length entity, the majority of CBC/Radio-Canada's revenue comes directly from yearly parliamentary appropriations. Moreover, there have been questions about the independence of the politically appointed board of directors that controls the crown corporation (Taras et al., 2007). Additionally, CBC/Radio-Canada has faced considerable budget cuts over the last four decades, leaving it, as some have suggested, at a critical point where "either [it will] be reimagined and reinvented or die a slow death on the outskirts of the media world" in the coming years (Taras & Waddell, 2020: 9).

While the federal government boosted spending for the crown corporation in 2016–2017, Canada remains, relative to other OECD countries, home to one of the most poorly funded public broadcasters in the developed world, spending about CAD 34 per capita, compared to the likes of France and the UK, at CAD 73 and 105, respectively (Nordicity, 2018). Like other traditional broadcasters, CBC/Radio-Canada's audiences have diminished in recent years, particularly television viewership. Despite its declining budget and audience, CBC/Radio-Canada reaches an average of 20.2 million Canadians through its digital platforms each month (CBC, 2019). While CBC/Radio-Canada remains the biggest news gathering service in the country, their spending on news, according to the country's broadcast regulator, has declined over the last five years (CRTC 2019a: 174). Canada's broadcast industry is governed by the Canadian Radio-Television and Telecommunications Commission (CRTC), which, under the 1991 Broadcasting Act, has the authority to "regulate and supervise all aspects of the Canadian broadcasting system" (Canada 1991: 5.1).

Canada's commercial news media has also witnessed considerable downsizing and consolidation in recent decades. The overwhelming majority of Canada's

news media is owned by a core of big multimedia corporations, including Rogers, Bell, Corus, Postmedia, Torstar, and Quebecor. CTV, Canada's top-rated television network, is owned by Bell and broadcasts local news and current affairs programming, including the country's most watched television newscast at 23:00, *CTV National News*. Like CTV, Corus-owned Global News offers national and local newscasts on its television service across the country.

Concerns about ownership – complete with colourful press barons such as Lord Beaverbrook and Conrad Black – have swirled around Canada's newspaper industry since the early 1900s and persist today. Currently, three companies – Torstar, Postmedia, and The Globe and Mail – produce the vast circulation of Canada's daily newspapers. Postmedia, which notably emerged from the 2009 bankruptcy of Canwest Global Media Corporation, produces both a national newspaper, *The National Post*, as well as a string of major metro daily newspapers and community papers across Canada. The New York-based hedge fund Chatham Asset Management who is the de facto owner of Postmedia via debt holdings, has forced cost-cutting that has slashed staff considerably, and it closed numerous papers in the chain over the last decade in an effort to ease Postmedia's overwhelming debt. In Quebec, the *Journal de Montréal* and *Journal de Québec*, owned by Quebecor, continue to print newspapers, while the former French-language newspaper *La Presse* became an exclusively digital service in 2017. *The Globe and Mail* – founded in 1844 by George Brown, one of the subsequent fathers of Canadian confederation – now owned by the Thomson family, is commonly considered Canada's newspaper of record.

Canada is also home to a number of alternative and minority media services, including online news services like *The Tyee*, *rabble.ca*, and *The National Observer*. In recent years, right-wing media organisations, including Rebel Media and the True North Centre for Public Policy, have added their alt-right perspective to Canada's media landscape. These organisations only find small niche audiences online. Notably, a right-wing television news channel, Sun News Network, modelled after Fox News in the US, launched in 2011 but failed to find a large audience and went off the air in 2015. A wide range of ethnocultural and multilingual programming is broadcast on commercial and community television and radio as well, reflecting Canada's multicultural diversity. The Aboriginal Peoples Television Network (APTN), the world's first Indigenous independent national television service, broadcasts its programming about and for Canada's First Nations, Inuit, and Métis Peoples across the country. APTN is one of the few television services that the CRTC has determined must be carried by all broadcast distributors in Canada.

Conceptually, Canada's news media fits in what Hallin and Mancini (2004) describe as the North Atlantic or liberal model. To be sure, liberal thinking – whereby journalists are watchdogs and truth-speakers who play an important function in democracy (Ward, 2015) – underpins much of the thinking and

motivation of Canada's news media. In line with McQuail's (2009) conception, most Canadian journalists interviewed for this study see their role as monitorial. The Canadian Charter of Rights and Freedoms, Section 2b, declares the existence of the fundamental freedoms "of thought, belief, opinion and expression, including freedom of the press and other media of communication" (Canada, 1982). However, unlike the much-heralded First Amendment of the US constitution, Canadian press freedom is expressly stated to be subject to the limitation imposed in Section 1, which declares: "The *Canadian Charter of Rights and Freedoms* guarantees the rights and freedoms set out in it subject only to such reasonable limits prescribed by law as can be demonstrably justified in a free and democratic society".

While there is clearly a strong foundation for journalism in Canada, like many other jurisdictions around the globe, Canadian news is currently facing enormous challenges brought on by a range of converging technological, political, and economic factors.

Covid-19

The Covid-19 pandemic has proven devastating for Canadian news, as advertising revenues, already weakened over the previous decades, collapsed even further. In an opinion piece published in the *Toronto Star* in March 2020, Daniel Bernhard, executive director of Friends of Canadian Broadcasting, called the Covid-19 crisis a "six alarm fire" and predicted "we are staring down the end of Canadian private media as we know it. With few exceptions, we're talking about the extinction of the entire Canadian media industry" (Bernhard, 2020). In short order, the industry began to prove him right.

The Quebec newspaper *La Presse* reported that the National Cooperative of Independent Information, which brings together six daily newspapers in Quebec, would temporarily lay off 143 people because of the Covid-19 pandemic – almost half the number of people employed by the papers collectively (Marin & Paradis, 2020). West of Quebec, also in April, *Postmedia* announced the closure of 15 weekly newspapers in Manitoba and the Windsor-Essex area of Ontario. It blamed the closures on the financial fallout from Covid-19.

The Canadian Journalism Project, a collaboration of Ryerson University and Carleton University, maintained a database on the impact of the Covid-19 pandemic on Canadian news providers, including a map demonstrating that news closures were not restricted to any one region of the country. According to this project, of the 51 news outlets that closed across Canada as of October 2020, 48 were community newspapers (J-Source, 2020). However, major cities were not spared the economic pain brought on by the Covid-related collapse of the advertising market. In May 2020, Torstar, the company which includes a wide

range of newspapers including the *Toronto Star*, Canada's highest-circulation newspaper, was sold for a price of CAD 52 million, or CAD .63 per share. Torstar stocks had been trading at CAD 1 per share in June 2019.

The horrible contradiction in this situation is that while the Covid-19 pandemic has proven economically devastating for news media across the country, the Canadian public maintained a very strong reliance upon news organisations for their information on the most significant health story in a century. This was captured in data from Statistics Canada for March–April 2020, which noted 51.3 per cent of Canadians named traditional news outlets as their main source of information about Covid-19 during the peak of the pandemic. The next-most popular source was daily announcements by public health and political leaders in individual provinces, at 12 per cent. Less than 10 per cent of Canadians listed social media as their main source (Statistics Canada, 2020). The data is clear that, by a wide margin, Canadians turned to established news sources in this period of emergency.

This overall reliance on professional journalism has not made Canadians immune to the false information circulating associated with Covid-19. A study out of Carleton University surveyed Canadians' responses to Covid-19 conspiracy theories, and nearly half of those who responded (46%) believed at least one of four Covid-19 conspiracy theories and myths addressed in the survey. A quarter of Canadians surveyed (26%) believe a widely discredited conspiracy theory that the coronavirus that causes Covid-19 was engineered as a bioweapon in a Chinese lab and released into the general population. Despite the prevalence of conspiracy theories, over half of Canadians surveyed (57%) were confident that they can distinguish conspiracy theories and misinformation from factual information about Covid-19. The study also notes that the individuals who believe the discredited conspiracy theories spend more time every day on social media platforms than those who do not believe them (Carleton Newsroom, 2020).

The Covid-19 pandemic seems to have greatly accelerated the elements that our study reveals were already in place: Canadians look for information via professional journalism that current economic models simply will not sustain.

Leading news media sample

Most of the data presented in this chapter comes from publicly available documents, reports, websites, and recent academic research. The figures presented in the coming pages are rounded out by a dozen anonymous interviews conducted with Canadian journalists, newsroom and union leaders, and former journalists-turned-academics or media and communication scholars. In order to gather a representative sample, interviews were conducted with people working at both

digital and traditional news organisations, including newspapers and broadcasters (radio and television), and mainstream and alternative news services all across the country. As well, the interview subjects reflect a cross-section of journalists and newsroom leaders working in both local and national newsrooms. The Canadian Broadcasting Corporation/Société Radio-Canada chose not to participate in the study. Given the sensitivity of some of the indicators being assessed in this study, interview data is presented in a way so as to not identify any participants. Moreover, this work complies with the University of Calgary's research ethics requirements.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 2 POINTS

Because of Canada's immense landmass and population distribution, large northern and rural parts of Canada's regional areas are not well served by the news media when compared with the country's large urban areas, where considerable news media is available in both digital and analogue forms.

As the second-largest country on the planet – 41 times larger than the UK – and a population density of four persons per square kilometre, big gaps and regional disparities, not surprisingly, exist in Canada. While there is media abundance in Canada's urban areas, large parts of rural Canada, especially its vast north, are underserved by news media and broadband, mobile, and telephone coverage. Despite the challenges, CBC/Radio-Canada, APTN, and other Indigenous news media do offer services in several Indigenous languages in Canada's arctic. There is also clear division between rural versus urban broadband speed. The federal government committed in 2019 to connect all Canadians, including many remote Indigenous communities, to reliable high-speed Internet by 2030 (Jordan, 2019). The Covid-19 pandemic highlighted the digital divide, prompting the federal government to accelerate its commitment to speed up broadband in rural and remote communities.

Canada's news media comprises a mixture of both public broadcasting (radio, television, and digital) and commercial radio, television, newspapers, magazines, and digital services. See Table 1 for details about household access to each media type.

Table 1 *Media use in Canada*

Media type	Household access (%)
Free-to-air television	97
Television subscriptions	72
Internet subscriptions	89
Radio	88
Daily newspapers	41
Magazines	23

Source: CRTC, 2017

More than 700 commercial radio stations (122 AM and 599 FM) are spread across the country. The vast majority (599) are English, while 97 broadcast in French, and 25 in a third language (CRTC, 2019a: 134). CBC/Radio-Canada has 66 radio stations across Canada, and their radio services are available, free-over-the-air, in every region in both official languages as well as online.

In the switch to digital, free-to-air television over the last decade, some communities (smaller cities and rural areas) have been left without service, including access to the public broadcaster. Conventional television transmitters remain only in mostly urban markets (CRTC, 2018; Taylor, 2013). Nearly three-quarters of Canadians subscribe to a television service (cable, satellite, or Internet). There has been a more than 10 per cent drop in television distribution since 2013, the first year Canadian television distribution had ever experienced a decline in customers. There are 94 private and 27 CBC/Radio-Canada conventional television stations across Canada (CRTC, 2019a: 178). Five Canadian networks – CTV, Global, CBC/Radio-Canada, Télévision associés [associated telecasters], and CityTV – provide national and local services across the country.

The last decade has been bleak for newspapers in Canada, with hundreds of local news outlets – mostly community papers –closing. Reportage about civic affairs has declined, especially in smaller communities, raising normative questions about democratic information and participation (Lindgren & Corbett, 2018). As noted in the news journal *The Walrus*, “the symptoms of local news poverty are increasingly evident: the underreporting of complex political issues, the proliferation of superficial journalism, and a citizenry deprived of credible information” (Lindgren, 2019: para. 2).

Advertising revenue for newspapers in 2016 and 2017, the years in which the latest data is available, fell by 20 per cent. The challenges facing Canada’s news industry was made clear in the federal budget of 2018, in which the Liberal government pledged public support for local journalism. Despite the commitment of government support, local journalism has continued its decline. The Local News Map, a crowd-sourced research project tracking local news in

Canada, estimates Canada has lost 297 news services in smaller communities across the country since 2008 (Lindgren & Corbett, 2020: 2).

Despite more than a decade of tough times, slashing staff, budgets, and reducing the amount of coverage offered, newspapers continue to reach more than three million Canadians each day.

Canada has two national newspapers, *The Globe and Mail* and *The National Post*. As of 2017, *The Globe and Mail* no longer distributes its newspaper in Atlantic Canada. This move is indicative of the wider news distribution trend across Canada: larger cities are relatively well served while smaller communities are increasingly left with local news with very few journalists, or no local news at all.

The issue of limited local coverage may have reached a boiling point in March 2020, when CBC News (the division of CBC/Radio-Canada responsible for news programmes on its English-language operations) announced they were suspending local television newscasts in many regions of the country. Public reaction was swift and furious. The Premier of Prince Edward Island, Canada's smallest province, put out an angry public statement noting that CBC News was the only local television news in the province (Hurst, 2020). Two weeks later, CBC News was forced to backtrack and reinstate the local television news shows.

(F2) Patterns of news media use (consumption of news) 3 POINTS

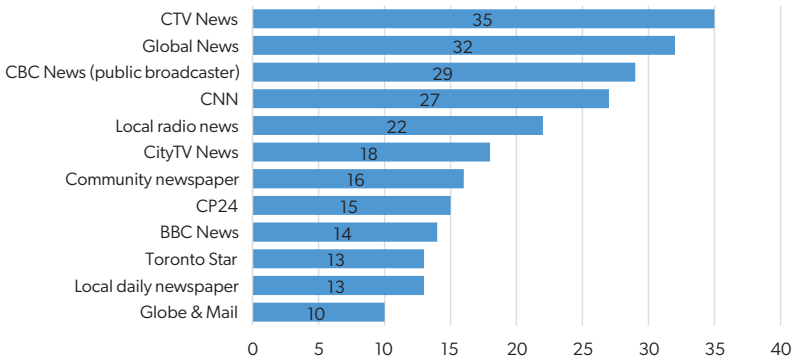
Despite challenges in smaller markets, Canadians have access to a wealth of news sources.

In 2018, Canadians could choose from 762 television services authorised for service, over 700 radio stations, and 88 paid-for daily newspapers (CRTC, 2019a; Winseck, 2019b). As an advanced democracy – with a high literacy rate and strong public education system – Canadian news consumption is relatively high.

A 2019 survey by the Canadian Journalism Foundation found that nearly eight in ten Canadians say they follow the news very or somewhat closely. Canadians get their news from a variety of news sources, including online (60%), television (59%), newspapers (34%), and radio (26%), according to the same survey conducted by the Canadian Journalism Foundation (2019). Older Canadians are more likely to get their news from traditional sources such as television, radio, newspapers, and magazines than younger Canadians, who tend to turn to online news sources. Almost two thirds (62%) of Canadians turn to legacy television, newspaper, or magazine websites to get online news. A large number of Canadians access news through social media sites such as Facebook and Twitter, and social media sources have increased by 4 per cent since 2016. As Figures 1 and 2 illustrate, Canadians, according to the Reuters

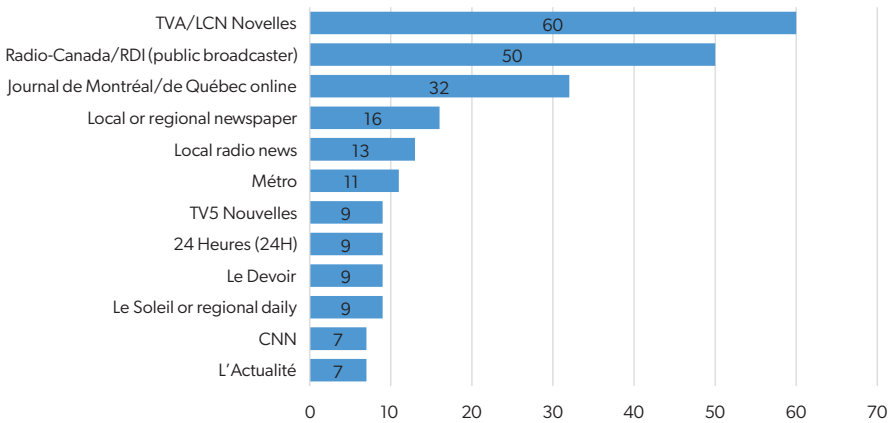
Institute for the Study of Journalism (2020), rely on a range of national, local, and international sources for their news.

Figure 1 Weekly use of television, radio, and print in English (per cent)



Source: Reuters Institute for the Study of Journalism, 2020

Figure 2 Weekly use of television, radio, and print in French (per cent)

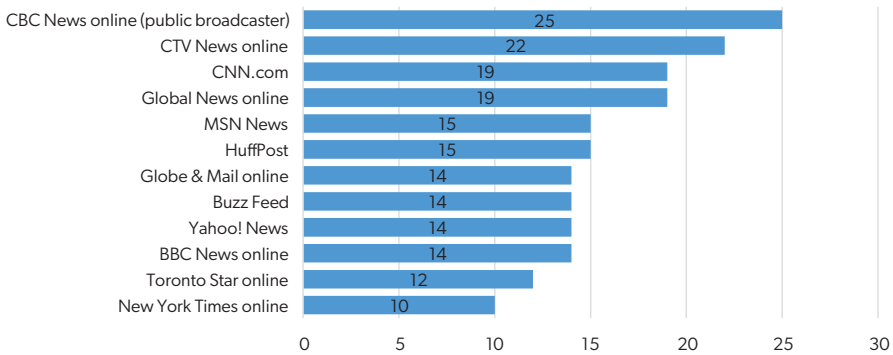


Source: Reuters Institute for the Study of Journalism, 2020

Most Canadians can access free-to-air radio. More than a quarter of Canadians say they rely on radio for news (Canadian Journalism Foundation, 2019), and almost nine in ten Canadians tune in to traditional radio every month. Streaming music and video surveys are growing in popularity, with the average 18+ Canadian reporting that they listen, on average, to about eight hours a week of streaming audio services (CRTC, 2019a: 136). As Figures 3 and 4 show,

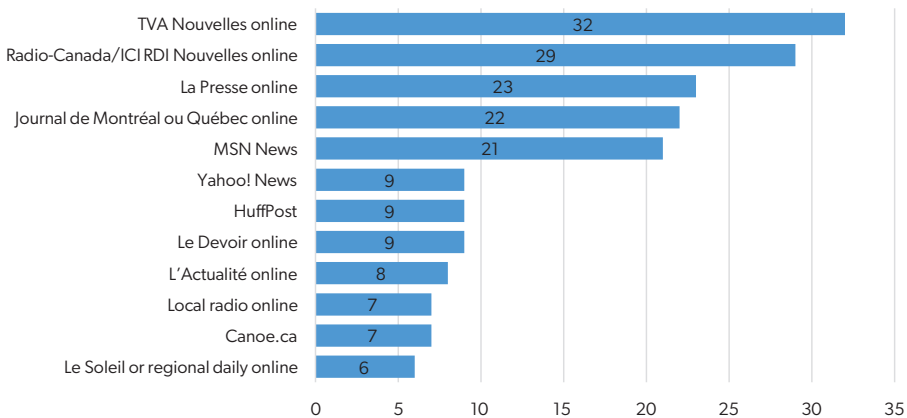
many Canadians (both English and French) spend considerable time listening to CBC/Radio-Canada's information programming or commercial news talk radio services. Notably, more than a third (36%) of Canadians listen to a podcast each month (Briggs, 2019).

Figure 3 Weekly use of online news in English (per cent)



Source: Reuters Institute for the Study of Journalism, 2020

Figure 4 Weekly use of online news in French (per cent)



Source: Reuters Institute for the Study of Journalism, 2020

CBC/Radio-Canada, with 14 AM stations and 52 FM stations across the country, attracts big audiences, capturing a total share of 18 per cent of the country. The public broadcaster's advertising-free radio services are often the only sources of information for minority-language communities across the country.

The CRTC estimates that 68 per cent of Canadians would lose radio service in their first official language without CBC/Radio-Canada (CRTC, 2019a).

In 2018, Canadians watched 24.5 hours of television per week. The vast majority of that time (89%) was traditional television, while the remaining time was Internet-based service (CRTC, 2019a: 168). A survey of Canadians in the same year found that only 7 per cent of Canadians report watching conventional over-the-air television. While declining slightly, nearly six in ten (59%) Canadians still rely on television to get their news (Canadian Journalism Foundation, 2019).

New online news ventures have emerged with varying degrees of success. Names such as *The Tyee*, *The Narwhal*, *Huffington Post*, *Buzzfeed*, *Vice*, *Policy Options*, *Canadaland*, *iPolitics*, *The Sprawl*, and others have provided some new voices and variety in Canadian journalism. However, according to Dwayne Winseck and the Canadian Media Concentration Research Project at Carleton University,

Perhaps most tellingly, while the increasing diversity brought about by new journalist ventures is important, none of the outlets noted above ranks even in the list of the top 60 internet news sources that people in Canada turn to for their news on the internet [...]. This implies that they account for under one percent of internet news traffic, suggesting that they speak mainly to small and specialized audiences. (Winseck, 2019a: 53)

A similar point was raised by former CRTC Chair Jean-Pierre Blais in his testimony before the Standing Committee of Canadian Heritage on the continued relevance of traditional news sources:

Digital platforms certainly offer quick and easy communication. But, at least for now, they cannot provide a reliable alternative to the skills of investigation and analysis that established media have developed over the past decades. Established media also have the advantage of having journalists who adhere to professional standards and codes, and who are trained to gather and interpret facts to create valuable, intelligent news analysis. (Standing Committee on Canadian Heritage, 2017: 60)

So, despite the appearance of exciting new digital journalism ventures in Canada, it is the more traditional sources of information that continue to garner the lion's share of the public's attention.

While CBC/Radio-Canada's radio and online news services have a large reach and dominate in English, it is important to note, unlike most European countries, that commercial television broadcasters attract considerably more viewers to their television newscasts than Canada's public broadcaster.

While Canada continues to be served by a wide range of "traditional" media, the advertising base for commercial news is crumbling, and new journalism start-ups have yet to reach a broad audience, as noted in a key 2017 study:

Established news organisations have been left gasping, while native digital alternatives have failed to develop journalistic mass, especially in local news. The financial degradation has been insidiously incremental, but one whose accumulation and now acceleration has brought to the fore the issue of sustainability of newsgathering in our democracy. (Public Policy Forum, 2017)

Overall, Canadians continue to rely upon a journalistic model that finds itself on a very shaky economic foundation.

(F3) Diversity of news sources

2 POINTS

Canada's English-speaking audiences have a wide – national and international – array of news sources. French-speaking Canadians have less. All Canadian news organisations have scaled back their foreign correspondents. Moreover, critics charge – and many of the journalists interviewed for this study concede – that Canada's news media tends to index too much of its coverage to elite (non-diverse) sources.

Diversity remains a problem in Canada's news. Indigenous people, women, racialised people, and divergent opinions are underrepresented in Canada's news, and Canadian newsrooms remain disproportionately white. Women of colour and Indigenous women, in particular, remain seriously underrepresented in the production of Canadian media (Golick & Daniels, 2019). Even at Canada's public broadcaster, only 12 per cent of staff is a visible minority (CBC, 2018). The Global Media Monitoring Project reported that women are systematically underrepresented and stereotyped in Canadian news (Sikka, 2015), and recent media monitoring also shows that women tend to be quoted significantly less than men in Canada's news media (Informed Opinions, 2021).

The lack of diversity in Canada's news media is well documented. Tolley (2016) starkly concludes that systematic assumptions about visible minorities decidedly shape negative news coverage of Canada's minorities. The problems are not new. In 2010, a content analysis conducted for CBC News found that its radio and television news underrepresented the voices of women and visible minorities (Spears et al., 2010). Similarly, Clark's (2014a) analysis of Canada's major television broadcasters, for instance, found that Indigenous people are often invisible in news broadcasts and that longstanding colonial stereotypes connected to Indigenous people persist in the broadcaster's coverage. In a similar vein, Clark (2014b) concluded that Canadian news organisations still face considerable challenges to better represent the diversity of Canada's Indigenous and growing multicultural population, because white mainstream news editors tend to frame news from dominant perspectives. For instance, DeCillia (2018) shows that because Canadian journalists overwhelmingly indexed their coverage to officials, the coverage of Canada's military mission in Afghanistan lacked diversity of opinion and critical appraisal of the mission.

The number of Canadian eyes and ears around the world has decreased over the last decade: “We have almost no foreign correspondents reporting back to Canada anymore”, observed one long-time journalist and former news executive. Increasingly, Canadian news organisations rely on wire services or stringers to report news from around the world. CBC News has shut bureaus in the last decade or so in Cape Town, South Africa, Mexico City, Jerusalem, Nairobi, Kenya, and Bangkok. Canadian news executives have suggested in recent years that they can cover the world more economically by occasionally sending their reporters abroad, parachuting them into hot zones or big stories, or setting up so-called short-term “pocket bureaus” around the world when news warrants the demand for Canadian eyes and ears abroad. The Canadian journalists interviewed for this research are not so sure, expressing concern that generic wire stories cannot replace having Canadians around the world reporting home.

Diversity of options and sources is also a repercussion of newsroom job losses and budget cuts. One journalist worried about the lack of coverage of municipal issues, noting that “the number of reporters at city hall has really, really been radically reduced over the last decade or so”. Postmedia, owner of a national newspaper and chain of daily newspapers across the country, is doing less enterprising reporting. Moreover, the news organisation merged newsrooms in cities where it owned both the broadsheet and tabloid newspaper. As well, daily newspapers are increasingly using Canadian Press wire stories instead of assigning its own reporters, to save costs. Plus, the national newspaper chain requires its newspapers to run national editorials and endorse conservative parties at the federal and provincial level, undermining the local independence that daily newspapers had to make their own endorsements. Clearly, diversity of news sources remains a problem for Canadian journalism.

(F4) Internal rules for practice of newsroom democracy 2 POINTS

While there are no written rules for newsroom democracy in Canada’s media system, journalists do have input and freedom.

All of the journalists, newsroom leaders, union officials, and academics interviewed for this research confirmed that there are no existing rules surrounding newsroom democracy. Most newsrooms, however, feature story or editorial meetings where journalists, editors, and newsroom leaders collaboratively discuss their coverage of issues and events. While newsroom leaders, such as managing editors or executive producers, have the final say over story assignments and treatments, most journalists interviewed for this study talked about the synergy and collective decision-making that happens at these meetings. One

reporter told us there are “no rules”, stressing that editors are keen to hear “great ideas” from their journalists. Many journalists, especially more senior ones and investigative reporters, stressed the freedom they have to pitch and pursue stories, emphasising that their bosses give them considerable latitude to produce rigorous journalism. Media unions often focus their advocacy on working conditions and industrial matters surrounding the rights of journalists. There is a veto right for bylines in many unions’ contracts – that is, journalists can refuse to attach their name to their story. At the national level, an advisory committee of the Canadian Association of Journalists (CAJ) offers advice on ethical issues faced by working journalists. While there is no written rule, the journalists we spoke to feel free to pursue a wide range of stories. The choice of executives (editors-in-chief, managing editors, executive producers) who run news organisations is not a democratic one; these positions are determined by the leaders or owners of news organisations. In the case of CBC/Radio-Canada, the president is appointed by the federal government.

(F5) Company rules against internal influence on
newsroom/editorial staff

2 POINTS

The influence of media proprietors is more subtle than direct in newsroom decisions.

Internal influences are most often not overt, making the question of influence a complicated assessment. While most Canadian news organisations’ journalistic mandate and ethics herald their independence, several interviewees talked about the subtle influence bosses or owners can have on the content and direction of editorial matters. Several journalists interviewed for this study stressed that owners and bosses make hiring and promotion decisions. It follows then that bosses and owners do not need to explicitly say what they want; the people they hire will conform because they want to please their bosses.

At CBC News, there are clear distinctions between the roles of journalists and newsroom bosses. All assignment decisions at the public broadcaster are made by journalists who are members of the corporation’s unions. News executives, outside the union, have control of journalistic standards and ethical questions, allowing them to kill stories that do not meet the public broadcaster’s standards – but these bosses cannot assign stories.

In an interview with a reporter for a major Canadian news organisation, the reporter stated “as far as I know, [the owner] has never called up and said, you know, we want this story covered and in this way”. This was supported by other journalists who insisted they had a large degree of autonomy. Canadian journalists by and large told us they bristle when bosses insert themselves in

editorial matters; however, there are some examples of this very thing happening in Canadian media.

In 2015, for instance, the president of Bell Media, the owner of Canada's most-watched newscast CTV, was forced to apologise after he interfered in news coverage concerning Canada's broadcast regulator. Kevin Crull had told his news service not to use interview footage of CRTC chair Jean-Pierre Blais after the regulator had announced a decision to unbundle cable channels, which hurt Bell's bottom line. While daytime news on CTV acquiesced to Crull's demand, CTV's Chief anchor Lisa Laflamme and senior correspondent Robert Fife defied the order and ran part of the interview with Blais on the late national broadcast (Bradshaw, 2015). The next day, the CRTC released a public statement reprimanding Bell for interfering in the journalism process.

The allegation [...] that the largest communication company in Canada is manipulating news coverage is disturbing. Holding a radio or television license is a privilege that comes with important obligations that are in the public interest, especially in regards to high-quality news coverage and reporting.

An informed citizenry cannot be sacrificed for a company's commercial interests. Canadians can only wonder how many times corporate interests may have been placed ahead of the fair and balanced news reporting they expect from their broadcasting system. (Canada, 2015b)

Crull publicly conceded it was wrong of him to intrude in the editorial process, and a month later, released a statement announcing his departure and stressing that the independence of the telecommunication giant's news service was of "paramount importance" (Faguy, 2015).

Another notable exception to the general sense of journalistic freedom in the Canadian press is found in the powerful Postmedia newspaper chain. Despite financial struggles resulting in successive debt restructuring (Krashinsky Robertson, 2019), the company remains Canada's largest newspaper chain, with holdings including *The National Post* and 33 other daily newspapers, such as the *Ottawa Citizen*, *Edmonton Journal*, *Calgary Herald*, *Vancouver Sun*, and *Montreal Gazette* (as well as dozens of non-daily newspapers). A series of investigations from varied news sources including online start-ups such as *Canadaland* (Craig, 2019) and more established news magazines such as *Maclean's* (Subramanian, 2019) have uncovered the strict limitations placed upon editorial (opinion and commentary) direction across all Postmedia properties. The corporate ownership insists on a consistent conservative voice on editorial matters across all papers, including the endorsement of political candidates (see Figure 5). In a clear act of journalistic dissent, both members of the *Ottawa Citizen* editorial board resigned in 2015. The national impact of the editorial centralisation at Postmedia was illustrated in the twitter feed of journalist Jonathan Goldsbie during the 2019 federal election (see Figure 5).

Figure 5 Postmedia editorials

Comments: Clockwise from top left: Vancouver Sun, Calgary Herald, Edmonton Journal, Saskatoon StarPhoenix, Regina Leader-Post, London Free Press, Montreal Gazette, Ottawa Citizen, and Windsor Star.

Source: Goldsbie, 2019

Despite occasional instances, which have been appropriately met with national outrage, most Canadian journalists claim freedom to pursue their work. Editorial decisions at Postmedia have unfortunately clearly been centralised, despite a promise to the Competition Bureau in 2015 that their newspapers would maintain “distinct editorial departments” (Canada, 2015a).

(F6) Company rules against external influence on newsroom/editorial staff

3 POINTS

There are very few external influences on newsrooms in Canada.

There is little evidence to suggest that external forces have a direct influence on Canadian news content. Like internal influences, the power of external forces is sometimes subtle and not direct. As noted earlier, Postmedia’s opinion pages across the country are decidedly conservative. Some journalists worried about the influence of this conservative view leaking into editorial decision-making, including news selection and treatment.

Most news organisations pride themselves on their independence. While some broadcast journalists and newsroom leaders told stories of advertisers

complaining about news coverage or trying to shape the news, these efforts were always rebuffed. A reporter interviewed at a major news organisation recognised the efforts of advertisers to tilt the news in their favour but claimed it had little effect: “Yes, advertisers have pulled advertising in reaction to stories that we’ve written in the last three years [...]. We don’t have discussions with our advertising department about this. There is a real separation of church and state”. Another reporter interviewed agreed:

When a company is being quite aggressive with us, they might in some sort of ham-fisted way try to threaten that they wouldn’t advertise with us, but I’ve never heard of any reporter or editor backing down on this story because of that.

One newsroom leader talked about how a car dealership commercial may get strategically moved from blocks containing investigative stories highlighting the deficiencies of automobiles. This journalist, however, proudly highlighted how the broadcasting station’s senior manager had even scolded the car dealership advertisers who complained about critical news coverage.

(F7) Procedures on news selection and news processing 2 POINTS

A fluid and divergent process of news selection does not lend itself to formal rules in Canadian newsrooms.

Our research found little evidence of formal written rules for selecting news stories. Generally, there are some universal news values (Galtung & Ruge, 1965) that lead newsrooms and journalists to prize some stories – some narrative elements – over others. Investigative reporters, we heard, do not pay much attention to agenda news or press releases. Moreover, some news organisations market or differentiate themselves by their commitment to investigative journalism. CBC News, for instance, heralds its commitment to investigative reporting. The news organisation’s Go Public investigative unit encourages Canadians to “hold power to account” by shining a light on alleged wrongdoing by government or business. It follows, then, that the journalists responsible for producing this news segment for radio, online, and television look for and select compelling characters with stories, for instance, about medical treatments gone wrong, consumers being ripped off by big corporations, or people being treated unfairly by business or government.

As Shoemaker and Reese’s (2014) hierarchy of influence model suggests, and our interviews confirmed, journalists value stories that are important or unusual, timely, reflect a human interest, convey a clear conflict, and are nearby. None of the journalists, newsroom leaders, or scholars we interviewed talked

about formal rules or a stylebook for news selection. “News is news”, said one interviewee, adding “you know it when you see it”. A number of journalists highlighted the importance of news meetings to “kick around” or “hash out” story ideas and potential treatments. Some journalists talked about the benefits of “blue skying” or “story boarding” their ideas in story meetings to decide if their idea warranted further pursuit. Often, it is at these meetings or smaller assignment meetings where stories originating from social media get a critical eye or review before deciding whether there is merit to assigning a reporter or producer for further pursuit.

(F8) Rules and practices on internal gender equality 2 POINTS

Addressing gender equality in a structural way in Canada’s news media remains a challenge.

For the first time ever, Canada’s 2019 English-language federal leaders’ debate featured an all-female line-up of journalist moderators. Notable as well, all three major network television main newscasts feature women anchors. Women have made considerable advancements in the Canadian news media, with the most recent census data showing that 48 per cent of all journalists in Canada are female (Statistics Canada, 2016). Ground-breaking research done in 2011 by the International Women’s Media Foundation found that while women make up nearly half of the employees at news organisations in Canada, they often encounter a “glass ceiling” in senior management (Byerly, 2011). Women, the study determined, tend to plateau in middle-management jobs. Things have changed since 2011, and the heads of news at both CTV and CBC/Radio-Canada are now both women. Moreover, most news organisations’ hiring practices are sensitive to questions of gender equity.

All the journalists and newsroom leaders interviewed for this study had no really substantive equity complaints about their working conditions. Most interviewees discuss their organisations’ sensitivity to efforts to eliminate inequality and promote women, and some of the journalists we interviewed raised concerns about men being more assertive about negotiating higher salaries than their female counterparts. Media unions in Canada also remain concerned about inequalities and continue to push news organisations and media companies, through their collective bargaining and other advocacy, to do more to reduce inequality and make newsrooms more sensitive to the needs of female journalists.

CBC/Radio-Canada offers potentially interesting insight into gender equality in Canada’s news media. Women make up almost half of all employees at CBC/Radio-Canada, according to the public broadcaster’s most recent employment equity report, and the public broadcaster is led by its first female president,

Catherine Tait. Women also occupy many of the corporation’s top jobs, including the head of English-language services, news, and radio, and television programming. Yet, data unearthed in 2018 using Canada’s access to information law, in the wake of the gender pay gap scandal at the British Broadcasting Corporation, revealed that male hosts earn almost 9.5 per cent more than their female counterparts (Haupt, 2018). According to a reporter at a major media organisation, there is a need for more work to improve gender equity: “There should be rules”, the reporter told us, adding, “I think all these organisations could do a better job of promoting women”. Despite some progress, there is clearly still room for improvement.

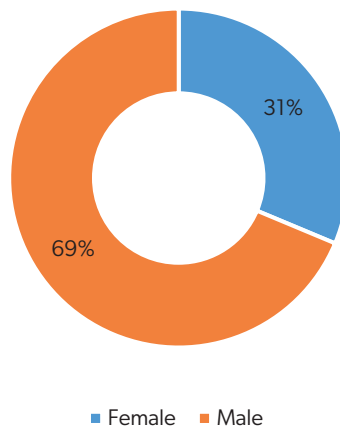
(F9) Gender equality in media content

1 POINT

Acknowledging gender inequalities in media content is not enough. Canadian news organisations must approach the problem of promoting free expression and the inclusion of diverse voices in a more meaningful and structural way.

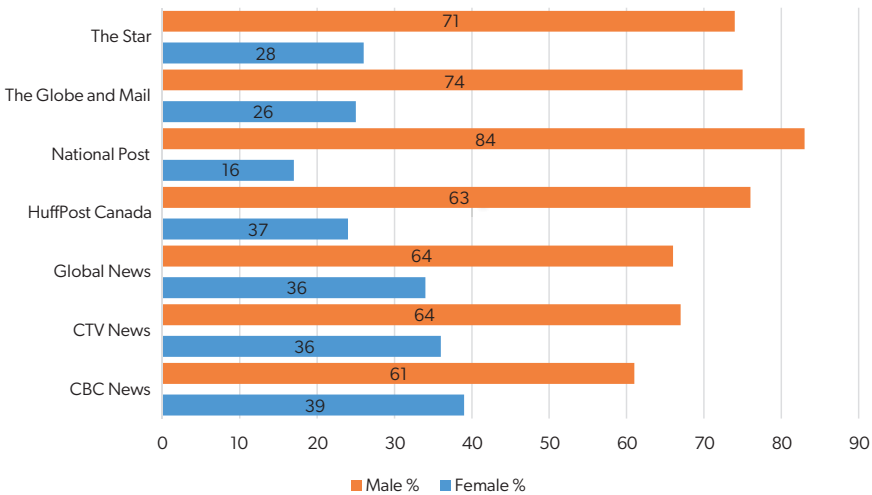
Launched in 2019 by Simon Fraser University’s Research Computing Group, the continuously updating Gender Gap Tracker (Informed Opinions, 2021) clearly shows that major news organisations in Canada feature women as sources in stories far less than men – one-third less, in fact (Figures 6 and 7 make the disparity clear).

Figure 6 Female underrepresentation in Canadian news media



Source: Informed Opinions, 2021

Figure 7 *Ratio of female to male sources in Canadian news media*



Source: Informed Opinions, 2021

Several news media workers stressed the importance of trying to do stories highlighting women. Furthermore, several journalists and newsroom leaders discussed how they continuously tried to incorporate more female voices and opinions in their reportage. Much of this thinking and discussions about these concerns also happened in story or editorial meetings. Some newsroom leaders and journalists mentioned efforts to informally track the number of female sources, with the intention of increasing the number of women featured in news and current affairs. There was no discussion in our interviews about the extent of newsroom rules, codes, or guidelines aimed at gender-sensitive coverage of gender-based violence.

(F10) Misinformation and digital platforms
(alias social media)

3 POINTS

While Canadian newsrooms are worried about disinformation and misinformation, there are few recent examples of coordinated efforts to misinform the population.

There are real concerns about misinformation and disinformation in Canada. A national poll in 2019 suggests nine in ten Canadians thought they had fallen for fake news (Thompson, 2019). Canadian journalists and news organisations share these concerns. There was real – and pronounced – fears about foreign actors disrupting the 2019 federal election with disinformation. Experts and

election officials warned about the potential spread of disinformation during the political campaign, and the federal government tightened rules about online advertising and invested millions of dollars in security and intelligence efforts aimed at combatting any foreign meddling in Canada's general election. Additionally, the Canadian Journalism Foundation launched a public service campaign aimed at encouraging Canadians to critically evaluate news media so they could spot the difference between legitimate journalism and fake news being spread on social media. During the 2019 federal election, CBC News offered Canadians a "chat bot" to help news consumers spot so-called fake news. The public and journalists armed themselves for an information battle that never really materialised.

A 2020 study from the Digital Democracy Project, based out of McGill University in Montreal, studied the effect of misinformation on the 2019 Canadian federal election and came to the following conclusion:

Our finding is that disinformation did not play a major role in the 2019 Canadian election campaign. This is consistent with the findings of many other investigations by journalists, academics, government agencies and officials, and the private sector. That is not to say there were no instances of disinformation, but what there was generally did not appear co-ordinated and had limited impact. (The Digital Democracy Project, 2020)

This view was supported by a veteran Canadian journalist interviewed for this study:

Most news organisations, the CBC and I think *The Globe and Mail* and *The [Toronto] Star* and some others thought that misinformation and disinformation would be a big issue in the [2019] election campaign. And so, had someone assigned to that beat. And I think other publications did, too. But I think we discovered that there, in fact, wasn't very much. And the studies I've seen have shown that there wasn't an awful lot and that the biggest distributors of disinformation and misinformation are political parties and candidates. And so, they [journalists] didn't really have an awful lot to do.

Despite the recent example of the 2019 election, many of the journalists or newsroom leaders interviewed for this research worried about misinformation and disinformation; however, none of them detailed any sophisticated mechanisms or technology being used to counter the problem. Many of the journalists talked about being sceptical of information originating from social media platforms, and special attention is paid to checking the veracity of social media content. Journalists detailed procedures such as labelling and identifying information from social media, and verifying information with a second or third source before reporting it. CBC News' journalistic standards and practices are clear:

Material that originates from a non-CBC source is clearly identified as such. Before text, image, video or audio is published, we try to verify the information with a second source. There may be times when a third source is required. (CBC, 2020)

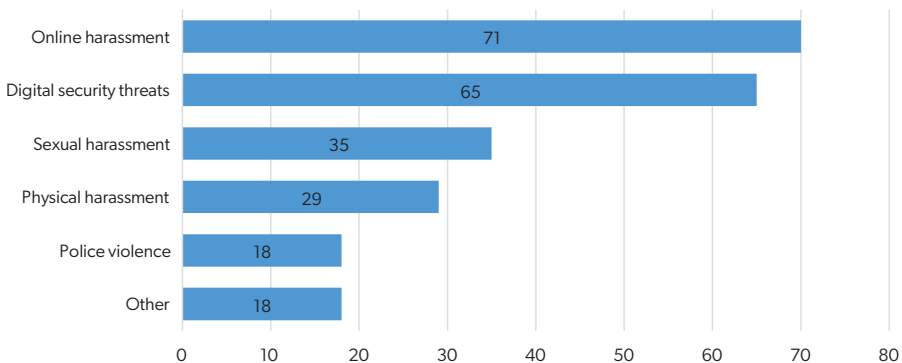
Moreover, a number of Canadian news organisations have responded to misinformation and disinformation with a focus on fact-checking. No journalists mentioned training aimed specifically at spotting misinformation.

(F11) Protection of journalists against (online) harassment 2 POINTS

No specific laws protect Canadian journalists against online harassment. News organisations apply an ad hoc approach to helping their journalists when they become the target of online trolls.

A 2019 survey of journalists conducted by the Committee to Protect Journalists suggests worry about becoming an online target because of their need to use social media for work (Westcott, 2019; see Figure 8). Seven in ten Canadian journalists called online harassment, including threats of violence or harm, the biggest threat they face. Female journalists, in particular, face a range of harassment, including death threats and unsolicited sexual messages through social media. Male journalists interviewed for this study cited “nightmare stuff” they have heard from their female colleagues.

Figure 8 Largest threats to Canadian journalists’ safety (per cent)



Source: Westcott, 2019

Canada’s criminal code does not address online harassment of journalists specifically. To date, Canada’s legal system has not dealt with cases involving harassment or disinformation campaigns aimed at journalists. An Ontario case

in 2016 found a man not guilty of using the Internet to harass a pair of feminist activists (Csanady, 2016).

Most of the journalists and newsroom leaders interviewed for this study expressed concern about online harassment and described it as a real problem. Yet, most also detailed ad hoc procedures aimed at protecting journalists who are targeted online. Some journalists described generic policies and training aimed at protecting them from online harassment, and a number of interviewees described newsroom bosses as being supportive and understanding when harassment occurs. Union officials representing Canadian journalists believe news organisations need to do more to protect journalists.

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 2 POINTS

The issue of news concentration has been the subject of successive government studies for 50 years, with very little change. The digital environment has provided a wealth of viewpoints, introducing new problems.

The limited ownership in Canadian national media remains a stubborn and persistent problem. Newspapers in particular have proven to be a small club where very few new voices are able to compete. Successive federal studies in 1970 (the Davey Commission) and 1981 (the Kent Commission) raised concerns about media concentration in Canada and the implications it might have on the availability of differing views, and by extension, democracy (Montgomery, 2019).

Despite the launch of the English-language *The National Post* in 1998, there remain limited national news outlets. In 2020, *The Post* is heavily indebted and largely controlled by New York-based hedge funds. Many arguments similar to the Davey and Kent Commissions have been resurrected in more recent studies:

Canada has one of the highest rates of media concentration in the world, and the Committee has noted that no federal government body has the mandate to intervene when necessary to ensure a healthy and competitive media industry. Collapsing media revenues have become a justification invoked by media conglomerates to explain the need for merging, acquiring, selling and shutting down media outlets, shutting down newsrooms, moving corporate headquarters, layoffs by the tens of thousands, and to concentrate a growing proportion of media in the hands of a small group of businesses that are less and less diverse. (Standing Committee on Canadian Heritage, 2017)

However, another key 2017 study questioned the continued relevance of the concentration of ownership concern in the time of ubiquitous digital content:

The odd blend of content fragmentation, revenue consolidation and indifference to truth has overtaken simple concentration of ownership as the main threat to holding public officials to account and reflecting Canadian society back to its citizens. (Public Policy Forum, 2017)

According to the authors of this report, all Canadians now have the ability to express viewpoints and be exposed to a range of ideas online – therefore, concentration is not the paramount issue; the problem now rests with the ability to provide professional, reliable journalism as the established economic model is collapsing. The digital world offers a wide range of information from a broad scope of perspectives, so the concerns of previous decades have been usurped by new questions regarding quality of reporting and shared information among citizens.

(E2) Media ownership concentration regional (local) level 3 POINTS

Local media continues to struggle but does not suffer from the same ownership concentration as the national news services.

The Canadian small-market news that manages to continue under these difficult economic circumstances has a fairly diversified ownership base. The following data is from the Local News Research Project out of Ryerson University in Toronto. According to this survey of newspapers with less than 50,000 readers, family-owned and regional chains continue to play a significant role (see Table 2).

Table 2 Ownership characterisation

Answer choices	Responses (%)
Owned by a national newspaper chain	22.1
Owned by a regional newspaper chain	30.7
Owned by a hedge fund or non-journalism company	5.5
Government owned	0
Locally or community owned	12.6
Family owned	36.2

Source: Lindgren et al., 2019

Support for local news has come at the level of national media policy as well. The CRTC recognised the significance in supporting local news broadcasting in small markets and established the Independent Local News Fund in 2016.

This policy required cable and satellite providers to contribute 0.3 per cent of their previous year's broadcast revenues to help support local, small-market television news (CRTC, 2016).

Perhaps it is because local news is more diverse in ownership that it does not have the same capital to draw from as the more vertically integrated major national news, and has not been able to sustain the pressures of the loss of advertising revenue, coupled with people unwilling to pay for small-market digital news.

(E3) Diversity of news formats

3 POINTS

There is great diversity of formats for Canadian news.

Canadians have an abundance of media options across a range of formats. The country's early embrace of cable television distribution opened the broadcasting world to a wealth of channels. In 2018, Canada offered 762 television channels, not including streaming services (CRTC, 2019b).

According to a 2015 survey, 36.2 per cent of Canadians got their local news from television, 23.3 per cent from newspapers, 20.7 per cent from radio, and 18 per cent from the Internet (Standing Committee on Canadian Heritage, 2017). While its television ratings have been problematic, the national public broadcaster CBC/Radio-Canada offers very popular radio programming and also hosts the most-visited news website in the country.

In the online world as well, Canadians have many options. According to the Canadian Media Concentration Research Project, "Canadians get their news from a wide plurality of internet news sources, both old (CBC, Postmedia, CTV, Toronto Star) and new (Huffington Post), as well as domestic and foreign (CNN, CBS, BBC, NBC, Guardian, New York Times)" (Winseck, 2019b: viii). There are many avenues of news information in Canada.

(E4) Minority/Alternative media

3 POINTS

Efforts have been made to establish a minority and alternative media sector within the wider news system.

Ethnic media has a history in Canada spanning more than four decades. In 1978, the Canadian Ethnic Journalists and Writers Club was founded, which evolved to later become the Canadian Ethnic Media Association. In the last two decades, there has been a wider effort to expand Canadian media beyond the traditional English and French mainstream (Taylor, 2008).

There is a broad range of Indigenous media, including independent print news (Baker, 2016). The Native Broadcasting Policy (CRTC, 1990) emphasises the importance of Indigenous ownership and the preservation of Indigenous languages and cultures. In 2019, the CRTC announced a review of this policy in an effort to ensure that it reflects the current needs of Indigenous communities.

According to the CRTC, there are over 50 licensed – and hundreds of licence-exempted – Indigenous radio stations across Canada (CRTC, 2019b). The APTN is the first national Indigenous television network in the world, run by Indigenous people and designed to reflect their communities in many of their languages. APTN must be carried by all television service providers.

Canada licenses a national multilingual, multi-ethnic service called *Omni Television*. In 2019, the CRTC issued a rare must-carry order that determined *Omni* must be offered by all licensed television distributors (CRTC, 2019a). This means that all Canadians with access to cable or satellite distribution (which is all Canadians) have the ability to acquire *Omni Television* if desired.

The country also has a range of alternative media in print. In December 2015, *MIREMS*, a firm that tracks trends in ethnic media, estimated that at least 460 print or web-based ethnic news organisations and 160 broadcast outlets have a total audience reach of 6.7 million in Canada. For many Canadians, ethnic publications are a primary source of news. In 2008, *Ethnique Media* found that 55 per cent of those with South Asian and Chinese heritage read English newspapers, versus 75 per cent for ethnic publications (Public Policy Forum, 2017). *Diversity Votes*, a website dedicated to the study of ethnic news in Canada, cites over 800 ethnics news outlets across the country (Diversity Votes, 2019). Their 2019 study on ethnic media and the 2019 election demonstrates political divisions between various communities, with a slight edge for liberals – in other words, a view similar to the wider Canadian public.

Outside the mainstream political spectrum, far-right-wing news sites such as *The Rebel* have a small following. During the 2019 election, there was debate regarding whether such populist media organisations were, in fact, journalism (Levant, 2019).

(E5) Affordable public and private news media

2 POINTS

Prices vary, but Canadians can access news.

Cost of news to consumers is not often measured. According to the 1991 *Broadcasting Act*, the media regulator CRTC can intervene if prices for broadcasting services are too high:

- 3 (1) It is hereby declared as the broadcasting policy for Canada that [...]
(t) distribution undertakings [...] (ii) should provide efficient delivery of pro-

gramming *at affordable rates*, using the most effective technologies available at reasonable cost [*italics added*]. (Canada, 1991)

While broadcasting news is accessible to Canadians, newspaper subscriptions have suffered, and online sources have not fared well either – only 9 per cent of Canadians pay for online news (Newman et al., 2019). Costs of Canadian newspapers can be a factor. More Canadians have subscriptions to the relatively cheaper *The New York Times* than *The Globe and Mail* (Adams, 2017).

(E6) Content monitoring instruments

0 POINTS

There is no formal monitoring.

There is no formal mechanism to monitor media content in Canada, though there were past efforts. In 1987, the Fraser Institute, a conservative think tank, established the National Media Archive that monitored the national newscasts of CBC/Radio-Canada and CTV. The project was largely dismissed as a vehicle to promote the anti-CBC, free-market ideology of the Fraser Institute and was discontinued after a decade. The anti-public broadcasting view remains one held closely by conservative politicians and supporters in Canada.

(E7) Code of ethics at the national level

1 POINT

While most news organisations have a code of ethics or set of journalistic standards of practice during their work, there is no mandatory national code of ethics in Canada.

There is no compulsory national-level code of ethics in Canada. All of the major news organisations in Canada have their own code, rulebook, or standards of practice. Generally, all of them highlight core journalistic principles such as accuracy, fairness, balance, independence, and integrity. The CAJ offers ethical guidelines for the ethical behaviour of journalists, and the Radio Television Digital News Association (RTDNA) also has a code of journalistic ethics. The Canadian Broadcast Standards Council (CBSC) acts as a voluntary programming-standards watchdog for the country's private broadcasters, providing a code of conduct on a range of issues including violence on television, equitable portrayal, and journalistic ethics. The CBSC does not apply to print or online news services (for more information on the CBSC, see Indicator E8 – Level of self-regulation).

(E8) Level of self-regulation

2 POINTS

An established broadcasting self-regulator for private broadcasters.

The CBSC is a broadcasting self and co-regulating body overseeing radio and television. It was created by the Canadian Association of Broadcasters (CAB) in 1989 and is more of a co-regulatory body, since the national regulator CRTC can still overrule decisions, and the public can appeal CSBC decisions to the CRTC. Membership in the CBSC is often a required condition for new broadcasters to be licensed by the CRTC. The areas of authority for CBSC involve the administration of five codes: CAB Code of Ethics; CAB Violence Code; CAB Equitable Portrayal Code; RTDNA Code of Ethics; and the Journalistic Independence Code (CBSC, 2020). The last two are of greatest relevance for this study. The Radio Television Digital News Association's (RTDNA) code notes, "It is our responsibility to act independently, to be fair and respectful, and to report the facts" (CBSC, 2016: preamble). The Journalistic Independence Code has three set criteria that Canadian broadcasters are expected to support:

- the effective use of news-gathering resources in a manner which ensures that Canadians have access to diversity and quality of information assembled and reported by broadcast journalists;
- the existence of diverse and distinct editorial and news reporting voices in their broadcast and print media; and
- the independence and separation of the management of news departments in their broadcast and newspaper divisions with common ownership.

(CBSC, 2008: Introduction)

The launch of the CBSC in 1989 included the creation of a governing body composed of industry representatives as well as experts and local representatives from across Canada. A 2007 report commissioned by the CRTC found that the CBSC had been largely successful in its mandate (Dunbar & Leblanc, 2007). CBC/Radio-Canada is not a member of the CBSC but does have a public ombudsperson. Similarly, traditional print media are not part of the Council.

(E9) Participation

2 POINTS

While some avenues remain open, others have closed to greater public contributions.

Many print news outlets reserve space for reader submissions. Newspapers such as *The Globe and Mail* contain letters to the editor and also accept pieces of approximately 700 words from the public. Major broadcasting media such as

CBC/Radio-Canada accept and encourage video and photography submissions but do not pay for them. *The Globe and Mail* also hosts speaking events at its Toronto offices for its readership.

Citizen journalism in Canada had a major impact in a story about the taser electroshock-related death of Polish immigrant Robert Dziekanski at the Vancouver International Airport in 2007. Paul Pritchard filmed four police officers subduing Dziekanski and turned his video over to police, who claimed it was necessary for their investigation. When Pritchard learned the investigation's conclusion was not what he had seen and police refused to return his film, he hired a lawyer, held a news conference, and threatened to use legal action to get it back. When his film was returned, he took it to the news media and the resulting outcry resulted in a major investigation into police tactics (CBC News, 2009).

Online comments to news stories have proven more problematic for both journalists who do not appreciate being professionally maligned and news outlets that do not want to be associated with the often-hurtful comments that can appear. Canada's largest newspaper, the *Toronto Star*, suspended online comments entirely in 2015, due to what the public editor called "a cesspool of complaints" (English, 2020). *The Star* quietly reopened comments in 2020. In 2015, CBC News halted comments on its online news stories that specifically dealt with Indigenous issues, due to the "clearly hateful and vitriolic" nature of much of the rhetoric (CBC News, 2015).

While there are avenues for public input, news organisations want to limit incendiary online comments.

(E10) Rules and practices on internal pluralism

2 POINTS

A wide variety of rules and practices exist when it comes to ensuring that news organisations include a wide variety of perspectives.

All of the journalists and news executives interviewed for this research recognised the importance of including diverse views in their coverage. Despite this recognition, the empirical evidence (as detailed above) suggests the Canadian news media has considerable work to do when it comes to reflecting the diversity of the multicultural country. There are some glimmers of progress. The wide range of ethnocultural and multilingual programming does a better job than the mainstream media reflecting multicultural diversity. Similarly, the APTN focuses on and highlights stories about Canada's First Nations, Inuit, and Métis Peoples. CBC News' Indigenous Digital Unit focuses on news content about Canada's first people.

Most journalists interviewed for this research described ad hoc processes to ensure diversity in their coverage: “This is something we talk about internally”, one reporter said, adding, however, that it “depends on the particular reporter”. While some reporters described informal internal “counting exercises”, whereby editors tracked the representation of diversity in coverage, many reporters talked about personal efforts to better reflect the diversity of Canada. One reporter stressed the importance of “getting the best sources”, while acknowledging an effort to avoid filling stories with “old white guys”.

In the summer of 2020, inspired by the international Black Lives Matter movement, both CBC/Radio-Canada and *The Globe and Mail* faced internal concerns over the diversity of their newsrooms. At CBC/Radio-Canada, reporters expressed apprehensions that the corporation’s Journalistic Standards and Practices policy might restrict journalists from voicing their personal views and critical experiences amidst the global protests sparked by the death of George Floyd in Minneapolis. There was strong among the journalists that the public broadcaster’s Journalistic Standards and Practices was not truly inclusive (Press Progress, 2020). On June 11, 2020, Unifor, the union representing *The Globe and Mail* employees, issued an internal statement noting the “lack of diversity among employees” and expressing the need to make *The Globe and Mail* “a more diverse workplace”. The statement was not public, but it was released on social media by several of *The Globe and Mail*’s journalists.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers”

2 POINTS

Several independent observers scrutinise Canada’s news media.

Canada is home to a robust debate about the news media; however, there is no central body that carries out regular review. Many news organisations have mechanisms to hear and adjudicate complaints. *The Globe and Mail*, for instance, has a public editor who frequently critiques the national newspaper’s coverage. CBC/Radio-Canada’s independent ombudsperson adjudicates public complaints about the public broadcaster’s journalism. The independent CBSC handles public complaints about alleged transgressions of Canadian broadcasters’ code of conduct. In a similar vein, the voluntary National NewsMedia Council, an amalgam of former provincial press councils, promotes ethical practices in the news media. The Council adjudicates complaints about journalistic standards and ethics.

Canada's news media is also the subject of intense media scrutiny. The podcast *Canadaland*, for instance, is a focal point of news media critique. The progressive online news sites *Rabble.ca* and *PressProgress* often features debate and critique about Canada's mainstream media's watchdog function.

(C2) Independence of the news media from
powerholders

3 POINTS

Legal instruments, democratic traditions, and journalistic standards and practices protect the Canadian news media's independence.

Canada's Charter of Rights and Freedoms enshrines the freedom of the press. Moreover, the country's courts and democratic institutions frequently herald the autonomy of the news media, noting that reliable information is "integral to a functioning democracy" (Standing Committee on Canadian Heritage, 2017: 1). According to the *Reuters Institute Digital News Report 2019*, 49 per cent of Canadians think the media does a good job in monitoring the powerful (Newman et al., 2019).

In 2017, Canada adopted a so-called shield law to protect journalists from revealing confidential sources. The Journalistic Source Protection Act was approved unanimously by both chambers of Canada's parliament. Before the law, Canadian journalists had to convince a judge that protecting their confidential source had merit. It was up then up to the court to decide if the journalist must name their source. The new law shifts the burden to judicial authorities to convince a judge that the journalist's information cannot reasonably be obtained through other means and that the public interest in the information outweighs the importance of eroding the freedom of the press (Taylor et al., 2017).

When it comes to the autonomy of CBC News, there remains a contentious issue concerning the transparency and accountability of appointing the public broadcaster's President and CEO (under the Broadcasting Act, the president is the chief executive officer) and Board of Directors. The CBC/Radio-Canada Board is composed of ten members, plus the chair and the president and CEO, all of whom are appointed by the governor in council (federal cabinet), as outlined in Section 36 (2) of the Broadcasting Act (Canada, 1991). This framework calls into question the ability of CBC/Radio-Canada to maintain its arm's-length independence from the sitting government (Taylor, 2017). The Liberal government of Justin Trudeau reformed the selection of the board in 2017, creating an independent advisory committee to appoint broad "experts in broadcasting and digital technology, representatives of cultural sectors from across Canada" (Haupt, 2017).

(C3) Transparency of data on leading news media

2 POINTS

There is little discussion about media system transparency.

While considerable information about Canada's media companies exist online in regulatory, corporate, and academic publications, this information is rarely the subject of intense public attention. CBC/Radio-Canada, as a public broadcaster, publishes an annual report detailing its spending and corporate priorities, but critics charge the corporation is often too secretive and lacks proper oversight (Friends of Canadian Broadcasting, 2020). Canada's broadcast regulator, the CRTC, publishes detailed and regular information about the country's media system, including an annual *Communications Monitoring Report*. Moreover, numerous parliamentary reports over the last decade have provided a comprehensive picture of Canada's news media. The 2017 Standing Committee on Canadian Heritage provides an in-depth analysis, for instance, of the disruption and changes in the news industry sparked by digital technology. Given the growing concentration, decline of local news, and general disruption in Canada's media system over the last decade, there has been increasing public debate about the future of news and access to information.

(C4) Journalism professionalism

2 POINTS

Most Canadian journalists receive professional training.

Journalism programmes (college and university level) are available all across Canada. Up slightly from 2006 (with about 2,300 students), there were 2,700 students enrolled in journalism programmes at Canadian universities in 2016. In addition to formal university education, most journalists talk about on-the-job training as well. A number of journalists reported taking short courses at conferences hosted by CAJ or RTDNA. Newsroom leaders stressed that they want their journalists to participate in ongoing education and training.

Despite the overall professionalism of Canadian journalists, the current economic realities of the news industry have affected the quality of reporting. This is supported by a Canadian authority interviewed for this study:

When they lay people off or cut back on staff and get rid of and do buyouts, you end up with less experience, less knowledge in newsrooms, fewer people doing editing, journalists being asked to do more things. It's not a great environment in which to work at the moment, in the midst of all the cutbacks and changes. What we've seen is a pretty significant move away from, in most cases, journalists that had any degree of specialisation and turning more and more people into general assignment reporters: generalists who are doing a

bit of everything. And when you when you have those sorts of jobs, it's very difficult to develop any expertise or any knowledge in some complicated fields. So the quality journalism we get isn't that great.

Essentially, training – many journalists and newsroom leaders told us – depends on budgets.

(C5) Journalists' job security

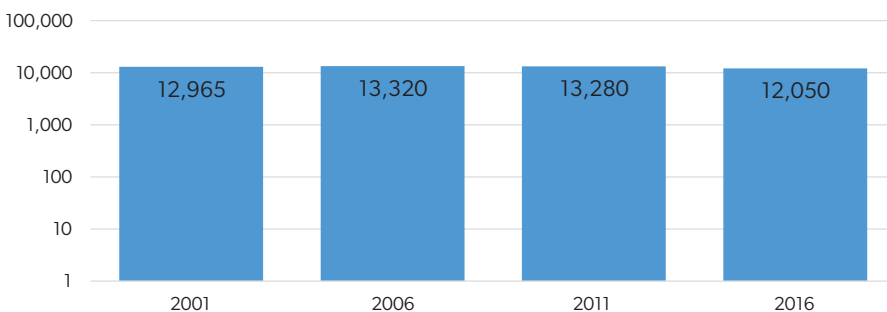
1 POINT

Job security is elusive in Canada's news media.

There are no legal provisions in Canada protecting the job security of journalists. Unionised journalists have rights when they are laid off. Casuals or temps comprise about one-quarter of CBC's unionised workforce who work in English-speaking Canada and Radio-Canada employees outside of Quebec and Moncton, New Brunswick. Many of these public broadcasting workers complain that they have little agency or security, leading to poor morale (Houpt, 2019). CBC/Radio-Canada's most recent collective agreement with the Canadian Media Guild included the provision to convert 41 employees into permanent workers at the public broadcaster.

Many newsrooms have downsized. In 2019, for instance, the Torstar publishing company shut down dozens of daily and community newspapers across the country, cutting 70 jobs. In a time of job slashing in the news industry, Statistics Canada census data from 2016 shows that the number of journalists working in Canada declined by 7 per cent since 2001 (see Figure 9). When asked to reflect on the state of job security in Canadian journalism, a well-known scholar in the field interviewed for this study remarked "everyone's kind of trying to stay alive and keep their jobs".

Figure 9 Number of journalists in Canada, 2001–2016



Source: Skelton, 2018

A close look at statistics reveals that the number of journalists working in Canada has, in fact, risen slightly in absolute terms since 1987 (Wilkinson & Winseck, 2019). But, as a percentage of the total Canadian working population, journalists fall from .08 per cent in 1987 to .06 per cent in 2017. More journalists are working as freelancers or in permanent positions for news organisations. Wilkinson and Winseck (2019) contend that while there have indeed been substantial layoffs at legacy media organisations, a lot of Canadian journalists are working at new digital news services or as social media managers.

(C6) Practice of access to information

2 POINTS

While laws offer access to public information, problems with Canada's freedom of information laws persist. Moreover, Canadian officials and the legal system often blunts journalists' efforts to obtain information.

Canada's freedom of information laws are outdated and flawed (McKie, 2012). Introduced in 1980, Canada's Access to Information Act was envisaged as an economical and efficient means for Canadians to get information about their government and its work. Yet, some forty years later, advocates for transparency and journalists often both complain about the lack of information the law produces and the obsequiousness of bureaucrats administering the programme. In fact, the commissioner charged with overseeing Canada's information laws called the system "very outdated" in 2018 (Desmarais, 2018). Critics of Canada's freedom of information process say there are too many loopholes for the government to withhold information. As well, journalists have expressed concern about the secrecy that cloaks government decision-making, and they complain it is hard to illuminate how the government arrives at policy options if administrators of the programme constantly exempt records because they are deemed to be a cabinet confidence or advice to a minister.

Journalists interviewed for this project complained vociferously about Canada's freedom of information laws at both the provincial and federal levels. Journalists called the system hopelessly broken, noting it often takes too long and costs too much (the government often imposes exorbitant search fees) to get little information. While the journalists and experts interviewed for this project describe a wealth of information available online and through publicly available databases, many noted there has been a retrenchment of access to experts and civil servants. Public relations controls have clamped down on access to sources. One long-time journalist remembered being able to call up low- and mid-level bureaucrats in the 1980s: "There was no rule against most public servants talking to most reporters about things that were within their area of competence", the journalist recalled, stressing, "that has completely changed",

with government rules now requiring reporters to go through public relations officials to request information and interviews. Statistics Canada data shows that there are 4.1 public relations professionals for every Canadian journalist (Baluja, 2014).

Reporters Without Borders' most recent report highlighted a number of troubling incidents blocking Canadian journalists from getting access to information, including the national police force's efforts to block journalists from reporting on a protest of the construction of a natural gas pipeline. The Royal Canadian Mountain Police threatened to arrest journalists if they crossed the force's assembled roadblock near camps erected by Indigenous protestors. Reporters covering the protest also complained that jammed communication signals in the area prevented them from filing their stories. Reporters Without Borders also raised concerns about a ruling by Canada's top court that forced a VICE reporter to hand over to police all his communication with an alleged Canadian terrorist. As well, the report also highlighted concerns about a Radio-Canada reporter who was compelled by a Quebec Superior Court to reveal her sources surrounding a corruption scandal (Reporters Without Borders, 2020). Clearly, access to information remains a problem for Canadian journalism.

(C7) The watchdog and the news media's mission statement

3 POINTS

Canadian journalists see themselves as a watchdog.

Despite all the challenges they face, being a watchdog remains intrinsic to Canadian journalists' identity. In line with Burke's notion of a fourth estate, journalists and newsroom leaders see it as their job to hold decision-makers (government and business) to account. Canadian journalists envision themselves as independent truth-tellers and honest brokers of information, playing an important role in Canadian democracy. By their nature, Canadian journalists are sceptical of authority and see it as their job to challenge authority.

In line with the watchdog role, CBC/Radio-Canada's mission "is to inform, to reveal, to contribute to the understanding of issues of public interest and to encourage citizens to participate in our free and democratic society" (CBC, 2020). Similarly, the *Toronto Star's* so-called Atkinson Principles, named after the newspaper's founder, commits the news organisation to "the advancement of society through pursuit of social, economic and political reforms" (Toronto Star, 2019). Moreover, many journalists interviewed for this study highlighted their commitment to holding decision-makers accountable, especially in a time marked by political spin and post-truth politics. One interviewee described their job as fact-checking what powerful people say.

(C8) Professional training

2 POINTS

Most media organisations offer some sort of training.

Training is available for some journalists, but not all. Often, access to training depends on budgets. Most interviewees confirmed that training is important, especially as newer technology means journalists are doing more. While CBC/Radio-Canada offers in-house training to its journalists on everything from storytelling, media law, video, and audio editing – and even hostile region and security awareness training – many journalists who work for private media say training is increasingly poorly resourced at their news organisations. Regular training seems to be a luxury largely restricted to news organisations with the necessary capital.

Most professional organisations – including CAJ and RTDNA – frequently offer training, workshops, and panel discussions at their annual conventions.

(C9) Watchdog function and financial resources

2 POINTS

While many news organisations say they are committed to enterprising and investigative journalism, fewer resources are making it harder to produce good journalism.

Consistent with Davies's (2009) *Flat Earth News*, the downsizing of newsrooms across Canada has made it tougher for Canadian journalists to fulfill their watchdog function. The reporters left in the newsrooms across Canada told us they are squeezed to produce more. Many journalists are shooting and editing their stories as well as writing their online copy, and reporters complain about the constant grind to report more (sometimes for multiple platforms) and churn out a steady stream of social media. These demands, they worry, detract from reporting and advancing stories. As a result, journalists say they are forced to produce more single-source stories and stories based on news releases, news conferences, and official statements. Journalists worry they are not doing enough fact-checking.

Still, most news workers and newsroom leaders say investigative journalism is important and central to what they do. They stressed that even in financially tough times, it is important not to short-change audiences by failing to dig deeper and uncover important truths. CBC News and *The Globe and Mail*, for instance, have committed significant resources to producing investigative news, reinvesting in investigative units. CBC's *The Fifth Estate* and CTV's *W5* produces a steady stream of in-depth investigative reporting that prompts government reaction and policy changes. The television programme has also exposed serious miscarriages of justice in Canada's legal system. The public broadcaster

argues its investigative work sets it apart from the rest of Canada's news media, highlighting its important journalistic contribution as part of its mandate and a justification for the taxpayer money spent on the public broadcaster.

Conclusions

Canada has developed a solid foundation in journalism that now finds itself struggling for its very survival. Unlike its southern neighbour, Canada has not succumbed to accepting accusations of “fake news” or the view that the press is somehow “the enemy of the people”. To the contrary, Canadians seem to show continued faith in their institutions of professional journalism. A national public broadcaster active across a range of media has certainly helped ensure that news is accessible to Canadians and generally open to public scrutiny. The economic model for private journalism, however – based upon advertising revenue and paid subscriptions – is in freefall.

The Liberal government under Justin Trudeau brought forth measures in its 2018 budget to try and offer some relief to the struggling news industry, and in so doing opened an entirely new set of concerns. The government's annual budget described the problem and proposed solution:

As more and more people get their news online, and share their interests directly through social media, many communities have been left without local newspapers to tell their stories. To ensure trusted, local perspectives as well as accountability in local communities, the Government proposes to provide \$500 million over five years, starting in 2018–19, to one or more independent non-governmental organisations that will support local journalism in underserved communities. The organisations will have full responsibility to administer the funds, respecting the independence of the press. (Canada, 2018)

This initiative had to walk a delicate balance between government support for the news industry and not making the press reliant on direct government subsidy, thereby questioning its independence. The government proposed an arm's-length panel that includes representatives of eight media organisations, including the CAJ, News Media Canada, the Association de la presse francophone [association of the French-speaking press], the Quebec Community Newspaper Association, the National Ethnic Press and Media Council of Canada, the Fédération professionnelle des journalistes du Québec [professional federation of Quebec journalists], Unifor, and the Fédération nationale des communications [national communications federation] (Parry, 2019). Despite the range of representation, many journalists continue to question not only the panel composition, but the very principle of the government assistance plan.

In *The National Post*, a newspaper unable to climb out of mounting debt issues, columnist Andrew Coyne was adamant that the Liberal government's plan is the wrong remedy for what ails the news industry:

To hell with it. To hell with all of it. No newspaper publisher should have anything to do with this plan. And no journalist worthy of the name should go anywhere near that accursed panel. (Coyne, 2018)

Despite apprehensions among journalists, it is clear that the private marketplace on its own will not continue to deliver the type of journalism to which Canadians have become accustomed. Multiple studies and government reports have yet to devise a plan that seems acceptable to all involved. The Liberal government plan is bolder than previous government inactions and, predictably, faces a strong backlash.

Meanwhile, the problems outlined in this chapter have not eased; in fact, they appear to be gaining momentum.

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Chapter 3

CHILE

Crisis of trust and a precarious industry

Enrique Núñez-Mussa

Introduction

Chile has a population of 19,458,310 inhabitants (INE, 2020). Surrounded by the Andes and the Pacific Ocean, Chile's neighbours are Argentina, Bolivia, and Peru. The long territory from north to south gives the country a wide variety of climates, landscapes, and cultures. The main political and economic activities in the country are concentrated in its centre, specifically in the capital city, Santiago de Chile, in the Metropolitan Region, with a population of 8,125,072 people (INE, 2020) and also where the main national media is located. Politically, since 1990 Chile is a democracy, going through profound structural changes as the writing of a new constitution in 2021.

Freedom in the World 2021: status "free" (Score: 93/100, down from 94 in 2017–2019, but up from a dip to 90 in 2020).

Chile is a stable democracy that has experienced a significant expansion of political rights and civil liberties since the return of civilian rule in 1990. Ongoing concerns include corruption and unrest linked to land disputes with the indigenous Mapuche population. (Freedom House, 2021)

Liberal Democracy Index 2020: Chile is placed in the top 10–20% bracket – rank 25 of measured countries, down from 21 in 2018 (Varieties of Democracy Institute, 2019, 2021).

Freedom of Expression Index 2018: rank 36 of measured countries, up from 39 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 51 of 180 countries, down from 46 in 2019 (Reporters Without Borders, 2020).

Chile is currently experiencing a very important political moment. After a dictatorship that lasted for 17 years, Chile's democracy has spanned the past

30 years with seven governments: five from left-wing parties and two from right-wing parties. This made Chile an exemplary case of both a functioning democracy and a booming economy in Latin America.

However, under the current administration of right-wing president Sebastian Piñera's second term, on 18 October 2019, after a rise in public transportation fares of CLP 30 (EUR .033), a group of students decided to avoid paying and started jumping over the turnstiles at metro stations. This gesture was the origin of a social movement questioning the country's political and economic structure and calling for improvement in pensions, healthcare, education, and political institutions, among other issues. According to analysts, this moment could usher in a paradigmatic shift in Chile, where structural elements inherited from the dictatorship have collapsed, as, also, the neoliberal economic system (Mayol, 2019). A crisis of legitimacy of political institutions – which functioned under the constitution written and approved by the dictatorship with a fraudulent referendum (Fuentes, 2019) – and the disillusionment and discontent from the middle-class towards politicians, accumulated throughout the years and crashed under the current administration (Tironi, 2020). The protesters represent a generation that does not share the values of the previous ones (Peña, 2020) – this in addition to economic inequality (Araujo, 2019). The slogan of the movement became, “It is not 30 pesos; it is 30 years”.

Clashes between protestors and the police became commonplace, and the president made several national broadcasts and instituted restrictive measures, for example, a curfew, all leading to economic crisis and uncertainty. The parliament called for a national referendum on the possibility of creating a new constitution, where the option for a new document finally prevailed. Amid this political scenario, the 2020 Covid-19 pandemic arrived.

One call from the movement was to “turn off the television”, extended as a general critique of the media's coverage of the protests, especially because of the insistence to repeatedly show videos of the violent clashes and barricades. Some examples of anger were flyers of journalists' faces with the word “miente” [lies] pasted on street walls, protests in front of the offices of television channels, and attacks on journalists unable to identify themselves as such when covering the protests.

This heightened already existing mistrust towards media. The 2020 Reuters Institute's *Digital News Report: Chile* shows a decrease of 15 points in trust towards media, dropping to 30 per cent (Fernández Medina & Núñez-Mussa, 2020). This came hand in hand with a wave of misinformation, giving rise to several new fact-checking projects in Chile (Núñez-Mussa, 2019).

Chile's media system has political parallelism and a commercial profile with high concentration, with businesspeople in charge of holdings. The only Chilean public television channel, Televisión Nacional de Chile [National Television of Chile] (TVN), functions within corporate practices because it is financed through

advertising; therefore, it highly relies and depends on ratings. This adds to an already existing economic crisis within the media industry, worsened by the one being experienced by the rest of the country.

Covid-19

The scenario described above has had a few variations since the onset of Covid-19. The government's early strategy was moderate quarantine, which led to a fast growth of the contagion curve. Two months after the first cases, there were erratic calls for a "new normalcy" and a return to adapted routines and commercial activity, which were later dismissed after the obvious increase in contagion. Large parts of the country were quarantined – with permission required to move within them – a curfew has been implemented since April 2020, borders were closed, and supermarkets' opening hours were shortened. Towards the end of 2020, some measures were made more flexible, such as the opening of shops and restaurants.

The relationship between the press and the government has been tense. The former minister for health, in charge of the crisis response for the first months, declared in an interview on television, "The work of the press is to sell by inventing lies" (Vera, 2020), and after being questioned in different news stories, he accused journalists of fabricating "fake news" (CNN Chile, 2020a). Now that the press is overseeing the government, right-wing sectors are spreading the hashtag "#rechazoprensabasura" [#rejecttrashmedia], showing that the lack of trust towards journalism is cross-cutting and has intensified in different political sectors, depending on the context.

Despite the aforesaid, research shows that since Covid-19, trust in legacy media increased, while the confidence across social media platforms decreased (Cadem, 2020; Grassau et al., 2020). However, whether this sudden regaining of trust in the media will be sustained in the future is uncertain.

Leading news media sample

For this investigation, the media selected includes the only public television channel, TVN, whose press director was interviewed along with a journalist. Furthermore, interviews were conducted with one editor-in-chief and a journalist each from two leading informative FM radios, *Cooperativa* and *BioBio*; one journalist from the newspaper *La Tercera*; the editor-in-chief of *El Mostrador* (dedicated to written journalism and a pioneer digital outlet); and the director of *Pauta.cl* (FM radio with a multiplatform vocation). Finally, the general secretary of Colegio de Periodistas [National Journalism Association] was also interviewed.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

There is a large variety of media, complemented by access to it for the citizens in the country. Nationwide media coexists with regional media.

The two main newspaper companies in Chile, El Mercurio SAP and Copesa, are located in the capital, Santiago. Regarding nationally distributed newspapers, El Mercurio SAP prints the morning paper *El Mercurio*, an evening paper *La Segunda*, and the tabloid *Las Últimas Noticias*. Copesa is transitioning to a digital media company, so it reduced its print outlets in 2021. Their daily national newspaper *La Tercera* is now printed only on weekends in two regions of the country, and their tabloid *La Cuarta* became a website.

El Mercurio SAP also owns a network of regional publications, including daily newspapers, periodicals, and magazines, the most extensive network in the national territory. Some of these publications belong to other owners, for whom El Mercurio SAP sells the advertising. Distributed by zones, each newspaper covers more than one city.

Building upon data collected by Orchard and colleagues (2017), I reviewed how many printed publications are still functioning, discarding those without an active online presence proving their existence; I also removed one published by a municipality. In total, I identified 63 regional newspapers in Chile, outside of the Metropolitan Region, including dailies and weeklies. Of this number, 34 belong to the network of regional newspapers of El Mercurio SAP and 21 of them are owned directly by the company (Medios Regionales, 2020; see also Indicator E2 – Media ownership concentration regional level).

The Metropolitan Region has the largest number of newspapers, including more niche and independent projects, for instance, specifically economic or political media. Therefore, it is the region that offers most access and media diversity.

Among the free newspapers is *Publimetro*, by Metro International, distributed in the metro stations in Santiago and ten other cities across the country, and *HoyxHoy*, born as a project from El Mercurio's regional newspapers to exclusively cover the Metropolitan Region. Until 2020, Copesa also printed the newspaper *La Hora*, which was closed down due to the economic crisis that the media is currently undergoing.

The average number of televisions per home is 2.5, as of 2017 (CNTV, 2018a); and, it is in the regions with higher purchasing power that the most modern equipment can be found, for instance, smart-TVs (CNTV, 2018b).

There are eight open access channels nationwide. The only public channel is TVN, with a large offering of VHF television signals and one signal for digital television. Meanwhile, private channels *Canal 13* and *Chilevisión* (CHV) have geographically extensive coverage in both systems. In terms of total coverage, these are followed by *Mega*, *Telecanal*, and *TV+*. After the start of quarantine due to Covid-19, a new channel called *TV Educa Chile* was created to be aired on open access television, online, and through over 20 companies of paid television. It broadcasts educational content for the whole country (Mineduc, 2020).

The public station TVN has a network of nine regional centres distributed across the country from north to south: Antofagasta, Atacama, Coquimbo, Valparaíso, O'Higgins, Maule, BíoBío, Araucanía, and Austral. Every day they produce a half-hour regional news programme, only shown in the respective region and privileged over national broadcasting. At the same time, they feed regional information to the central headquarters to be eventually distributed nationwide (TVN, 2020).

An example of the large coverage of open access television in Chile is its reach to Easter Island, where, despite logistical difficulties, three signals are received: TVN, CHV, and *La Red*, alongside the local channel, *Mata o te Rapa Nui*.

Digital Land Television had hoped to end analogue television by 2020. However, television channels requested the Telecommunications Undersecretary to postpone it until 2024, since they are not yet ready for complete nationwide implementation that demands more sophisticated technology (Bertran, 2019a). Most channels already working with this technology across the country belong to the main open access stations (TVD, 2019), but between 2017 and 2018, local access concessions were given to educational, commercial, and community entities, of which some signals are still available (CNTV, 2020b). Therefore, the technology spans the country and is projected to be accessed by 80 per cent of Chileans by 2022 (Bertran, 2019b).

For each of the 16 zones dividing Chile, there are open access regional television channels. In addition, there are local and community television concessions that reach less than 25 per cent of regional population. Despite this, regional television has an increased viewership and greater approval from audiences when it shows content focused on the representation of local identities (CNTV, 2018b).

The Regional Association of Television Channels, comprising 21 stations, produces the television news programme *Portavoz Noticias*, which unites long and short news pieces sent by the different members of the network; these are broadcast by each station. The Regional Association of Television Channels also manages projects, such as workshops, to instruct their associated channels about content digitalisation and streaming-based transmission.

According to data from the Telecommunications Undersecretary (Subtel, 2020a), there is a wide variety of companies providing cable services across Chile, present in all 16 regions and representing a total of 1,760,368 cable

television subscribers as of September 2019. The Metropolitan Region, where the capital is located, has the single largest number of 213,068 subscribers, and the Aysén Region, located in the southern end of the country – although with the least number of subscribers, 10,743 out of a population of 66,568 – speaks of a high connectivity.

Companies offering satellite television are also present throughout the territory, with 1,505,912 users. Of these, the majority are concentrated in the central zone: the geographically adjacent Valparaíso, Metropolitan, and O'Higgins regions.

The offering of cable television includes the open national stations and two channels broadcasting national news 24 hours a day: *24 Horas* from TVN, and *CNN Chile* from Warner Media Latin America.

Radio is the form of media that enjoys the widest access in the country. Data from the Telecommunications Undersecretary represents a total of 2,454 radio stations for the whole country, including FM (1,879), AM (147), minimal coverage (10), short wave (1), and community (417) stations. This is because of the technological ease of radio transmission and reception, as well as access to concessions in the radio-electric spectrum at regional levels. Radio is the only medium for which the Metropolitan Region does not concentrate most of the broadcasting stations; instead, they are concentrated in Los Lagos and Valparaíso, with the largest number of stations (Subtel, 2020b).

In Chile, the rate of Internet penetration is 78 per cent (Fernández Medina & Núñez-Mussa, 2019). The most current data provided by Subtel, from September 2019, shows three companies providing Internet services to all regions, another one is concentrated in the southern zone, and six others operate at specific locations. The total number of broadband Internet subscribers nationwide is 3,434,402, with a total penetration of 17.88 per 100 people. The highest concentration of connections is in the Metropolitan Region (1,661,025), and the second-highest – though significantly lower – is Valparaíso Region (373,294). Mobile Internet has a higher impact on the total statistics, with 18,755,659 connections, of which 291,504 are neither 3G nor 4G. The total penetration rate per 100 inhabitants is 97.71, representing significantly wide access at the national level (Subtel, 2020c).

All of these combined guarantees access to online versions of most national media. Newspapers *El Mercurio* and *La Tercera* have paywalls on their web pages, but other portals, such as television channels and radio signals, are open access. In addition, there are also a series of regional portals, which correspond to a citizen media network called *Mi Voz*, alongside the *SoyChile* network, with regional content, belonging to *El Mercurio SAP*.

(F2) Patterns of news media use (consumption of news) 2 POINTS

The protests that erupted in Chile emphasised the amassing tendency for a frequent consumption of news, but it is tainted with distrust, especially for online and television news and with a small readership of printed newspapers, leaving radio as the most credible medium.

When analysing patterns of media consumption in Chile, one must consider a before-and-after 18 October 2019, when the media was publicly criticised by protesters with a call to “turn off the TV”, a critique extended to all forms of media. It was a response to the coverage of the protests, as well as increased discontentment with mass journalism throughout the years, exacerbated by the civil unrest in October.

The 2020 Reuters Institute’s *Digital News Report: Chile* (Fernández Medina & Núñez-Mussa, 2020) presents a scenario where general trust in the media is at 30 per cent, 15 points lower than the previous year. This is telling, since in 2019 it had reached 45 per cent, 8 points lower than the previous year (Fernández Medina & Núñez-Mussa, 2019). According to the report, the main source of news consumption for Chileans was online media (86%), including social media. This was followed by social media platforms alone (73%), television (66%), and finally, print (24%), which had dwindled progressively, from 2017 (46%), 2018 (40%), to 2019 (33%). While online news is the most widely consumed, only 9 per cent of users paid for it. At the same time, the most-used devices to access news are smartphones (83%), followed by computers (31%) and tablets (9%).

The social media network most widely used for news consumption in 2020 was Facebook, with 63 per cent of usage, one point lower than the previous year; this was followed by WhatsApp, with 40 per cent.

The most recent national survey from the National Council for Television shows that open access television is the preferred media for information, followed by radio and social media (CNTV, 2018a). *The Digital News Report* made digital outlets combined with social media the most-used form of media. However, both reports coincided in the importance of television. Across the full range of open television programming, informative content was the most-offered one in 2019, consisting of 20.6 per cent, which is totally produced in the country. This was 3.1 per cent higher than in 2018. Informative content was the most consumed by Chilean users in 2019 (28.6%), surpassing the previous year (25%) (CNTV, 2020b).

Informative radio stations with the largest news departments, *BioBio* and *Cooperativa*, ranked fifth and sixth places, respectively, in the radio ranking, behind entertainment music stations, with a small percentage increase in their audience between the first semesters of 2018 and 2019. Meanwhile, in the age group 15–34 years old, *BioBio* was in fourteenth place and *Cooperativa*

in nineteenth. For audiences older than 25, *BioBio* was at third place, and *Cooperativa* at fourth. Both were more commonly listened to by men than by women (AAM, 2019).

61 per cent of radio news content corresponded to current events, with informative programmes including guests, having a demand from 64 per cent of the audience. Current events information by itself – for instance, commentary and analysis – was offered against 28 per cent and 21 per cent demand, respectively. News programmes occupied 11 per cent of radio content offered and were demanded by 15 per cent of the audience (IPSOS & ARCHI, 2019).

The free print newspaper *Publímetro* had the highest weekly readership (386,920). As for paid newspapers, the most widely read was *El Mercurio* (328,808), which increases its circulation on weekends (409,161), followed by the tabloid from the same company, *Las Últimas Noticias* (268,879). Their key competition, *La Tercera*, had a weekly readership of 268,879 (Valida, 2018).

Muñoz and González (2018) show that Chileans stated they consumed little political content: 63 per cent declared that they did not watch, read, nor listen to political information on the Internet, radio, television, or newspapers (21% used only one medium, 9% two, and 4% all four). Television was the most utilised (27%), followed by newspapers (13%), Internet (10%), and finally, radio (9%). The population 18–24 years old – with higher levels of education and who identify with either the left or right wings – were more likely to use mass media to inform themselves about politics. It must be noted that the databases utilised by Muñoz and González (2018) were from 2014–2017.

The most-watched contents on television and other screens by teenagers 15–18 years old were news programmes (25%) (Antezana Barrios et al., 2018). General interest from young people in political issues was at 30 per cent, being more visible in the upper-middle class (41%) and middle class (33%) and dropping among lower-middle and poorer classes (both 25%) (Scherman et al., 2018).

Political turmoil had an impact on news consumption. During the protests, Chileans consumed news mostly in the mornings and nights. The most-used traditional media were open access and cable television, while WhatsApp and Facebook were the most-used social media platforms. Facebook positioned itself as the most influential medium, surpassing television for all targets, regardless of age, gender, and socioeconomic status, except for people over 55 years old: those 55 and older, and of higher socioeconomic status, preferred television. Magazines and print newspapers had minimal relevance (Cadem, 2020).

In October, news programmes increased their offering on television, occupying 30 per cent of total programming countrywide, 554 hours more than in September. There was also a general increase in the number of hours dedicated to television consumption; however, this was unequal regarding age and socioeconomic groups. A relevant contrast appears in the age group 25–34: within this group, people with higher earnings increased their television consumption,

across all of the population, while those with lower earnings decreased their consumption (CNTV, 2020b), as shown by Figure 1. This last group was the most active in the protests, which may provide a possible explanation to this pattern.

Figure 1 Variation in time dedicated to open access television, January–September average compared with October, 2019 (by age & socioeconomic group)



Comments: Levels of earnings go from higher to lower, ABC1 being the group with higher economic earnings.

Source: CNTV, 2020b: 39

The age group reading more digital outlets was 18–45 years old, though in the 50+ group, there was a considerable amount of consumption too. Those upwards of 35 years old listened to a lot of radio, while it was lower in younger age groups. Printed newspapers did not have wide readership, reaching a maximum of 22 per cent in the age group 45–54 (Grassau et al., 2019).

In the first week of the protests, 80 per cent of people stated they used social media to read news, while 62 per cent used WhatsApp. The number of hours dedicated to each network varied according to age, with younger people dedicating more time (Grassau et al., 2019).

Cadem survey data (2020) about news consumption during the protests reveals that higher levels of usage did not translate into greater trust in a medium, as the best-evaluated medium was radio; in second place, newspapers and online outlets; and thirdly, Facebook, which showed a growing relevance. The decrease in trust is more pronounced for open access television (dropping from 55% in 2017 to 29% in January 2020). In the same period, the increase for Twitter was considerable (14% to 30%).

Grassau and colleagues (2019) demonstrated that the most-used forms of media were also the worst evaluated by users. Television was the second-most consumed medium and was evaluated poorly, followed by digital outlets in a bad evaluation, which were the most used. Both Grassau and colleagues (2019) and Cadem (2020) showed radio as being the best-evaluated medium and being better valued by users for its credibility and informative role.

Cadem (2020) presents that the decrease in trust towards media happened across all social groups: genders, ages, socioeconomic, and geographic. One explanation given by the report for the low rating of television is that 90 per cent of the surveyed people saw it as being interested only in their earnings and increasing their audiences. This view was already evident in 2017, when the public declared their suspicions about not all the news being given, the media taking advantage of human suffering, the irrelevance of some subjects, and a political bias within them (CNTV, 2018a).

Though the protests of 2019 made the problem visible, in the case of young people, general trust in media had been decreasing throughout the years in any case. According to Scherman and colleagues (2018), in 2009, trust was at 60 per cent, against 20 per cent in 2018. This went together with diminishing trust in other institutions, such as the armed forces, the police, and the Catholic church. In 2018, radio was the most trusted by this age group, followed by open access television and social media.

Brands with higher trust indexes according to the Reuters Institute *Digital News Report: Chile* (Fernández Medina & Núñez-Mussa, 2020), were Cooperativa radio, CNN Chile, and BioBio Chile – all had an informative focus and were at the top of the survey in the previous year.

After the protests, the media sector saw an increase in their negative visibility (12% in August 2019, much lower than November's 46%). Open access television channels were the most affected; for instance, Canal 13, which before and after the crisis had 9 per cent and 52 per cent, respectively. Among the more reliable brands for users, according to the *Digital News Report*, CNN Chile went from a negative visibility of 14 per cent to 36 per cent (Cadem, 2019).

(F3) Diversity of news sources

2 POINTS

Daily journalism includes mostly official sources, with nuances varying between each publication outlet. Television is the one medium that introduces more diversity with citizen sources. The daily agenda, work rhythm, and the part and counterpart logic, sees influence in their lack of deep reflection on source selection.

Mellado and Scherman (2020) studied diversity of sources in the Chilean media. They compared the outlet, that is to say the distribution platform, as well as the medium, understood as the brand, considering that the majority owns more

than one platform. Outlets emerged more influential than the medium when it came to diversity of sources, with television the most diverse. This can be understood as its being the one that incorporated more citizen voices.

In the same study, radio was highlighted for being the outlet including more political sources. Online news stood out for including more sources coming from other outlets, without being a considerable contributor to diversity – an outcome of their economic structure and publication rhythms. Newspapers included the most non-political official sources.

However, Mellado and Scherman propose that the selection of sources can be better explained by the medium than by their outlets, considering the editorial culture and work structure of each organisation. The visibility of some sources is influenced by the political and economic stance of the medium and how they evaluated their news balance.

On average, most articles published by printed media in Chile contained two sources, usually an interview and a press release (Del Valle-Rojas et al., 2016). In this regard, the interviewed editors said they could use just the press release in the article, but they usually processed it.

Díaz and Mellado (2017) concluded that the sources with biggest presence in the news were official and governmental ones – a warning about Chilean journalists' dependency on them. The Barometer for Information Access of the National Press Association (ANP, for the initials in Spanish) shows that the five sources to which journalists resort to the most are municipalities, regional governments, Carabineros de Chile [national police], investigations police, and the Ministry or Regional Secretaries for Health (ANP, 2019).

The media houses interviewed for this research all subscribed to at least one news agency, without this being an input that defines their editorial identity. As declared by the editors, neither was it relevant when deciding what is published, except for one case that gave special emphasis to economic journalism and where, as a result, information from Bloomberg was key to the development of their content.

From the interviews, it was also understood that even if they sought balance in news coverage, it was only to search for objectivity, which is often reduced to political party representation, implying that both the government and opposition parties were represented in an article or as interviewees throughout the week. However, there was barely any search for sources that intended to reflect other types of existing diversity or those that emphasised the representation of minorities. "It allows us to move very little, we are boring. We go to the sure thing: who gives us the news", in the words of one interviewee. Other editors and journalists expressed a similar idea. This is symptomatic of a daily journalism punctuated by routines and urgency, rather than planning a strategic agenda.

There are instances of investigative and long-form journalism – but they are exceptions. These journalists have freedom to research, but only few media

houses could afford themselves the time and resources to delve deep into this form with their own teams, as well as to sustain them (see Indicators C7 – The watchdog and the news media’s mission statement and C9 – Watchdog function and financial resources).

(F4) Internal rules for practice of newsroom democracy 1 POINT

Media structure in Chile is hierarchical. Journalists can participate in the discussion of content and may advance in their careers, but the editors and directors have the power to make decisions.

In Chilean media, there is no horizontal democratic structure, either for the development of professional careers or for daily work. Editors-in-chief are selected by directors and, very often, approved by the management board. It often happens they were journalists who have had a consistent internal trajectory leading them to higher positions within the organisation, or that their trajectory in other media and the trust from the directors played a role. Through the interviews, a common observation emerged about how media organisations allowed for such different careers to be developed, in order to one day assume decision-making roles. There was no established set of rules or a specific process for hiring at these positions.

Media structure in Chile tends to be vertical, and the interviewed editors-in-chief and directors recognised that especially for contingent topics more relevant for each media, they involved themselves in the production and decisions related to content. In their daily work, journalists had the possibility to propose topics and decide how to cover them, even though they depend on the editors’ dispositions (see Indicator F5 – Company rules against internal influence on newsroom/editorial staff). The mechanisms for this process vary across media forms and organisations, and type of content; daily journalism has less participation from reporters than long-form reporting, where proposals usually come from the journalists themselves.

Regarding daily agenda, what emerged as commonplace is that the editor assigned tasks and supervised the process, without an established formal mechanism. The latter gave this aspect of journalism several variations, depending on the journalists’ experience, the editor’s trust in them, the topic, or even their shift. For instance, according to our interviewees, journalists working on weekends had more chances of taking decisions because editors in those shifts were usually reporters in the rest of the week.

In every case, it was the editor, or even the director, who made decisions for aspects such as titles, cover pages, central issues, and key interviewees, and dealt with the political and social consequences of an article. While this

is a hierarchical relationship, they also assumed responsibilities for protecting journalists from complaints that the article might generate, as well as defending reporters and editorial decisions in front of management boards, whose tension with the newsroom staff varied for each individual medium.

Women reporters did not feel a gender gap and observed there was recognition for the individual abilities of each journalist. However, a gender gap was evident for women journalists when it came to reaching editor-in-chief and director positions (see Indicator F8 – Gender equality in media content).

(F5) Company rules against *internal* influence on
newsroom/editorial staff

2 POINTS

Internal pressures exist between management boards and editors-in-chief and directors, but these do not directly reach journalists, who confirm the exercise of freedom in their work. The 2019 protests implied an exceptional internal pressure within different forms of media.

Perceptions of inner pressures were different between interviewed journalists and those in a decision-taking position as editor-in-chief or press director. Journalists stated they do not feel inner pressures from owners or management boards and testified to having no contact with them. They were aware of the view that owners have on current affairs and that if there were orders, these would reach them through their editor, on whom they recognise pressure being exerted. This is all understood as part of the job.

All the interviewed journalists considered that they could freely exercise their profession. Even when they had differences with their editors, their own ethical criteria in the reporting process was the most important ground to close the conversation or take decisions, without consequences to their professional development. Their answers were coherent with the data gathered by Mellado (2014), showing that 62.3 per cent of journalists considered they had a high level of freedom to make decisions about the news, 27 per cent considered they had moderate autonomy, and 10.6 per cent stated they had low levels of autonomy. “If there are differences, there is a margin to discuss this. The journalist has power to make decisions, because they are the ones on the ground reporting on the story”, said one of the interviewed reporters. This agrees with Greene González (2017), where journalistic ethics appeared as an important value for Chilean reporters.

Although the interviewed journalists said they had the possibility to dialogue with their editors, they also recognised that the editor had the final say for titles and content. A recent case setting a union against editors showed that this inner pressure can happen (El Dínamo, 2019), much in line with what research shows (Gronemeyer, 2002; Mellado, 2014; Otano Garde & Sunkel, 2003).

Journalists appeared to know that the director or editor-in-chief is a person trusted by the owners. They assumed that conversations between them impinged upon editorial directions for the journalists. This is in line with research by Sapiezynska, Lagos, and Cabalin (2013), who concluded that internal pressures are generated from these conversations. Although 76.9 per cent of Chilean journalists valued leadership inside their newsroom, this was centred on the person, not their company's rules (Yez, 2011).

Among interviewees, the ones who experienced significantly more internal pressures were the editors-in-chief and directors. The tension levels varied also among the different media forms. In some cases, they mentioned having management boards being more open to dialogue, while in other interviews, press directors or editors-in-chief saw themselves defending the journalistic autonomy of their team. Therefore, their role is fundamental in dealing with such types of pressure. Here, the different levels of command within media must be considered, since Gronemeyer (2002) stated that editors felt more autonomy than journalists did. Within our interviews, we had some editors-in-chief and directors who had a direct relationship with management boards and corporate levels. Therefore, their differences with medium-level management, who only makes editorial decisions, must also be considered.

Such a view agrees with the results from Greene González (2017), who concluded that the main internal pressure faced by Chilean journalists comes from the corporate level, which corresponded with media company interests. In the study by Yez (2011), 38.1 per cent of journalists declared they were "encouraged" to cover a story by the owners or the director. Our interviews revealed the process is not direct, but with the editor as a mediator. Equally, this was not a decisive feature in daily routine, because 76.6 per cent of Chilean journalists reported not having received criticism or internal pressure from their editor after covering a story against the financial interest of the owners of the media company (Yez, 2011).

For the interviewees, direct pressure from commercial areas to reporters was absent, and they considered it as not affecting their autonomy (see Indicator F6 – Company rules against external influence). A most common aspect to these areas is their being in different physical spaces and functioning separately from the newsroom.

One form of tension appearing from the interviews was from editors-in-chief and directors, who, after the 2019 protests, in turn received more pressure from their management boards, resulting in that between journalists and editors. Most journalists received instructions: "Since the 2019 protests there is more preoccupation from above, from the editors. They have asked for facts, not opinions", mentioned one journalist. Another interviewee explained:

When the protests started, we all received a message saying that we would only cover the facts, but we were not going to focus on the police repression.

This decision made us uncomfortable as journalists, because we saw what was happening on the streets, and in the end, we did not respect it much.

In this regard, the collective experiences of journalists and editors represented the generational gap on how the protests could be covered. “For the first time in our medium’s history we had to exercise editorial control. Our journalists were from a younger generation, were on the streets, and felt effervescent for the historical moment, leaving other perspectives out”, commented an editor-in-chief. “Those of us from previous generations are more impartial, disciplined; younger people express themselves in social media”, said a journalist. This last aspect accounted for the discussion regarding the different ways of understanding the function of journalism in a politically tense context among different generations.

(F6) Company rules against *external* influence on
newsroom/editorial staff

2 POINTS

Chilean media depends highly on advertising, which has led to scenarios of low revenue resulting in firing of journalists and editors. Despite this, journalists defend their autonomy from commercial interests.

In Chile, media functions as an industry, depending on advertising for its subsistence, which is also true for the public television channel. In 2019, some newspapers and online media started trying subscription models, but at the time of writing this report, in general, advertising was still the main economic support and income for media.

Between 2019 and 2020, the amount of monthly advertising fell significantly, due to both the economic crisis caused by the 2019 social unrest and the Covid-19 pandemic. When comparing advertisers’ investment in media between May 2019 and May 2020, there was a variation of -67.5 per cent in print and online press, -42.3 per cent in radio, -23.2 per cent in paid television, and -21.0 per cent in open access television (Megatime, 2020). This has dealt a critical blow to the media, which lost advertisers, including one case that became public, because there was an ideological difference between the company that provided advertising revenue and the coverage given to the protests. Consequentially, this economically precarious scenario has resulted in the firing of multiple journalists and editors within the industry, which was already dealing with a previous crisis of redundancies.

Before the crisis intensified, data from previous research stated that 26.3 per cent of Chilean journalists reported being asked to cover a story related to advertisers, and the two biggest problems they see for the practice of journalism are the greater concern about reaching audiences than quality (26.7%) and too

much emphasis on economic achievement (23.1%) (Yez, 2011). In the current critical context, testimonies of the interviewees remain consistent with these numbers. Reporters were aware of the commercial reality of the industry, but in their daily work, they said they did not have any dialogue with commercial areas – and did not even know them. “I find out who the advertisers are when I read the medium”, mentioned one journalist. However, while they did not consider it to be a direct or habitual pressure for journalistic work – nor something that could be generalised for the Chilean case – some interviewees did mention exceptions. In one such case, they admitted to taking special care when giving unfavourable coverage to one of the sponsoring companies. In another, the production of “advertorials” was mentioned as a business strategy adopted in order to reduce effects of the current economic crisis. Therefore, while commercial aspects may not exert a direct pressure on journalists, the medium’s economic subsistence emerged as an unavoidable concern.

Directors and editors-in-chief are more directly exposed to all types of pressures (as presented in Indicator F5 – Company rules against *internal* influence on newsroom/editorial staff). While they recognised such pressures did not always exist, it varied from case to case, since it largely depended on the internal rules of the medium, as well as the temper and personality of the head of the specific newsroom in question. While one of the editors-in-chief stated they preferred to lose an advertiser before losing their autonomy, and a director commented that considering sponsors inside the newsroom would be a “mortal sin”, others said that due to their economic dependency on advertising, they have had to cede to and privilege commercial aspects, for instance, when a topic might potentially damage a sponsoring company. At the same time, they concurred on the relevance of protecting certain stories – giving the medium more credibility – from any kind of pressure.

(F7) Procedures on news selection and news processing 2 POINTS

Routine is the main element when selecting news, with relatively small space for reflection. Decisions are mainly taken in editorial meetings and the conversations between journalists and editors during the day.

An ethical code from the national journalism association, Colegio de Periodistas, does exist. But neither the document nor the entity was considered a referent by the media. In their interviews, they asserted it was a political entity, hindering journalistic labour and situating itself in opposition to the media, rather than being a true contributor to their work.

Three of the interviewed media houses stated they had stylebooks. The public television channel explained that it exists, and each journalist receives

it, but also that its use was reserved only for critical situations. However, for another, it was reported as a fundamental tool, updated yearly, and it could imply a sanction for journalists not respecting it. In this case, an abridged version was displayed in the editorial meeting room. Generally, there was a certain consensus that journalists gradually learnt and knew the identity of the medium where they work. Therefore, either with or without a document, there were issues and ways of addressing them that respond to that identity, which are developed on the job.

In every case, the most relevant factor for defining the medium's identity in its news selection was the decision taken by the editor together with the journalist. Editorial meetings, often more than once a day, are an established part of the daily routine for most media, where the staff decides on what news would be covered. Also, depending on the format – for instance, in-depth reporting or a live dispatch on television – journalists and editors agreed that the dialogue during the day is vital, whether it happens remotely or inside the newsroom. Such conversations were considered essential to internal deliberation. It is where, for instance, they defined how to treat issues of equality, the plurality of sources, and the language and focus of the news.

This, however, does not automatically imply high levels of reflection, and functions in the same way as the daily editorial meeting, answering to the agenda and urgent matters of the day. Studies on written and televised news in Chile (Gronemeyer & Porath, 2015; Mujica & Bachmann, 2015; Valenzuela & Arriagada, 2009) have shown that there is a tendency towards homogeneity in news selection. Explanations for this are that the media in general answers to routine, invitations to common briefings called by authorities or other public figures through communication agencies, journalists covering the same area for too long, and solidarity among colleagues from different media working on the same topic. The interviewed journalists and editors working in daily coverage recognised that routine has a heavier weight than strategic reflection about content. One editor interviewed commented: “The guidelines for daily reporting are constructed usually by heart. It is not as if we have heavy discussions in the mornings, because there is no time. The topics are the obvious ones”.

There are indications that digital media republishes content from other media, and therefore, it does not make a substantial difference in the news selection process (Mellado & Scherman, 2020). However, it was observed that media incorporating more investigative journalism intended to differentiate themselves and introduce topics in the agenda. While content published in social media helps them to be up to date with public discussion, both editors and journalists stated they were careful when checking this information. In interviews, they asserted a critical view against polarisation, uncivility, and disinformation occurring on social networks, therefore considering them less relevant than other mechanisms for the generation of news.

(F8) Rules and practices on internal gender equality 1 POINT

There is a notorious gap in participation in higher positions, where women face greater challenges to work than men. There is also a difference in salaries between genders.

The *Global Report on the Status of Women in News Media* (IWMF, 2011) showed that in the Chilean media industry, the ratio of men to women was 2:1, a split even more noticeable in women's participation within management boards and higher positions of command. This agrees with the general national reality (CNN Chile, 2020b). Only in junior and senior professional levels inside the media industry – such as in administration, sales, and finances – is there a certain gender balance.

Table 1 Occupational level of men and women journalists in Chile

Occupational level	Men (#)	Men (%)	Women (#)	Women (%)
Governance	32	91.4	3	8.6
Top-level management	16	76.2	5	23.8
Senior management	38	92.7	3	7.3
Middle management	53	77.9	15	22.1
Senior-level professional	364	58.1	262	41.9
Junior-level professional	465	66.8	231	33.2
Production & design	465	79.4	121	20.6
Technical professional	512	87.8	71	12.2
Sales, finance, & administration	389	43.8	500	56.2
Other	51	81	12	19
Total	2,385	–	1,223	–

Source: IWMF, 2011

From the analysis of this data by Lagos and Mellado (2013), it can be concluded that there are no significant policies within the different media companies to promote gender equality, nor for enhancing women's careers inside the newsroom. This reality is further confirmed with data from the Global Media Monitoring Project (2015), which stated that in both television and written journalism, 41 per cent of journalists in Chile are women, and 59 per cent are men. Specifically for television, 35 per cent are women and 65 per cent men, while in newspapers, women make up only 23 per cent of journalists, compared with men's 77 per cent.

The women journalists interviewed stated they did not feel a notorious gender gap in the journalistic environment, but they did in decision-making positions. One summarised: "In this medium, the editor is a man and all the journalists

are women”. A female editor commented: “When I arrived, there were no women in editorial positions. This has been one of my preoccupations, adding more women editors”. A woman journalist, from the same medium, added: “As for women reporters, there is no problem, but there is a lack of women editors. It is a man’s world. This happens because of the schedule. There is a lack of space for women there”. The interviewed women editors recognised difficulties ranging from questioning their work and their positions, to their relationship with the management board and external sources; therefore, they face higher challenges in validating themselves in a position of command. One commented: “My first year was very difficult. I had problems with my peers of the type: ‘*Who are you to be my boss?*’” These women directors and editors-in-chief have been opening positions for other women journalists to rise in the hierarchies of their media.

Table 2 *Annual salary of journalists in Chile by gender (USD)*

Occupational level	Men (avg. low salary)	Men (avg. high salary)	Women (avg. low salary)	Women (avg. high salary)
Governance ^a	1,311.97 (N = 3)	4,808.32 (N = 3)	2,412.55 (N = 3)	2,412.55 (N = 3)
Top-level management	68,553.44 (N = 3)	92,935.11 (N = 3)	35,231.94 (N = 2)	50,331.35 (N = 2)
Middle management	30,749.72 (N = 7)	69,729.68 (N = 6)	36,903.73 (N = 6)	57,134.16 (N = 6)
Senior-level professional	13,802.11 (N = 8)	46,284.52 (N = 8)	17,928.84 (N = 7)	49,617.17 (N = 7)
Junior-level professional	10,556.89 (N = 7)	38,014.19 (N = 6)	9,530.93 (N = 8)	28,175.56 (N = 8)
Production & design	8,365.47 (N = 8)	19,824.49 (N = 8)	7,568.86 (N = 5)	29,866.70 (N = 5)
Technical professional	6,966.79 (N = 5)	22,714.91 (N = 5)	10,249.47 (N = 3)	17,300.77 (N = 3)
Sales, finance, & administration	11,577.69 (N = 7)	48,230.51 (N = 6)	10,154.03 (N = 9)	39,529.64 (N = 9)
Other	7,382 (N = 5)	17,878.01 (N = 5)	27,266.07 (N = 2)	44,888.45 (N = 2)

Comments: N = number of companies.

^a “Salaries are noticeably low for both women and men in the governance level, suggesting that service on boards of directors may be mainly voluntary or paid by small honoraria” (IWMF, 2011: 166).

Source: IWMF, 2011

In the area of salaries, the *Global Report on the Status of Women in the News Media* (IWME, 2011) shows that in most positions, men have higher salaries than women. There are some exceptions, as in the senior professional level, where the participation gap is narrower, corresponding with women reporters and news presenters (see Table 2). This, again, is consistent with the national reality in other work environments (GfK Adimark, 2020). Nevertheless, from the interviews conducted, what emerges is that in positions corresponding to senior and junior levels, negotiations are individual, and other factors such as experience and professional capacity are also weighed, adding to our understanding of why the wage gap is smaller at these levels.

Maternity is an issue arising when discussing women's role in media. Media follows parental leave laws, which rule at a national level, allowing their contracted employees to return to their work positions. However, these are not always fully respected, as evidenced by some cases becoming public due to this (Sepúlveda Pozo, 2018). The interviews revealed that individual maternity experiences varied according to the empathy of each employer. In some cases, more allowances such as a home office or flexible schedule are practiced, while in others, such measures are not adopted.

Regarding harassment, the *Global Report on the Status of Women in the News Media* (IWME, 2011) shows that internal policies are often irregular: 56 per cent of all Chilean media do not have regulations in place, while 44 per cent do. While this was not a prominent topic in the interviews, we can confirm that for female journalists, support in confronting this type of situation is dependent on the criteria of specific employers and their direct bosses.

Another issue has to do with the gender gap regarding the type of topics assigned, especially when considering that Chile is a country of natural disasters, and that it recently experienced a wave of protests. One of the editors said:

We need to have a cultural change. That is a reflection we have done within this medium. For emergencies, when you think about who to send, you think of a man. In this medium there are more women than there are men, and we sent men to cover the protests. We have a debt there.

(F9) Gender equality in media content

0 POINTS

The difference in sources and roles assigned to men and women is noticeable in Chile. This issue concerns academia and several entities. Despite available guidelines, it is still not apparent in the journalistic profession.

Data from the Global Media Monitoring Project (GMMP) (2015) shows that in both written and television media, 68 per cent of news subjects are men and 32 per cent are women. Separated by type, in television, 35 per cent of

the news subjects are women and 65 per cent men, and in print, only 23 per cent are women against 77 per cent men, as news subjects. Table 3 highlights the professions of sources called to speak on the news. There, we can see that women surpass men only in less-qualified positions.

Table 3 *Occupation of news subjects in Chilean media, by gender (per cent)*

Occupation	Female	Male
Police, military, paramilitary, militia, fire officer	0	100
Sportsperson, athlete, player, coach, referee	0	100
Health worker, social worker, childcare worker	0	100
Criminal, suspect, no other occupation given	0	100
Lawyer, judge, magistrate, legal advocate, etc.	9	91
Businessperson, executive, manager, stockbroker	10	90
Government, politician, minister, spokesperson	16	84
Government employee, public servant	20	80
Office or service worker, non-management worker	22	78
Academic expert, lecturer, teacher	30	70
Science or technology professional, engineer, etc.	33	67
Activist or worker in civil society organisation, NGO, trade union	33	67
Student, pupil, schoolchild	38	63
Doctor, dentist, health specialist	50	50
Media professional, journalist, filmmaker, etc	50	50
Other, only as last resort & explain	50	50
Villager or resident – no other occupation given	58	42
Tradesperson, artisan, labourer, truck driver, etc	67	33

Source: GMMP, 2015

Hudson's (2016) research, analysing the presence of women as sources in traditional Chilean media in 2014–2016, coincides with this. In her research, the ratio between male and female sources is 4:1, and she concludes there is considerable inequality in the representation of women in “hard news”. This, according to Hudson, corresponds not only to journalistic cultures, but also to the general reality of the country. Table 4, in such regard, compares media presence with the participation of men and women in three different areas of coverage.

Table 4 Coverage area of news source, by gender (per cent)

Area	Female participation	Female media presence	Male participation	Male media presence
Politics	21.58	20.40	78.42	79.60
Economics & business	12.32	10.40	87.68	89.60
Science & technology	41.36	32.20	58.64	67.70

Source: Hudson, 2016

Zurita Prat (2017) studied newspaper covers and found that 77 per cent portrayed men, and only 18.4 per cent women; 4.6 per cent portrayed both genders. This study also highlighted how women appear slightly more often in tabloid covers than legacy media. As for topics, covers where women appeared frequently include politics, show business, crime news, and society. Men appeared in covers related to politics, sports, crime, and international news. It is important to consider it was an election year, and that the president of Chile was then Michelle Bachelet, which may explain the prominence of women in politics.

The main role given to women in Chilean media is representing popular opinion, as well as giving their personal experiences, against authority roles – such as spokesperson or expert – which are often accorded to men (GMMP, 2015).

Table 5 Role of news subject by gender (per cent)

Role	Female	Male
Spokesperson	16	84
Expert or commentator	24	76
Eyewitness	47	53
Personal experience	57	43
Popular opinion	64	36

Source: GMMP, 2015

Antezana Barrios (2011) identifies feminine roles within Chilean news shows; for women presenters, roles are “the professional woman” and “traditional lady”, while as sources, the roles are “the female victim”, “sensual woman”, and “professional woman”. This represents a rather limited framework for roles, where the male gaze dominates.

Coverage of women in Chilean media has also been a concern for academia. One of the focuses has been the coverage of femicides, where Antezana Barrios and Lagos Lira (2015) analyse a narrative associated with these stories. They demonstrate how violence against women is normalised in the search to justify

the culprit's actions in the story, questioning the woman's autonomy. The same researchers studied the coverage of abortion in Chile (Antezana Barrios & Lagos Lira, 2019) where, equally, the press frames women negatively.

Gender equality in media coverage is a concern for several entities in Chile:

- UNESCO, in conjunction with Chilean universities, published the handbook *Por un periodismo no sexista: pautas para comunicar desde una perspectiva de género* [For a non-sexist journalism: Guidelines to communicate with a gendered perspective] (Alberti Garfias et al., 2010).
- The government also published a guide for non-stereotypical communication (SECOM & SERNAM, 2016).
- The collective of women communicators *Mujeres en el medio* [Women in the media], together with the Gender and Equality Observatory, published *Guía de definiciones y prácticas periodísticas para medios no sexistas* [Guide of definitions and journalistic practices for non-sexist media] (Gutiérrez González & Maureira Martínez, 2018).
- The National Television Council commissioned a study about good gender practices on the international level (Lagos Lira, 2010) and published a guide with advice on how to medially deal with subjects of sexual orientation and gender identity.
- The National Association of Women Journalists created a handbook to promote gender equality in media (ANMPE, 2020).
- The NGO *Hay Mujeres* [There are Women], seeks to increase the participation of women experts in media.

The information extracted from the interviews shows these efforts are yet to permeate newsrooms. There are no policies in this regard, and it is up to each editor and journalist to choose sources, with them prioritising the balance of different political tendencies over other efforts, such as women's representation.

(F10) Misinformation and digital platforms (alias social media)

2 POINTS

Having teams dedicated to fact-checking is still an emerging process within the Chilean journalistic routine. The social protests of 2019 promoted and accelerated the establishment of these practices.

A key consequence of the 2019 protests in Chile was a wave of misinformation. The seven categories of information disorder identified by the NGO First

Draft (2019) were present in content shared from and about the protests. With people starting to use the term “fake news” in daily conversation, fact-checking as a journalistic genre had important growth: from 2 active fact-checking projects, there was a jump to 17, among them professional newsrooms, and both university and independent initiatives. The fact-checkers behind these projects recognised the urgent necessity of the context (Núñez-Mussa, 2019). At the time of writing this report, 13 of them were still active.

In parallel, the media began to introduce fact-checking practices for their published content with more intensity than ever before, as they were particularly observed and questioned about their coverage of the protests. “Everyone was seeing intentionality where there was none. Our challenge was very hard, because people were very angry”, mentioned one editor. At the same time, the media continuously received user-generated content, especially audiovisual material. Because of this, there was special preoccupation with monitoring television channels, due to a previous case where a station, after the 8M march, had shown out-of-context images corresponding to archive footage.

Despite all the precautions taken by the media after the 2019 protests, part of the audience expressed an attitude of distrust towards the content. The most notorious example was one video, sent by users and broadcast by the public channel, which showed an intentional fire being set on the door of a bank. This video was widely disputed by other media, social media, and the national journalism association, even though the channel broadcast a verification process of it.

Some sections of the media have established handbooks with protocols to prevent the publication of misinformation, and they made temporary changes to their teams, in order to dedicate more journalists and time to this work. For instance, one organisation increased its internal fact-checking capacity from one to four people exclusively, with a policy of not publishing anything without passing through this process. After the four most intense months, two of these four people continued their work as fact-checkers. A similar experience was seen across all media organisations, with some variations. One journalist said: “We started to take fake news seriously during the 2019 protests. After a few days, we created a fact-checking team, which not only produced publishable articles, but also verified any dubious information received in the newsroom”. All the interviewed editors argued that they preferred losing a scoop over publishing content that is not fact-checked, and that they care, especially, about content received from social media.

(F11) Protection of journalists against (online) harassment 1 POINT

The protection of journalists is irregular, depending on each employer and on the context.

As of 2020, Chile occupies the 51st place out of 180 countries in the World Press Freedom Index from Reporters Without Borders (2020). According to the index, Chilean journalists are “vulnerable”, both regarding the protection of their sources, and when reporting certain issues like corruption cases or the Mapuche conflict. The report adds that in 2019, after the social upheaval, several journalists were attacked while they were covering the protests. The interviewed editors and journalists corroborated that they implemented measures such as reporting with mobile phones instead of microphones and cameras, without identifications linked to their media, and parking their cars away from the events. One journalist stated:

There were a lot of aggressions against us since the protests started. There were colleagues who were grievously upset by this, and as a result, the media’s administration organised workshops with psychologists. There were cathartic moments in the team chat group. Some of them were very affected by the comments they received in social media.

Reactions to these attacks, whether they happened in person or online, varied (as mentioned in Indicator F8 – Rules and practices on internal gender equality, the same happened with sexual harassment, with decisions to back up journalists depending on employers and higher command positions). Referring to sources calling to criticise their coverage, a journalist commented, “Many times you do not find out about this, but the editors defend you”. In some media houses, when the work of one journalist is in question, the medium publishes other content backing up the previous work. In other cases, concerning well-known journalists, the organisation would give them space to defend themselves on air or in the paper, may simply not react or, alternatively, the journalist could do it through their personal social media accounts.

One interviewed editor reported that she takes special care to back up her journalists, because when she was a reporter, she experienced being attacked on social media and by sources, at the time feeling she did not receive the support needed: “Other journalists defended me personally”. Another editor, at the command position, considered that support means taking no part in criticising the journalist. Meanwhile, another editor reflected on this and commented: “Maybe we should begin taking care”.

Two editors mentioned they saw zero contribution in making available the opportunity to have comments made on their websites, both disabling that section and using the same adjective for them: “vicious”. One said: “We used to have a journalist dedicated to moderating comments, but a few years ago we

decided to close comments altogether”. There is also consensus from journalists and editors on their view that the national journalism association, under their current administration, is an entity that attacks rather than protects them.

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 1 POINT

A highly concentrated market with media holdings.

For the last decade, media concentration in Chile has been a topic of concern for academics and observers of the industry (see also Del Valle-Rojas et al., 2011; Godoy, 2016; Guerra, 2019; Mayorga-Rojel et al., 2010; Monckeberg, 2009; Sunkel & Geoffrey, 2002). This became one of its defining characteristics, and as a result, Chile stood out among other Latin American countries in this aspect (Becerra & Mastrini, 2017), particularly for print, although it also demonstrated high indexes of concentration in the television market. Noam (2016) measured the concentration of the market share among the top four firms and found that Chile ranks 4 of 30 countries, with over 90 per cent concentration. In the same study, for the Herfindahl-Hirschmann Index – measuring market concentration, going from most to least concentrated in all media markets – Chile ranks 11 of 30 countries. Within this analysis, Chile has a little over 3 points out of 10, in a range going from 2.5 upwards; this is considered a high level of concentration.

As for plurality of content, the Noam Index (Noam, 2016) gave Chile less than 2 points, placing it 14th among 30 countries, from most to least pluralistic (the index ranges 0–10; the higher the number, the lower the pluralism).

As for cross-concentration, that is to say, actors being present in more than one media industry, the Power Index – combining the results from Herfindahl-Hirschman Index, concentration ratio of the four largest firms, and Noam Index – shows that Chile ranks 12 among 30 countries, with an index close to 4 out of 10. Additionally, the study shows that the country has over 60 per cent foreign ownership in its media market and less than 10 per cent public ownership.

The 1980 Constitution forbids state monopoly for media and allows the entrance of private companies to the television market. The law “on freedom of opinion and information and the exercise of journalism” (Ministry Secretary General, 2013) includes pluralism as a value and defines it. This law establishes the liberty of different actors to edit, establish, and sustain media organisations or companies and allows foreign property for radio within a maximum of 10 per cent participation. Exception is granted as a principle of reciprocity if, in the country of origin of the investor, a Chilean can access the same or higher property of radio stations or television channels. Owners of media houses have

not followed this rule strictly, as in the case of radio stations bought by the Prisa group, without any subsequent sanction (Anguita Ramírez & Labrador Blanes, 2019). There is also a duty to be transparent and account for changes in ownership of media to the Office of the National Economic Prosecutor. This, as opposed to the Tribunals for Free Competition, was established as the entity in charge of ensuring free competition in the case of media companies after a modification to the original law.

The law “enabling the introduction of digital terrestrial television” (Ministry of Transport and Telecommunications, 2014) modified the National Television Council and accords the entity a role of safeguarding the inner plurality of the television system. Further, it understands the radio-electric spectrum as a national good, and therefore, not attributable to one person: concessions are temporary, and the State must be paid for their use. This law does not allow an owner to have more than one national open access television concession in VHF, except for the public channel. However, they can also opt to own a digital land-based signal UHF. For everything else, the media market falls under the law for free competition.

Advertising investment has, during and since 2018, dropped for every form of media, except digital outlets, where there was an increase. Table 6 shows that most advertising in the market is concentrated in digital media, followed by open access television (AAM, 2020).

Table 6 *Advertising share by media, 2018–2020 (per cent)*

Media	2018	2019	2020
Television	28.8	27.3	25.3
Paid television	8.9	6.4	5.8
Newspapers	14.9	11.6	9.6
Magazines	1.3	0.6	0.3
Radio	8.8	8.7	8.1
Street	14.4	14.8	14
Cinema	0.5	0.3	0.2
Digital	22.4	30.2	36.6

Source: AAM, 2020: 4

The Chilean media market has among its main actors several media holdings, shown in Table 7.

Table 7 Chilean media holdings

Holding	Media and other companies
Edwards Group and El Mercurio SAP	<i>Print:</i> El Mercurio (newspaper, supplements, & magazines); Las Últimas Noticias (tabloid); La Segunda (evening newspaper); HoyxHoy (free newspaper) <i>Book Publishing:</i> El Mercurio Aguilar <i>Online:</i> The digital version of the print newspapers & magazines; Emol; SoyChile <i>Radio:</i> Digital FM; Positiva FM; Radio Universo <i>Regional newspaper companies:</i> Gestión Regional de Medios S.A.; Empresa El Mercurio de Valparaíso S.A.; Empresa Periodística El Norte S.A.; Sociedad Periodística Araucanía S.A.; Diario El Sur S.A. (See Table 8 for each regional newspaper.)
Consortio Periodístico de Chile (Copesa)	<i>Print:</i> newspaper (La Tercera) <i>Online:</i> LaTercera.com and its online products; LT Pulso; Paula; Icarito; Culto; Mouse; Glamorama; Biut; LaCuarta.com <i>Radio company:</i> Grupo Dial <i>Radios:</i> Duna 89.7; Paula <i>Distribution company:</i> Meta S.A.
Bethia Group (72.5%) and Discovery Inc. (27.5%)	<i>Company:</i> Megamedia <i>TV:</i> Mega <i>Cable TV:</i> Mega +; Etc...TV (70% belongs to Megamedia and 30% to Etc...medios) <i>Radio:</i> Infinita; Carolina; Romántica; Tiempo; Disney
Luksic Group	<i>TV:</i> Canal 13 <i>Cable TV:</i> 13 C; REC TV <i>Online:</i> 13.cl; T13.cl; Ar13.cl; Factormujer.cl; Horizonte.cl <i>Shop:</i> Bazar 13 <i>Streaming apps:</i> 13 Now; T13 móvil; Tele13 Radio <i>Radio:</i> Tele13 Radio; Oasis; Play; Sonar <i>Podcast:</i> Emisor Podcasting
BioBio Comunicaciones S.A.	<i>Radio:</i> BioBio Concepción; BioBio Santiago; El Carbón; San Cristóbal FM; Punto 8 <i>TV:</i> BioBio TV; Canal 9 BioBio TV <i>Online:</i> BioBio.cl; Página 7 <i>Print:</i> La Tribuna (newspaper)
Prisa Group	<i>Company:</i> Iberoamericana Radios Chile <i>Radios:</i> Imagina; Concierto; Futuro; Pudahuel; ADN; RadioActiva; Rock&Pop; FMDos; Corazón; Los40
Warnermedia	<i>Cable TV:</i> CNN Chile; TNT Sports
ViacomCBS	<i>TV:</i> CHV
Albavisión	<i>TV:</i> La Red; Telecanal; Telecanal Talca; Telecanal Santa Cruz
TVI Group	<i>Cable TV:</i> Via X; Via X 2; ARTV; Zona Latina

Comments: Excluding those owning just one or two media, independent of their role within the market.

Source: based on public information

Considering the whole of the media market, the Bethia Group concentrates most of the advertising (with 30–40%), followed by the Luksic Group (10–20%), the Edwards Group and Copesa (both 5–10%), and the Prisa Group (0–5%) (FNE, 2019), representing how one key actor leads the proportion of total advertising in the realm of television and radio products.

If we consider media markets separately, for newspapers, *El Mercurio* has an average circulation of 123,687 copies throughout the week, surpassing its competitor, *La Tercera* (weekly average of 77,478 copies) by a wide margin (Valida, 2018); this is even bigger after Copesa reduced its circulation in 2021. However, regarding newspapers, there has been a change in the business model. Both Copesa and El Mercurio SAP began boosting digital subscriptions in 2019, making them compete with other free and independent actors. Therefore, there is an absence of sufficient data to precisely understand the role they play within the digital market regarding readership and subscriptions.

In 2016, the Herfindahl-Hirschman Index for television market shows a concentration of 2,314. This is significantly high considering that the Justice Department and the Federal Trade Commission in the United States declare that a market is highly concentrated when it reaches 2,500. An explanation for this is the emergence of Bethia Group as a strong actor in a market facing an economic crisis and taking a big share of the audience and the advertising (Julio, 2017). The contents offered by television channels are equal, without any of the channels going over 20 per cent (CNTV, 2020b). Among the cable companies, the market is shared between Vía Trans Radio Chilena – VTR (34.2%), Movistar (21.3%), DIRECTV (18.9%), Claro (13.5%), and others (12.2%) (Julio, 2017), demonstrating a competitive marketplace.

For the radio market, Prisa Group received the largest number of radio commissions at 10, twice as much as the Bethia Group's 5, and, thereby, concentrating the most. This is consistent with investment in advertising. While Prisa has a higher investment, between 30–50 per cent, the two larger groups competing in radio, Bethia and Luksic, hold between 10–20 per cent. The Chilean Communications Company was not included in Table 7 because it only owns Radio Cooperativa, with 10–20 per cent of investment, followed by Copesa, with 5–10 per cent. Finally, BioBio and El Mercurio SAP account for 0–5 per cent of the advertising market. Regarding audiences achieved by each of these companies' radios, there is an equal percentage relationship, but Copesa exchanges its position with the Chilean Company of Communications (FNE, 2019).

The native digital landscape has a variety of actors of different scales, like Ciper Chile, Interferencia, El Dínamo, El Mostrador, El Desconcierto, Cambio 21, and so forth. This, alongside others with print and digital outlets like The Clinic and El Periodista, nevertheless, provides a diversity of ownership in the media market.

(E2) Media ownership concentration regional level 2 POINTS

One company dominates newspapers, but media ownership is diversified at the regional level.

Chile has 16 regions. In the newspaper market, among the 63 periodicals identified for this report, 34 belong to the regional newspaper network of El Mercurio SAP; of these, 21 are directly owned by it and for the rest, it acts as an advertising agent. If we consider only the newspapers owned by El Mercurio SAP, through its local companies, it holds 33 per cent of the regional print market – it is the only one to achieve this level of concentration. A network of online news outlets called Soy Chile, one per region, complements its print publications.

For television, the public channel TVN has a network of nine regional offices: Antofagasta, Atacama, Coquimbo, Valparaíso, O'Higgins, Maule, Bío-Bío, Araucanía, and Austral. These units provide information to the central station in the capital and broadcast their own news programmes. This means that it is the only transversal actor present in several regions of Chile with local content.

The media holdings with higher impacts on the market, such as Bethia and Luksic Groups, have put their efforts in products with a national vocation, leaving space for entrepreneurial projects in different regions, whether from individual efforts or small groups whose focus is to develop content about what happens outside Santiago. The profiles are diverse. There are advertising firms that also own radio channels, start-ups like Mi Voz – a network of citizen journalism outlets focused on each region – and bigger companies like BioBio Comunicaciones. The latter is very strong in the BioBio Region, with its newspaper, television, and radio channels. It has expanded its brand to Santiago and is steadily becoming one of the most trusted brands for news consumption at the national level, as shown in the *Reuters Institute's Digital News Reports* (Fernández Medina & Núñez-Mussa, 2019, 2020). CNTV and Subtel allow the concession of regional and low-range stations, bringing considerable diversity to the media map with small projects.

Table 8 *Regional products of Chilean media holdings*

Holding	Media and other companies
Grupo Edwards and El Mercurio SAP (north to south)	<i>Regional newspaper companies:</i> Gestión Regional de Medios S.A.; Empresa El Mercurio de Valparaíso S.A.; Empresa Periodística El Norte S.A.; Sociedad Periodística Araucanía S.A.; Diario El Sur S.A. <i>Newspapers:</i> La Estrella de Arica; La Estrella de Iquique; El Mercurio de Antofagasta; El Mercurio de Calama; La Estrella de Antofagasta; La Estrella de Tocopilla; La Estrella del Loa; El Diario de Atacama; La Estrella del Huasco; El Líder de San Antonio; El Mercurio de Valparaíso; La Estrella de Quillota; La Estrella de Valparaíso; Crónica Chillán; El Sur; La Estrella de Concepción; El Austral, el diario de la Araucanía; El Diario Austral, Región de los Ríos; El Austral, el diario de Osorno; El Llanquihue; La Estrella de Chiloé <i>Associated newspapers:</i>^a El Día; El Ovallino; El Andino; El Observador; El Trabajo; El Rancagüino; El Centro; La Prensa; La Tribuna; Las Noticias; El Divisadero; El Pingüino Multimedia; La Prensa Austral <i>Online:</i> SoyChile (21 websites with local content from north to south) <i>Radio:</i> Digital FM; Positiva FM
Madero (north)	<i>TV:</i> Desierto de Atacama TV <i>Radio:</i> Radio Madero (four press centres: Antofagasta, Copiapó, La Serena and Santiago)
BioBio Comunicaciones S.A. (south)	<i>Radio:</i> BioBio Concepción; El Carbón; San Cristóbal FM; Punto 8 <i>TV:</i> Canal 9 BioBio TV <i>Print:</i> La Tribuna (newspaper)
SC Comunicaciones (north)	<i>Radio:</i> Caribe FM; Alegre FM; Estación FM; FM Éxitos
Cadena 33 (north)	<i>Radio:</i> Festiva; Pedro León Gallo; Regional
CNC Medios (north and centre)	<i>Radio:</i> Canal 95; FM Plus; FM Quiero <i>Online:</i> El Mensajero <i>TV:</i> Antofagasta TV; Televisión Regional de Chile
Red Mi Voz (north to south)	<i>Online:</i> El Morrocotudo; El Boyaldía; El Nortero; El Quehaydecierto; El Observatodo; El Martutino; El Paradiario14; El Rancahuaso; El Maule; El ConceCuente; La oPiñón; El Naveghable; El Vacanudo; El Repuertero; El Magallanews
Diarios Comunes (north)	<i>Online:</i> El Comunal; El Serenense; El Vicuñense; El Coquimbano; El Paihuanino; El Andacollino; El Hurtadino; La Perla del Limarí; El Montepatrino; El Punitaquito; El Combarbalino; El Canelino; El Illapelino; El Vileño; El Salamanquino
Diarios en Red (north to south)	<i>Online:</i> 14 news websites

Comments: Excluding the public channel TVN.

^a Associated with the network of El Mercurio, though not owned by the company

Source: based on public information

(E3) Diversity of news formats

2 POINTS

A media landscape that achieves innovation, but it is still at an early stage as for the variety of formats and consolidation of the same.

In the domain of the printed press, publishers dedicated to producing magazines have closed down, leaving fewer actors in the market. Among these actors, we can highlight independent projects that diversify the informative landscape. For instance, *The Clinic* is an exceptional case for the formats it offers, including combinations of interviews, narrative journalism, and high-quality investigations along with humorous content like jokes, caricatures, and memes discussing current political events.

El Mercurio SAP is the main actor in the domain of the printed press. *El Mercurio* newspaper includes several specific content supplements. Some are published daily, and give coverage to economics and international affairs, alongside other supplements published on weekends, which dwell deeper into topics such as culture, interviews, and long-form political reporting. In addition, they also publish several magazines on diverse topics exclusive to subscribers like current events, long-form journalism, decoration, women, and traveling. However, in 2020, to decrease costs, the magazines have been adapted into supplements inside the newspaper. In 2019, the newspaper implemented a paywall on its website, providing access to a digital version of the printed edition and some exclusive content, such as a newsletter. Additionally, the company has an evening newspaper, a tabloid, and the largest network of regional newspapers in the country, as well as owning other products such as FM radio stations and an informative web outlet, *Emol*, which functions as a parallel newsroom and presents news, audiovisual content, services, and multimedia specials.

Meanwhile, the Copesa group in 2021 closed several print products and reduced the circulation of its main newspaper *La Tercera* to weekends and only in two of the country regions: Metropolitan and Valparaíso. However, it is propelling a large variety of digital products. Under the brand *La Tercera*, it includes sub-brands offering quality articles on evening news, reporting, in-depth interviews, and columns. They are also known to develop more niche products. For example, they have a women-targeted outlet, a website about the geek world, one about culture, a site for economic reporting, another for science, sports, and practical guides for daily life, among others. To access this content, one needs a digital subscription. They have different newsletters for each product, a daily podcast, and some audiovisual productions. Its focus on digital outlets follows the line of multiplatform media, where there are some consolidated experiences. Notable among them are the news products from Tele13, the news brand of Canal 13. This offers mobile online transmission, integrating content from radio and television. Additionally, *Pauta.cl*, a project born out of a multimedia logic, with an FM radio channel as the main axis for

its content, is also transmitted in an audiovisual format. This format is privileged for some interview programmes. It also has a web outlet with original content, repeating what has been broadcast, alongside a daily newsletter.

It is important to distinguish between informative radio channels – which include news departments with journalists on the streets, and news shows throughout the day – and others specialising in columnists, interviews, and news analysis that include conversation panels in the mornings and evenings. The first type is offered by Cooperativa, BioBio, Agricultura, and University of Chile's own station; all of them also have conversational spaces. Meanwhile, channels that only have columnists, interviews, and panels are offered much more widely in FM.

The *Digital News Report* (Fernández Medina & Núñez-Mussa, 2019) shows that 38 per cent of those surveyed listened to podcasts on a monthly basis. Within this category, notable attempts have been provided by independent initiatives such as Las Raras Podcast and Relato Nacional, which produce audio narrative chronicles.

Luksic Group, owners of Canal 13 and its radio channels, have promoted this format, first with podcasts depending directly on the stations, then with *Emisor Podcasting*, a platform offering more specific content. Cooperativa launched its first podcast site in 2020; this functions independently from the content broadcast on the radio station using different formats, such as documentary chronicles, not often heard in daily coverage.

Open access television offers informative content constituting 20.6 per cent of the total programming, equivalent to 9,543 hours of broadcasting (news shows compose 95% of this offering) (CNTV, 2020b). In addition to television reporting and dispatches with daily information, news shows have increasingly become more extensive, where different formats share the same airtime: columns by specialised journalists and analysts or in-depth reporting, for instance. These specific sections often have a team of professionals dedicated to its development. A similar thing happens with sections dedicated to travelling and lifestyle, with pieces that border on documentaries. On Sundays, sports sections also have their own shows. In addition, news shows present in-depth interviews, where interviewees vary from experts to relevant public figures.

In other non-fiction formats, conversation shows occupy 19 per cent of total programming, subdivided in the following formats: group conversation (34.4%), interview (32.6%), opinion (14%), services and orientation (12.5%), forum-debate (3.7%), and commentary (2.7%) (CNTV, 2020b). Morning shows are additional to these. After the 2019 protests, they shifted from entertainment to news content, with politicians, news presenters, and specialists participating in conversation panels about the topics of the daily agenda.

Cable television has two national channels (*CNN Chile, 24 Horas*) that offer 24/7 news and varied shows including interviews, reporting, and discussion

rounds about different topics like health, sports, inclusion, economics, international issues, and so forth. Alongside, there is also a cable channel depending on Mega, which combines informative content with a variety of shows and movies.

As for web outlets, there is a large assortment of independent, university, and foundation projects offering columns, reporting, and interviews, including long-form investigative journalism. The most prestigious is the Centre for Investigative Journalism (Ciper, for the initials in Spanish), a referent for watchdog reporting. It has added to their content a section with columns written by university professors to share their academic works. Interactivity, design, and user experience, whether by time or resources, are still better achieved in media that depend on companies, such as Grupo Copesa, or in university media.

One of the most relevant developments in improving diversity of news formats has been the increasing number of fact-checking projects in the country. Before 18 October 2019, there were two regular fact-checking projects, one being *El Polígrafo*, a section within *El Mercurio*, and the other being *Factchecking UC*, belonging to the School of Communication at Pontifical Catholic University of Chile. After the protests, between university, independent, and media initiatives, there were a total of 17 projects verifying information, emerging due to the need to combat misinformation during the unrest (Núñez-Mussa, 2019).

(E4) Minority/Alternative media

2 POINTS

There are media and initiatives for several specific communities, but usually they are born out of those same groups and tend to be niche.

According to data from the Immigration Department of the Ministry for the Interior and Public Safety (2020), the number of visas granted between 2000 and 2006 was under 50,000. It started to grow from 2012 (107,372) and reached a peak of 438,222 visas in 2018; however, it decreased to 328,211 in 2019. This has had an effect on the creation of new communities within the country. Between 2000 and 2019, the largest number of visas were granted to immigrants from Peru (27%), followed by Venezuela (18%), Colombia (13%), and Haiti and Bolivia (both 11%).

Among migrant media, immigrants have found a space to talk to their own diasporas within the country with independent media projects, such as community channels, low coverage radios, and printed newspapers. All these projects are self-managed, whether by individual initiatives, or by groups with diverse motivations, such as answering to the discrimination they have received in the country, giving information to newcomers, or sharing their migrant experiences (Yévenes Vivianco, 2018). For instance, the Haitian community has various independent initiatives: the radio channel Konbit FM, broadcasting in Spanish

and Creole; a television show within the local channel in the district of Quilicura; the YouTube channel ANYTV, which is produced, edited, and presented by a Haitian for other migrants; and a weekly show in Universidad Austral de Chile's [Austral University of Chile's] radio, an initiative created by young people from this Caribbean nation.

Media received criticism for being discriminatory against Haitian migration coverage (Dorsainvil, 2019). In order to correct that criticism and promote integration, some mainstream outlets took measures, such as Copesa's former tabloid *La Cuarta*, which hired a Haitian anchor for a news show posted on their website. The morning show *Bienvenidos*, meanwhile, had a sociologist who had immigrated from Haiti for almost five months on their panel.

Since 2015, the self-sustained radio Charanga Latina from Antofagasta – created by a young Colombian entrepreneur – exists in the north of Chile. It was originally online, but has since moved to FM, alongside a mobile app. It is financed through dance events under the brand of the radio, which has a team of nine people. They have declared that only 30 per cent of their audience is Chilean (Yévenes Vivianco, 2018). Another relevant case is *El Vino-Tinto*, a politically oriented newspaper founded in 2016 and developed by a team of professionals for the Venezuelan migrant population. It prints 5,000 copies per edition and is distributed at 85 points throughout Santiago. It also has a web version.

One of the oldest projects for migrants and tourists is the newspaper *The Santiago Times*, printed 1991–2014. It was born as a hobby for its creator and became the only medium to publish Chilean news entirely in English. According to their website, it has employed journalists who then moved to Reuters and *The New York Times* (The Santiago Times, 2020). After an economic crisis, a crowdfunding campaign assisted the publication in finally returning as a web outlet in 2016.

Concerning accessibility practices, The National Service for the Disabled, under the Ministry of Social Development and Families, is an entity that advises the media about good accessibility practices, among other functions. All open access television channels have sign language interpreters. The Regional Association of Television Channels has a news programme transmitted by 23 stations, with a guideline for inclusive topics, and with a co-anchor who uses sign language. The same project has a parallel website with an accessible configuration for users with diverse needs. The cable channel *CNN Chile* has in its regular programming a conversation programme called *Conciencia Inclusiva*, which approaches in each episode a topic related to disability, incorporating testimonies and specialists.

There is not a complete census of alternative media in Chile. During the 2019 protests, lists of recommended independent media were distributed, among them the project *Piensaprensa* and the collective *Red Estudiantil de*

Información [Student information network], formed by university students. In addition, there is an organised network of alternative media: Red Alternativa de los Pueblos [Alternative Network for the People] that unites 18 media projects, all self-managed, varying from radio stations and programmes to newspapers, websites, magazines, and news agencies. The initiatives are rooted in collectives of diverse sizes and NGOs. For sustenance, some ask for funding from their own followers. A few projects have professional journalists. The network's collaboration is evident in the case of radio programmes, as they are transmitted by other stations. Despite some members of the network working with printed editions, their main means of communication is the Internet. Their sites are hosted in different platforms with diverse levels of professionalisation, starting from blogs to websites with more advanced designs. The sites combine original content with articles extracted from other sources.

This network's media projects coincide with its anti-capitalist agenda, as expressed through their editorials. For example, Radio HumedaLes and Radio Agüita says their existence is an answer to the concentration of media and a criticism to how mainstream media covers the issues concerning the network, like indigenous peoples, human rights, environment, feminism, and social justice. These are the topics where the different projects converge; some initiatives, meanwhile, have greater emphasis on only some. For example, Radio HumedaLes defines itself as a lesbian feminist radio programme; the newspaper *El Pueblo*, with a Marxist bent, stresses areas related to ideological education. One of the most common topics for the network is the situation of indigenous people. For instance, the radio programme Ayni presents contents in Aimara and Quechua. Among the ethnic groups existing in Chile, the most relevant is the Mapuche people, who have taken part in a historical conflict with the Chilean State for their autonomy, territories, and political representation. Members of the network are particularly critical of the way legacy media covers Mapuche people, arguing that it creates a narrative of criminalisation. The most significant project in this respect is *Mapuexpress*, formed in 2000 as a website by Mapuche professionals. What distinguishes them is their publications have communities as their direct source, through releases about their activities and problems. There have been other similar initiatives, which have since disappeared, while *Mapuexpress* has been running steadily for 20 years (*Mapuexpress*, 2020).

Alternative media is usually not in Santiago, but in cities to the north and south of the country. The focal points for local conflicts are in regions further away from the capital. Therefore, offices of these projects outside Santiago means their priority is local issues, and in-depth coverage of indigenous and environmental topics. Alongside the network, some projects are also associated with other initiatives with similar profiles. Outside the network, meanwhile, the channel *Mata o te Rapa Nui*, broadcast from and for Easter Island in Rapa Nui language, is worth mentioning for their focus on local issues.

(E5) Affordable public and private news media 2 POINTS

Subscriptions to the main printed and digital newspapers are expensive for the average salary, but the rest of the media are affordable for the people

In 2020, Chile's average income per month is CLP 573,964 (EUR 620), and the gross domestic product per capita is CLP 12,478,712 (EUR 13,481) (INE, 2019).

The national newspapers from the two largest companies, *El Mercurio* and *La Tercera*, established paywalls in 2019 and gave a greater emphasis to their subscription model. An annual digital and print subscription to *El Mercurio* costs CLP 164,900 (EUR 178) in Santiago, while outside the capital prices vary between CLP 171,610–214,400 (EUR 185–231) in different regions, mostly due to shipping costs. A digital-only subscription costs CLP 149,390 (EUR 161); therefore, for Chileans with an average income, it is expensive and not an accessible medium. *La Tercera* offers a yearly print and digital subscription for CLP 77,880 (EUR 88) and digital-only subscriptions for CLP 47,880 (EUR 43), both of which are also relatively high for a Chilean earning average wages (all prices consulted in 2020).

Open access television and radio channels are free and there is no special usage tax, beyond the fact that the state funds the public channel in a combined model with advertisement. Within available companies, access to only cable or satellite television can cost from CLP 23,000 (EUR 25). However, they are usually sold as a single pack with Internet or phone services. These companies offer both 24/7 national news channels, *CNN Chile* and *24 Horas*, and international reference brands such as CNN and the BBC, but only in English. Overall, these are more accessible for average-earning Chileans.

Different companies offer fixed and mobile Internet connections. The cheapest fixed Internet plans are around CLP 20,000 (EUR 22) per month, and the most economic mobile plans are nearly CLP 10,000 (EUR 11) per month (2020 data). This provides access to a large variety of informative online media, which are, with some exceptions, free to access for all content. Mobile Internet, being the most economical, is also the most widely used.

(E6) Content monitoring instruments 1 POINT

There is more than one external instance, which functions in a case-by-case manner, but media do not self-monitor permanently for the citizenship.

In Chile, the national associations of radio, television, and printed press, grouping most commercial mass media organisations in the country, forms the Chilean Federation of Media. It is an entity that includes an ethics council for the media, comprising experts and academics. Since 1990, the council has

ruled over cases concerning the media that are part of the Federation. In case a majority of the council members rules against a medium, it must publish that resolution publicly. There is no constant monitoring of content, which is resolved on a case-to-case basis. In addition, there is the National Council for Television fulfilling functions of media monitoring. First, they do so by supervising content through complaints about what is deemed inappropriate by audiences or the council, which may imply an economic sanction for the broadcaster and even the suspension of transmissions. Second, they present public studies about the state of the television industry, its content, and the consumption of it. The National Journalism Association has a National Ethics and Discipline Tribunal, as well as Regional Ethics and Discipline Tribunals, which investigate complaints against collegiate journalists. In case they do not belong to this institution, the journalist in question is expected to volunteer for scrutiny. The sanctions are related to the participation of the questioned professional within the organisation (for further details, see Indicator E7 – Code of ethics at the national level). With the objective of informing the advertising industry, the Chilean Association of Advertising and the Association of Media Agencies also gather data and observe the Chilean media.

There are also private monitoring companies with services providing press reports on topics, public issues, and organisations. They also inform companies, media, and institutions regarding audiences in order to make commercial decisions. In addition, survey agencies and think tanks sometimes gather data about the media. Meanwhile, universities carry out studies which are later translated into public reports and academic publications.

(E7) Code of ethics at the national level

1 POINT

There is more than one entity in charge of media ethics; however, they are not relevant referents for the daily exercise of journalism.

The most common ethical framework for the Chilean media is the Freedom of Opinion and Information and Exercise of Journalism Act (Ministry Secretary General, 2013). Promulgated in 2001, it established the rights and duties for the exercise of journalism in the country. For instance, it assures the right to keep sources a secret, provides a regulatory framework for media ownership and functioning, and gives journalists the right to clarify and rectify. There is also a section that affects the exercise of journalism by establishing a regulatory framework for infractions, criminal offenses, responsibilities, and how to proceed in these cases; it also has a concrete definition of defamation.

This act, however, does not incorporate ombudspersons, ethical tribunals, or other content-regulating organisations, which happens only on the level of

televised contents with the law creating the National Council for Television (Ministry of Interior, 2017). Modifications of the law over the years have given this entity the role of overseeing what is broadcast on television, with the possibility of receiving complaints from citizens and fining the broadcasters. The mission of the council, among other aspects, is to promote pluralism and respect for the diversity of society. In practice, some content effectively accumulates complaints and fines; the concerned stations pay the fines and some programming is adapted or cancelled, but the latter is unusual.

Another entity working with media ethics in Chile is the Ethics Council of the Federation of Media (Ethics Council, 2020), created by the Association of Radio Broadcasters of Chile, National Association of Television, and the National Press Association. This institution advises on the content published or broadcast by the three federated entities. While it can analyse cases from different media organisations, their main objective is self-regulation, with an emphasis on prevention. They receive complaints through their website and their sanctions are moral – they publish the resolution of the case in the same medium where the content was originally published. This council avoids judgment except for cases where ethical violations are evident.

Furthermore, the National Journalism Association (Colegio de Periodistas, 2020) is an association with voluntary membership, where every journalist in Chile can participate. It has its own ethics code, whose norms only apply to collegiate journalists, and if broken, might lead to sanctions after an evaluation from the corresponding Ethics and Discipline Regional and National Tribunals. However, in the interviews, journalists and editors unanimously declared they did not consider this entity as a referent, since it attacked journalists more than supporting them. However, a representative of the national journalism association said about their code of ethics:

I would like to believe that the document is used in newsrooms. However, honestly, I know that it is not. When we receive ethical complaints, we enquire with journalists if they have read our guidelines and most often, they are not familiar with them. Maybe the older generations knew it better.

As for professional development, alongside universities offering undergraduate and postgraduate degrees in journalism, there are several extending and continuing education programmes for professionals. There is also a network of journalists, which promotes conversation and workshops about the professional exercise, and the National Association of Women Journalists, which organises events and activities.

(E8) Level of self-regulation

1 POINT

Internal self-regulation exists associated with a culture shared by journalists and editors within a medium, with clear dogmas, but are rarely written down.

Like with news selection, use of stylebooks guiding daily editorial decisions also varies between media organisations. Of these organisations, three declared possessing them; two of these considered them relevant, whereas both the editor and journalist of the third said they had not read it.

In every case, there was awareness on the part of the interviewees about the concept of editorial guidelines containing the medium's mission, and therefore, its philosophy. The interviewees said they learnt it by immersing themselves in its culture, where the shared ethos is defined. According to the interviews, it was evident that new journalists acquired the culture through conversations with their colleagues and editors, by working in the newsroom, as well as through their own understanding of the organisation they worked in. In the interviews, this culture is evident in phrases that sound like statements of principles extracted from an official document:

- As a principle, we have to believe in our workers.
- We do not consider a stylebook, because we tend to trust our journalists.
- Since we are not witnessing everything we inform on, we use the word “conditional” a lot, so it is understood that it is developing news. We take care of the language we use. We also do not state the exact numbers for people who participate in protests.
- Something unchanged in the past 20 years is our role as a watchdog. We oversee power, not a political colour.
- Without necessary investigation and information, certain topics like sexual abuse are not published.
- Working in this medium is a personal choice.
- We will always defend public institutions, private property, and representative democracy, not a dictatorship of the minorities.
- To accuse an authority, there must be a legal conviction or information that present a non-biased reasonable assumption about lack of honesty.
- I ask to see the advertising, because they have to be coherent with my editorial guidelines.
- We do not cover issues to indulge ourselves in – this is journalism.
- We are pro-democracy. We have guidelines for clarity that we are not worried about making transparent to the audience.

- The audiences are the ones to judge.
- This is not activism; it is journalism, and journalism is a professional information service.
- The only boundaries are ethics.
- My boundaries to not do something are: if they asked me to lie or if I was forced to interview someone who incites hatred or discrimination.
- We all function with our own ethical views on journalism.
- My view is similar to the medium's editorial guidelines, and that happens to us journalists who work here.

Therefore, there is self-regulation within a shared culture between journalists and editors. Even not using a stylebook, for two editors, appeared to be a gesture of professional trust, attributing a negative connotation to the document. Thus, ethics are in large part defined in the formation and personal experience of each professional.

(E9) Participation

2 POINTS

There are limited instances for citizen participation in media, and editors are critical of the quality of the discussion provided by the audiences.

Newspapers and news outlets incorporate traditional features like letters to the editor and opinion columns. These go through a selection and editing process within the organisations. “We check the newspaper’s mailbox regularly. We have a journalist in charge of this and our other social media communities online”, explained an editor.

Meanwhile, radio stations stand out for being the most inclusive when it comes to citizen’s voices. For example, Radio BioBio airs calls from listeners narrating events as witnesses around the city, such as traffic problems. The radio stations also use WhatsApp audio messages after careful scrutiny by the team in charge. “All audio messages go through two filters, first by a producer and then by an editor. We care about length as well as language. We select those that express an opinion, and leave out those that send insults”, said a journalist from Radio Cooperativa.

WhatsApp and phone calls are also a news input for media, especially when it comes to photos and videos; however, editors fear misinformation. The checking and processing of such content is more important for editors and journalists than running after an exclusive; therefore, it is not aired without going through several checks and filters. Editors are also very critical of participation through

comment sections in the news. According to them, these do not add any value to the conversation, but instead contribute to attacks and polarisation (see Indicator F10 – Misinformation and digital platforms). One of the editors admitted that this was a gradual ride from early optimism to disappointment. Therefore, even if some media have kept theirs – usually associated with a social media platform integrated into their website – they are becoming less common within news websites or are exclusive for registered users, as it happens in *Emol.com*, or for subscribers, as in *LaTercera.com*.

The views are similar regarding social media. For the interviewed editors, they are certainly platforms for diffusion, but not for conversation and the generation of a community with audiences. “Social media is poisonous”, said an editor. “What the audience comments on has no impact on internal decisions”, stated another. These sentiments are understandable, because recent research has confirmed that people who comment on news in Chile often have an uncivil profile, are angry, and use these spaces to express their anger (Saldaña, 2019). Generally, the comments are not deliberative and lack evidence to support their arguments. There is also an abundance of fictional names and identities (Rosenberg, 2018).

Certain digital projects like *El Líbero* and *Interferencia* have a community philosophy towards their readers. Sometimes subscriptions give access to exclusive content, by organising meetings with editors and journalists, or by asking for voluntary economic support to sustain the medium, as does *Ciper Chile*; however, they usually function under a passive-audience logic, with no participation of the readers in the content offered. One exception is *Base Pública*, which organises citizen encounters to raise issues that may later become articles.

The media outside the capital incorporates users more widely through local radio stations and television channels. They effectively become permanent content generators, also through the Citizen Newspaper Network, *Mi Voz*. However, they are less of a journalistic organisation and more about citizens’ participation, with a tendency towards opinion over information (Puente & Grassau, 2011).

(E10) Rules and practices on internal pluralism

1 POINT

There are no rules for internal pluralism, but there are opportunities for deliberation. In any case, in a polarised scenario, the issue of inner pluralism generates tension.

The Chilean media does not have policies or programmes regarding internal pluralism. It was clear from the interviews that journalists considered it was possible for them to express their ideas, while being aware of working in a place with specific editorial guidelines. They agreed on professionalism, being

above personal convictions, keeping in mind that professionalism could mean different things in diverse contexts.

As mentioned earlier, editorial decisions are made in meetings where journalists can participate or, more generally, in dialogue with editors; therefore, it is the editor's responsibility to create opportunities for deliberation.

The 2019 protests created a tense scenario within media organisations (see Indicator F5 – Company rules against *internal* influence on newsroom/editorial staff). There were different opinions between younger and older journalists, with the latter considering their younger colleagues as sacrificing their objectivity when covering the protests, turning into activists. At the same time, the younger group thought that certain directives – such as not focusing on police violence – compromised their journalistic ethics. As there was more than one way of understanding professionalism in the face of certain events, this accounted for internal pluralism in a polarised scenario becoming the elephant in the room for the Chilean media.

Meanwhile, recent research focusing on television stations (Saéz et al., 2020) concluded that internal pluralism was weak in Chile, with stations lacking programmes on opinions and debates, and diversity of sources and issues was scarce.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog "control of the controllers"

2 POINTS

There are different instances to oversee whether the media fulfils their journalistic function.

There is academic research that observes journalists' actions, including how they exercise their role as watchdogs within the Chilean context (see also Hellmueller & Mellado, 2016). In this regard, it has been universities dedicating themselves to observing in what way the profession is undertaken, publicising their results both within academic circles and as analysis in media themselves, in the form of columns or interviews. In this regard, after the October protests, *Ciper Chile* published, in their section Academic Ciper, a series of columns by academics from different universities that presented a critical view on how current events are covered in Chile.

Two more systematic projects throughout the years have been initiatives from Universidad Alberto Hurtado [University Alberto Hurtado], through its School of Journalism, which in 2008 founded the website *Puroperiodismo.cl*, dedicated to covering topics regarding Chilean journalism, as well as opinion columns. At the same time, the University created the Prize for Excellence in

Journalism, which is the yearly instance that establishes a canon for what is considered good journalism on a national level.

Since 2017, Chile has been a part of the *Reuters Institute Digital News Report*, whose local partner organisation is Pontifical Catholic University of Chile. The results of the report are shared and commented upon by editors in the industry and later translated into articles, as well as conversations on Twitter.

There are independent observatories, and on both Twitter and Facebook, there is continuous conversation without any formal structure about the performances of journalists, in which professionals in the industry, academics, and audiences participate.

The National Press Association has a magazine in which it informs on issues regarding journalism; the National Council for Television has commissioned reports and panels to approach media-related topics; and the National Journalism Association publishes critical messages about journalism. Some other media houses, additionally, cover their competition's performances, but this is rare.

(C2) Independence of the news media from powerholders

2 POINTS

The industrial view encompassing the Chilean media system has led to its property becoming mainly corporate. However, there are views about politics and society that reach the people in charge of the newsrooms.

Media in Chile functions as an industry; therefore, there are no restrictions regarding who can own one or more media organisations in the country, independent of their trajectories or political and public affiliations. That, however, has an exception with foreign ownership. This context has led to the ownership of larger legacy media houses belonging to holdings (see Indicator E1 – Media ownership concentration national level) in charge of businesspeople whose main profile tends to be commercial, but not exempt from views on politics and society.

Previously, the system of legacy media had more variety. For many years, the Catholic Church and Pontifical Catholic University of Chile owned a competitive television channel now owned by the private holding, Luksic Group. There are still some actors in the media that do not belong to the corporate world, the most important example being the Chilean State owning the public channel, Televisión Nacional del Chile. Its financing, however, is acquired through advertising, adding it as another competitor to the market. Additionally, the three largest universities in the country also own FM radio channels.

This industrial quality of Chilean media allows for people of different backgrounds, influences, and agendas to be visible, be partners, or participate in the boards of several media organisations. For example, a channel owned by Warnermedia and recently acquired by Viacom CBS was previously the property of the current President, Sebastián Piñera. There are other examples of people in politics involved in media projects: former treasury minister during the dictatorship, Hernan Büchi, is now a partner in the online outlet *El Líbero*; and former education minister and daughter of the first transition president, Mariana Aylwin was a founding member of the online outlet *El Dínamo*.

In other cases, the affiliation could be indirect, or merely an affinity. However, there are circles of power with strong influence over the media. For example, Radio Cooperativa, which does not belong to the Christian Democratic Party, are transparent about the fact that their editorial guidelines lean towards it, determining the coverage they do of the said collective. Another case is *El Mercurio*, whose owner in the 1970s, the late Agustín Edwards, lobbied the administration of Richard Nixon for a military coup, and they divulged the regime's ideas in their pages. However, after the return of democracy, the newspaper has, over the years, won prizes for excellence in their journalistic endeavours. Despite their conservative editorial guidelines, they also employ journalists not necessarily sharing their political views.

The journalists interviewed were not naive about the media industry's reality. They knew very well they must exercise their professional ethics even within projects where owners and boards have a specific perspective or agenda. However, they defended their capacity to report freely. A journalist summed this up:

I have never seen intervention. I have never considered how owners would or would not react, when reporting on a topic. We know who owns the media where we work. I would not write an article against their companies, because I have common sense. I understand, from my colleagues who cover economic issues, that there are no restrictions for writing about the companies they own.

There is a law protecting the exercise of journalistic freedom and the integrity of sources (Ministry Secretary General, 2013). The interviewed editors in charge of newsrooms defended the quality of their work, but they recognised there are calls and pressure on them, because the owners or the members of the board might not always share their expectations. However, how that pressure is exerted, and how influential it is, varied according to each medium and the way in which each director executes their role, whether as a mediator or as a counterpart (see Indicator F5 – Company rules against *internal* influence on newsroom/editorial staff). One director said:

There has always existed pressure over the directors or editors-in-chief. We get calls and try to balance things out. I would lie to you if I said that these

calls had no influence. They do not happen every day and they are not how topics are decided. I try to do good journalism.

Another editor explained: “I do not ask the board whether to publish or not. They advise”. While this pressure does exist, journalists declared this was not a problem when doing their daily work. They mentioned that owners trust directors to safeguard the journalistic work and that they were in charge of protecting the journalists’ freedom to report, and therefore, the pressure was of an assimilated nature. One journalist made a statement that summarised a common view among the interviewees:

Nobody forces you to report against your beliefs; we have a work contract that can be broken in any moment. I have never seen people forced to write against their personal political beliefs. I have personal political views and they are not an impediment to cover a politician who does not represent me.

Additionally, smaller independent projects, which function online and combine reporting and opinion pieces, also exist. Their inner structures imply that owners are part of the newsroom. Therein, a more clearly partisan political agenda can be observed, especially becoming more visible in polarised periods, such as election season.

(C3) Transparency of data on leading news media 2 POINTS

By law, every media publishes information about their ownership, but only a few give more details.

All media organisations constituted in Chile are legally obliged to publish the name and address of the legal representative or owner, as well as the director responsible for content, in a visible place (Ministry Secretary General, 2013). It is also compulsory to disclose detailed information about the medium’s ownership for whoever requests it, and in case this doesn’t happen, any person can denounce the medium in question. Additionally, Chile has a Transparency Law forcing public organisations to make their information available to citizens. As a result, the public television channel has its financial status, salaries, and management board data displayed on its website. Such details are not readily available for private media, unless they voluntarily decide to make it public. The information is irregular within the corporate websites of each medium, usually with a commercial objective, rather than for reasons of transparency. A recent study on the television industry rated the public channel TVN as the most transparent, followed by CHV, Mega, and Canal 13, especially regarding economic information (López-López et al., 2019).

Regarding print media, all publications must register with the National Library, which also functions under transparency laws, thereby making this another way to access ownership information. However, this process needs a specific request, and receiving an answer can take several months. A similar thing happens with every change in the ownership of a medium, which must be informed to the National Economic Prosecutor, an entity that also answers to the law.

No other entity constantly monitors the ownership of media, except for individual efforts by researchers and academics.

(C4) Journalism professionalism

1 POINT

Although professional education is high at the university level, the work scenario is precarious, offering little time and resources for journalists to improve their skills.

To be a journalist in Chile, one must possess a university degree valid in Chile or be legally “recognised” as a journalist (Ministry Secretary General, 2013). Since the latter is rather subjective, there are no particular restrictions to professional practice, while it is mainly a professional field supported in higher education.

The first journalism school in Chile started in 1953 at University of Chile. In the 1960s, under the influence of the International Centre for Higher Education in Journalism for Latin America, a formative model was introduced with a bachelor’s degree in Communication. This incorporated content about journalism, public relations, and advertising that is still used today (Mellado & Hanusch, 2011). In Chile, there are currently 43 journalism programmes throughout the country in different modalities: evening, morning, and those directed to people with bachelor’s degrees in other areas. Sometimes there is more than one programme per university across private and public institutions (Mifuturo, 2020). The number of programmes offered has increased greatly since 1985, hand in hand with the growth of private universities (Délano et al., 2007). In addition, within the field of communications, there is an increasing number of postgraduate programmes with specialised courses, master’s degrees, and three doctoral programmes.

Professionalisation, too, has grown, with 50 per cent of journalists holding a title in the field in the 1960s, to 70 per cent in the 1970s. The last available study (Mellado, 2014) shows that 86.2 per cent of working journalists had studied this specific degree at university, and 92.5 per cent had a professional degree (6–9% had a master’s degree) (Cabalin & Lagos Lira, 2012; Mellado, 2014). The number of these programmes is still growing.

According to Cabalin and Lagos Lira (2012), journalists do not value their previous formative academic learnings, but understand it as a formal step needed

to access the industry, where the “real” learning happens. While journalists criticised their formative education, they were unable to detail what these gaps are. They were also critical about what they considered deficiencies in their colleagues’ training, for example, a lack of general knowledge.

To achieve their degrees, students are obligated to undertake a professional internship in a journalistic medium; some cases consider two internships, including one linked to corporate communications. Mellado and Hanusch (2011) conclude that those who work in journalism and public relations share common values but fulfil different roles. The report by Mellado and colleagues (2015) about the profile and expectations of journalism students shows that as they advance in their academic degrees, while most of them maintain their interest in working in media, there is also an increase in expectations of working for corporate communications or as academics.

Since Chile’s return to democracy, the professionalism of the country’s journalists has been in question, given the previous 17 years of dictatorship, when censorship and state intervention in the media occurred alongside self-censorship and independent media that worked clandestinely. Such a history has, therefore, created a legacy of questionable practices. This critical view of journalism has been reflected in concerns of academia about professionalism and performance of journalists, with research interrogating their routines, values, practices, and the systemic elements that model these (Gronemeyer, 2002; Lagos & Cabalin, 2013; Otano Garde & Sunkel, 2003). This gained ground during the 2019 protests, with columns written by academics as well as declarations to the media (see also Aguilar, 2019; Lagos & Faure, 2019; Salinas & Cabalin, 2019). Two letters signed by professors of journalism from University of Chile and the Pontifical Catholic University of Chile criticised the coverage of the protests.

Regarding ethics, while the interviewed journalists considered it an important value, Mellado (2014) showed that only 43.3 per cent of journalists affirmed ethical principles that cannot be transgressed, independent of situations. In the same study, journalists said that if necessary, they would use ethically questionable practices, for instance hidden cameras and microphones. In addition, Lagos and Cabalin (2013) show that each professional interprets ethics differently.

Journalists inhabit what is considered a precarious market (Lagos & Cabalin, 2013; Lagos & Faure, 2019), where routine is more important than innovation. Here, creativity is not a shared value, let alone being the most relevant, from the perspective of information professionals (Gronemeyer, 2002). Digital outlets have gradually created an innovative space, but it is still in early stages. An example of this is the fact that the Award for Excellence in Journalism gave its first prize for digital innovation in media as recently as 2020, and decided not to keep the category in 2021. While development of narrative multimedia tools has not been the main contribution of digital media in Chile, online

outlets have moderately reinforced the role of watchdogs, which is weaker in legacy media (Elórtegui Gómez & Mellado Ruiz, 2019). *Ciper Chile* represent an important case. While the organisation had not made much use of multimedia resources for years, it was reputed for publishing impactful and thorough investigations. After an audience survey, it took a decision to make its website more user-friendly, which was complemented with a call for economic support from readers, in order to function as a foundation.

Mellado (2014) exposes that participation of journalists in the National Journalism Association is 13.5 per cent, corroborating the negative view that all interviewees reported about this entity. Participation in other associations, as of 2012, was 14.5 per cent. A representative of the National Journalism Association, in turn, recognised they face a critical situation regarding new adherents:

Our professional formation is individualistic; we are not trained to do teamwork. Colegio de Periodistas has more than 60 years and close to 6,500 journalists in its historic membership. We are aware that we are going through a representation crisis. Colleagues only come to us when their job is at risk. The media, as a whole, is not aligned with our agenda, for example, regarding our call for a new media law.

The Chilean Network of Journalists, founded in 2013, provides professional development opportunities to journalists through workshops as one of its main tasks. As of 2020, it counts 353 individuals as members, while 561 people have attended their workshops (Red de Periodistas, 2020); this is very low considering that every year, about 1,000 journalists graduate from universities (e.g., 907 journalists graduated in 2018) (Mifuturo, 2020). In 2005, practicing journalists numbered 10,768, and on the assumption of about 850 graduates a year on average, was projected to reach 22,492 active journalists in 2020 (Délano et al., 2007).

Employees of the media are active within internal unions, grouped under the Chilean Confederation of Media Unions and the Federation of Television Unions, which make pronouncements about labour practices that media workers consider unfair, both at administrative and editorial levels. In 2019, the union in Radio BioBio organised a strike with a public demand for improvements to their work conditions; among their reasons was the fact that some journalists were working 65-hour weeks, when the law establishes that workweeks cannot exceed 45 hours. This case received support from other media unions, the National Journalism Association, journalists, and editors, all of whom agreed this represented the general reality of all media organisations in Chile (El Desconcierto, 2019). Sometimes, such actions generated internal controversies. An editorial case occurred after the 2019 protests in the newspaper *La Tercera*, where a journalist claimed the director had made them sign an article they had not researched themselves and with which they did not agree, considering it

imprecise. The newspaper recognised this later and erased the journalist's name from the article. The story became public by the newspaper's union, which denounced this as a common practice; however, the medium's editors wrote another letter in response, denying these accusations (El Dínamo, 2019). This pitted one group's word against another's.

(C5) Journalists' job security

0 POINTS

Academics describe work conditions as "precarious". Wages are low. The crisis faced by this industry has enhanced this situation.

In a media system that functions under market logic, an industrial crisis directly affects working conditions of journalists. Massive firings of journalists have become more frequent in the last few years. This has been a consequence of industry decisions, such as closing magazines, merging work teams from two media houses within one holding, and externalising production of content and other services to third-party companies.

Meanwhile, academia has reported for years that this is a work sector with "precarious" conditions when it comes to working hours, salaries, and benefits from employers. Instead of improving, such a situation has become worse (Lagos & Faure, 2019; Lagos & Cabalin, 2013), with journalist unions becoming news subjects in 2019 (El Desconcierto, 2019; El Dínamo, 2019). The employment rate of journalists in the first year after graduating is 71.9 per cent, while it is 81.3 per cent in the second (Mifuturo, 2020). Of these persons, 80 per cent have a full-time contract, 60 per cent long-term contracts, and 24 per cent fixed term, while some do not have any formal contract (Mellado, 2014). While these numbers seem high, it must be noted that not all graduate journalists work in media, but in other fields such as corporate communications. There are editors who, in the interviews, agreed on the difficulty of retaining journalists who, after two or three years in a media house, decide to start working in communication agencies, because they have better work hours, contracts, and conditions, in addition to higher wages.

Journalists' salaries grow slowly. In their first year after graduation, without considering income tax or other deductions such as health insurance and pensions, gross average monthly income is CLP 681,896 (EUR 746); the fifth year after graduating, it reaches CLP 1,061,515 (EUR 1,160) (Mifuturo, 2020). Lawyers, by comparison, earn an average income after graduating of CLP 1,073,253 (EUR 1,174) in the first year, reaching an average of CLP 1,896,175 (EUR 2,073) (Mifuturo, 2020) the fifth year after graduating.

(C6) Practice of access to information

2 POINTS

There is a law for freedom of information, but under 50 per cent of journalists evaluate it positively. Specific knowledge is required to use it effectively.

Evaluation by journalists regarding information access from institutions is unfavourable. Just 38.3 per cent of institutions were evaluated positively about their willingness to share information, 42.3 per cent for the reliability and precision of the given information, and 32.8 per cent for timely delivery of said information. This resulted in an average of 37.8 per cent positive evaluations. Since 2007, the curve has been changing, with the lowest average at 30 per cent and the highest at 44 per cent (ANP, 2019).

The journalists interviewed confirmed the difficulty of accessing certain sources and having to go through the bureaucracy of communication managers. After the 2019 protests, it was particularly difficult to obtain data from the police. The perception of journalists about access to information in the last five years also varied. It registered only one relevant improvement, in 2009, when the law about public information access was enacted (widely known as Transparency Law) (ANP, 2019; Ministry of Transport and Telecommunications, 2014). This law created the Council for Transparency, an autonomous institution that enforces these regulations. The legislation advocated for websites of public institutions to have permanent access to their information – what is called “active transparency”. At the same time, it gave citizens the right to access this information; therefore, one can make transparency requests to which every organisation must respond, unless there are reasons meriting secrecy or reservations about the information. This tool, although meant for every citizen, is only fully effective with certain knowledge of its workings. Therefore, journalists have been educating themselves on how to use it, as well as learning strategies so the information they receive is most useful and readily usable. Because the actual information delivery is slow, even through this process, it is mainly used by journalists working in investigative and long-form journalism, and less frequently in daily work.

This explains the fact that, in an evaluation of 12 mechanisms to obtain public information, the use of this law is only at seventh place. Journalists evaluate other tools as more efficient ways to access public information: direct consultation with sources, formal interviews, and direct communication through WhatsApp and similar mobile applications (ANP, 2019). However, when evaluating specifically this law as a tool, after 35 per cent positive evaluations within its first year of enactment, these dropped to as low as 28 per cent until 2015. However, it later saw a constant improvement in its evaluation until 2017, which has sustained at 41 per cent for both 2018 and 2019 since then.

(C7) The watchdog and the news media's mission statement

2 POINTS

There is a certain notion about the watchdog role of journalism, but this tends to be relegated to specialised units or specific practices within daily coverage, where other roles are more dominant.

The watchdog role is not predominant in Chilean political journalism, where the interventionist, infotainment, and civic roles are more dominant (Hellmueller & Mellado, 2016). In legacy media, in general, there are teams with specialised journalists who have dedicated a large part of their careers to this type of work. Some editors continue to sustain these teams as serving essential aspects of their editorial work as well as their mission within the medium. For teams who work in daily coverage and do not develop long-term investigative journalism, both journalists and editors said they see tools to develop this type of role through interviews and journalistic questioning. In other cases, this may be through analysis and opinion pieces. In any case, the informative function is privileged to that of overseeing.

The perceptions of journalists and the audience, however, differed. The 2020 *Digital News Report* presented that 66 per cent of Chilean journalists agreed that the media “monitor and scrutinize the powerful”, while only 36 per cent of the audience agreed with that very sentence (Kalogeropoulos & Fletcher, 2019). “My topics are very informative, there are no serious accusations”, said one journalist who covers the government. An editor commented that their main function is overseeing power, but as they do not have an investigative unit, when they have information that is critical of conflicts of interest, it is often published with less development. This is done with a view to impact the agenda of other media houses that will potentially follow the story through.

Although the ecosystem of digital media is wide and varied, recent research shows that in this medium, at least moderately, there is a greater manifestation of the watchdog role than in legacy media (Elórtegui Gómez & Mellado Ruiz, 2019; Mellado et al., 2018). This can be explained by projects that are born or developed in an environment linked to investigation journalism. While *Ciper Chile* is one example that stands out, there are also other independent projects, new fact-checking initiatives born after the 2019 protests (Núñez-Mussa, 2019), and university media publishing work of students putting investigation techniques taught in their classes into practice.

(C8) Professional training

2 POINTS

There is a large offer for journalists, but their work conditions do not allow them to specialise as much as they would want to.

Cabalin and Lagos Lira (2012) show that 68 per cent of journalists considered they needed more preparation, with 93.9 per cent valuing continuing education. Additionally, 57.4 per cent developed professionally through workshops within their own medium of practice, and 25.6 per cent undertook a specialisation programme. According to Yez (2011), 59.3 per cent of journalists said they have not been part of any specialisation course provided by their company. Although numbers differ, continuing training and development are, yet, rare.

Development opportunities for journalists have increased with universities offering master's degrees and specialisation courses in specific aspects of the profession, such as investigative journalism, fact-checking, social media, narrative journalism, or written journalism. While these programmes usually have schedules compatible with a regular workweek, they are expensive. Nonetheless, there has been an increase in instances of continued development and training for practicing journalists. Continuing education programmes in universities bring in guests and offer free or low-cost seminars. The Network of Journalists in Chile has focused on offering cheap workshops with tools for reporters. However, 59.8 per cent of journalists declare that their long workdays do not allow them the time to pursue specialisations (Cabalin & Lagos Lira, 2012).

(C9) Watchdog function and financial resources

1 POINT

There are some media houses that produce investigative journalism, but they have decreased for economic reasons.

The reduction of journalistic newsrooms due to economic crises faced by the media has been to the detriment of investigative journalism. However, some media houses maintain these teams, as they are highly valued. Many have outsourced this to production companies, and in some other cases, the work of freelancers is published. Still others dismantled their investigation units for economic reasons. An editor reflects on this reality:

We started as a medium that did a lot of investigation, but now we can't, because it is expensive. In 2018 the last people who worked there, left. Now we have a fund to buy articles by freelancers whom we know and, in whose criteria, we trust.

Ciper Chile, the Centre for Investigative Journalism in Chile, has grown their section of opinion columns. By becoming a foundation, it uses crowdfunding

from its readers to finance high-quality investigations. A problem is that such long-form journalism with potentially high political and social impact, but independent of advertising, is also harder to monetise. But such constraints also open opportunities for non-corporate media houses to develop. An example of this is University Diego Portales, which in 2020 inaugurated a Centre for Journalistic Projects and Investigations, including books and web projects developed by both professionals and students.

Conclusions

This is the first time that Chile participates in the Media for Democracy Monitor, and it does so in a moment of political and social transformations countrywide, where reflections about the democratic role of media have become extremely important. As can be discovered by the parameters offered by this report, several criticisms faced today by media from both academia and citizens are exclamation points for systemic problems that have been warned of for years.

Freedom of and access to information in Chile is geographically wide in distribution, with national and regional media, in addition to their traditional platforms, being also available through the Internet. While media consumption is indeed frequent, audiences are also critical, exacerbated by the social movement and coverage of protests. This led journalists to take measures to protect themselves when reporting on the protests.

Internal and external pressures exist, coming from issues regarding the ownership and commercial model of media; even so, journalists defend their freedom. There are lacunae in gender equality policies and reflection on stories covered and sources used (since they mainly consult political and official sources); this usually responds to the daily agenda with a he-said/she-said logic. A positive effect of the protests, however, has been a strengthening of fact-checking as a practice.

Concentration is one of the characteristics of the Chilean media system; nonetheless, regional and alternative media contribute to diversity, although with impact on limited audiences. These are also, however, spaces where the audience's voice is better represented. This contrasts with national media where citizen participation is usually seen with suspicion.

Self-regulation is based on journalists' personal ethics and each medium or organisation's internal culture. The latter, and the journalist-editor relationship, are what determine how the internal pluralism within these organisations develops. Such a structure is fragile if one considers that, during the 2019 protests, there was tension between journalists and editors. External ethical codes are irrelevant for daily work, especially the one from the National Journalism Association, which is seen, under its current administration, to be a political entity that does not represent professionals.

A watchdog role is not one most common in Chilean journalism, but there are media houses that value their investigative areas, in addition to projects that are dedicated to developing investigative journalism. However, economic crisis faced by the media have weakened investigative journalism teams and initiatives. The national economy has also impacted work stability, with massive layoffs occurring quite frequently in recent times. While journalists usually have university education, work conditions of low wages and little free time make further specialisation difficult. It is common for younger journalists to leave the media to work in corporate communications after a few years of exercising the profession.

This report allows us to see there are parameters indicating that the media in Chile, at present, continues to face strong challenges with regard to democracy, ranging from the structure of the media system to inner practices of newsrooms.

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DENMARK

High media independence and informal democratic traditions in the newsroom

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Introduction

Denmark is a small Northern European country with 5.8 million inhabitants. Together with Sweden and Norway, Denmark is part of a group of Scandinavian welfare states with a tradition of public support for both broadcasters and newspapers, strong professional associations for journalists, and a significant share of foundation-owned newspapers. Politically, Denmark is considered a mature liberal democracy.

Freedom in the World 2021: status “free” (Score: 97/100, stable since 2017).

Denmark is a robust democracy with regular free and fair elections. Citizens enjoy full political rights, the government protects free expression and association, and the judiciary functions independently. However, Denmark has struggled to uphold fundamental freedoms for immigrants and other newcomers. (Freedom House, 2021)

Liberal Democracy Index 2020: Denmark is placed in the Top 10% bracket (rank 1 of measured countries, up from 5 in 2016) (Varieties of Democracy Institute, 2017, 2021).

Freedom of Expression Index 2018: rank 2 of measured countries, up from 6 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 3 of 180 countries (after Norway and Finland, 1 and 2, respectively), up from 5 in 2019 (Reporters Without Borders, 2020).

¹ Authors listed alphabetically

Denmark is a parliamentary democracy and, since 1953, the Danish Parliament has consisted of only one chamber: Folketinget. Elections to parliament (Folketinget) are held at least every four years, but it is within the power of the prime minister to call elections sooner, if he or she wishes to do so. Elections to the Danish Parliament are based on proportional representation. The parliament has 179 members, including four elected from Greenland and the Faroe Islands, which belong to the commonwealth. In 2020, there are ten national parties in the parliament making up two political blocs – the red and blue blocs. On the left, the red bloc includes the Social Democrats, The Social Liberals, The Socialist People's Party, The Red–Green Alliance, and The Alternative (newly formed in 2015). On the right, the blue bloc includes The Liberals, The New Liberals (formed in 2018), The Conservatives, The Danish People's Party, and Liberal Alliance. In 2019, the election saw the Social Democrats form a single party minority government with the support of all parties in the red bloc except The Alternative.

The Danish media landscape has been characterised as a dual media system (Helles et al., 2011) with two dominant actors: the two public service broadcasters, Danmarks Radio (DR) and TV 2 on the one hand; and daily newspapers, most owned by foundations and some in commercial ownership, on the other hand. While data from the *Reuters Institute Digital News Report* (Newman et al., 2020) indicated that the reach of the public broadcasters had fallen since the first Reuters survey in 2013, in 2020, DR and TV 2 still reached most Danes on a weekly basis. Thus, according to the 2020 Reuters report, offline DR TV and radio reached 59 per cent of the Danish population, whereas TV 2 (TV 2 Nyhederne and 24-hour news channel TV 2 News) reached 54 per cent. Both offline and online, the largest Danish newspapers are the two tabloids, *B.T.* and *Ekstra Bladet*, who rank third and fourth in online news reach with the two public broadcasters ranking first (DR) and second (TV 2). Meanwhile, the traditional morning newspapers are struggling with a fall in their print editions but are gaining momentum online (e.g., *Politiken* reaching 14% of the Danish population online in 2020, but just 6% offline). Private television plays a relatively minor role in Denmark. Today, the private market in Denmark is largely made up by Nordic Entertainment Group (NENT), whose television channels are funded by advertisements. Discovery Networks Denmark also plays a big part within the private television market; it owns 11 commercial television channels and streaming services, such as Kanal 5 and Eurosport. Some studies show that the Nordic Entertainment Group channels reach about 10 per cent of the viewers, whereas Discovery reaches about 5 per cent.

Covid-19

From mid-March to mid-May 2020, the Danish government led by the Social Democrats imposed a large number of restrictions on liberal freedoms in Denmark, such as closing borders to neighbouring countries, banning all public gatherings and events with more than 100 participants, shutting down many parts of the public sector, closing schools and universities, as well as limiting public transportation. A large part of the staff from both public service broadcasters were also sent home by the Ministry of Culture. However, this was later admitted as being a breach of the arm's length principle.

During this shutdown, linear public service television increased their audience share, as did daily newspapers online. A report published in late August by the Danish Media Association – the industry organisation for private Danish media – showed an increase in the Danes' willingness to pay for online news during the Covid-19 crisis. In June 2020, around 100,000 more Danes had access to paid digital news services as compared with October 2019. The study also indicates that during the Covid-19 crisis, Danes gained more trust in the news media and to a large extent preferred to get their news from traditional news channels rather than from social media (Danske Medier, 2020).

However, because of the economic restrictions, advertising slumped between 30 to 50 per cent. This resulted in revenue losses in advertising-based media and led to lay-offs in several media companies, including at *Berlingske*, which is a part of our sample. In order to prevent further layoffs and collapse of media companies, the government provided two aid-packages to the private Danish news media. This prevented closures and mass firing in the media industry to some extent. On 9 June 2020, however, Denmark's second largest media company, JyskFynske Medier, announced cut-backs due to loss in advertisement revenues during the Covid-19 pandemic, which may result in the firing of up to 100 employees (Marckmann, 2020; Slots- og Kulturstyrelsen, 2020). A side effect of the aid packages has been that several media outlets have registered with the Press Council (Nyhus, 2020). The Press Council is the institution in Denmark that handles complaints about the media covered by the Media Liability Act – and it is a requirement to be registered with the Press Council to access the aid packages.

Leading news media sample

Our media sample for the Media for Democracy Monitor (MDM) 2021 consists of ten leading news media representing different types of outlets and different types of ownership: two public service broadcasters (DR & TV 2) and the seven national newspapers: *Politiken* (centre-left), *Berlingske* (centre-right), *Jyllands-Posten* (centre-right), *Information* (centre-left), *Kristeligt Dagblad* (centre-right), *Børsen* (centre-right), *Ekstra Bladet* (centre-left), and *B.T.* (centre-right).

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

A wide variety of news media are broadly available all over Denmark.

Denmark has a total of 31 daily paid-for newspapers and one free newspaper. Compared with other Scandinavian countries, Denmark has the smallest number of newspapers, which to a certain extent is an effect of different strategies of public media support (which in Sweden is directed towards the “second” newspaper of a given region). Eight of the 31 newspapers are considered national newspapers (*Politiken*, *Berlingske*, *Jyllands-Posten*, *B.T.*, *Ekstra-Bladet*, *Information*, *Kristeligt Dagblad*, and *Børsen*), while the rest are either regional or local newspapers, covering all parts of the country. From 2010 to 2018, readership of the printed press fell by 41 per cent. On an average day in 2018, about 1.6 million Danes read a printed newspaper, whereas more than 1.9 million Danes accessed an online news site of a daily newspaper (Slots- og Kulturstyrelsen, 2019d). The biggest national newspapers online are the two tabloids, *B.T.* and *Ekstra Bladet*, while the biggest regional newspaper is *Jyske Vestkysten*. However, the biggest of all online news sites are the two public service broadcasters TV 2 and DR (Schrøder et al., 2019).

According to the *Reuters Institute Digital News Report* (Newman et al., 2020), the willingness to pay for news in Denmark is at 17 per cent, the lowest amongst Nordic countries. Norway, at 42 per cent, has the highest willingness to pay for news in the world, followed by Sweden in second position at 27 per cent and Finland a close third at 19 per cent (Schrøder et al., 2020). In general, Danish newspapers have managed to survive in a disrupted news market; there have been layoffs, but major media outlets have not closed. The regional and local media, however, are suffering an immense economic struggle.

In 2018, 85 per cent of Danish households had at least one television hooked up to a television signal. However, the remaining 15 per cent could have possibly either owned a Smart-TV that was hooked up to the Internet instead or streamed television on their computers (Slots- og Kulturstyrelsen, 2019e). In 2018, almost 98 per cent of the Danish population had Internet access. However, there were some regional differences when it came to download speed, with the area around the capital Copenhagen having higher download speeds than the rest of the country (Slots- og Kulturstyrelsen, 2019b). Furthermore, both public service broadcasters and commercial broadcasters are expanding their streaming services, which is also forcing the shift from traditional television viewing to streaming. In Denmark, roughly 20 per cent of the population sub-

scribe to television packages with more than 50 channels. Although television viewing in general is falling, when measured in hours of viewing, public service television is still the most popular. Public service television includes both the two national broadcasters, DR and TV 2, and the eight regional television stations that are part of TV 2 and which cover all parts of the country (Slots- og Kulturstyrelsen, 2019e). Since January 2020, DR has three television channels: the main channel DR and two niche channels, DR 2 (focusing on politics and culture) and children's channel Ramasjang. Before 2020, DR had six channels. However, with the latest media policy reform in 2019, DRs budget was cut by 20 per cent, resulting in one channel (DR Culture) being merged with DR 2, and two other channels were reduced to streaming only (DR 3 for the younger audience and DR Ultra for children and younger viewers). Meanwhile, TV 2 has six channels: the main channel (just called TV 2) and five niche channels: TV Zulu (for younger viewers), TV 2 Charlie (for older viewers), TV 2 News (a 24-hour news channel), TV 2 sport, and TV 2 Fri (a channel focused on food, travel, and leisure).

DR also has the most popular radio stations in Denmark. In general, radio is still a popular platform in Denmark, though time spent daily on listening to radio in general dropped by four minutes – from 111 to 107 – from 2017 to 2018 (Slots- og Kulturstyrelsen, 2019c). As of January 2020, DR radio consists of seven radio channels with P4 being the most popular based on the number of listeners. P4 is made up of ten regional radio channels and comprised 40 per cent of the market in 2018, while P3, a channel aimed at younger listeners, came in a distant second with 12 per cent of the listening audience. Denmark also has a second FM public service radio provider, Radio 4, which took over the broadcasting licence of Radio 24/7 in 2020. Radio 24/7 had previously been de facto excluded from seeking to renew its licence, a process causing heated public debate and political controversy. Since 2020, a new DAB public service radio station, Radio Loud, has been conceived to target young listeners specifically; however, so far it has had very limited success.

(F2) Patterns of news media use (consumption of news) 3 POINTS

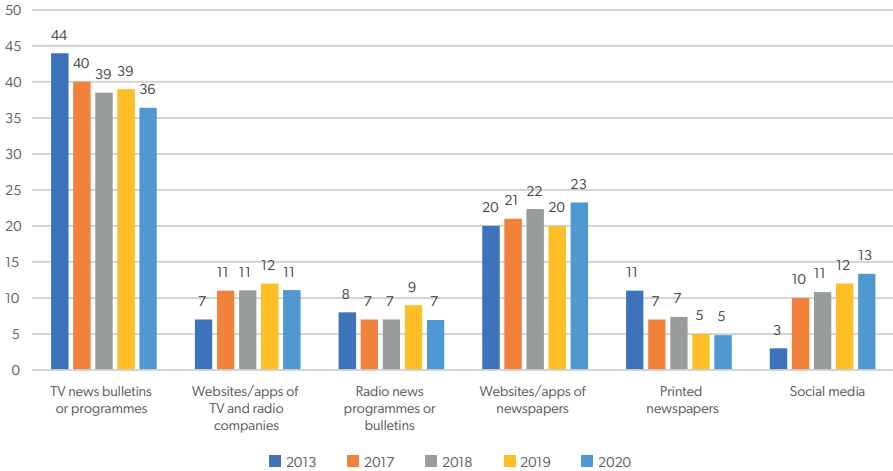
Public service television and online newspapers remain the prime sources of news and information in Denmark. Some age gaps in media use exist, particularly with regard to Danes under 25, who continue to consume news, but prefer to receive their news through social media.

News media is still central for Danes when it comes to getting news and being informed about society. According to the 2020 *Reuters Institute Digital News Report* (Newman et al., 2020), 84 per cent of the Danish population access

news daily, and according to 2019 study Publicistisk Barometer [The Publicist Barometer] (Blach-Ørsten et al., 2019), most Danes (76%) considered journalistic news media important or very important for society. According to the report, only 15 per cent of Danish users indicated that they sometimes or often try to avoid news altogether – the second lowest rate (after Japan) among the 38 countries in the sample (Newman et al., 2020).

Overall, news media is widely used in Denmark by all segments of society and on a variety of platforms. Numbers from the Danish part of the Reuters report (see Figure 1) show that from 2013 to 2020, television, although declining, remained the preferred news source for most Danes, with newspapers’ online sites coming second. Social media is the preferred news source of just 13 per cent in 2020 (Schröder et al., 2020).

Figure 1 Preferred news platforms in Denmark, 2013, 2017–2020 (per cent)



Source: Newman et al., 2020

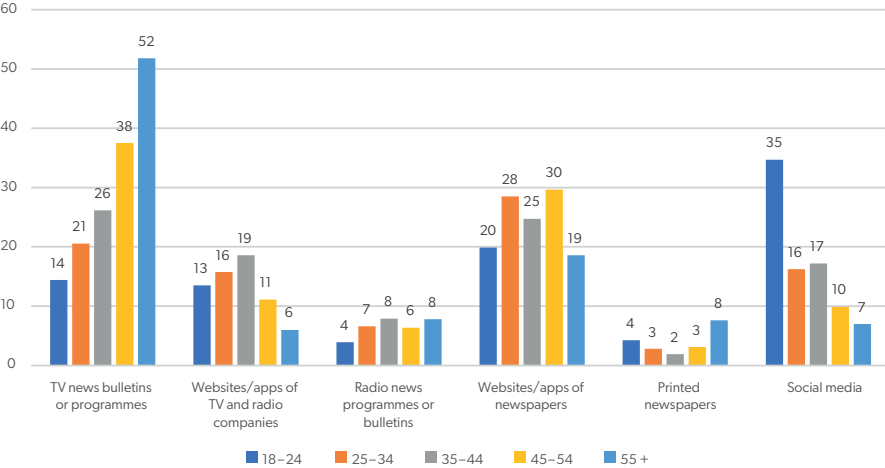
However, there is a widening gap between age groups when it comes to platform use, with older generations preferring television and the younger age group preferring social media (see Figure 2).

There were also some differences noted between genders, in patterns of media use: female users (37%) were more likely to have accessed news via social media than male users (24%) (Schröder et al., 2020).

Geographical cleavages in news consumption exist, though to a relatively minor degree. While users from the Copenhagen region were more likely to consume nationally distributed newspapers (online and offline – 65% reach within the last week), these “big city” papers still reached almost half of the

adult population in smaller towns and rural areas as well, where they supplemented regional and local newspaper consumption (Blach-Ørsten et al., 2019).

Figure 2 Preferred types of news media in Denmark by age, 2020 (per cent)



Source: Newman et al., 2020

Overall, age, gender, and geographical differences in news media use are comparatively less pronounced, and many Danes get their news from several different news platforms on a daily basis, with public service platforms (online and offline) still being part of most Danes’ news diet.

(F3) Diversity of news sources

2 POINTS

Diversity of news sources is relatively high but limited by reliance on a single national news agency and a decreasing number of foreign correspondents.

Denmark’s only national news agency, Ritzau, remains an important source across all Danish news media platforms. Ritzau is owned by eleven Danish news media, including Danmarks Radio, and has been found to be widely quoted as a source in online news sites (Lund et al., 2009; Blach-Ørsten et al., 2013). From 2012 to 2015, Berlingske News Agency existed as a rival to Ritzau; however, in the end, the small Danish media market could not sustain two national news agencies. According to interviewees,¹ Ritzau still plays a role in day-to-day reporting, but mostly online. For print editions, the national newspapers focus on their own original content.

Regarding the use of public relations (PR), journalists usually state that it has little or no influence on their work, while research often suggests otherwise. Kristensen (2004) argues that journalists and professional sources, including PR agencies, increasingly have become dependent on one another, while Wedel (2016), based on interviews of actors in the PR-industry, shows that news media is fundamental to PR work, and that selling stories, especially exclusives, to news media is a common and successful PR-practice.

Content exchange with partners and other media is still the exception, except with bigger international stories, such as the *Panama Papers*. In these instances, different news media – usually one of the public service broadcasters and one of the eight national newspapers – team up to do the coverage together. But news media also quote each other's stories, especially online (Blach-Ørsten et al., 2013), to an extent that news media – from time to time – accuse each other of over-quoting. This led to new guidelines for quoting by the interested organisation “Danske Medier” (Danish Media's Employer Organisation) that were passed in late 2014.

Sources in Danish news media have in several studies been found to be mostly elite and male, but more female sources have been appearing in recent years (Willig et al., 2015). Minorities, however, are still not widely represented in the news (Jørndrup, 2017).

(F4) Internal rules for practice of newsroom democracy 2 POINTS

Newsroom democracy in Denmark is well established. However, it is informal and carried out more in the professional culture rather than written down in formal, internal rules.

Interviewees describe a strong, but informal democratic culture in newsrooms that grants individual journalists veto rights, flat hierarchies, and participation in decision-making processes. Danish newsrooms do not have newsroom councils.

The Danish Media Liability Act of 1991 states that “the content and conduct of the media shall be in accordance with sound press ethics” (Pressenævnet, 2013: para. 1). The code of press ethics is written down in the “Advisory rules of sound press ethics”, last revised in 2013 (Pressenævnet, 2013). The Code of Ethics is further supervised by the Danish Press Council.

Besides the advisory rules, a 2015 study of media ethics in Denmark documented that most major news organisations either had published or were preparing to publish their own ethical guidelines online (Blach-Ørsten et al., 2015). In general, all media guidelines favour balanced and fair reporting, ideals that journalists themselves also mention in interviews. However, only a few of these guidelines focus on internal newsroom democracy. The rules that do address

these issues are rather vague, such as stating that journalists should not be asked to perform tasks that go against the advisory rules or be asked to perform a task that goes against his or her principles. Neither of these guidelines has ever been tested in the Danish Press Council.

With regard to influence on hiring an editor-in-chief, most of our respondents say that editors are hired or appointed without the participation of the regular journalistic staff. For public service outlets DR and TV 2, the board – including one member representing staff – is part of the hiring process when it comes to hiring at the top executive level.

To our and our interviewees' knowledge, there are no Danish news media who have internal rules to support and promote female journalists' careers or women's access to managerial positions, and we do not know of any formal systems of monitoring and evaluating the presence and participation of women in decision-making at all levels.

(F5) Company rules against *internal* influence on
newsroom/editorial staff

2 POINTS

The degree of independence of Danish newsrooms is high; editorial decisions remain in the domain of the editorial staff, but there is increasing collaboration between editorial and commercial departments.

With regard to ownership, Danish newspapers separate their newsrooms from owners, although there are not – in most cases – any legally binding rules in place. Most newspapers are foundation-owned, which serves as a safeguard against commercial pressure exerted by owners.

Interviewees state that owners stay out of the newsroom and that all editorial decisions are taken solely by editorial staff. While newsrooms and advertising are still two separate departments, more collaboration is taking place between the editorial and commercial parts of the papers. Also, there is a growth in news sections for which collaboration between journalists and the advertising department are more likely, such as travel, leisure, holidays, celebrities, and mobility (cars).

For public service media, the arm's length principle shields editorial staff from the influence of the board and politicians (see also indicator C2 – Independence of the news media from powerholders).

(F6) Company rules against *external* influence on newsroom/editorial staff

3 POINTS

Danish newsrooms are well shielded from external commercial influence. The increasing relevance of native advertising does, however, pose a potential gateway for increasing external influence.

With few exceptions, Danish news media do not solely rely on advertising revenues. Newspapers in Denmark are financed by public media subsidies, sales, and advertising. The national channels of TV 2 are financed by advertising and sponsorship, while the eight regional channels are financed via the same licence fee that is also the main finance for DR's radio and television channels, along with some sponsorship for specific types of programmes.

Protection from external influence in newsroom and editorial staff is a fundamental value of Danish news media and reporters and is mentioned explicitly in many guidelines (Willig et al., 2015; Blach-Ørsten et al., 2015). In DR's guidelines (Danmarks Radio, 2019a), it is highlighted that DR is independent and has full editorial rights to all its programmes. Likewise, the editorial guidelines of *Politiken* state that the newspaper is independent of political parties, organisations, financial interests, groups, and individuals (Willig et al., 2015). Editors and journalists all acknowledged that there are, and always have been, actors who try to influence the news, but that newsrooms are built to withstand that pressure. Our interviewees also did not report incidents of advertising clients attempting to influence editorial content.

In recent years, there has been a general increase in the use of so-called native advertising in Denmark, in other words, sponsored content that takes on a journalistic form. Today, much of professional media has internal guidelines for both production and dissemination of native advertising, and the largest media houses have designated staff who specialise in native advertising. Although in accordance with the Danish Marketing Practices Act and the Press Ethical Guidelines, as long as such content is clearly marked as paid-for content, studies have shown that actual marking practices are not always ideal, with users facing difficulties in identifying such content as advertising.

(F7) Procedures on news selection and news processing 3 POINTS

Most news media have formal procedures for news processing. For news selection, however, the formal procedures are far less detailed.

The education and professional training of Danish journalists are characterised by strong homogenisation and conservation of professional values – including those related to news selection and news processing (Willig, 2016). The

five so-called news criteria – timeliness, importance, identification, conflict, and sensation – are core professional values of all Danish journalists and used explicitly in newsrooms when selecting and processing news (Schultz, 2007; Willig, 2012). In addition, most news media houses have their own written policies stating different criteria for news selection and processing, alongside more implicit professional values such as “exclusivity” (Willig, 2012). In daily practice, news is selected and discussed in the many daily meetings among both the chief editors as well as section editors and staff. If common ground cannot be found on a story, it is either the editor or the editor-in-chief who makes the final decision, according to interviewees.

(F8) Rules and practices on internal gender equality 2 POINTS

Gender differences in terms of salary and positions persist, albeit to a lower degree than in other sectors and in other countries. There is relatively little emphasis on achieving gender equality through formal rules and initiatives, but in recent years, awareness has increased and large media organisations are beginning to explicitly articulate their goals on internal gender equality.

Compared with neighbouring Sweden, Denmark has fewer formal rules on gender equality, and less of a tradition of practising internal gender equality – generally, in both the public and private sector as well as, specifically, in the media industry. Public broadcaster DR has implemented a gender quota at the managerial level (minimum 40% women) and both DR and TV 2 monitor the in-house gender distribution and wage gap. Some newspaper companies (such as JP/Politikens Hus) include a formal commitment to equal pay in their annual and corporate social responsibility (CSR) report (JP/Politikens Hus, 2018: 19).

The salary gap between men and women in Denmark is 13 per cent in general (Poulsen, 2018), and 5 per cent in the media industry (Obitsø, 2020b). The salaries of female journalists are already a little lower at the entry level and there is a significant difference in the type of jobs that pay the most at entry level for either women or men (Obitsø, 2020a).

According to The Danish Union of Journalists, 48 per cent of their members are female and 52 per cent are male; however, members of the union do not necessarily work as journalists. According to a study on Danish journalists by Skovsgaard and colleagues (2012), 46 per cent of Danish journalists are women and 54 per cent are men. However, gender differences become wider at the top level and managerial positions (Andreassen, 2015, based on a Women and Media Industries in Europe report). The 2017 Media Pluralism Monitor places Denmark at low to medium risk on the dimension of “access to media for women”, stating that “women are still under represented compared to men

in the news, but women are well represented in the key positions in PSM” (Netterstrøm, 2017: 7).

Interviewees stated, on the one hand, that there is an increased focus on gender balance in the newsroom, but on the other, they acknowledged that there is still a pay gap between men and women, with men having higher salaries. Several stated that the pay gap is a high priority and needs to be addressed, and some mentioned that media strives for gender balance in inviting candidates to job interviews. Interestingly, they seldom referred to their own reports and written statements on the subject.

(F9) Gender equality in media content

1 POINT

Danish news media has no codified rules securing gender equality in media content, but an increased awareness of the issue exists.

Women are under-represented as sources in Danish news media, although independent studies show a different ratio of male and female sources. One study finds an increase in the number of female news sources in the average week from 1999 to 2012, from 16 per cent to 22 per cent (Willig et al., 2015), while the 2015 *Who Makes the News* Danish country report found 25 per cent of female sources at the time of study. This study also found that female journalists produced only 32 per cent of the news at the time (Jørndrup & Bentsen, 2015).

Despite these differences, only a few news media organisations have had an editorial focus on gender sensitivity in media content. Of these, the two newspapers *Information* and *Politiken* have both tried – but failed – to secure more equality in their media content, while the television programme *Deadline* on DR 2 has had more success including more women as guests in the programme. Several of the interviewees, however, stated that this has received an increased focus in the newsroom within internal editorial debates. Some also stated that they have taken measures to count the use of sources to secure a more balanced use.

(F10) Misinformation and digital platforms
(alias social media)

2 POINTS

There is high awareness on the issue of misinformation on digital platforms in Denmark; the actual amount of fake news and disinformation campaigns on social media appears, however, to be comparatively low. Defence mechanisms are in place, but they mostly rely on established journalistic fact-checking, while algorithmic and data-driven solutions are only slowly being tested by few media.

The debate about misinformation and fake news has been a big part of the public conversation in Denmark since 2016, and several leading news outlets (*Politiken*, *Berlingske*, DR) have regularly focused on the issue of “junk news” in media coverage. However, studies show that Danish media users come across very little misinformation and fake news in traditional news media (Schrøder et al., 2019). Studies of the 2019 national elections found very little evidence for the dissemination of misinformation on social media platforms (Guldbrandsen & Just, 2020; Derczynski et al., 2019).

Independent fact-checking is only done on a regular basis by the television programme *Detektor* on DR 2 and by the online news site Mandag Morgen, which has a sub-site, TjekDet, dedicated to fact checking. Interviewees state that controlling the validity of information is the core task of journalism, and this also goes for information on social media. A few of the interviewed media houses suggested that they have been trying more technical ways of verifying information, either themselves or via a third party.

(F11) Protection of journalists against (online) harassment 3 POINTS

There is increasing awareness for the issue of online harassment, and internal policies to address the issue are in place – although not always well implemented in practice. The trade union provides an ample level of assistance and guidance.

Our interviewees stated that online harassment is an increasing problem, especially – but not exclusively – for female reporters. Several Danish media have updated policies dealing with cyber harassment. One study conducted in 2018 suggests, however, that these policies have not yet fully translated into solid procedures for handling incidents of online harassment. Consequently, journalists may fail to report these incidents, and not all incidents are necessarily reported to the police (Østergaard, 2019). All interviewees found that when a journalist experienced and reported online or other types of harassment, the editors were there to help and possessed the resources to do so. Moreover, Dansk Journalistforbund [The Danish Union of Journalists] provides ample guidelines and assistance for its members (including freelance journalists) –

such as a 24/7 emergency phone number – and founded a “digital self-defence group” for journalists in 2019 (Therkildsen, 2019).

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 2 POINTS

The level of media ownership concentration in Denmark is relatively high and primarily the result of Denmark being a small media market (as Danish is only spoken in Denmark).

According to the Danish country report in the Media Pluralism Monitor project, Denmark does not have specific laws regulating ownership of media; instead, the media market is regulated by general competition. There have been no legal cases (litigation) regarding media pluralism, nor regarding limitations on media pluralism. Neither has Denmark faced problems with politically affiliated business people taking control of central media outlets and using them for direct or indirect political influence (Willig & Blach-Ørsten, 2016). This is due to the large public service sector and to the tradition of foundation ownership. It is also important to note that Danish laws on public service radio and television demand diverse programming and that all public service media have editorial freedom. Furthermore, there is a media subsidy system (innovation pool and direct subsidies) for editorial content for the written press, online and in print, which is based on a general consideration for media pluralism. The Danish media system has various boards that function independently of the political system and work as defined in law and following their statutory obligations. Finally, pluralism of the media and of content is a general principle of the media laws, especially concerning public service and media subsidies (Willig & Blach-Ørsten, 2016).

Denmark does, however, show evidence of media ownership concentration at the national level. There are two explanations for this: 1) Denmark is a small media market, and 2) the Danish state is a large domestic media owner, owning the two large broadcasting companies as well as eight regional public service broadcasters (funded by licence fees), with one regional television channel each and regional windows on the largest television channel TV 2, if measured by audience. Furthermore (especially relevant to the cross-media ownership concentration) the largest national news agency (Ritzau) is owned by a large group of media companies including the Danish public service broadcaster DR (Willig & Blach-Ørsten, 2016).

Due to the market dominance of the two public service channels, CR3 (the total market share for the three largest suppliers) on the television market

is 0.86 (2018). Market concentration in the print media sector is somewhat lower, although still significant (as Danish newspapers have ceased to measure their circulation in 2014, a CR3 comparable to the other countries cannot be calculated).

(E2) Media ownership concentration regional (local) level 2 POINTS

There is a relatively high degree of media ownership concentration at the regional level in Denmark after a period of market consolidation in the last decade.

Until 2014, ownership of regional and local newspapers was characterised by five large “regional monopolies” (Schultz, 2007): Nordjyske Medier, Midtjyske Medier, Syddanske Medier, Fynske Medier, and Sjællandske Medier; however, this changed when Midtjyske Medier and Syddanske Medier were bought by Jyske Medier and renamed Jysk-Fynske Medier.

In 2020, one of the two large media companies – the foundation-owned JP/Politikens Hus – gathered its remaining 12 local newspapers (distributed in the eastern part of Jutland) under the ownership of *Jyllands-Posten*, after having sold off titles in Denmark (the northern part of Sealand) and Sweden (JP/Politikens Hus, 2020).

The other large media company, Berlingske Media – which has been in commercial ownership since 2000 and is now owned by Belgian De Peers-group – used to have a portfolio of local newspapers, but these have all been sold except for a minority share in one local newspaper, *Bornholms Tidende* (Qvitau, 2011).

(E3) Diversity of news formats 3 POINTS

There is strong diversity in news formats in Denmark on all platforms and in both privately owned and public service media.

Danish news media provides for a large variety of different news formats. They are available in both printed and online media, owned by private foundations or owners, and in public service media, mainly provided electronically and digitally in broadcast, on-demand, and radio. Printed subscription newspapers in Denmark are traditionally broadsheets carrying a wide range of genres (original news items, telegrams, op-eds, backgrounds, features, columns, etc.) and a wide range of topics (politics, economy, current affairs, culture, sports, etc.), which are presented in different combinations, thus catering to different market segments. The online editions of legacy media houses also spill off from their

heritage and carry a relatively broad mix of genres and topics. The two printed tabloids also offer a mix of news genres (both original news and telegrams on current affairs, politics, crime, celebrity, and sports) as well as columns. They also have space for the public to comment on stories, and so forth. Meanwhile, the national public broadcaster DR carries a wide range of news formats on radio, television, and podcasts, both flow and on-demand. The regional public broadcaster TV 2, on the other hand, offers different news formats on flow and on-demand television as well as online. In total, almost all genres are supplied, and news is offered on local, national, and international levels.

(E4) Minority/Alternative media

2 POINTS

The only officially recognised minority group in Denmark, the Germans, have their own media. Other minorities are less visible and represented in the Danish media landscape.

Political minorities are represented by online (so-called alternative) media. The public broadcasters provide news for minorities with challenges concerning hearing, seeing, and reading.

German is the only officially recognised minority language and population in Denmark, and one newspaper carries news for this group. The German minority in Southern Jutland has its own newspaper, the well-established *Nordschleswiger*. Moreover, the Danish state heavily subsidises the Danish minority language newspaper *Flensborg Avis* in Germany. However, there are no (alternative) media organisations for other language minorities (for instance Turkish and Urdu speaking minorities) in the country, and attempts in the past have not been economically viable due to its relatively small market.

Public broadcaster DR no longer produces programmes that target minority groups; there are no private media houses either catering to (unofficial) minority languages, such as Turkish or Urdu. Even though immigration as an issue continues to be in the political and media spotlight, ethnic minority voices are still under-represented in news content (Jørndrup, 2017). Immigrants and their descendants have a substantially lower level of television and print news consumption than the average population (34% consume news several times a day; 9% have not consumed news within the last week), but are more likely than people of Danish origin to get their news through social media (Stenholt Engman, 2019).

The political majorities belonging to the centre-left and centre-right are represented by the printed and online legacy media, while the political minorities belonging to the far left or far right are more present in dedicated online media organisations. Alternative media in Denmark are directed towards political fringe audiences on the right- and left-wing of the political spectrum, as well

as catering to news audiences in search of “constructive” or “slow news”; but, that market is still rather limited (Mayerhöffer, in press; Blach-Ørsten & Mayerhöffer, in press).

The public broadcaster DR has an obligation to cater to the minority population of hearing- and sight-impaired individuals and people that have difficulties reading. While the 2017 Media Pluralism Monitor placed Denmark accordingly at low risk when it comes to access to media for people with disabilities, the risk for access for ethnic minorities had been rated at medium to high (Netterstrøm, 2017).

As part of the Danish Commonwealth, Greenland and the Faroe Islands have broadcast and print media in Greenlandic and Faroese. The public broadcasters are funded by the respective governments, and the newspapers are privately-owned. There are no media operating on the Danish mainland that cater to Greenlanders and Faroese based in Denmark.

(E5) Affordable public and private news media 2 POINTS

Public service media are relatively affordable. Newspapers – both print and online – are relatively expensive.

At the most general level, a Danish household spends around 7 per cent of its overall consumption on media related expenses such as streaming, television, telephone, newspapers, and so forth (Slots- og Kulturstyrelsen, 2019a). Compared with the past, this has somewhat declined and reflects a general decrease in media-related expenses in Danish households. Although the decrease does not concern one single form of media use, it is the biggest for media that is read and seen. The streaming shows, meanwhile, have seen an increase (Slots- og Kulturstyrelsen, 2019a). Danes pay a licence fee for public service television and radio, and Danish newspapers are generally priced higher than in the other Nordic countries (Schrøder et al., 2017) making a printed newspaper a product not affordable for all Danes. Prices for broadband access are in turn somewhat lower.

(E6) Content monitoring instruments 1 POINT

Content monitoring instruments are not widely implemented in the Danish media industry.

The content of privately-owned media houses who receive public media support are regularly monitored by the authority (The Media Board), but the information is not publicly available.

Public service media also provide content information to the authority (The Public Service Board) that is published annually in the form of Open Access reports.

Content monitoring reports are occasionally published by various organisations (e.g., universities and The Agency for Culture and Palaces). Private news media's annual reports do not include content monitoring.

The commercial company Infomedia offers media monitoring services, which are used by news media as well as authorities and private companies.

(E7) Code of ethics at the national level

3 POINTS

National media have high ethical standards and procedures on a formal as well as informal level.

The Media Liability Act of 1991 states that “the content and conduct of the media shall be in accordance with sound press ethics” (Pressenævnet, 2013: para. 1). The press ethics are written down in the “Advisory rules of sound press ethics” and were last revised in 2013 and are under the supervision of the Danish Press Council. However, new online news media must actively choose to register to be supervised by the Danish Press Council. While some have chosen to do so, some smaller alternative news sites have not. Overall, however, most Danish news media are supervised by the Press Council (Blach-Ørsten et al., 2015) and respect its rulings.

In 2019, the Press Council received 201 complaints about breaches of the sound press ethics. In 2018, that number was at 160. Only 21 per cent of the 201 complaints led to criticism from the Press Council (Pressenævnet, 2019). The complaints were about almost all types of media, with one tabloid and one public service radio station having the most complaints in 2019. In general, most complaints concern crime reporting or financial reporting (Blach-Ørsten et al., 2015). Our respondents confirmed that there is a high degree of focus on the sound press ethics, and that this focus is probably stronger now than it was previously.

(E8) Level of self-regulation

3 POINTS

The level of self-regulation is high in Denmark and part of a professional newsroom culture.

All ten of the leading Danish news media organisations have their own ethical rules and guidelines, with most of them being published online. A study shows

that there has been an increase in the development of internal guidelines and self-regulation from 2006 onwards (Blach-Ørsten et al., 2015). The internal guidelines supplement the guiding rules of sound press ethics and in some instances are more specific and far reaching, for instance, DR's 94-page book of rules and guidelines (Danmarks Radio, 2019a). One editor-in-chief argued that the internal rules were stricter than the general rules. Three Danish news media houses – DR, TV 2, and the newspaper *Politiken* – also have an ombudsman to address media content and receive complaints from users. DR's and TV 2's ombudsmen are mandatory by law, whereas *Politiken* has set up an ombudsman by choice – and is so far the only private media with an ombudsman in Denmark.

(E9) Participation

2 POINTS

News media in Denmark invite participation from the public and value comments, tips, and letters to the editor.

According to the respondents, maximum participation happens when citizens contact journalists with story tips, post comments about news stories in online newspapers, or write letters to the editor. Generally, media houses are very open to the participation of the public, and newspapers often print op-eds written by citizens.

More direct contact between the media and the public can be seen in lectures, public debates, or other activities where the media invites their audiences and the public. One newspaper's representatives travel around the country once a year to visit its audience. Public broadcaster DR has several initiatives, including ten regional dialog forums for securing input from its users (Danmarks Radio, 2019b). In the past decade, a small number of news media have experimented with open newsrooms or public news conferences, but none of those experiments have been implemented yet.

(E10) Rules and practices on internal pluralism

2 POINTS

The internal pluralism in Denmark is based more on practices than rules and most often discussed in relation to professional journalistic values.

Danish newspapers are not partial or political in nature. Most adhere to either a centre-right or centre-left universe in their editorial pages but strive to achieve a certain amount of pluralism in the opinion pages, while – in their self-understanding – working with professional values of impartiality in the news content.

Newsrooms will have daily discussions on the sources and opinions presented in the media, but the discussions are usually based on professional values (such

as news selection criteria or the self-understanding of the newspaper) rather than based on explicit values of internal pluralism. Interviewees, however, stated that they experienced increasing awareness regarding questions of internal pluralism.

To our knowledge, there are no standardised procedures in Danish news media to ensure internal pluralism and give voice to various groups; this includes public service media. The public broadcaster DR, however, has a Director of Pluralism and Diversity who is in charge of a range of pluralism activities regarding recruitment of participants in popular programmes, for positions as journalists, and so forth.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers”

2 POINTS

Media performance is often publicly discussed in media, and media themselves are a topic for critical journalistic coverage in special magazines and sometimes very rarely in media scandals.

DR and TV 2, the two public broadcasters, are obliged to have ombudsmen. One privately-owned newspaper, *Politiken*, has had a “reader’s editor” since 2001. Together, the ombudsmen contribute to public debate by writing columns and reports on media performances and coverage. Journalism scandals have generally been uncovered by other media houses rather than the media affected by the scandal.

Special interest magazine *Journalisten* provides a platform for debate on ethical questions among journalists. Meta-reflections on the role of the media (e.g., with regards to phenomena like racism, populism, or xenophobia) are not frequently taken up in editorials and columns of leading news media. There are generally only few formats providing meta-journalism, such as *Presselogen*, *Mennesker og Medier*, Mediawatch’s *Q podcast*, or DR’s satire programme *Tæt på Sandheden*. Recent scrutiny of “junk news” sites has been initiated by public and private media alike, while right-wing blogs and alternative media are critically monitoring the leading news media.

(C2) Independence of the news media from
powerholders

3 POINTS

No formal or ownership-related influence looms over leading news media houses, but political parallelism is a factor for newspapers.

For the public service media, the relationship between news media and powerholders is guided by an arm's length principle (Moe & Mjøs, 2013), which means that “neither politicians nor the Ministry of Culture are involved in the concrete subsidy allocation or act as arbiters of taste” (Kulturministeriet, 2012: pp. 3–4). Thus, the principle is thought to prevent the political level (the Ministry of Culture, the boards of DR, and TV 2) from interfering in editorial discussions and day-to-day practices. In recent years, the arm's length principle has, however, occasionally been challenged by both board members of DR and politicians. They have also attacked specific journalists, programmes, or news coverage in very clear terms. Like the other Nordic countries, Denmark is in the process of shifting to a tax-based media licence system, which might put extra pressure on the arm's length principle in the future.

With the exception of Berlingske Media, newspapers are foundation-owned and thus not owned by non-media companies or political parties. Most Danish newspapers have their historic origins in the party press system. Though formally independent, the degree of political parallelism in news content and audience patterns continues to be comparatively high. Boards of leading news media are in turn largely shielded from powerful business interests. A recent Danish elite study showed that media executives and editors, with very few exceptions, do not form part of Danish elite circles (Larsen et al., 2015).

For the media sector as a whole, the Media Pluralism Monitor 2016 found Denmark to be at low risk when it comes to political influence, as well as at low risk for commercial and ownership-related influence over media content (Willig & Blach-Ørsten, 2016).

(C3) Transparency of data on leading news media

2 POINTS

Some data is published regularly, but not everything is easily accessible. Transparency requires data collection from several different sources, and it does not provide a uniform basis of comparison for all the leading news media.

The transparency of public service media cannot be measured definitively by relying only on obligatory public service statements, which are yearly reports of all receivers of public media support: DR (entirely funded by public media support), the regional TV 2 broadcasters, and various radio stations (Kultur-

ministeriet, 2020b). Such reports document different statistics on economy, audience reach, and content.

Written news media (both in print and online) can also receive public media support and are equally obliged to provide transparent reports on economy (Kulturministeriet, 2020a). The media committee appointed by the minister of cultural affairs oversees that the media who get public media support comply with various content criteria stated in the law (e.g., professional journalism). JP/Politiken (2018), Berlingske Media (2018), DR (2019), and TV 2 (2019) also publish annual reports – sometimes called CSR reports, and sometimes just yearly reports.

(C4) Journalism professionalism

3 POINTS

The journalism professionalism in Denmark is high with strong professional ethos.

According to Hallin and Mancini (2004), professionalisation of journalism has three components: autonomy of journalists; development of distinct professional norms and rules; and the public service orientation of journalists. The degree of autonomy of Danish journalists is relatively high, not least due to a combination of 1) a very strong union representing almost all Danish journalists, which has been very successful in securing high income and good working conditions for their members, and 2) the Danish welfare state model which gives (media) employers high flexibility and (media) employees high income security.

Until global digital intermediaries challenged the business model of national professional media organisations by attracting advertising spending to social media platforms, the economy of media companies in Denmark was good. In recent years, however, the economy has been challenged in news organisations and this has led to less job security and lower income for the youngest generation of journalists (see also indicator C5 – Journalists' job security). The professional culture of Danish journalists is strong and goes hand in hand with a homogenous development of distinct professional norms and rules (Willig, 2016). Regarding the third component, the public service orientation of Danish journalists is relatively high. First, electronic media carrying news are predominantly public service media. Second, regarding newspapers, Denmark has a tradition of not-for-profit ownership (Willig, 2010), reflected in mission statements and policy papers of individual news companies (Willig et al., 2015) as well as in the self-understanding of journalists (Skovsgaard, 2010; Willig et al., 2015). Thirdly, Denmark had a monopoly on journalism education until 1998, but even with the introduction of two new programmes of formal journalism educations at two different universities, all three forms of education are more alike than different, not least because they all include 12–18 months of paid internship (Willig, 2016).

(C5) Journalists' job security

2 POINTS

Journalists' job security in Denmark is generally high compared with other countries. However, the older generations have more secure job positions and privileges than their younger counterparts.

Traditionally, job security has been high in Denmark. But recent economic challenges to traditional news media have led to lay-offs and an increased use of freelance contracts. Although several interviewees did not feel that they experienced less job security than previously, a former head of The Danish Union of Journalists was more sceptical of recent developments, pointing especially to the unstable job security of the younger generation of journalists, highlighting an increased use of freelancers by more and more news media houses. Recent layoffs, as well as the Covid-19 crisis, have also led to a slight increase in the unemployment rate of journalists.

(C6) Practice of access to information

2 POINTS

Traditionally, Danish news media have enjoyed a relatively high widespread access to public information. However, a revision of the law in 2013 led to several restrictions that, despite debate and criticism, are still in place today.

The Danish Information Act has traditionally guaranteed widespread access to public information – so-called *aktindsigt* [access to documents]. It explicitly states the need to guarantee news media's role in delivering information to the public. Journalists enjoy certain privileges; for instance, public institutions are instructed to quickly react to requests from the media and cannot deny requests based on a lack of resources (Dansk Journalistforbund, 2020). However, only 40 per cent of requests are actually responded to on time (Dahlin, 2016).

However, the Act was revised in 2013 and now includes a number of significant and much-debated restrictions. Among others, correspondence between civil servants and ministers – as well as between ministers and members of parliament – is no longer publicly available (TI-DK, 2020). In this respect, the Danish Information Act now grants fewer rights to access than are in place at the EU level (Jørgensen, 2020). The system is also weakened by a rather ineffective complaints system (Obitsø, 2019).

A number of interviewees named an increasingly restricted access to political decision-makers and the revised Information Act as one of the key challenges for media's democratic role in Denmark today. A 2020 report of the Freedom of Speech Commission has concluded that the system of access to information is one of the main obstacles to an enlightened public debate in Denmark (Okholm et al., 2020).

(C7) The watchdog and the news media's
mission statement

3 POINTS

All leading news media refer to the watchdog role and work to exercise it.

An analysis of news media's policies shows that most news media in Denmark adhere to the principle of critical and independent journalism that especially focuses on the "bearer of golden chains" (power-holders) (Willig et al., 2015). The role of a watchdog also presents an integral part of individual journalists' self-perception in Denmark. According to World of Journalism Data, a large majority of Danish journalists perceive monitoring and scrutinising political leaders, as well as businesses, as an extremely important part of their work; numbers are higher than in most other European countries (Skovsgaard, 2010; Skovsgaard et al, 2012).

(C8) Professional training

3 POINTS

Continuous "knowledge" training for journalists in news media are available and are usually funded by the employer.

Professional training, in particular, also with respect to data and investigative journalism, is widely available and well-established. The Danish Media Association and The Danish Union of Journalist's collaborate for the Educational Fund of the Press, which finances training courses for its members (including unemployed ones) as part of the collective wage agreement (Pressens Uddannelsesfond, 2020). This system is, however, heavily geared towards persons in traditional journalistic positions and has been criticised for not sufficiently catering to emerging "atypical" journalistic positions (Fagenes Fremtid, 2019). There is no tradition of offering courses that specifically target female journalists.

(C9) Watchdog function and financial resources

3 POINTS

Leading news media give high priority to well-funded investigative journalism

According to the interviewees, investigative journalism is highly prioritised, even more than in the previous years. The Danish Association for Investigative Journalism (since 1989) serves as a base for professional sparring and training; the association organises many workshops and conferences to discuss and promote investigative journalism and awards several annual prizes for investigative journalism. Denmark's most prestigious journalistic award, the Cavling Prize, heavily tilts towards primarily honouring investigative journalism, as well.

Most leading news media have installed specific task forces, or even editorial offices, for investigative journalism. For example, Tabloid *Ekstra Bladet* has, in October 2019, increased their focus on investigative journalism by erecting an editorial office with more than 20 journalists dedicated to the purpose. Journalists from leading Danish news media regularly join cross-border investigative journalistic projects. We do, however, lack data on the number of financial resources dedicated to investigative journalism.

Conclusions

This is the first time that Denmark is part of the Media Democracy Monitor project. The report shows that Denmark generally lives up to most of the democratic criteria regarding freedom of information, media pluralism, journalistic professionalism, equality, and the watchdog function of the news media. Despite economic pressure on the media industry – not helped by the current Covid-19 crisis – interviewees stated that media independence is high and that resources allocated to investigative journalism have increased in the recent year in leading news media.

Still, several challenges persist in the Danish news media. Interviewees stated that increased government control of information is a problem. A change to the Public Information Act in 2013 made it more difficult for the media to access information. A 2020 report on freedom of speech in Denmark points to this as a democratic problem that needs to be addressed (Justitsministeriet, 2020). The media itself does not score too highly when it comes to internal control of media content, access, and coverage of some minorities, as well as to fostering gender sensitivity and equality. A new threat to journalism, that of protecting journalists from online harassment, has in a short time become a priority in all major news media, who report setting up systems to protect and counsel journalists who come under attack.

With regard to internal democracy in the Danish newsrooms, Denmark has a strong – but informal – tradition of including journalists in their editorial discussions. Securing the media's democratic role through informal culture, rather than through codified rules and guidelines, is also more generally a characteristic feature for Danish news media. While this remains a robust and highly adaptive model at the present time, it also introduces an element of fragility in the long run.

Note

1. We conducted ten interviews with reporters and editors between February and March 2020, with additional interviews conducted in June 2020. We interviewed both current and former employees working in the leading Danish news media as well as two of the most important interest organisations: The Danish Union of Journalists and The Danish Media Association.

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GREECE

Media concentration and independent journalism between austerity and digital disruption

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Introduction

The Greek media system reflects the geopolitical history of the country. Greece is a medium-sized European country located on the southern part of the Balkan Peninsula. By the middle of the nineteenth century, it had just emerged from over four centuries of Ottoman rule. Thus, for many decades, the country was confronted with the task of nation-building, which has had considerable consequences on the formation of the over-extended character of the state (Mouzelis, 1980). The country measures a total of 132,000 square kilometres, with a population of nearly 11 million citizens. About 4 million people are concentrated in the wider metropolitan area of the capital, Athens, and about 1.2 million in the greater area of Thessaloniki. Unlike the population of many other European countries, almost all Greeks – about 98 per cent of the population – speak the same language, modern Greek, as their mother tongue, and share the same Greek Orthodox religion. Politically, Greece is considered a parliamentary democracy with “vigorous competition between political parties” (Freedom House 2020).

Freedom in the World 2021: status “free” (Score: 87/100, up from 84 in 2017).

Greece’s parliamentary democracy features vigorous competition between political parties [...]. Ongoing concerns include corruption [and] discrimination against immigrants and minorities. (Freedom House, 2021)

Liberal Democracy Index 2020: Greece is placed in the Top 10–20% bracket – rank 27 of measured countries (Varieties of Democracy Institute, 2021).

Freedom of Expression Index 2018: rank 47 of measured countries, down from 31 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 65 of 180 countries, steadily increasing from 99 in 2014 (Reporters Without Borders, 2020).

The political history of modern Greece is coloured by many upheavals, dichotomies, and partitocracy (Charalambis, 1996). While the growth of the modern Greek press in the mid-nineteenth century paralleled the establishment of political parties in the country, both radio and television broadcasting were introduced under dictatorships in modern Greece's troubled history. Radio was formed in the late 1930s under the Metaxas dictatorship and television in the mid-1960s under the Colonels (1967–1974) (Iosifidis & Papathanassopoulos, 2019).

As far as its structure is concerned, the Greek media system is primarily characterised by excess in supply over demand. In effect, in this small country, there has been an oversupply of newspapers, television channels, magazines, and radio stations, which undergo severe competition to capture audiences and the advertising market. Although the developments in the Greek media sector may not entirely respond to the needs of its advertising industry, it has been surprisingly adaptable to swings in the economic business cycle (Papathanassopoulos, 2017a).

The fiscal crisis of the 2010s, however, coupled with the crisis in economy, brought about major losses in advertising revenues for the media industry. Recently, although Greece was successful in combating the Covid-19 pandemic, the lockdown has had major negative impacts on the media sector. Today, all media outlets are facing their most difficult times ever, but it is the print media (newspapers and magazines) suffering the most.

In fact, one might argue that in Greece, there are more media outlets than the Greek audience can consume in reality. Therefore, it's not a coincidence that the fiscal crisis has simply demonstrated in a cruel way the irregularities of the Greek media system, and in this way, it has also affected its other aspects. Mostly, the nation's stagnant economy affected the consumption rates due to the collapse of the available income, derived from the heavy taxations and wages cuts. It led to the decline of the advertising budgets of most private companies and consequently, of the advertising spending on the media market. The Covid-19 outbreak and the consequent national lockdown had a negative knock-on effect on the media market, and in particular, on newspapers.

In the late 1980s, there were changes in the ownership of the Greek media with the entry of private radio and television stations. The fiscal crisis also affected the ownership status of traditional media outlets. For example, Tegoopoulos Publishing, the Greek company in charge of the well-known *Eleftherotypia* – a daily newspaper and one of the most widely circulated newspapers in the country – ceased to exist. In June 2017, the historic but financially distressed Lambrakis Press Group (DOL) came under the control of ship owner Evangelos

Marinakos, who, after a public auction, won the tender by offering EUR 22.89 million to the lenders (banks). Following that, Ivan Savidis, after another public auction, bought the bankrupt Pegasus Group (including newspapers *Ethnos*, the Sunday edition *Ethnos tis Kyriakis*) for EUR 3 million and *Imerisia* for EUR 580,000. However, despite the operation of the historic newspapers under new ownership, the publication of the daily *Ethnos* was suspended on 30 July 2019, while the Sunday edition *Ethnos tis Kyriakis* stopped its circulation on 9 August 2020, with Dimera Media Investments announcing that the newspaper's website would continue its operation.

Covid-19

It is widely acknowledged that Greece managed to react successfully to the Covid-19 pandemic crisis by taking early severe restrictions and imposing, like other countries, a national lockdown. From mid-March to mid-May 2020, the Greek government imposed strict measures on liberal democracy freedoms and rights of the citizens in order to curb the spread of the potentially deadly Covid-19 virus. They closed borders to neighbouring countries, imposed a ban on all public gatherings and events, announced a curfew, and shut down all shops except food supply, supermarkets, bakeries, pharmacies, and a few others.

Nevertheless, the case of the media – especially the so-called mainstream media – is another story. The media, coming out of the recent financial crisis accompanied by major losses of advertising revenues, had to face the pandemic now, however, continuing the task of informing the public, which was more necessary than ever. According to media professionals, although the lockdown had increased television viewership, advertising revenue had declined considerably by 40 per cent. Moreover, the lockdown imposed further impediments to the distribution of the press, since most Greeks were used to buying newspapers distributed and sold by kiosks rather than subscribing. The new and sharper decline of newspapers sales led some to consider that these were the last days of the Greek press. On 21 March 2020, the government decided to allow supermarkets to sell daily and Sunday newspapers. Additionally, media professionals in the press industry, as in other sectors of the economy, were given a one-off compensation of EUR 800.

Although news websites attracted new readers and users, they faced the same problem as television stations: lack of advertising. In effect, it declined sharply by 40 per cent, causing revenue losses in advertising-based media, especially affecting Sunday newspapers and private-commercial television channels and radio stations. As in other countries, most of the remaining advertising revenue went to the tech giants such as Google and Facebook. A similar pattern was followed in the field of television streaming and subscription services. Since Greeks

stayed at home due to the pandemic, there had been an increase in pay-TV and streaming services. As a result, the Covid-19 crisis resulted in an increase in the consumption of news, particularly on television (Chaimanta, 2020a, 2020b), similar to other countries around the world (Nielsen et al., 2020).

The Greek media have urged the government for support in order to sustain their business. In effect, the government announced a EUR 12 million campaign regarding Covid-19 with a view to increase it to EUR 20 – or even EUR 30 – million, but actually, it was an indirect way to help the media industry, desperate for advertising money. Meanwhile, adversarial media, or media affiliated to the opposition, accused the government of discrimination regarding the allocation of the “Covid-ads”.

Leading news media sample

Today, media ownership in Greece is concentrated in the hands of a few media magnates. The main media groups of the country are as follows:

- Alafouzos Group, including *Kathimerini* (daily newspaper) and *Kathimerini tis Kyriakis* (Sunday newspaper), *Kathimerini* – English Edition (daily newspaper), Skai TV (television channel), Skai FM 100.3 (radio station), Erotikos FM (radio station), and *Skai.gr* (news website). A member of Alafouzos family (Giannis Alafouzos) is the owner of Panathinaikos football team.
- Alter Ego (former DOL), now under the ownership of Evangelos Marinakis. Alter Ego owns *To Vima tis Kyriakis* (Sunday newspaper), *Ta Nea* (daily newspaper), *In.gr* (news website), and Mega TV (television channel). Marinakis is also the owner of Olympiacos football team.
- Proto Thema (Anastasiadis-Karamitsos). This group operates *Proto Thema* (Sunday newspaper), *Newmoney.gr* (financial news website), and *Olivemagazine.gr* (food website).
- Dimera Media Investments (Pegasus, former Bobolas Group), under the ownership of Ivan Savvidis. It operates news website *www.ethnos.gr* (since the suspension of its newspapers: daily *Ethos* and Sunday edition *Ethnos tis Kyriakis*) as well as Open TV channel. Savvidis is also the owner of PAOK football team.
- Real Group (Chatzinikolaou-Kouris), incorporating *Real News* (Sunday newspaper), Real FM (radio station), and *Enikos.gr* (news website).
- Vardinoyannis Group, including Star TV (television channel), Alpha TV (television channel), Alpha Radio (radio station), and Diesi FM (radio station).

- Kyriakou Group, incorporating Antenna TV (television channel), Macedonia TV (television channel), Easy (radio station), radio stations in Romania and Moldova, Heaven Music (music company), Daphne Communications (publishing), and *Vice.com/gr* (Greek edition).
- Philippakis Group, including *Dimokratia*, *Estia*, and *Espresso* (daily newspapers), *Dimokratia tis Kyriakis* (Sunday newspaper), *Orthodoxi Alitheia* (religion monthly newspaper), and *Newsbreak.gr* (news website).

On the other hand, the digital media field seems not very different from the traditional one. In effect, there are four main digital-born groups operating more than four different digital news brands (news websites) and seeming to have an advantage over their competitors:

- DPG (owned by Dimitris Giannakopoulos, basic shareholder of one of the most important pharmaceutical companies in Greece, Vianex, and owner of a famous basketball team, Panathinaikos). DPG owns several websites: *Newsbomb.gr* and *CNN.gr* (news websites); *Gossip-tv.gr*, *Queen.gr*, and *Ratpack.gr* (lifestyle websites); *Leoforos.gr* (sports); and *Astrology.gr*.
- 24 Media Group, mostly owned by Dimitris Maris, includes the websites *News247.gr* and *Huffingtonpost.gr* (news websites), and *Sport24* and *Contra.gr* (sports websites).
- Liquidmedia, owned by Mr. Rudolf Odoni. It owns various websites, including the following: *Gazzetta.gr* (sports); *Insider.gr* (news); *Meteorologos.gr* (weather); *Jenny.gr*, *Koolnews.gr*, *Zappit.gr*, *Toratora.gr* and *Neopolis.gr* (lifestyle websites); *Akispetretzikis.com* (food); *Spirosoulis.com* (decorations); and *Luben.tv* (satire).
- Attica Media Group, owned by Theocharis Philippopoulos. It incorporates the following websites: *Capital.gr* (finance news); *Missbloom.gr* and *Madamefigaro.gr* (women-oriented websites); and *Playboy.gr* (lifestyle).

At the moment of writing this text, the government has certified 675 digital media companies with more than 1,500 news websites.¹ According to the law, if a news website wants to carry advertisement from a public organisation, it should be certified by the Secretariat of Information and Communications. It is estimated that there are more than 10,000 websites and blogs in Greece.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographical distribution of news media availability 3 POINTS

In the Greek media market, news media are widely available all over the country, with supply often superseding existing demand. It is a media landscape characterised by high level of public access. Newspapers are mostly located in Athens, being national in scope; however, some regions still prefer, either as a first or a secondary choice, the local press. There are also both regional and local radio stations, with the most influential radio stations located in Athens and Thessaloniki. Television is available through terrestrial, satellite, or digital (broadband) transmission. Most of the media content, albeit not in its entirety, is offered free of charge.

The Greek media market is characterised by excess supply since there are more media outlets than what a small market can sustain. Despite a low readership, in 2016, the country accommodated 280 local, regional, and national daily newspapers. Among them there were fifteen national daily newspapers, four national business newspapers, sixteen national Sunday newspapers, and ten national weekly papers. Geographically, these are mostly located in Athens, which is not surprising since 40 per cent of the country's population resides in the wider Athens region. The Athenian press has become national in scope, but some regions still prefer local newspapers, albeit as a secondary choice (Papathanassopoulos, 2017b).

Radio is also readily available to all citizens across all regions in Greece. There are over 918 radio stations in Greece, transmitting mostly on the FM band. Most radio stations in Greece are privately owned and are transmitted on a local or regional basis, with the most important stations located in Athens (56 in Attika region) and Thessaloniki (Papathanassopoulos, 2017b).

With regard to the television landscape, private-commercial television dominates, with 120 terrestrial television channels broadcasting on a regional and local level and 8 terrestrial television channels broadcasting on a national level (Papathanassopoulos, 2017b). Satellite pay-TV is also available through Nova, owned by Forthnet Company, and through Cosmote TV of OTE Group, now a subsidiary of Deutsche Telekom, all offering their services. Streaming television services such as Netflix, Wind Vision, and Vodafone TV are also available to Greek households.

In 2017, pay-TV penetration in Greece was 22 per cent. In 2018, 86 per cent of pay-TV subscriptions were via satellite (DTH), and Internet-based subscriptions (IPTV) were at 14 per cent (Papadimitriou, 2020: 187). The dominance of satellite technology is expected to change with the ever-increasing expansion

of high-speed broadband, and especially fibre-to-the-home technology. According to the latest data released by the Hellenic Telecommunications and Post Commission (EETT), over the period 2015–2019, there has been a clear shift in consumers' preference towards IPTV. At the end of June 2019, there were 1.04 million pay-TV subscriptions in general, both via DTH and IPTV, with the greatest boom being given by the latter (Mandravelis, 2020).

More specifically, since June 2015, IPTV has more than doubled its subscribers, from about 85,000 connections to 174,000 connections in three years. During the same period, the share of IPTV, within the total field of pay-TV, increased from 9.1 per cent to 16.7 per cent, as opposed to the share of pay-TV via DTH that underwent a clear decline from 90.9 per cent to 83.3 per cent (Mandravelis, 2020).

Finally, regarding digital media, all national newspapers and television channels offer digital versions in electronic, PDF, and app formats. Most of that content is free of charge; however, there are a few media organisations using paywalls. According to the latest *Reuters Institute Digital News Report* (2020), Internet users in Greece pay for online news only at a rate of 11 per cent (Newman et al., 2020: 72).

(F2) Patterns of news media use (consumption of news) 2 POINTS

A considerable majority of the population is reached by news media, with some gaps between the young and old. Although there is an abundance of choices, media consumption in Greece remains low compared with the rest of Europe, and uneven within the population. Greek media mostly reach the elites, while significant minority segments of the population experience deep inequalities of representation and access to the media.

Greek newspapers have been in a state of chronic crisis since the mid-1990s. Greece has one of the lowest newspaper readerships in the developed world; for example, on the eve of the economic crisis in 2010, newspaper readership was at a meagre 53 readers per 1,000 people (WAN, 2010). Over the recent past, the market has been experiencing a continuous fall in rates of average circulation, with even fewer Greeks reading newspapers on a daily basis (Papaathanassopoulos, 2017b).

According to the Hellenic Statistical Authority (2020), in 2019, compared with 2018, a decrease of 13.7 per cent was recorded in the total sales of newspapers and in the individual types of newspapers. A significant decrease, in absolute values, was observed in the sales of political newspapers (11.3%) and in the sales of sports newspapers (18.2%). In 2018, compared with 2017, there had been a decrease of 5.9 per cent in overall newspaper sales. Regarding the magazine sector, in 2019, compared with 2018, a decrease of 3.2 per cent

was recorded in its total sale, with the exception of children-comics and sports magazines, which increased by 56.9 per cent and 4.6 per cent, respectively (Hellenic Statistical Authority, 2020).

On the other hand, broadcasting remains one of the most important sources of information for the Greek audience. More specifically, Greeks listen to the radio approximately 3.5 hours per day (Focus Bari/Aemar, 2013), and, according to Nielsen's (2020) data, they watch television for 270 minutes per day.

The daily consumption of television media by the population over four years old, over the last decade (2010–2019), ranged from 251 to 274 minutes, on the whole. However, within the younger audience, 18–24 years old, much less time was spent watching television. More specifically, it is noteworthy that in the period 2010–2019, the daily consumption of television by young viewers showed a steady decline from 162 (in 2010) to 94 minutes (in 2019) (Nielsen, 2019).

According to data from Nielsen (2019), from the period of September to 8 December 2019 the most loyal viewers in Greece were women over 55 years old, devoting 434 minutes per day to television. This was followed by men over 55, who spent 368 minutes per day on what they considered a still-dynamic medium. In contrast, men aged 18–34 were proved to be the least loyal television viewers, spending 117 minutes per day on television. Female viewers of the same age category daily consumed television for 165 minutes.

Online and digital media have rapidly taken their place in the Greek media system, and Internet penetration in the country has been increasing over the last years. A recent study by the Hellenic National Centre for Social Research, in the context of the international World Internet Project, revealed that 71 per cent of the Greek audience sample, from the age of 15 or more, described themselves as users of the Internet (Demertzis & Tsekeris, 2020: 23). Furthermore, over three quarters of the total participants who did not report themselves as Internet users justified it by highlighting that they were either deprived of technical knowledge or they simply were not interested in using the Internet (Papathanassopoulos, 2017b). Meanwhile, 84.6 per cent of Greek Internet users saw it as an important or very important source of information, and 68.7 per cent consumed news online on a daily basis (Papathanassopoulos, 2017b). Kalogeropoulos (2019) reported that on an average, Greeks use more than five online news sources per week, an outcome placing them second among 38 countries.

According to the report from the Hellenic National Centre for Social Research, seven out of ten Greeks had access to the Internet (Demertzis & Tsekeris, 2020: 24). This represented a portion of the population, which was quite small compared to the relevant data in other developed countries. However, it reflected a rapid increase in Internet use, given that in 2015, Internet access was ten percentage points lower. Among Internet users, three out of four had access to the web on a daily basis using either personal computers or mobile phones (Demertzis & Tsekeris, 2020: 32).

The same research also showed that men, in terms of years, had a greater track record in Internet use (51.7% are long-term users of 11+ years) than women. The latter bear the highest percentage in the category of new users (12.3% are new users, 0–5 years) (Demertzis & Tsekeris, 2020: 28–29). However, over the period 2015–2019, the gender gap in Internet use was narrowed by 17.7 per cent, given the upward trend in female population. As a result, in 2019, according to the aforementioned research, only a small difference of 5.7 per cent was recorded between men and women.

A significant intergenerational digital gap exists in the use of the Internet in Greece. While there has been a steady increase in web access among all age groups since 2015, older people appear to have the most limited presence on the Internet. This contradiction is exemplified in how, in 2019, although almost 100 per cent of those below about 35 years of age used the Internet, it declined to as little as 22.8 per cent among those over 65 (Demertzis & Tsekeris, 2020: 37–38). Between 2017 and 2019, people 35–44 years old showed the most considerable increase when it came to Internet use (which amounted to a rise of 10% in a two-year period). However, a smaller, but noteworthy increase of 7.6 per cent in use also occurred among those above 65 (Demertzis & Tsekeris, 2020: 37).

Despite some media outlets being more successful in reaching the public than others, Greece suffers from deep inequalities of representation and access to media by minorities. The European University Institute's report on media pluralism in Europe attributed a higher risk to Greece regarding social inclusivity. Psychogiopoulou and Kandyla (2018) mentioned that Greece has a very high-risk score regarding "access to media for minorities", as legislation does not guarantee any airtime access to them. There is no legal obligation for public service media or for privately owned broadcasters to include minority content or minority-created content in their programmes. Furthermore, the obligation of Greek broadcasters to broadcast mainly in the Greek language further hindered programming dedicated to them.

However, there are some exceptions. In the Thrace region, some radio stations broadcast in Turkish for the Turkish-speaking minority. An equally high-risk element is noted with regard to the population's access to local, regional, and community media, as media legislation does not impose obligations on network providers to carry local television channels or radio stations. There are no subsidy schemes for regional or local print media, nor is there a legal recognition of community media (Papathanassopoulos, 2013; Psychogiopoulou & Kandyla, 2018). However, it should be mentioned that this research does not take into account the 19 regional radio stations operated by the national public service broadcaster ERT.

Another thorny issue regarding the social inclusivity of the media in Greece is access to the media by people with disabilities. There is no coherent policy

in Greece, as the measures addressing accessibility issues are limited to imposing on television content providers with the requirement to provide daily sign language bulletins and subtitles in television shows for people with hearing disabilities (Psychogiopoulou & Kandyla, 2018).

(F3) Diversity of news sources

1 POINT

There is a limited variety of formats across media, and few formats are available. Research, as well as findings from interviews conducted with journalists and editors-in-chief on the issue of sources used by leading news media in Greece, revealed a uniform use of sources, albeit with some room for further investigation by the journalists. Moreover, the findings revealed differences among media outlets on how dependent they are on source material and the level of investigation they engage in.

Starting with the press, the findings from the interviews conducted with media professionals pointed towards press journalists relying on a few official sources and partnerships with foreign newspapers. The main institutional source of Greek newspapers is the Athens News Agency – Macedonian Press Agency, and at the same time, each newspaper has partnerships with foreign newspapers and agencies such as Reuters.

“We have *The Guardian* to begin with. Each day some items get in with the signature of *The Guardian* [...] of course there are the classic deals with Reuters and other big agencies”, said one editor-in-chief. However, the press journalists argued that when receiving news through news agencies or public relations sources, they are only used as a starting point, adding to that their own research and analysis. As one of the interviewed journalists described: “Everything that comes in as news is assessed and researched, it’s not reproduced in any case. At least in our newspaper”. Another press journalist admitted that newspapers very “rarely” republished news from other media outlets, while they also saw the agency copies as a stimulus to conduct their investigative journalism.

On the other hand, radio journalists described a mixed image with regard to the sources used and the balance kept between the news that come from agencies and public relations companies and the news that derive from their own reports. “Nowadays the ratio is 60/40. In effect, 60 per cent from agencies and 40 per cent from primary news”, argued an interviewee.

The issue of collaboration between Greek radio stations and local or international media is similar to the press, with the main collaboration being established with the National Athens and Macedonian News Agency and additional ones with international media, such as the BBC, or international news agencies, such as Reuters. “We have a collaboration with the BBC, we re-transmit its programme, but we do not have the possibility of sending our people in London to observe the logic and the process there”, said an interviewed editor-in-chief.

Television journalists said they also relied upon similar sources like their press and radio counterparts, and they concur that up to 30 per cent of the news they broadcast come from news reported from news agencies, with the exception of the national public service broadcaster, Hellenic Broadcasting Corporation (ERT). A journalist described the main agencies that Greek television stations collaborate with and how much they depend on them: “To a large degree the news comes out from the news agencies Associated Press, APTN, Reuters. They are the main sources we use. News comes out from press releases and approximately 70 per cent comes from primary reporting”.

However, another interviewee argued that there was less dependence on these sources: “I need to underline that our outlet does not depend exclusively on the content of the international agencies and on foreign websites. We have a large network of correspondents throughout the country as well as overseas”.

The latter also echoed the important role played by the funds and resources in the capacity of the media to have a multitude of sources and depend less on news agencies and public relations copy. The testimony of another interviewee pointed to the negative impact that the crisis had on the resources available to Greek television stations and how it had led to a form of syndication among television journalists in order to be able to have all the news occurring in a day:

There is an informal collaboration among all TV channels. After the financial crisis that had impacted the media, that’s how we have the capacity to be present on many topics at the same time. There are many times that we might have coordination with another TV channel. For example, I would cover for a particular trial for someone, but request that person to go to another rally and cover that for me. That’s the informal collaboration we rely upon.

Finally, Greek news websites seem to be mainly dependent on “copy–paste journalism”, reproducing news as they are reported by news agencies and other media houses, having very little time to do anything more due to time pressure. One interviewed journalist compared working for a news website with other media and how dependent they were on news agencies:

We rely on agencies very often, a lot more often than in other media organisations. It is because of the flow of the website. You need to do it quickly. You are chasing after the current news, and everything that happens you need to be faster especially from the other news websites, so at a rate of 90 per cent I would say that it comes from there [news agencies].

In conclusion, it appears that, to different degrees, the Greek media has uniform sources and Greek journalists have the capacity to independently conduct an inquiry. Press journalists reported the most freedom to do so, and news website journalists the least. The national news agency is dominant, and there are a number of international news agencies also relevant in the Greek media

landscape. Public relations announcements had less of an impact, according to testimonies by the journalists. But the financial crisis has had an impact, with content syndication being applied to television journalists, at least. Finally, despite the journalists not explicitly mentioning the impact of politics on their source selections, recent research on the Greek press (Kostopoulos, 2020) reveals that politics is still the most important determinant of source selection and information management.

(F4) Internal rules for practice of newsroom democracy 1 POINT

Journalists are heard and participate in decision-making, but do not have the power to make decisions. In Greek newsrooms, internal democratic practices are applied in rudimentary ways, with journalists merely having the opportunity to be heard, at best, and at worst, being deprived of any engagement with the decision-making processes. The appointment of editors-in-chief and other managerial positions are decisions left to the discretion of a media organisation's managers and owners. Moreover, Greek journalists' voices have no tangible impact on how news topics are ultimately framed.

Newsroom journalists reported that they usually did not have an equal say in how political issues are framed, although guidelines and rules exist at an informal level. Managerial appointments were decided by managers and media owners, and journalists did not have a say in this process either. Finally, several gender issues abound in Greek journalism, whether recognised by the journalists or not. A complete lack of any formal rules to support or promote women journalists' careers and access to managerial positions existed, as well as the lack of any system for monitoring and evaluating their participation in decision-making procedures.

Starting with the process of appointing editors-in-chief, the interview findings are rather uniform across all different media outlets. An exception was the newspaper *Efimerida ton Sintakton*, which is collaboratively owned by its journalists and, therefore, adopts different democratic procedures in the election of its editor-in-chief. Interviewed editors-in-chief and newsroom members of leading news media all concurred on how the appointment of the editor-in-chief was a decision made by directors of the organisation, and sometimes its owners. Some editors-in-chief interviewed underlined the importance of certain values, such as impartiality in the decision-making process:

For someone to become an editor-in-chief he/she needs a lot of things. They [editors-in-chief] need to know how to manage, to prove each day that they have professional judgment, and be impartial; to make sure that there are no political interests behind their actions, and make sure that what is broadcast is what most people want, what they are most interested in.

Another interviewee added the importance of experience:

It is first and foremost a matter of experience. It is a matter of a well-rounded understanding of news. One needs to have gone through various posts, so he/she can have an in-depth understanding of the issues and of the news itself. Whoever is good at what he/she does and works hard and in a correct manner, can move on.

However, most of the interviewees made it clear that although there are certain criteria that someone must fulfil before being appointed editor-in-chief, the decision ultimately rested with the organisation's owners. For example, another editor-in-chief explained: "For privately-owned media, it is clearly a decision of the ownership. We do not have a self-governing system; the owners decide and appoint who will take charge of what in the framework of a structure". Other interviewees argued that "the owner and the management decided it, obviously based on the work of each of us", pointing to some cases where the ownership of the media had a more direct role in employees' selection process. In other cases, however, the administration of the organisation did not play a role in the selection process. This was especially true for larger organisations, such as the one described here:

The director proposes someone; the administration cannot propose. The administration does not understand journalistic work. It has executives that they trust and, these are the executives who decide to propose, in a well-documented manner always, what it is that makes them believe that the person can fulfil the duties of an editor-in-chief, to the administration.

Finally, as aforementioned, the *Efimerida ton Syntakton*, a daily newspaper, which is a collaborative business endeavour owned by its journalists, is a key exception. One of the interviewees describes the process through which the journalists can have a say in the election of an editor-in-chief:

It is a simple mechanism. From the day we started, the general assembly chose the director and the director of editing. From then on, each department elected its own editor-in-chief [...]. The editors-in-chief are elected and that is confirmed by the editing board, which is the sum of the editors plus the two members of the administration [...]. The department can also propose someone for the position of the editor-in-chief, meaning, for example, the political department of the newspaper. When the position is vacant, they can say, for example, that we propose this or that person. The director and the editor in chief propose; it is discussed in the board of directors and if – let's say – the department accepts it, then we are fine with it.

However, this example remains an outlier in the Greek media landscape, rather than the emergence of a new paradigm. The lack of formal rules, compounded

with the lack of agency of journalists to be anything more than merely heard, was also noted by some interviewees with regard to how political issues were framed and how decisions were made.

In any case, the Greek media remains more politicised and partisan than their northern European counterparts. Moreover, the political stance of a medium's owners is still the defining factor determining how news pieces are framed, as demonstrated in the arguments within journalists' testimonies:

The sense I have is that each media company has a political identity, even if professionally non-partisan. You try to serve this identity, it in the best possible way without, of course, being against public opinion. This means that you do not misinform, you do not peddle propaganda. There is a visible line. Discussions between the editors and the editor-in-chief obviously result in the final decision.

Finally, the issue of women's careers and women's ascendance to managerial positions is also rather problematic. Most women journalists and editors-in-chief reported that there were very few women that climbed up the hierarchy of their media organisations. One of the female chief editors interviewed explained:

A woman's career in journalism goes through many levels where she has to prove much more than a man [in the same position] what she is worth. It is enough to say that in 2019 in Greece there is not even one woman news director in any media house. A woman's career stops at the position of the editor-in-chief, and very rarely in a managerial position, not because she is not qualified or cannot manage it, [...] but the numbers speak for themselves. It is not acceptable that in a newsroom there are two women and ten men. Moreover, there can be no working place with ten men and one woman in the editor-in-chief positions.

(F5) Company rules against *internal* influence on newsroom/editorial staff

1 POINT

Management and sales departments meet newsroom staff regularly. In Greek media organisations, although newsrooms, management, and sales departments are separated, internal manipulation is still exerted through unspoken pressures that lead to self-censorship by journalists. It implies a subconscious adoption of the editorial stance preferred by the ownership. Pressures from the advertising department are far less considerable, with most journalists being unaware of the main advertising sponsors in most cases.

Despite the fact that management of media organisations, sales departments, and their newsrooms are separated, in effect, there are a number of mechanisms in place that ensure journalists will follow the editorial stance preferred by the

ownership. Pressures from the advertising departments are not so accentuated as political ones, since most journalists report that they do not have any knowledge of the advertising workings of their media organisations. Unspoken pressures exist, however, that lead journalists to cases of self-censorship.

When it comes to pressure from the ownership, cases of direct interventions are not reported, and that is an improvement for Greek journalism. However, journalists always have a sense of what the stance of their organisation is, and they adhere to it. For example, one interviewed editor-in-chief noted:

Not at all. Through the corporation they [owners] do not get involved in the news editing. What exists [...] is a stance from the owner of the organisation that has to do with how each one manages the audience, and we do not want to cause fear and fear-mongering among people.

Other interviewees reported that media owners not only suggest the framework of reporting, but also the ideological stance that the organisation should adhere to despite a lack of direct interventions:

We do not have any relationship with the board of directors. We have an owner and a CEO who are in charge of the finances. But I want you to know that none of them is involved in the newsroom. Nevertheless, we do have rules and principles. These pertain to liberalism and the code of journalistic conduct. By default, the owner does not intervene. From then on, we have a framework that we work under. We are in favour of an open economy, we have a liberal understanding and within that framework we will hear the member of the Communist Party, the member of Syriza, the right-winger, and the extreme right-winger. We have no dealings with Golden Dawn but everybody else is hosted. We have a pro-European stance and we are in favour of the free market.

Despite a lack of cases of direct interventions by the owners, this did not mean that Greek journalism has become less instrumentalised, as the pressures are now indirect through the managerial class selected by the owners, according to the statements made by an interviewed editor-in-chief:

The ownership has never shown up, as far as I know. But I would say that it goes without saying and nobody has to tell you that you will never have a front-page that is against the ownership of the organisation. Meaning that nobody has to tell you that, it probably works subconsciously.

In some cases, the owners of new media companies in Greece are journalists themselves. This muddies the water of intervention, as they often have a say in how issues are covered, as described in the interviews conducted:

The owners are journalists. So as journalists they have an opinion. That doesn't mean that they will intervene to change something, but on the grounds that

they are journalists, they have an opinion for a piece of news. They don't force an editor how to write that.

Another interviewee explained how this coordination with the owner of the media organisation ensures that there would not be any necessity to intervene later in the process, giving a similar account:

There is a possibility to coordinate with the owner of the organisation, who happens to be a journalist and in favour of information and that makes things easier. I believe that there are no interventions, due to this coordination. So, some things are solved before [...] there is a necessity for intervention, or corrections.

Pressure from the advertising department was considered to be far less important in the Greek case, as the political value of information is more significant in a very small market with very slim margins of profit being made through advertisement and sales (Hallin & Papathanassopoulos, 2002; Kostopoulos, 2020). Most journalists interviewed reported that not only did they not have any direct communication with advertising departments of their organisations but, in most cases, they also did not really know who the main sponsors were.

Finally, the interviews confirmed that the public service broadcaster ERT, even more than the private media, was free from interventions coming from the advertising department, because, as an ERT journalist testified, the advertising revenue of the public service broadcaster is not that significant: "The advertising department has no relationship with the newsroom. There are some advertising agencies that ERT works with and they ask the advertising time for their clients. Beyond that, they have no say in how issues are reported".

(F6) Company rules against external influence on newsroom/editorial staff

1 POINT

Newsrooms depend on a few major advertisers or sponsors. Leading media companies in Greece – either for reasons of political or ideological standpoints, or due to journalistic integrity and professionalisation – have the potential to resist outside pressures. However, there have been cases where media houses have experienced boycott or pressures because of their reporting. Most journalists are unaware of the main sources of advertising income, with the very small Greek advertising market having shrunk during and after the economic crisis, leading to dependence on fewer advertising sponsors.

Despite the pressures from the sales department and advertising agencies, there are certain cases where the media have been boycotted because of their reporting. These can be very critical, especially for smaller organisations.

This was confirmed from the many cases, reported by journalists, where they have experienced boycott or pressures because of the news they reported on. For example, one interviewee described the threats of advertisement sponsors to withdraw their funding: “There is no way that we won’t transmit news that concerns our client. It has happened a number of times [...] we have received threats of withdrawal if a piece of news gets out”.

Based on the interview findings, it seems reasonable to say that large media companies in Greece – either for reasons of political and ideological standpoints or for the reasons of journalistic integrity and professionalisation – have enough power to resist outside pressures. Furthermore, another interviewee pointed out that the introduction of new online media organisations has increased the communication nodes of the system, making it harder to conceal uncomfortable information.

However, a participant who works as journalist in one online media outlet reported that they [journalists] were more susceptible to pressures and might not emphasise such information so much:

There are interventions in all companies, but only as long as you have a primary advertiser and there is a piece of news that doesn’t make them look so good. This exists in every [media] organisation. But if we are talking about something very serious, it is very difficult to ensure that it is not written at all [by the journalist]. It can be written and not go up very highly. But, in any case, it will be written, so it is typically there. Even if it can be buried a bit.

This could be the case because these are smaller media outlets that lacked the backing of a strong owner, and therefore depended more on advertising money. As a director of a small media outlet argued, his organisation has been boycotted due to its reporting on big advertisers. Thus, he chose to find alternative means, such as crowd funding.

Most journalists and editors-in-chief claimed that they had no idea regarding which advertisers dominated the Greek market, but one editor-in-chief described the shifting post-crisis situation:

First in the ladder used to be the public businesses and banks. There are no public businesses anymore. Even the banks have cut down on their ads. However, the banking sector remains high, the energy sector, the betting sector, but I do not know specific numbers.

Therefore, we can assume that the market has been further shrunk after the economic crisis, increasing interdependencies and competition.

(F7) Procedures on news selection and news processing 2 POINTS

Internal debate on news production is practiced more than once every day and is part of journalistic routines. Leading news media follows informal rules and procedures, consisting of meetings between the editors-in-chief, when selecting news topics. The primary factor in this selection seemed to be the political stance of the organisation. In managing news derived from social media, certain processes of verification were in place, however, nearly all media outlets lacked a fact-checking department.

The news selection practices in Greek media organisations appear to be crystalised and concrete. They involved at least one meeting between the editors-in-chief on a daily basis and a critical stance towards news originating in social media. However, these rules were largely informal and not consistent across all media organisations. Also, a quite troubling finding is that most journalists reported the absence of fact-checking departments in their organisations.

One journalist interviewed described the process of news selection and how much journalists are involved in that, as well as how they treated information obtained from social media:

The supervisor of each department is the first to select news that they consider important. This is followed by a meeting in the presence of the news director and the editors-in-chief of the organisation, who move forward with the final selection of the topics of each day. The journalist that covers each topic has a say in the selection of issues, as they have an immediate connection with the [thematic] object and, therefore, considered to have better knowledge. Any information that is distributed through social media is treated with caution. In such cases, it is considered necessary to confirm the information through official sources.

A columnist working for a quality newspaper confirmed that the process was similar throughout Greek media and outlets, albeit with differentiated levels of participation for their journalists:

In the newspaper there is a meeting at four o'clock where we evaluate what is available. There is an assessment of the ranking with regard to next day's news. There is another meeting at 19:00–20:00 among the editors, with some things emerging as stronger and some milder. Certainly, it's important how original the story is, the assessment that we have on how much the people will care about it and the assessment on how much the country could change from it. These three are the rules that exist.

However, the primary factor for news selection in Greece remained the political stance of the organisation. As one interviewee revealed: "Each organisation has a specific way of seeing things, that's the political stance of the respective newspaper [...]. It's [the political stance] the most important criterion for news selection. In all the organisations, not just ours".

Finally, most journalists reported that their organisations do not have a dedicated fact-checking department, with one exception on the part of the public service broadcaster ERT: “We avoid using social media as sources, only in urgent cases we might use online sources, but in these cases ERT has a fact-checking department that screens those”.

(F8) Rules and practices on internal gender equality 1 POINT

Inequalities exist and remain. The organisations slowly move towards eliminating them. The Greek media do not acknowledge the existence of gender issues; therefore, there are no rules applied to address them. According to male journalists, all news employees enjoy the same treatment irrespective of gender. However, women journalists’ accounts reflect images of income inequalities based on gender, as well as difficulties in climbing the ladder of rankings within a media organisation.

The interviews conducted with Greek journalists on gender equality brought to light very different responses, varying based on the gender of the responder, with gender proving to be an important factor in whether one acknowledged the existence of such issues. Usually, male journalists said there were no issues of gender equality, whereas some even argued that women were more privileged than their male counterparts. However, the accounts given by women journalists reflected a very different image. They highlighted the fact that although women were employed en masse, they faced the problem of climbing to top positions, and also of income inequalities based on gender. The main issue, however, is that the Greek media do not acknowledge the existence and insistence of gender issues, and therefore, there are no rules to address them.

When asked about gender issues, most male journalists responded in the same manner as the one noted here: “There has not been an issue of equality between men and women. Each journalist has the same treatment regardless of gender”. That could be true regarding how journalists are treated within newsrooms in general, but it’s not true regarding the general progress of women’s careers within a media organisation. Additionally, women interviewees pointed out a very different experience compared with their male colleagues. “Let me answer that politely because that’s an issue. No there’s no equality. It is a man’s world”, one of them said. Another female editor-in-chief gave one of the best examples of how women have problems in climbing the hierarchy in the profession of journalism:

I have worked in five biggest media companies in the country. It is unbelievable that in all five of them, women are simply lacking. There is a huge difference and they face a lot of racism. I told you there is no woman director and there never has been one.

The situation of gender equality in Greek media can be summarised as one of lack of knowledge, since there is a complete lack of any formal framework to address these issues.

(F9) Gender equality in media content

0 POINTS

There are no specific rules on gender equality in reporting, and each journalist decides whether or not it is respected in reporting. In leading news media organisations, a culture of safeguarding gender equality in their content is lacking. This is reflected in the lack of rules regarding gender balance or parity in reporting, a phenomenon stemming from the lack of awareness that gender sensitivity in reporting is crucial in order to make media reflect upon the plurality of society's voices.

Greece did not exhibit any special efforts to address challenges regarding gender equalities in media content or promote the inclusion of diverse voices. There were no rules or codified practices observed, and no consideration was given to these aspects when assigning issues to report upon. In some cases, such as the one described by one of the journalists interviewed, the understanding in media organisations among journalists is that there are some topics more relevant for women than others:

There is no segregation or discrimination towards gender, age, or other factors as to how the [news] topics to be assigned are selected, or as to what it has to do with the fulfilment of the reports. On a personal and friendly level there is, in some cases, “conceding” of topics from a man to a woman, for example on a topic that’s about fashion or vice versa with a sports report. But that’s not because of a central decision and it’s not in any sense a rule.

For some interviewees in our research, gender was not considered important in who was selected to cover a story, while others argued that “the equality between men and women as to the conducting of the report has principally to do with its topic”. Therefore, we can assume that there is a complete lack of formal rules regarding gender balance in reporting and news content, because of the lack of an understanding that this is a problem in the first place.

(F10) Misinformation and digital platforms (alias social media)

1 POINT

Regular internal meetings to discuss potential misinformation. There is no common approach applying to all the Greek media regarding the issue of misinformation. The process of careful crosschecking is the typical action of Greek journalists in order

to deal with misinformation. Most media organisations do not have fact-checking departments, nor have they established official collaboration with external fact-checking organisations.

There is no uniform approach by the Greek media regarding the issue of misinformation. One could say that the most common approach is an effort to simply translate the values of journalism to the new era, with an extra layer of caution when information originates from social media. Starting with the public service broadcaster ERT, the interviewee described a combination of a fact-checking department with the traditional practice of information cross-checking:

ERT of course has its own fact-checking department. The staff of ERT has experience and it is hard for misinformation to happen, whether it is guided or not. It is a matter of experience. To a large degree, what we call fact-checking often happens through traditional cross-checking that we always did.

In most cases, Greek journalists use their experience and employ extra caution with social media information in order to deal with misinformation, as one of the editors-in-chief mentioned:

We are dealing with the fake news phenomenon because most associates, freelancers, and colleagues, have experience. We do not broadcast if we do not cross-reference. We won't rush to be first if we are not certain that this piece of news exists. And because with social media things have become too quick, the orders that we have is that we need to be very careful.

This process of careful cross-checking is the go-to practice of Greek journalists in order to deal with misinformation. Meanwhile, people working for alternative media outlets have a very different perspective regarding fake news and misinformation:

Ever since the advent of journalism, misinformation has always existed. So, we follow the basic principles of the code of conduct. We make sure to double-check a piece of news, and carefully choose our sources, etc. We haven't made any changes because fake news is in fashion.

Most organisations do not have fact-checking departments. Moreover, there is also no official collaboration with external fact-checking organisations. The only fact-checking organisation that is mentioned is Greek Hoaxes. It is an unofficial organisation that has taken up that role on the Greek Internet. One of the editors-in-chief described how their website collaborated in some cases with Greek Hoaxes:

There are "hoaxes" that surveys all of us in any case. We work with them and when there is something, they call us out and we either fix it, or we give an explanation on what is going on. I think that is the process we follow.

Another journalist also mentioned Greek Hoaxes, but as a source to be advised from rather than as a stable relationship: “The burden rests upon ‘Hoaxes’ here in Greece. It is a credible source in my opinion, rather than a partnership”.

By and large, it can be argued that misinformation and fake news are slowly pushing Greek media companies to consider new technologies and ways of addressing these issues. However, the process is still in its infant stages.

(F11) Protection of journalists against (online) harassment 2 POINTS

Journalists can rely on their employers in such cases, but cost or other reasons sometimes compromise the assistance provided by news media organisations. In case of harassment, the main type of support offered to journalists from their media organisations is legal support. However, not all journalists feel adequately protected, or there are cases where they felt no level of support towards them, especially for women journalists.

One of the editors-in-chief in our research described how their organisation supported them when they received threats:

I have been threatened and I have called the legal service to the Cybercrime Division and we have done what we needed to do. On the threat level, on the level of comments, each and every one said whatever he/she wanted. If someone is stalking you, then yes, we can use our legal service. Thank god they are here and we have enough to go and get the job done.

Another editor-in-chief also mentioned how their organisation supported journalists that were actually attacked:

A few years ago, we had a reporter that was assaulted by a police officer during a protest. He was hurt so bad that he had to be taken to the hospital. Someone from the website went with him to the hospital [...] and he was with him. Whatever he needed, the website was there for him, because that is what was needed to be done.

But the main type of support offered to journalists from their organisations was legal support, as one editor-in-chief mentioned: “When it starts becoming intimidating or you see someone obsessed and is trying to hack you, for example, or is sending threatening letters, that’s where the legal division of the organisation steps in and protects you”.

However, not all journalists feel adequately protected, as in the case of a woman editor-in-chief, who felt that her organisation did not support her as much as they could have:

Limited support I would say. I had a bad example. Members of the Golden Dawn party attacked me and I didn't feel like my newspaper supported me enough. I think it is an issue of sensibility. They probably felt that I did not need support.

Therefore, it can be concluded that in most cases of harassment, Greek journalists receive different forms of protection and support from their media organisations.

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 2 POINTS

There is a moderate concentration ratio, with some market dominance by large companies – CR3 is between 0.40 and 0.70. Despite the fact that Greece has more media outlets than the market can sustain, the level of ownership concentration is dangerously high. The main reason for this is the vulnerable media legislation, whose limitation on horizontal concentration in broadcast media and newspapers permits a specific *modus operandi* of the market.

Despite the number of media outlets in Greece, the level of ownership concentration in the state is dangerously high. The main reason for this development is the vulnerable media legislation, whose limitation on horizontal concentration in broadcast media and newspapers permits a specific *modus operandi* of the market. Two authorities – the National Council of Radio and Television (NCRTV) and the HCC – are in charge of the task of keeping track, imposing remedies, and enforcing compliance with media regulations. However, there have been periods when both of these authorities take actions with limited results due to the restricted availability of data or the purposeful obfuscation of them regarding market shares and media ownership.

Specific difficulties characterising the Greek media market combined with its small size has proved to be quite an unwelcome environment for new entrepreneurs. Five mainstream media groups (Alafouzos Group, Alter Ego, Kyriakou Group, Vardinogiannis Group, Dimera Media Investments) dominate the market. It also includes free-to-air terrestrial television and radio stations, newspapers, and online news websites, followed by three other secondary groups, making up the bulk of the market (see Trappel & Tomaz, Introduction).

Regarding free-to-air terrestrial television, after a delay of 28 years, six national television licences were granted in 2018. Their owners came from other sectors of the economy, principally the shipping industry. Among them, the most popular television stations are ANT1, Star, and Skai TV (CR3 = 0.46), companies that have also paid for satellite distribution. For the purpose of

our research, we have also taken under consideration journalists and editors coming from the public service broadcaster ERT, even though traditionally, its television channels score low in audience share (5%).

In subscription-based television, three major suppliers dominate the market. They are Cosmote TV, Nova, and Vodafone (CR3 = 0.99) with the penetration of pay-TV (in relation to the total number of households), via both DTH and IPTV, reaching 25.3 per cent in June 2019 (Mandravelis, 2020) (for penetration, see Indicator F1 – Geographic distribution of news media availability).

In the field of pay-TV, the dominant player is Cosmote, which gained a 45 per cent market share in 2018, attracting more than 500,000 subscribers. It also represents the most dynamic Internet provider in terms of subscriptions, having conquered 48 per cent of the mobile and 47 per cent of the fixed-line markets. Nova TV, the oldest subscription television service in Greece and owned by Forthnet S.A., in 2018 gained a 42 per cent market share (Papadimitriou, 2020: 186–187). When, in 2018, fibre-to-the-home technology appeared in the market, Cosmote and Forthnet initiated separate over-the-top media services. Moreover, two mobile phone companies, Vodafone and Wind Hellas, which are also Internet service providers, have been launching pay-TV services since 2017.

Additionally, Netflix is a new promising player in the Greek communication market. It reached more than 100,000 subscribers in less than three years, despite its relatively low start in January 2016.

The print media is legally required to name their director and publisher on their copies. Evening daily newspapers are the most popular newspapers in Greece despite their reduced circulation nowadays. The main competitors are *Ta Nea*, *Kathimerini*, and *Efimerida Syntakton* (CR3 = 0.72). Most popular news radio stations are *Skai 100.3*, *Real FM*, and *Parapolitika FM* (CR3 = 0.21).

(E2) Media ownership concentration regional (local) level 2 POINTS

More than two media companies address most relevant regions. Following the media market deregulation and the abolition of state monopoly on broadcasting, regional television stations entered the media field in the early 1990s without receiving official licences, as was also the case for the national television stations. Later on, indicative of the harsh crisis afflicting the media market, is the fact that more than 50 regional television stations closed down over the period of the economic recession.

According to the NCRTV 2019 index, there are 112 television channels and 1,001 radio stations registered in Greece (NCRTV, 2019a, 2019b). Regional television stations started appearing in the early 1990s, following deregulation and the abolition of the state monopoly on broadcasting. Nevertheless, the first regional television station, ERT3 – part of but also independent from the public service broadcaster ERT – was established in 1988. ERT3 seems

to have a national rather than regional reach, although the news output and some programmes primarily appeal to the audience of the Greek periphery, particularly those in northern Greece.

The first real regional channel Thessalian Radio Television, located in Volos, was established in 1989 as soon as the first private national television channel appeared. In a relevant piece of research, Roy Panagiotopoulou (2004) notes that the vast number of low-budget regional and local television channels has been the outcome of businessmen investing in television channels as a source of influence, without having the technical knowhow to run them. In 1998, Greece had 150 regional and local television stations. Many attempts were made to regulate the field (1995, 1998, 2003, etc.) through a paradigm of contemporary broadcasting licences, since none of these stations were legal. At present, with the economic crisis hitting the media market particularly harshly (more than 50 regional television stations closed down over the period of 2009–2016), and with the granting of the regional television licences in progress, there are 102 registered regional television channels in operation (NCRTV, 2019a). Of these, 92 broadcast nationally via Digea's digital terrestrial platform.²

Public service broadcaster ERT, funded primarily by the licence fee, does not compete with national, regional, or local private channels on commercial level, as it receives only a 3 per cent share of the total advertising. This corresponds to only about 5 per cent of its revenues (ERT, 2020: 30).

Almost one-fourth of the population in Northern Greece stated that it was watching one regional television channel per day (21–26%). This rate for Western Greece and Crete was close to 28 per cent (Focus Bari, 2019b). Unfortunately, there is no evidence regarding the listening habits of the audience when it comes to the regional radio stations, due to unreliable data collection. The Attica region, where Athens is located, has more than 28 radio stations (CR3 = 0.21), with 84 per cent of the population listening to the radio daily (212 min. per person per average) (Focus Bari, 2019a). Thessaloniki region has 15 radio stations (CR3 = 0.41), with 82 per cent of the population listening to the radio daily (218 min. per person per average) (Focus Bari, 2019b).

(E3) Diversity of news formats

1 POINT

Few formats are available, and public attention is focused on dominant news formats. Deprived of substantial investments on innovative ventures, the news media of Greece are characterised by conventional news formats. The transition to the online environment has been slow, clumsy, and in some cases, questionably user friendly.

Only 27 per cent of Greeks expressed trust towards the media, and 54 per cent stated that it actively avoided the news – the main two reasons stated were the lack of trust and depression (Newman et al., 2019).

Table 1 *Greek news sources, 2016–2019 (per cent)*

	2016	2017	2018	2019
Television	66	66	67	68
Print	31	26	26	24
Internet (& social media)	96	95	94	92
Social media	74	69	71	67

Source: Newman et al., 2019

In this general climate of mistrust towards traditional media, Greeks turn to online news websites for their daily information (92%), reading between five to six different news sources daily. However, the native news platforms do not invest in research and development regarding news formats. For native online news platforms, click-bait technique was still the main way of gathering page views, while most of the articles were up to 300 words, including, in some cases, embedded tweets, image galleries, or television news clips. Popular news websites also use live blogging to report on breaking news.

Generally, the news media of Greece are characterised by conventional news formats. Printed newspapers, most of them tabloid-sized with a few exceptions, include journalistic texts of all types (editorial, reportage, feature articles, opinion articles and columns, and interviews), framed by a great variety of images. The online versions of these newspapers are mostly based on content made for the printed version, adopting the basic features of online journalism. Nevertheless, there are some online news media adopting innovative news formats, compared with the legacy media and their online versions.

Private television channels and public service broadcaster ERT incorporate several news bulletins and news-related talk shows in their flow, employing conventional formats of news presentations, such as recorded videos, live panels and multi-guest interviews in studio, outdoor broadcast interviews, Skype interviews, and telephone interviews. All television channels operate their website with a section devoted to releasing news on current affairs and another section of web television, where visitors can find and watch news programmes that were already broadcast on free-to-air terrestrial television, at a later date. Private television channels, compared to the public service broadcaster ERT, usually adopt more sensationalist forms of news presentations, particularly in the context of infotainment and soft news television magazines.

The public service broadcaster ERT spends a great part of its programming time on news and news-related talk shows. The main news report is at 21:00 (50 min. including news on sports and the weather report). However, the first news report is at 10:00 each day (15 min.), followed by the noon news report at 15:00 (50 min.) and the late-night news report at midnight (15 min.). The

evening news report is at 18:00 (10 min.) and includes sign language. Most commercial channels have a news report at noon, one in the evening (also in sign language), and one in the prime-time zone. Over the last years, political talk shows and debates have been absent from commercial television. Moreover, despite the fact that most of the editors-in-chief expressed their support for investigative journalism, the reporting process seemed to be reduced to the bare minimum under the pretext of the need to cut costs.

Furthermore, the Greek version of Euronews – a European and multilingual news television channel based in Lyon-Écully in France – is the only 24-hour news channel in Greek available online. However, there are foreign 24-hour news television channels provided to the audience via satellite.

In radio, a common feature shared by almost all stations is short news flashes every full hour. However, the radio stations focusing on information over entertainment, apart from short news bulletins, also broadcast hard news-related talk shows, where daily current affairs are reported and analysed by journalists, through the lens of political actors or experts. In these broadcasts, news is provided to the audience through pre-recorded sound-bite interviews, or live interviews conducted in studios or by telephone. Public service radio stations and most of the private radio stations are also available as web radio, or they offer podcasts to the public on specific websites.

In spite of low circulation, newspapers still set the news agenda (Papathanasopoulos, 2005). Both in radio and television morning shows, the newspapers' front pages remain a point of discussion. Due to fierce competition and motivated by sensationalising strategy, newspapers have turned to a more tabloid-like format (Diana, 2019). Moreover, during their online transition, the newspapers' tabloid appearance was transported to the online environment in the hopes that users would feel familiar with the online layout. However, newspapers failed to use the potential provided by the web (Veglis, 2005). This is nowhere more visible than on the mobile apps: Most of the main newspapers have a mobile app with simple functions and notifications leading nowhere, elements resulting in bad user reviews and no more than a few hundred downloads.

(E4) Minority/Alternative media

2 POINTS

The existing media houses recognise large and mid-size minority groups, and they operate their own media. Since the early 1990s, various attempts have been made to establish fair representation of minority groups in media outlets. However, governmental policies of no-recognition and counterfeit representation of ethnic groups by traditional media left a lot to be desired.

The Muslim minority of Western Thrace is the only minority officially recognised by the Greek state. The community has been characterised as a religious

minority, but it is also an ethnic one; Turks, Pomaks, Pontians of the former USSR, and Roma are cohabiting alongside Greeks in the area. Based on the Greek state's perception that these people are a single minority, they have been actively encouraged by local community leaders, and, to some extent, by the Turkish government, to use Turkish as their primary language since the mid-1990s. To that effect, six newspapers are issued in Turkish in the area (*Birlik Gazetesi*, *Cumhuriyet*, *Gündem Gazetesi*, *Bati Trakya Olay*, *Millet*, and *Trakyanın Sesi*), along with online news portals (*azinlikca.net*, *Trakyadan Haber*, *iskecemuftulugu.org*, and *abttf.org*).

In addition, there are other minorities such as Arvanites, Sarakatsanoi, Vlachoi, and so on, whose languages have either not been protected by the government or even actively suppressed, and therefore, have survived through oral tradition. News topics for these minorities exist only in the Greek language.

Regarding migrants, in 2007, there were more than a dozen newspapers issued in Athens in foreign languages (Arabic, Albanian, Bulgarian, Polish, Romanian, Russian, Philippino, and Urdu). Today, very few of them are left (*Mir* and *Omonoia*). They are mostly online, like *albanians.gr* news portal, Radio Bulgaria (*bnr.bg*), *Azat Or* (Armenian), *Aldafatan* (Arabic), and TV Tribuna (Albanian).

Apodimitika Poulia is a newspaper issued by young refugees assisted by journalists, coordinators, and translators. The initiative was started by a group of Afghani girls and the Greek Network for Children's Rights, and now features articles in five languages (Farsi, Urdu, Arabic, English, and Greek). There is also a radio station, Pikralida Internet Radio, which young journalists, migrants, and refugees operate with the support of Unicef.

Among the traditional newspapers, only *Kathimerini* has an English edition, both in print and online. Furthermore, there are some online magazines in English (*greeknewsagenda.gr*), German (*graktuell.gr*), French (*grecehebdo.gr*), Italian (*puntogrecia.gr*), and Spanish (*panoramagriego.gr*), featuring news topics on economy, culture, tourism, and so on. Few online news portals feature LGBT news as a special category. News regarding these communities can be found mainly on blogs and social media.

Meanwhile, for people with disabilities, news bulletins at 18:00 are accompanied by a presentation in sign language. Only a few television channels, such as Alpha TV, includes in their programme flow broadcasts like Greek series suitable for people with hearing loss.

In the alternative media field (such as the YouTube environment), all minority groups have easy access to produce content so as to make their voices heard.

(E5) Affordable public and private news media 2 POINTS

Price excludes only few households from receiving news – Prices of services are relatively low, while the majority of news content is offered free of charge. However, the cost of news media is still relatively high for an average household.

Table 2 Minimum cost for media products in Greece, first quarter of 2020 (EUR)

Products	Minimum cost
Annual subscription to a quality daily newspaper (Kathimerini)	120
Annual subscription to a weekly news magazine (Hot Doc)	20
Annual subscription to broadband access 25 MB (average: 20x12)	264
Annual subscription to general satellite-TV package (e.g., Nova Full Pack)	419
Annual tax for public service of television and radio (compulsory)	36
Total	860

Source: Data collected by the authors based on the lowest subscription available

Considering that the average income per capita in Greece in 2017 was EUR 15,556, the amount spent on a basic news media package is sizeable, since according to an approximate calculation, it amounts to 5.5 per cent of the annual income. This amount may seem low, but combined with the fact that 31.5 per cent of the Greek population is estimated to be at a high risk of poverty or social exclusion, it is certainly not an easy financial feat.

In particular, the Internet prices seemed to be rather high for what were mediocre services. While the rates with regard to Internet entry level in Greece were similar to the EU mean, the price for high-end Internet speeds was double the EU mean (European Commission, 2018). The offer for the triple-play packages (Internet + landline + TV) of the two main competitors ranged EUR 22–60 per month, based on a variety of channels and connection speeds. A report conducted by EETT (2018) found that 55 per cent of the respondents mentioned their subscription expense as the foremost reason for not selecting a pay-TV package. Even with contents of the main newspapers available online free of charge (without subscription), the technological progress and the multitude of audiovisual cues integrated into news stories rendered the slower Internet connections inoperable for their intended purpose.

In any case, taking the above scenario as an example, spending about EUR 72 every month to access the main media content as well as the Internet is a significant burden in a country where the minimum salary, legally prescribed, is now EUR 580 per month.

(E6) Content monitoring instruments

1 POINT

Content monitoring is done irregularly and occasionally by various organisations. The NCRTV is the monitoring body for broadcasting media, a regulating entity independent from, but supervised by, the government. Thematic observatories, as well as university departments focusing on media and communication studies, also conduct relevant monitoring procedures and research projects regarding news media content.

The NCRTV is the monitoring body for broadcasting media, a regulating entity independent from, but supervised by, the government. Its nine members are proposed by the parliament (in effect, by the political parties) and elected with a supermajority of two-thirds.

NCRTV's powers are mainly regulatory, being a monitoring and supervising body that deals not only with the content of radio and television stations, but also with the wider operation of the broadcasting field. More specifically, the council has been assigned 1) to control the broadcasters' operation with reference to their informational, educational, cultural, and entertainment responsibilities to the public; 2) to ensure fundamental benefits such as the freedom of expression, political, and cultural pluralism, and the broadcasting of reliable, fair, and balanced information; 3) to allocate licences, impose fines when needed, and take any decision of non-regulatory character. Apart from monitoring the broadcasters' content, NCRTV supervises their compliance with the journalistic code of ethics in respect to programme variation, plurality of views, protection of minors, and human dignity. In case of violations, meanwhile, the NCRTV committee can issue financial or other penalties, and for extreme violations, is entitled to recall a media organisation's licence.

In terms of media evaluation, it is indicative that over the period 2009–2018, the NCRTV published a number of reports referring to the degree of political polyphony in the news broadcasts of the leading news media (NCRTV, 2020b). Moreover, in the context of its annual activity reports, the NCRTV has occasionally discussed aspects of the media field with regard to the developments taking place in the television sector, the institutional problems of radio broadcasters (NCRTV, 2017), the developments inherent to the field of electronic media (NCRTV, 2014), changes in media legislation, as well as the decisions taken by the independent administrative authority in its attempt to regulate the radio and television market.

Apart from NCRTV in the communication field, there are also other thematic observatories, such as the Observatory for Racist and Fascist Speech in the Media, operating under the aegis of Journalists' Union of Athens Daily Newspapers (JUADN), publishing reports and issuing complaints about malpractices in media content.

Last but not the least, university departments offering media and communication studies also carry out research projects aimed at monitoring and

investigating many aspects of media content. The malpractices and misconduct of journalists is a debatable issue, and it represents one of the greatest concerns for most people in Greek society.

Additionally, there are private entities monitoring the market. Nielsen, for example, measures television audience shares among television channels, and Focus Bari offers radio audience measurements. Argos is the only press distribution agency providing the newspapers' circulation numbers, and Online Publishers Association is the voluntary online publishers union monitoring audio metrics.

(E7) Code of ethics at the national level

2 POINTS

A code exists, but not all leading news media respect it. In Greece, there are five journalism associations, which compose the Pan-Hellenic Federation of Journalists' Association, covering the whole country geographically and representing both newspapers and electronic media. There is also the Internet Publishers Association, representing the publishing companies of primary digital content. Each of them has issued their own Code of Ethics. However, they mostly share common norms on how journalism should be exercised. Despite journalists' declarations of loyalty and adherence to the journalistic Code of Ethics, research has shown that they are less sincere than it is thought. In leading news media, there are many cases where loose interpretation of the Code of Ethics proves to be a common practice among journalists, showing disrespect towards ethical standards.

Among the five journalism associations existing in Greece, composing the Pan-Hellenic Federation of Journalists' Association, JUADN is considered the primary one, incorporating two disciplinary bodies and an Ethics Council, consisting of ten regular and ten alternate members. It is noteworthy that news editors, and the second one by journalists, all of them elected by the Union's members, compose the first body. The Internet Publishers Association incorporates 19 parent companies and 69 news websites and maintains its own Code of Ethics, applicable to web journalists, user-generated content producers, and media consumers.

Despite journalists' declarations of loyalty and adherence to the journalistic Code of Ethics, research has shown that they are less sincere than it is thought. In leading news media, there are many cases where loose interpretation of the Code of Ethics proves to be a common practice among journalists, showing disrespect towards ethical standards.

A representative of JUADN described the way in which the Code of Ethics is employed:

It is for the benefit of both journalists and media to fully respect the Code of Ethics. However, this isn't always the case. Often both media and journalists

disregard the Ethics Code's provisions, either in order to serve their personal interests or to serve their medium policy, or even to achieve higher goals for their medium (circulation, readership, viewership, etc.). This happens mostly in online journalism with click-bait techniques, such as the use of dramatic headlines to attract readers, as well as fake news process. In the long run, these practices have a negative impact on a medium's reliability until they swipe it off the map.

The Code of Ethics in combination with the good journalistic practices is a well-known issue among journalists; however, considerable questions have often been raised about their reach and effectiveness. The non-permanent nature of the Ethics Council – along with numerous cases of ethics violations where Journalists' Union of Athens Daily Newspapers has failed to express its position or take action – enhances doubts about the effectiveness of the Code of Ethics.

However, this does not seem to be the case in public service broadcaster ERT, according to an editor-in-chief:

Obviously, we implement the JUADN Code. We never had incidents of breaching the Code. The journalists working in the public service radio and television are very experienced professionals. On top of that, news topics are not published just like that. Many colleagues see them. It is highly unlikely that there would be a mistake regarding the Code.

However, the applicability and efficiency of the Code of Ethics can be a thought-provoking issue in the case of private broadcasters or press companies. Also, journalistic practices for online media also seem to be "lighter". An interviewed journalist emphasised:

Yes, normally we have to respect the Code. But this has to do with every journalist on a personal level. We are not instructed to obey the Code like the Bible. While working, there is no time to check the Code.

Along the same lines, the chief-editor of a news website pointed out that the journalists working there usually have read the Code of Ethics, and they mostly adhere to it.

When interviewed journalists were asked whether there had been any instances where the Code of Ethics was neglected, and therefore measures had to be taken, the majority of the interviewees referred to their colleagues' high professionalism to justify why they couldn't think of any such case. It is indicative in the reference of an editor-in-chief working in a private radio station. He argued:

We follow the JUADN Code. If there is an incident of malpractice, we don't fire the journalist, but give him/her a warning. But I am telling you again, our journalists are professionals with over 15 years of experience. Therefore, such

incidents do not occur. It has occurred to me one or two times when I had to talk to a colleague and tell him to be careful. Not in the sense of “why and how”, rather not to risk his own or even the medium’s reputation.

These findings are in accordance with previous research (Dimitrakopoulou, 2017), which showed that Greek journalists perceive professional regulations and personal self-constraints – such as journalism ethics (77.7%) and personal values and beliefs (75%) – as the most important while reporting.

Contrary to journalists’ perception, research has highlighted numerous cases in which the Code of Ethics was seriously undermined, especially during the period following the 2008 economic crisis (Komninou, 2017).

(E8) Level of self-regulation

1 POINT

Self-regulation instruments exist, but are not notified. There is some “oral culture” in newsrooms. In the leading news media organisations of Greece, there seems to be no standard procedures or formal internal rules reflecting a typical self-regulation system. The interviewed journalists reported the dominance of an “oral culture” in newsrooms based on self-censorship and informal self-regulation practices. In this context, media organisations enforce their ideological orientation to which journalists must conform. Conflicting narratives and controversial topics are often settled through collective consensus in the newsroom.

All leading news media apply an “oral culture” in treating news topics. The JUADN Code of Ethics is allegedly taken as a point of reference for the self-regulation mechanisms taking place within the leading news media organisations. However, few of the traditional media have a mission statement emphasising their independence from political and economic powers or mentioning their devotion to pluralism (see Indicator E10 – Rules and practices on internal pluralism). They also cite technical guidelines – in other words, how to treat copyrighted material or gain permission to use material, and so on.

Journalists working in traditional media argue that the most important guideline is to put quality over quantity. That means they do not risk having a piece of news first at the expense of cross-checking information. An interviewed journalist of a private television station underlined this, regarding the internal practices they follow for news material that doesn’t derive from a trusted partner:

The truth is that we are much more careful now than in the past. The Internet is completely out of control and then there is the temptation to include something in our news bulletin, the scoops. We concluded that this makes no sense. So, we prefer to wait for our reporters to crosscheck if something is true or false.

Similarly, the editor-in-chief of a private radio station mentioned:

Beyond the JUADN Code, and in general within all media I have worked for, the speed in covering the news is not at stake. We have to be fast of course, but a piece of news is not coming out without having it crosschecked. It's ok not to be the first one to break it, as long as we are accurate. If we are not the first, then we consider having more information, more details to be a step ahead.

Quality is also of high importance to newspaper journalists. A statement made by a newspaper editor-in-chief is indicative:

We don't have any special internal rules. Our newspaper focuses on information, not resentment. We can be harsh in political critique, but we don't target someone that easily [...]. First, we put emphasis on what we call content. Beyond following leads, there is the ability of good writing. Our paper has always had strong writers. Writing has its value and its importance. It counts for a journalist's way to the top.

Both journalists and chief editors proved to be reassuring as to minimising missteps, based on their long-lasting professional experience and the practice of multiple checks done before a news topic is released, so that there is a very small margin for mistakes.

Positive of the efficient collective rules governing public service broadcaster ERT – as opposed to private broadcasters – is an interviewed journalist working in the public service television station who reported the following:

If someone breached the JUADN Code, the Union's disciplinary body would take action. However, I cannot recall any such instance. It is usually the private media that end up there, for example, when they keep their employees working during a strike and so on. Regarding the public service broadcaster, I cannot think of anyone ending up at the disciplinary authorities.

Nevertheless, in the field of online media, the rules seem to be more relaxed. In cases of misconduct, the disciplinary bodies of the Journalists' Union take action. According to a journalist of a private news channel who, despite believing in most journalists' adherence to the Code of Ethics, emphatically argued:

All journalists abide by the Code. However, there have been mistakes. As a result, measures were taken and removals had taken place on the part of the Union. We also have had disciplinary penalties and this can be humiliating for a journalist. All these can happen, but I believe that majority of journalists obey the Ethics Code.

Regarding internal rules, many journalists admit that usually in case of misconduct, there are no penalties internally from the media organisation's board of directors. It is rather a warning of "please don't do this again". Indicative is the description of a newspaper journalist who argued:

We have discussions. There are no standard practices or internal guide of conduct. Many issues have come up like whether or not to use the term “illegal immigrants”. Do we have to change the term or not? I was against it [...]. We have had articles that are sexist, racist, homophobic, and even anti-Semitic. There is not much conversation on these topics. For example, to discuss it among us, to respond with another article, there aren’t even consequences. Sometimes, if the telephone lines are very busy, the chief-editor gives lectures to the other editors, but there is no punishment as such like taking them off their columns for a couple of weeks. It is more like a “don’t do it again” warning. After a couple of months, one does the same.

However, an extraordinary type of internal rule seems to be applied in the case of the public service broadcaster ERT. As it is mentioned by a journalist of the public service radio, “there are no penalties for malpractices. They just put you on the ice; the same applies when the government changes”.

The dominance of “oral culture” in settling malpractices in newsrooms does not imply there are no special cases where stricter procedures are applied. As one journalist of our panel told us, “There is no standard procedure, something we have thought of. On the other hand, if a colleague didn’t respect the code on a regular basis [...] we would end the collaboration”. A newspaper journalist recalling an incident said that there was once an issue with one correspondent from abroad, when the director had to terminate the contract because the journalist didn’t respect the Code of Ethics.

Research conducted by the National and Kapodistrian University of Athens showed that from 2009–2014, there were 258 sanction decisions issued by the NCRTV: 39 for radio and 219 for the television sector. The most common type of violation was programme degradation (79 cases), followed by misguiding the audience (53 cases) and lack of political plurality (28 cases) (Komninou, 2017).

(E9) Participation

1 POINT

Newsrooms always closed some space for comments online, but in online forums, not underneath news items. In Greece, the transition to online journalism does not necessarily mean a rise in the interaction between the audience and newsrooms. The trend is that online news platforms close off their comments sections under the fear of legal action. Radio seems to remain the sole medium where audience members can participate without having their voices or comments edited or filtered out.

Despite technological advances, audience members are still not encouraged to participate in the news process. As an interviewed journalist pointed out, the most notable exception is public service television incorporating a citizens’ council – the so-called Social Monitoring Council – as a mechanism for audience

participation. The council consists of volunteers, and through periodic meetings, proposals are made by the audience members on new content, operational matters, and other regulatory issues. However, the council is not currently active, as its operation lies in the discretion of each administration.

Compared with the public service broadcaster, private television stations seem to be less active in terms of audience participation. As a private television journalist argued:

Public participation is a good idea in order to drive in a way that news comes closer to what the people think and to also see how people think. We are sometimes closed in a bubble. Having said that, we are part of the society. We are not superstars like the journalists in other countries. We are in the same place, in the same stores, in the same cafes; therefore, we have an understanding of the public. We are the common people. We do have a sense of how the society functions. So, it wouldn't be a bad idea.

As for the press industry, the general practice seems to be a quasi-dependable version of people's participation through opinions expressed either in the editor's column (usually in the second page of the newspaper) or through opinion pieces. Journalists or other renowned experts usually express public opinion. In addition, the default stance of citizen journalism is to rarely employ videos or audio items taken straight from the Internet without further text or context later provided by the media themselves.

In contrast to traditional media, the new media are meant to be more participatory by design. However, under web anonymity, users tend to become offensive and sometimes even threatening. In order not to be legally liable for users' comments, most online news platforms prefer to completely close down the comments section on their corporate websites instead of regulating discussion or removing offensive content. User comments are still prevalent on social media and online forums.

(E10) Rules and practices on internal pluralism

1 POINT

It is the personal responsibility of the editor-in-chief or chief producer to check for internal pluralism. Plurality is the default practice for the public service broadcaster ERT. On the other hand, commercial broadcasters are mostly tied to a specific political orientation, presenting a mono-dimensional policy in terms of internal pluralism. Thus, plurality in media is achieved through quantity of partisan perspectives, rather than through diversity of opinions inside a single medium.

In order to guarantee plurality, media organisations implement extra rules. For instance, public service broadcaster ERT has standardised rules safeguarding plurality in the sense that when presenting political news topics, sound bites

and visual content of all political leaders appear in a specific order, as dictated by the election results.

A journalist working in public service broadcaster ERT described this procedure adopted by the public service television:

It is compulsory to present the stance of all political parties on a given issue. In some topics, the Orthodox Church is also heard. However, no one interferes with the way a news piece is going to be presented. Generally, everyone has his/her share regarding television time, both political parties and advertisers. But they cannot interfere. It is very important to follow the rules and keep the balances, because with regard to public service television, everybody is being judgmental.

While journalists recognise the mission of plurality as necessary, public service broadcaster ERT has always been considered the mouthpiece of the party in power. On the other hand, commercial media have traditionally cultivated long affiliations and ties to political parties. This combination of factors creates the paradox of the Greek media system, where plurality may theoretically be sought, but a series of interests promote the unquestionable projection of some opinions at the expense of others.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog "control of the controllers"

2 POINTS

Media performance is often publicly discussed in the media or online forums – some forms of journalistic coverage of the media. In Greece, the most prevalent institutionalised mechanism to control the performance and role of the news media is the NCRTV, which occasionally has been regarded as ineffective. Although media performance is often discussed in the media or in online forums, this discussion is often merely descriptive or based on the subjective perception of the criticiser, leading to unfocused or unsystematic critique lacking in depth. The most usual context where media performance is investigated and discussed comprehensively and systematically is the academic one.

In Greece, the public debate on the role of media as watchdogs is by no means systematic, nor does it include effective or high-esteem institutionalised mechanisms for scrutinising the performance of the leading news media. The Greek media system, due to its particularities, has not facilitated the development of a truly dynamic and commonly respected body of journalistic ethics. At the same time, it is questionable whether a Greek journalist can stand above

ownership influences, since their views can hardly be independent from their media organisation's "line" – editorial policy.

This lack of independence is not new. It can be seen in the various calls by leading journalists to follow principles of objective or neutral journalism. These were mostly related to the adoption of a media ethics code (Papathanassopoulos, 1999). However, at times there have been cases where journalistic ethics have been explicitly set aside or undermined by a proportion of journalists in what is "churnalism", or other types of low-quality journalism. Since the emergence of the digital environment, this undermining process has become more frequent, stemming from the relentless competition of journalists on the web to publish news that should serve a rule of immediacy.

(C2) Independence of the news media from powerholders

0 POINTS

Strong formal or ownership-related influence of powerholders is exerted on leading news media. Leading news media houses in Greece are owned by powerful entrepreneurs, coming from other sectors of the economy, who use media companies as an effective instrument of serving their business interests.

Leading news media houses in Greece, for the most part, operate as subsidiaries of companies owned by a few powerful entrepreneurs coming from other sectors of the economy and exerting pressure on political actors in order to promote their business interests. This regime is as old as newspapers themselves of the post-dictatorship era and remained dominant even after the deregulation of the broadcasting sector and the strict surveillance that Greece recently went through based on a number of bail-outs. It is what Papathanassopoulos (2001: 519) has called a model of "interplay between media owners and political power centres and the battle for control of the public agenda" (see also Papathanassopoulos, 2017a).

Historically, the media system in Greece has been characterised by weak regulation and ineffective independent regulatory authorities, permitting a few powerful entrepreneurs – who were dominant in the newspapers sector – to expand their interests into the broadcasting and online media field. The rough-and-tumble deregulation of the broadcasting system that took place in Greece (1989) allowed the model of temporary television licences to thrive, a Greek paradox lasting 29 years (1989–2018). At the same time, a number of laws facilitated media ownership and cross-ownership.

Particularly in the broadcasting sector, the ineffective regulatory policies permitted the development of a problematic broadcasting model, characterised by clientelism and ministerial censorship in the shadow of a powerful state and

a weak civic society (Papathanassopoulos, 2017a). In Greece, there seems traditionally to exist the “triangle of power”, comprising the political leadership, entrepreneurs, and media owners (Iosifidis & Boucas, 2015: 12–14). Over the years that followed the deregulation of the broadcasting field, the legal and regulatory framework favoured or turned a blind eye to the concentration of press, television, and radio outlets owned by powerful entrepreneurs (Leandros, 2010). This is the result of the Greek media policy’s evolution, characterised by a traditional government-oriented model of policy-making, permitting a strong state intervention into the media field with the goal of serving political or other aims (Psychogiopoulou et al., 2014). The financial crisis, framed by the austerity measures imposed on Greek society through three bailouts for a period of nine years (2010–2018), enhanced the strong relationship between the political elite and the media (Papathanassopoulos, 2017a).

In this bleak media context, alternative models of journalism, in terms of ownership regime, were investigated based on a co-partnership rationale (such as *Efimerida ton Syntakton* daily newspaper) or crowd funding methods of sustainability (such as the news website *The Press Project*). A newspaper editor-in-chief commented on the advantages of the co-partnership operational model:

Employees are the owners of the medium. Therefore, they are involved in this process [editorial-decision] every day. However, there is no intervention from top to down so as a news topic not to be included [in the media agenda] or an issue to be turned into a news topic.

The low degree of independence – experienced by leading news media in Greece in their attempt to maintain a state of affiliation with the political field – is reflected in the carefully controlled process by which decisions are made on the daily news agenda or news editing. As a news website journalist underlined:

The director prioritises the news items that must go hand in hand with the political line [that is, the political orientation] of the media organisation. Journalists always express political beliefs diligently [...]. There is frequent contact with the director so as the news coverage does not contradict the political line of the media organisation [...]. There are interventions in everything depending on the political orientation of the medium.

As far as the public service broadcaster ERT is concerned, a public service radio journalist underlined:

There is no organised structure for the operation of an organisation even at the heart of the journalistic management. The main news comes from those serving the government line. Attempts [on quality content] are being made at ERT. However, these are performed recklessly without any logic of protection from those serving the government’s line. The latter dominates entirely.

(C3) Transparency of data on leading news media

2 POINTS

Information regarding ownership of leading news media is published once every year, but is available online. Leading news media's transparency of data, in terms of operational status and ownership identity, is undermined by a type of regulation that favours concealment of their funding flow and their ownership status. Therefore, citizens retain a blurred image of the media field. The release of relevant reports, available to the general public, is not compulsory, and therefore, transparency of information depends on the discretion of the media outlet.

Information regarding ownership of leading news media is published once every year and is available online. However, citizens in Greece, for the most part, retain a fragmented image of leading news media in terms of their operational status and ownership identity. Media organisations are not required to release relevant reports on press or electronic media, and therefore, information is occasionally provided either by universities or research institutes conducting studies on media market, or by regulatory authorities held responsible for supervising media outlets' operations according to the existing laws.

In the case of broadcasters' transparency, ownership information is achieved through NCRTV's intervention, requesting media owners to submit on an annual basis a series of documents for updating the Business Register kept in the Transparency Control Department of the supervising authority. All collected data related to shareholder composition of radio and television stations are available online on the NCRTV's website (NCRTV, 2020a, 2020b). Another regulatory authority having access to information concerning the ownership of leading news media is the HCC, with a mission of maintaining or restoring the healthy competitive market structure. In this context, among other duties, it precautionarily controls the effect on the competition of business concentration, as provided in articles 5–10 of Law 3959/11 (Hellenic Competition Commission, 2020).

Despite the regulatory framework (Law 2328/1995 and Law 2310/2005), the field was unregulated. In effect, information regarding ownership of leading news media is usually not available, or is only available to experts. However, the dissemination of such information depends on the discretion of the media outlet. Occasionally, universities or research institutes, in the context of relevant projects, discuss critically the ownership status of Greek media, but the provided data are usually not detailed. Journalists' unions and regulatory authorities keep records of ownership status of leading news media. However, in the past – and particularly in the “golden age” of the broadcasting sector (1990–2004) – there have been cases in which the ownership status of some media outlets was difficult to be fully and accurately identified, even by the NCRTV.

Last but not least, transparency of public funding received by the media outlets has frequently been questioned, raising serious counterclaims between

the political parties. Indicative is the case of the last campaign, “We Stay Home” – “We stay safe”, in the context of the Covid-19 pandemic, whose cost amounted to a total of EUR 20 million. The government spokesperson was asked persistently to release the exact amount given to each media outlet that received state advertising, as there was strong criticism focusing on the fact that in this list of 1,232 media outlets involved in the campaign, there were websites of very low traffic and readership, or even non-existent websites.

(C4) Journalism professionalism

1 POINT

Limited journalistic resources do not allow for high professional ethos. The profession of journalism in Greece has been distorted by the financial crisis and the subsequent and larger crisis distressing the media industry. Interventions in editorial decisions on the part of politics and media owners are a long-lasting malpractice hindering the development of journalism in the country.

Limited journalistic resources do not allow for high professional ethos. The journalism profession in Greece presents a number of chronic features, given that journalists have persistently served the model of advocacy, reporting under the influence of the news organisations’ interests. However, journalism has been a profession with an active social and political role, particularly after media commercialisation and market expansion taking place after 1989 (Papathanassopoulos, 2001). Therefore, it can be argued that in the period of prosperity (1990s and early 2000s), journalism used to be quite solid and sufficient, in the sense that journalists were governed by high level of competence and resourcefulness in implementing their reporting tasks, enjoying freedom from pressure in terms of time and resources and sharing some fundamental norms and standards of journalistic work.

However, the recent economic recession has brought about the financial collapse of the media market, as well as the demise of journalists’ labour rights, affecting adversely the quality and level of their professionalism. This situation seems to worsen in the aftermath of the Covid-19 pandemic, which has heavily affected all sectors of the economy, principally the media.

The main factors contributing to the distortion of the journalism profession are described by a representative of JUADN, highlighting,

the level of journalistic professionalism has always been very high in Greece [...]. Nonetheless, the financial crisis and the special crisis afflicting the media industry in recent years, and the various pathogens that characterise the way media owners grow and invest, have induced a significant blow to the industry, sometimes distorting the image of the profession itself.

During the economic crisis (2010–2018), the decline of the media market was reflected, as noted, in the bankruptcy of numerous media outlets: four historical media groups (DOL, Pegasus Publishing S.A., Imako Media S.A., and Liberis Publications). Moreover, 84 national newspapers, including newspaper inserts, 4 newspapers in Thessalonica, 4 national or Attica television channels, 55 regional channels, 3 satellite channels, 1 digital subscription-based platform (Alpha Digital), and 9 Attica radio stations closed down, forcing the media market to shrink.

At the same time, more than 50 magazines, either autonomous editions or inserts, suspended their edition, shaping the tragic account of the financial crisis. The market presented signs of recovery only to a limited extent through the replacement of certain losses. For instance, DOL passed to the jurisdiction of Alter Ego, while at the same time *Ethnos Newspaper*, *Sunday Ethnos Newspaper* (of Pegasus Publishing), as well as Epsilon television channel, now known as Open, came under Dimera's control.

The transition to the digital age has raised new challenges to the journalism profession. It relates to multitasking practices that journalists can cope with through constant training. According to a representative of JUADN, "the Journalists' Union is worried about the pathogens favoured by the digital environment (plagiarism, copy–paste phenomenon in news websites, aggregators – robot journalism and fake news) and evaluates the need to inform and train its members as very important".

Generally, in Greece, media is characterised by the lack of a strong journalism culture, a weakness that has deteriorated over the years during the financial crisis. In the networked environment, the partisan culture is interacting with new technologies under the pressure of the financial recession, leading journalists to search for alternative practices and funding models (Touri et al., 2017).

(C5) Journalists' job security

1 POINT

Leading news media change their journalistic staff frequently; employment for a longer period of time is not the rule. In contradiction to the past, due to sharp decline in media revenues, the journalism profession is characterised by non-permanent or occasional contact positions, which is a shared working regime between genders. At the same time, on the juridical level, there are no special legal measures or tools protecting journalists against dismissal.

Leading Greek news media change their journalistic staff frequently; employment for a longer period of time is the exception, not the rule. Nowadays, due to sharp decline in media revenues, the lifecycle of journalistic jobs in media organisations tend to be short-lived. As opposed to the heyday of leading news

media houses, over the last years, media owners have resorted to the systematic use of short-term contracting with journalists. As a representative of JUADN mentioned,

The truth is that in the past, during the heyday of media groups, journalists had a lifecycle of about 15 years in a media organisation, sometimes being retired from the same place where they began their careers in the industry. However, today, the cycle of a journalist's tenure in both traditional and new media houses has "shortened" dramatically, resulting often in their staying only for a few months on a website, a newspaper or a television channel and then leaving in search of a job in another media organisation.

The phenomenon of non-permanent positions or freelance contracts is not a working regime that differs between genders. There is also no discrimination in hiring journalists based on gender, according to most interviewees. However, there was a time, especially after 2006, when the advertising revenue began to decline, that media organisations provided job security mainly to young journalists, rather than to older ones, as a means of saving money. According to a representative of Journalists' Union of Athens Daily Newspapers,

At the time of the reduction in advertising spending, after 2006, both publishing organisations and TV channels often preferred younger journalists in order to reduce their payroll obligations on the grounds that younger journalists were considered more knowledgeable on digital tools. Today, this has started to subside in both traditional and new media, as the "slow journalism" movement has begun to inspire the Greek media organisations, which are slowly returning to credible reporting and to experienced, reputable reporters and to commentators.

On the juridical level, there are no special legal measures or tools protecting journalists against such dismissals. In terms of labour rights, what applies to all professions is the same for journalism as well. In case of proven illegal and abusive dismissals, journalists' unions are used to make allegations of support for underprivileged journalists, releasing relevant complaints. Although leading news media are mainly based on permanent staff rather than freelancers, there is no guarantee that a journalist's position will be preserved for a long period of time. At the same time, there are no professional rules protecting journalists against dismissal because of personal convictions. In effect, Greek journalists are usually subject to a type of self-censorship for fear of being fired.

(C6) Practice of access to information

2 POINTS

Public information is accessible by law, but not in reality. Journalists must spend time and effort to gain access. Although in theory, public information is accessible by law, in actual practice this is not the case, given that the accessing public documents presents considerable problems or difficulties. These restrictions affect the quality of investigative journalism, which at times is not truly revealing, or is ad hoc or only partially revealing.

In Greece, public information is accessible in theory, but not in practice. Journalists must spend time and effort to gain access. To be more precise, there is no media law specifically providing journalists with unrestricted access to public information. However, there are laws addressing citizens generally, which safeguard the above right. According to the Greek Constitution (Article 10, para. 1 & 3), citizens may either individually or as a group report in writing to the authorities asking for information or documents, and the authorities must provide a reasoned reply to the applicant or applicants within a specified period of time. With the constitutional revision of 2001, another Article (5A) was added to the supreme state law, which recognised citizens' right to information and to participation in the Information Society (Hellenic Parliament, 2019).

This important right of citizens is specialised in more detail in Law 1599/1986 (Article 16), defining that "every citizen has the right to be informed of administrative documents", and at the same time, the presidential decree 28/2015, coding the provisions for access to public documents and data, defines that "any person concerned/interested, at his/her written request, has the right to be informed of the administrative documents" (Official Government Gazette/FEK, 1986: 1644). The legislator's reference to "anyone interested" implies that the application for access to administrative documents should be based on a reasonable interest on the part of the applicant, whether they are a citizen or a journalist.

In the case of journalists, this reasonable interest (as defined by the law) derives from their obligation to provide the audience with accurate and timely information based on the principle of content documentation. However, this need for news documentation cannot be achieved without prior access to administrative documents. Therefore, the journalist's potential to request a public document is directly related to the satisfaction of an individual right and a wider public interest.

In practice, many times public information is accessible only in theory, as journalists must spend time and effort to gain access, since it may pose considerable problems or difficulties. One of the most common or recurring features is the tacit refusal of the administration to provide information requested by the journalist, or its long-lasting delay that amounts to refusal. This negative

attitude on the part of the administration at times may stem from political expediencies, meaning the administration's desire to protect politics.

Although journalists' access to public information cannot be characterised as totally unhindered or unrestricted, reporters enjoy an open communication regime when it comes to their contacts with politicians. A representative of JUADN argued:

Generally, there is an open field between politicians and editors [...]. What Journalists' Union of Athens Daily Newspapers is interested in is the observance of both the legislation and the rules of ethics in the way public information is collected, processed, and published.

In general, the accredited journalists to public sector bodies (such as ministries) gain easier access to public information, compared with other reporters or freelancers. In any case, all journalists, depending on their experience, gradually compile a list of personal contacts being used as a valuable source of information, even on topics regarding government or state activities. Nevertheless, in exceptional cases, there is still information inaccessible to anyone, deliberately hidden by those in power. An opinion-article journalist said, "There is quasi-public information intentionally hidden by the political sources".

(C7) The watchdog and the news media's mission
statement

2 POINTS

Media market investigative and watchdog journalism is part of the self-conception of leading news media, but journalists rarely have resources to exercise it. The mission statements of the leading news media organisations in Greece contain no particular or separate references to investigative journalism or watchdog performance of journalists against the abuse of power and corruption. They just incorporate the conventional rules of journalistic ethics, as defined by the JUADN, a professional association of daily newspapers and broadcasting journalists based in Athens.

In the Greek media market, investigative and watchdog journalism is part of the self-conception of leading news media houses. However, journalists rarely have resources to exercise it or, to be more precise, on the grounds of reduced financial resources they can avail it less than they wish for.

The watchdog function of journalists against the abuse of power and corruption is perceived on its own as a vital and integral part of the journalistic mission, which does not need to be framed by a special code of conduct other than the one characterising conventional journalism practices. As an editor-in-chief of a television channel aptly put it, "Investigative journalism does not deviate from classical journalism [...], it lies within the classical mission of

journalists”. However, he revealed that the media organisation’s future aim was “to compile an internal code of ethics so as to further advance the classical rules of Journalists’ Union”.

The mission statements of the media organisations mostly incorporated very conventional rules of journalistic ethics, as defined by the JUADN. This is a professional association of daily newspapers and broadcasting journalists based in Athens. It represents the most important Greek journalists’ association, with over 3,000 members, and thus, its Code of Professional Ethics and Social Responsibility directed at its members has been integrated – even informally – as an important reference guide to the mission and role of all journalists and media outlets based in Athens.

The obvious presence and informal acceptance of these rules is evident in a newspaper editor-in-chief’s testimony:

In our job contracts there is no reference to it [investigative journalism and its rules]. However, there is the general code of ethics of Journalists’ Union governing journalistic functions, which refers to all these relevant duties. In theory, the media a priori accepts it. Whether the rules are followed reverently, whether they are followed little or at all is another matter. Nevertheless, they are predominantly accepted [by journalists].

In sum, the selection process of news topics worthy of in-depth investigation is based on strict criteria. These, for the most part, include those that top the preference list of editors-in-chief or news directors within television newsrooms and those researchable by journalists in a relatively short period of time. This is because news bulletins cannot sustain the absence of an experienced reporter for a long time, as a chief editor of a private television channel pointed out.

(C8) Professional training

1 POINT

Training opportunities are not regularly provided. However, those who wish to participate find ways and means to do so. In Greece, the need for continuous and systematic professional training on watchdog and investigative journalism or on Big Data analysis is not embedded within leading news media organisations’ culture. Therefore, there is a lack of internally institutionalised means permitting training courses or training networks. Although there are some exceptions to this prevalent trend, the issue of training is a matter of personal decision on the part of journalists disconnected from the media outlet’s policy.

Training opportunities (especially for Big Data analysis, digital research methods, and collaborative online tools for investigative journalism) are not regularly provided; however, those who wish to participate find ways and means to do so.

One of the best and well-known sources of such professional training courses is JUADN, something most journalists are aware of.

In effect, the obligation for continuous training is not embedded in journalists' or Greek media organisations' culture. Therefore, the participation in training networks (e.g., for digital research and investigation methods) is not a matter of media outlet or gender; rather, it is clearly an individual option or decision. This lack of a widespread training culture is justified on the grounds that journalists are distracted by the daily hunt of news in their great attempt to earn their living. "In terms of education, everyone fights it alone. It is primarily left to individual training and the struggle and the effort is to focus on living from hand to mouth", mentioned an editor-in-chief of a radio station.

Nevertheless, the lack of contemporary professional training is not a common feature among media outlets, since television organisations appear more consistent on this task, with the exception of public service broadcaster ERT. For instance, the media group ANT1 occasionally (once or twice a year) conducts educational courses on new technologies, addressing employees from the sector of news editing and entertainment. An editor-in-chief said:

The ANT1 group holds seminars once or twice a year for the media group's employees as a whole. It has to do overall education [...] how we interact in today's market conditions, what the audience wants nowadays, how much the presence of social media has affected the media.

Another prime example is the recently rebranded TV MEGA, where the use of new-coming high standard technological equipment has led journalists to pursue seminars on new technologies, data journalism, and fake news. An editor-in-chief confirmed that journalists had been provided with seminars in order to use high technology (employed in the television station). "One of our journalists is already a member of the International Federation of Research Journalism having a very systematic contact [with data journalism and new research journalism tools]", he added.

Compared to private television channels, ERT lags behind in providing organised or systematic training. In the past (2007–2008), some rudimentary efforts were made with the aim of enhancing staff's knowledge and skills. However, they proved to be clearly temporary and far from being based on a well-thought strategic plan. A public service radio journalist explained this and highlighted the lack of implementation:

There is no organised education or staff training in public service broadcaster (ERT) in general. In 2007–2008 some efforts were made. At first, it all started with a little good mood [...]. However, today, there is no training within ERT, neither for the administration, nor for the technical staff and journalists. There is nothing about data analysis. Something relevant is implemented with

regard to new media in collaboration with the Athena Research Institute and the European Communication Institute, [...]. However, it is not implemented at an institutional level.

As opposed to private television channels, radio stations attribute minimal or no importance to professional training courses, mainly due to limited resources. However, the economic recession that afflicted the media market has dramatically affected the ability of the media outlets to invest in staff training, even in the case of the traditional press organisations. According to an editor-in-chief of a mainstream newspaper, before the crisis, everyone had the right to go to training courses. Especially for everyone from the group of editors who were involved in new technologies, the newspaper relied heavily on their own specialisation and their own promotional energy to improve themselves. Lately, “it is definitely not happening as often as it used to”, he added.

As to the question of whether women journalists are supported and encouraged to participate in training courses on digital research, investigative methods, or leadership skills, the answer is plain, given by a representative of JUADN: “There is no discrimination in the attention paid to women compared to their male colleagues in terms of professional training. Women are given the same attention as men”, he argued.

(C9) Watchdog function and financial resources

1 POINT

Investigative journalism happens, but it is the exception rather than the rule. In leading news media organisations in Greece, although investigative journalism is recognised as a task of great importance, lack of the financial resources since the period of recession has minimised the potential of the newsroom to perform their watchdog functions systematically.

In leading news media organisations in Greece, investigative journalism is the exception rather than the rule. Journalists recognise investigative journalism as a task of great relevance, confirming the role of journalism as the fourth estate; however, they are mostly unaware of the range of financial resources invested in this aspect of journalism. According to a newspaper editor-in-chief, “Investigative journalism should be the dominant element in the media field, but it is not for either public or private media”.

Nevertheless, journalists argue that the decade of financial crisis has raised difficulties and restrictions in newsrooms, in regards to performing their watchdog function. “Over the last years in Greece, the range and number of journalists involved in investigative journalism have significantly declined”, said a news director of a commercial television channel. Therefore, according to another journalist working in a private radio station, the truth was that in Greece, it is

not so simple to do investigative journalism under the current economic conditions, as the economy had directly affected mass media. “We [as media] had already been destroyed [before the financial collapse of 2009]. One of the first areas hit by the crisis in Greece was the media”, he added.

In short, journalists and media owners appear particularly keen to produce more projects of investigative journalism than they actually do. However, their strong willingness or desire has necessarily been tempered or suppressed by the economic recession that afflicted the media field and Greek society as a whole. Nowadays, journalists have been turned into multitaskers, something that often deprives them of the possibility of dealing with a newsworthy topic for a long time. As a result, today, in comparison with the past, there has been a decrease in news topics investigated in-depth due to restrictions on the time available for research. Although leading news media have at their disposal trained specialists on given topics, the process of news cross-checking is not equally rigorous on all issues.

In websites based on crowd funding – such as *info-war.gr* or *thepressproject.gr* – there is a system of ad hoc provision of funds to specific investigative journalism projects that are documentary in nature. These public contributions ensure the implementation of independent investigations and the sustainability of the news portal. “Based on the money from public contributions, the operating expenses are first covered, which is a fixed expense, and the rest [money] goes to research”, said the editor-in-chief of a news website.

In the leading news media organisations in Greece, the process of news production is mostly based on the model of accredited journalists, required to deliver a news topic by the ministries or other official bodies on a daily basis. This journalistic routine on news composition does not leave much room for journalists to exercise in-depth investigation – this is a privilege enjoyed by fewer and fewer journalists. In the case of newspapers, in-depth journalistic investigation is a mission preferably assigned to highly experienced individual journalists instead of a group, due to limited availability of time and money. “In this regard, over the last decade, investigative journalists have been perceived as ‘luxury editors’”, said a newspaper editor-in-chief.

According to a newspaper editor-in-chief, despite the lack of vital conditions for journalists to perform their watchdog role through well-funded independent investigations, other incentives in newsrooms remain strong, including encouragement towards journalists on the part of media owners. After all, it is argued that “the control and criticism of those in power is multifaceted” and therefore, is not an exclusive matter or mission of investigative journalism, but journalism as a whole.

Conclusions

Traditionally, in Greece, there have been more media outlets than what the state can sustain. This seems to be the main feature of the Greek media landscape that, at the same time, is also the main cause of its problems. This has resulted in the politicisation of the field and the traditional interplay between media owners (mostly coming from sectors other than the economy) and the government.

With regard to the press market, Greek newspapers and magazines have faced an existential crisis. The financial crisis of the last decade, coupled with one of the lowest levels of readership in Europe, has led the printed media to be in question. The recent lockdown due to the Covid-19 pandemic seems to be a further impediment regarding newspapers' existence. However, the broadcasting sector, and especially television, despite facing a decline in advertising revenue, remain one of the most important sources of information for the Greek audience. Meanwhile, the online media organisations have rapidly cemented their place in the Greek media system, with the digital sector incorporating 675 digital media companies, with more than 1,500 news websites certified by the government.

Nevertheless, despite a plethora of all kinds of media organisations, and some being more successful than the others in reaching the public, Greece, like other countries, is experiencing inequalities in representation and access to the media by social minorities.

Journalism in Greece is suffering from chronic and severe crises (financial and operational), derived mostly from the fact that powerful entrepreneurs, coming from other sectors of the economy, own leading news media in Greece. They use media organisations as an effective means to serve their business interests by exerting pressure on political actors. This means that in Greece, there thrives a media system where the "triangle of power" – consisting of political leadership, entrepreneurs, and media owners – dominates.

As noted earlier, this is the result of a traditional government-oriented model of policy-making permitting strong state intervention in the media field. The financial crisis enhanced this paradigm, and the bankruptcies recorded in the media market over the last years brought about a reorganisation of the media sector leading to a new pattern of media oligopoly. This setting has adversely affected the already low rank of independence and pluralism in journalism, regenerating a journalistic culture receptive to the model of media *instrumentalisation* and governed by self-censorship when reporting news.

These highly precarious working conditions of journalists have undermined their potential to fulfil their function as watchdogs. After all, in the Greek media market, investigative or watchdog journalism is part of a self-conception of leading news media houses. There is no particular reference within the mission statements. However, due to reduced financial resources, it is exercised less than journalists wish for. This weakness is directly related to the lack of

culture within most media organisations to provide training opportunities, as well as due to the lack of internally institutionalised means permitting training courses to journalists on a regular basis.

With more than one fourth of Greeks stating distrust towards the media, the audience seems to have turned to online news websites for daily information consumption. They have chosen it despite the fact that for online news platforms, click-bait technique is the main way to increase their page views.

Although there are conflicting views among journalists as to the existence of gender inequalities within the media organisations, they all agree that official rules on these critical issues are missing. Misinformation and fake news are perceived as major problems, and media organisations have been left behind in terms of how they could handle them efficiently, with journalists appearing adhered only to the traditional practice of information cross-checking, ignoring the aid offered by new technologies or the external fact-checking organisations.

Overall, Greece is a country with a media market in chronic crisis. “Advocacy culture” still prevails in most media organisations, which seem to be influenced by “analogue” considerations, even in the digital age.

Notes

1. <https://emedia.media.gov.gr/>
2. For more details, see <https://www.digea.gr/en>

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HONG KONG

Free press under existential threat

Lo Wai Han & Wong Tin Chi

Introduction

Hong Kong is a global metropolis with a population of around 7.5 million people that is located just south of mainland China on the eastern side of the Pearl River Delta (South China Sea). Hong Kong's Basic Law states that Chinese and English are the official languages; however, most of the population speaks Cantonese. According to the 2016 Population By-census, 96.7 per cent of the overall population aged 5 years or older could speak Cantonese, 51.9 per cent could speak English, and 50.6 per cent could speak Putonghua. Therefore, Hong Kong media companies compete in the Chinese-language market, which is one of the largest media sectors in the world.

The role and performance of a country's media depends on its political system, economic structure, and media environment. In a democratic and free society, in which the government is accountable to the people, the press serves as a watchdog and provides a platform for citizens to exercise their freedom of expression. This is unlike in an authoritarian state, where the press is the mouthpiece of the state, often deployed to exercise control through propaganda. In this regard, Hong Kong is a special case and demands close attention. Hong Kong was a colony of the United Kingdom until 1997, after which it was handed over to China under the principle of "one country, two systems". Hong Kong is officially designated as the Hong Kong Special Administrative Region (HKSAR) of the People's Republic of China (PRC).

Freedom in the World 2021: status "partly free" (Score: 52/100, down from 61 in 2017). Since the previous ratings were published in 2017, six points have been deducted in the Freedom of Expression and Belief (Civil Liberties) category. These were based mainly on increased levels of censorship and pressure placed on the media and universities in the wake of recent events, which included the demonstrations against the extradition bill and the implementation of a New Security Law (NSL) (Freedom House, 2021).

EIU Democracy Index 2020: Hong Kong is ranked 87 of 167 surveyed countries, down from 75 in 2019. It was downgraded from a “flawed democracy” to a “hybrid regime” (The Economist Intelligence Unit, 2019, 2020).

Liberal Democracy Index 2020: Hong Kong is placed in the bottom 30–40% bracket – ranked 115 of measured countries, down from a ranking of 107 in 2018 (Varieties of Democracy Institute, 2021).

2020 World Press Freedom Index: ranked 80 of 180 countries, down from 73 in 2019 (Reporters Without Borders, 2020).

Under the Basic Law adopted as a condition of the handover, Hong Kong has its own government and constitutional protection of civil liberties. This accords it power to retain its autonomy from the PRC until 2047. However, Hong Kong has been undergoing rapid political changes since the 2019 anti-government protests and demonstrations of social unrest. In June 2020, the central government bypassed the local legislature and directly implemented national security law. Many key political activists in Hong Kong are now either in jail or living in exile. The chief executive of HKSAR and half of the Legislative Council have not been elected through universal suffrage, but selected through a unique committee-based electoral process that favours the appointment of pro-Beijing candidates (Freedom House, 2020). A recent proposal endorsed by The National People’s Congress of the People’s Republic of China gives more power to the Election Committee. It has new power to nominate lawmakers and send some of its own representatives to the Legislative Council. Three hundred loyalists will be added to the existing committee. Their addition will ensure that candidates who run for chief executive or the legislature will be loyal to the authorities.

Since the United Kingdom’s 1997 handover of Hong Kong to PRC under the “one country, two systems” principle, the politics of Hong Kong have reflected this unique framework. There are two main political camps:

1. The first is pro-democracy. It promotes democratic ideals, including universal suffrage for the election of the Chief Executive and members of the Legislative Council. The more progress this camp makes toward development and enhancement of democratic practices, the higher the degree of autonomy Hong Kong enjoys. Prominent parties in this camp include the Democratic Party, the Civic Party, and People Power.
2. The pro-China (or pro-Beijing) camp, in contrast, places low emphasis on the democratisation process, the rule of law, and human rights; much higher priority is given to the welfare and stability of Hong Kong, or, as it is officially known, the HKSAR of the PRC. The pro-China camp therefore seeks closer collaboration between HKSAR and PRC. Prominent parties in this camp include the Liberal Party, the Democratic Alliance for the Betterment and Progress of Hong Kong, and the Federation of Trade Unions.

However, 47 pro-democracy activists and politicians were recently charged with conspiracy to commit subversion under the national security law. The maximum penalty is life imprisonment. The authorities may try to eradicate all dissenters under the new national security law.

Sino-British Joint Declaration and HKSAR's Basic Law guarantees Hong Kong's press freedom. Under colonial governance, the press in Hong Kong enjoyed a high degree of freedom and adopted a liberal model that resembled Western journalistic practices (Chan & Lee, 1989). Since the handover in 1997, however, freedom of the press has seen a steady decline, and Freedom House rated the Hong Kong press as "partly free" in 2020. A countervailing trend has been the emergence of online news sources as alternative media outlets. This has played a key role in helping to empower Internet users by providing a means of avoiding censorship and social control (Luqiu, 2017).

The PRC central government does not have direct control over the Hong Kong press, but its indirect interference has been increasing due to the purchase of media outlets by a group of businessmen with significant business interests in mainland China (Fung, 2007). Rather than taking control of daily newsroom operations, these media owners have tended to exert control by making personnel decisions and allocating resources (Lee, 2018). Nevertheless, the Hong Kong media operates in a context of the central government increasingly exerting direct political control over Hong Kong citizens in recent years. This is supplemented by a decline in the autonomy and political freedoms stipulated in the handover agreement (HKJA, 2017). Such a situation has intensified since the 2014 Umbrella Movement and forms a backdrop for the ongoing protests involving millions of Hong Kong citizens that were sparked in 2019 by the Hong Kong government's attempt to pass a controversial amendment bill related to extradition (Kaeding, 2017; Lim, 2017; Ngok, 2012). Such activism helped propel the pro-democratic camp to a landmark win in the 2019 Hong Kong district council elections. This was boosted by record participation (71% of registered voters), as a result of which the pro-democracy camp took nearly 90 per cent of the seats (Sanchez Manzanaro & Jamieson, 2019).

The media environment in Hong Kong bears the marks of this political divide. Nonetheless, the widely popular public broadcasting service Radio Television Hong Kong (RTHK) is rated the most-trusted media brand. Through its seven mobile apps, RTHK makes most of its television and radio broadcasts accessible as podcasts, contributing to the service's popularity.

RTHK has contributed to the popularity of podcasts in Hong Kong, in general. The newspaper market has struggled in recent years, and two well-known newspapers, *The Sun* and *Hong Kong Daily News*, have shuttered. Currently, the two most-circulated newspapers are *Apple Daily*, aligned with the pro-democratic camp, and *Oriental Daily*, aligned with Beijing, although it generally eschews an engagement with political issues. Both newspapers are

published in Chinese. The only English-language paid daily newspaper in Hong Kong is the *South China Morning Post*, which was acquired by the Alibaba Group in 2016. This acquisition raised questions about Beijing's influence over the news landscape, given Alibaba's strong association with Beijing (Chan et al., 2017, 2019; Luqiu, 2017).

Hong Kong's predominant free television channel is Television Broadcasts Ltd. (TVB). It owns various media and news platforms, including streaming services. Like other media companies in Hong Kong, TVB is well known for its pro-China stance. A notable recent entrant to the news landscape is the *Hong Kong Free Press* (HKFP), an independent online newspaper founded in 2015. HKFP, which has covered significant incidents in the region, earned USD 220,000 through a crowd-funding campaign in 2017. Despite this, since it is an English-language website, HKFP does not reach a broad audience (Chan et al., 2017, 2019; Luqiu, 2017).

News media are widely available to all citizens in Hong Kong, but the media landscape in Hong Kong has undergone significant changes over the past decade. According to The Hong Kong Journalists Association (HKJA), of twenty-six mainstream media outlets in Hong Kong, nine are controlled by entities linked to the mainland Chinese government. This number continues to increase (HKJA, 2017). However, 84 per cent of the Hong Kong survey respondents said that they sourced news from the Internet (including social media), and 43 per cent said that online media is their main source of news (Lee, 2018). Many news media organisations are undergoing a digital transformation and now endeavouring to operate within a model providing free online content.

Anti-extradition bill movement and the news media

In the summer of 2019, Hong Kong witnessed some of the largest demonstrations in its history. These were triggered by the introduction of the so-called Fugitive Offenders Ordinance Amendment Bill. In what came to be known as the Anti-Extradition Law Amendment Bill (Anti-ELAB) movement, one million of the seven million Hong Kongers took to the streets on 9 June to demonstrate against the bill. A few days later, the government announced the suspension of the bill; however, this action did not quell protests. On the contrary, the crowds grew quickly and the protests continued, as Hong Kongers became determined to show their will for the further democratisation of Hong Kong. Almost two million citizens filled the streets, demanding the release of detained activists and calling for investigations into police brutality (Lee et al., 2019). The movement remains active more than a year later.

The media has played an essential role in the movement. According to a study by Lee and colleagues (2019), almost all surveyed protesters (93.8%) reported that they relied heavily on online news outlets to collect information about the

events. A smaller share of protesters (58.6%) indicated that they depended on mainstream media. Hong Kong's alternative and independent media organisations were viewed as more reliable than the mainstream outlets, which was due to the latter's close association with the government and Beijing. Protesters also sensed that restrictions on the protest's coverage had become stricter and that censorship could grow still more severe if the extradition bill was implemented. Thus, journalists and other organisations argued that the protection of press freedom was an important element of the movement (Quackenbush, 2019).

New national security law and freedom of the press

At the end of May 2020, notwithstanding fierce opposition to the Fugitive Offenders Ordinance Amendment Bill, the PRC government submitted a blueprint decree stating that it can bypass HKSAR's legal procedures, such as the so-called Basic Law, in the implementation of a new form of national security law in Hong Kong. Beijing has indicated that it will consider criminally punishable actions that 1) undermine the central government (subversion), 2) lead to a breakaway from the country (secession), 3) intimidate and incite violence against people (terrorism), or 4) are orchestrated by foreign forces aiming to interfere in Hong Kong (Dupre, 2020; Tsoi & Wai, 2020).

The national security law has proved much tougher than the expected set of rules. Under this, Beijing can exercise jurisdiction to handle "complicated" cases. Mainland agents can operate freely in Hong Kong without falling under local jurisdiction. The maximum penalty for each crime is life imprisonment (HKSAR, 2020b).

This development has sparked fears over the suppression of free speech and potential interference in news companies' coverage of issues in Hong Kong. Coming on the heels of a new law that criminalises insulting the Chinese national anthem, the national security law is widely feared to be the straw to break the camel's back, finally dismantling all the freedoms Hong Kong has enjoyed since the 1997 handover. Many believe that Hong Kong's media landscape and news coverage will shift towards those in mainland China. In recent years, the public broadcaster RTHK has been handed several controversial orders that appear to be designed to suppress free speech, including demands that employees must align more closely with the government. Moreover, many media industry professionals have expressed concerns that the new security law will sound the death knell for the region's many independent media outlets (Palmer, 2020; Pomfret & Torode, 2020). The Hong Kong Journalists Association (HKJA) conducted a survey over the implementation of a new national security law. The findings indicated that 98 per cent of respondents opposed the implementation of the law and that more than half of those surveyed were worried about their personal safety with the implementation of the new law (HKJA, 2020b).

The authorities in Beijing have suggested that the new law will only affect a very small portion of people in Hong Kong. However, it has already been used as grounds to disqualify political candidates, prosecute students, arrest protestors, media tycoons, and pro-democracy figures, raid newsrooms of pro-democracy papers, and order arrest warrants for political activists overseas (Barron, 2020). Pro-democracy media tycoon Jimmy Lai was charged with collusion with a foreign country under the national security law. The maximum punishment is life imprisonment.

Covid-19

The Hong Kong government adopted a range of measures in response to the Covid-19 pandemic. These included the suspension of educational classes from early February to 27 May 2020, a ban on public gatherings of more than eight people, a restriction on the number of customers at catering businesses, and restrictions on arrivals from foreign countries. The revenue of news media organisations has been disrupted by the pandemic, with some interviewees reporting a significant drop in advertising revenue from many business sectors (e.g., the property market and luxury services). The revenue crisis is an open secret; for example, Jimmy Lai, the chairman of Next Media – one of the largest media companies in Hong Kong – made a video appeal to audiences to subscribe to *Apple Daily*, suggesting that almost all advertising revenue had been lost due to the long-lasting political suppression and the pandemic. People working for other media companies have also faced pay cuts or salary freezes, and some have been compelled to take unpaid leave for Covid-19.

The HKSAR government has provided a HKD 137.5 billion package of relief measures, including the HKD 80 billion employment support scheme designed to help employers retain their staff. Under this scheme, all employers in the private sector, including news media companies, are eligible to apply for a subsidy, which would last for a period of up to six months and is based on number of employees.

Leading news media sample

Our media sample for the Media for Democracy Monitor (MDM) 2021 consisted of nine leading news media representing different political standpoints, media types, and media characteristics: one public broadcasting service (RTHK), three daily Chinese newspapers with different political standpoints (*Apple Daily*, *Oriental Daily News*, and *Ming Pao*), one daily English newspaper (*South China Morning Post*), two television broadcasting companies (TVB and Cable TV), and two online news portals (*HK01* and *Stand News*). Among these, senior

staff (editors-in-chief or senior managing editors) and leading journalists have been interviewed, with the exception of seniors from TVB and *South China Morning Post* and the chairperson of the HKJA.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

Hong Kongers are kept informed by a wide variety of news media. High levels of public access and the efficient use of technology to gather and distribute news and information characterise the news media.

According to a 2019 report, there were 82 daily newspapers and 531 periodicals (including a number of electronic newspapers) available in Hong Kong. This included 53 Chinese-language dailies, 12 English-language dailies (including one in Braille), 13 bilingual dailies, and 4 Japanese dailies (HKSAR, 2019). Hong Kong is also a major international media centre in Asia and a regional base for international media organisations, including *Financial Times*, *Bloomberg*, *The Wall Street Journal*, *TIME*, and *CNN*.

The eleven most influential local paid newspapers are *Apple Daily*, *Hong Kong Commercial Daily*, *Hong Kong Economic Journal*, *Hong Kong Economic Times*, *Ming Pao*, *Oriental Daily News*, *Sing Pao Daily News*, *Sing Tao Daily*, *South China Morning Post*, *Ta Kung Pao*, and *Wen Wei Pao*; there are also five free newspapers, namely, *am730*, *Headline Daily*, *Lion Rock Daily*, *Sky Post*, and *The Standard* (The Chinese University of Hong Kong, 2019). Free dailies are not new in Hong Kong, with the first free Chinese-language newspaper, *Metropolis Daily*, having been launched in 2002 and freely distributed at Mass Transit Railway stations. It reached a daily circulation of 400,000, with approximately one million readers among the population of seven million. *Headline Daily* and *am730* joined the free-daily market one year later, with *Headline News* later becoming the city's biggest free newspaper, with a circulation of 800,000 copies (SCMP, 2013).

However, Hong Kong's traditional paid and free newspapers have suffered from the availability of free online news content, with plunging circulation numbers and financial decline. Despite the extremely low online advertising revenues, only a few paid newspapers have moved to charge readers to access their website, and most only charging for a portion of their content. Some free newspapers, including *Sharp Daily* and *New Evening Post*, quit the market, while *Metropolis Daily* stopped the free distribution of printed copies and moved

online (Vines, 2019). The actual circulation figures for traditional newspapers are difficult to ascertain, as only two Hong Kong newspapers are independently audited. For example, *Oriental Daily News*, one of the largest newspapers in Hong Kong, made the impressive claim that it had a readership of over 3.54 million in 2018, but there was no way to prove the accuracy of these figures. Looking at the positive side of the current situation, an abundance of news content from a wide range of traditional news media is freely available online for Internet users, and 99.1 per cent of all households in Hong Kong had access to the Internet, either at home or on a mobile phone in 2018 – a proportion that continues to increase. Mobile subscriber penetration rate is 283.7 per cent (Census and Statistics Department, HKSAR, 2019).

Politically, the major newspapers can be categorised according to their pro-establishment or pro-democracy stance. *Apple Daily* was the most outstanding example of a newspaper aligned with the pro-democracy camp, while *Wen Wei Po*, *Ta Kung Pao*, and *Hong Kong Commercial Daily* represented the pro-establishment viewpoint. Newspapers sitting somewhere between these two stances were under intense political pressure (Lee, 2007a, 2007b).

In 2019, the household broadband penetration rate was 93.6 per cent in Hong Kong, and the percentage of persons aged ten and over who had used the Internet during the previous twelve months using a mobile phone or personal computer was 99.3 per cent and 87.7 per cent, respectively. The increase in smartphone usage was particularly remarkable among the elderly: approximately two in three persons aged 65 and over had a smartphone in 2019, compared to only around three in five persons in the same age group in 2018 (Office of the Government Chief Information Officer, 2020). This might indicate that the information gap between different generations is narrowing.

Regarding broadcast media, Hong Kong had three domestic free-television broadcasters, two domestic pay-television broadcasters, twelve non-domestic television service providers, one government-funded public service broadcaster, and two audio broadcasters (HKSAR, 2019). In 2017, penetration rate of domestic free television was around 99 per cent. Nearly 90 per cent (more than 2.2 million) of households in Hong Kong have switched to digital terrestrial television, representing a very high level of digital terrestrial television penetration (HKSAR, 2020a). Among the television broadcasters, TVB continues to dominate free television news and online news, despite constant criticism over self-censorship and ties to mainland China (Chan et al., 2019).

RTHK is the only public broadcaster in Hong Kong, and it is fully government funded. Since 2014, RTHK has added three new television channels and seven new radio stations and faces a challenge to fill the airtime with enough fresh media content. It has been criticised by a government audit for not creating enough new programmes, and thus repeatedly broadcasting the same content (Chan et al., 2019).

Fantastic Television Limited launched its Chinese channel in 2017 and a channel in English in 2018. However, TVB still has a very dominant role in the free-broadcasting market, and the new operators have been unable to break up the TVB monopoly. The Hong Kong government was criticised for the decision in 2013 not to issue a licence to HKTV, despite the popularity of their programmes among the general public. It is believed that the decision was politically motivated, with the government not wanting to promote competition in the free-television industry, fearing that it could lead to more critical coverage of the central government in Beijing (Kwak, 2018).

Nevertheless, Hong Kongers can access a large number of television channels, with more than 800 local and overseas television channels being delivered through free-to-air terrestrial and satellite reception or pay-television services. Commercial Radio Hong Kong and Metro Radio Hong Kong, together with RTHK, also offer 13 analogue radio channels.

Additionally, there is an abundance of online news media available in Hong Kong, featuring different political orientations. For example, *Speak Out HK* is on the pro-establishment side and *Passion Times* takes a pro-localist stance (The Chinese University of Hong Kong, 2019). The English-language *HKFP* was founded in 2015 and is funded by public donations; despite its success in fundraising, it only reaches 3 per cent of the total Hong Kong population. This indicates that there is only a small market for English-language news in Hong Kong, and that the market remains dominated by international media, such as the BBC and CNN (Chan et al., 2019).

(F2) Patterns of news media use (consumption of news) 3 POINTS

90 per cent of the Hong Kong population consume news every day, with online and television being the main news media. Demographic factors contributed to different news consumption patterns.

According to the *Reuters Institute Digital News Report 2019*, around 82 per cent of the Hong Kong population consumed their news online, with 75 per cent and 44 per cent of the population consuming news on television and print media. Only 17 per cent were willing to pay for online news, and 51 per cent shared news items via social media, messaging, and e-mail.

A study by the University of Hong Kong (The University of Hong Kong, 2019a, 2019b) found that around 70 per cent of Hong Kongers consume news online, and 65 per cent consume news on television. Comparing the news consumption patterns over the past two decades, there has been a continual decline in the consumption of news on television and newspapers and an increase in online consumption; the trend for radio news consumption is quite steady (see Table 1).

Table 1 Different media nominated as the main news source, 2000–2019 (per cent)

Media type	2000	2009	2019
Newspapers	70.9	71.6	51.6
Television	81.1	84.5	64.0
Radio	26.2	34.5	30.2
Internet	5.7	37.6	69.4

Source: The University of Hong Kong, 2019a, 2019b

According to a further study conducted by Hong Kong Baptist University (2020), 90 per cent of the population consumed news every day, but 90 per cent of the population did not pay for access to news. Education was found to be an important factor in influencing the use of different news platforms. A survey suggested that 46.5 per cent and 52.1 per cent of participants using websites or mobile apps had a tertiary education background (Wang & Wong, 2018). However, the importance of age, education, and political background is not declining: government statistics suggested that over 90 per cent of young people use social media, and the penetration rate among people aged 45 and above was 78 per cent in 2018 (Information Technology and Broadcasting, 2019). A recent study conducted by The Chinese University of Hong Kong (2020) about the anti-extradition bill movement also found that age and educational background led to a difference in news consumption patterns. It suggested that people who gathered information from traditional media are more likely to be seniors, lower income, lesser educated, unemployed, or take pro-establishment stances. In contrast, people who were younger, better educated, higher income, or supporters of the pro-democracy camp tended to get their news from social media, *LIHKG*, and *Telegram*.

With only two Hong Kong newspapers being independently audited, it has been difficult to examine the loss of newspaper readership. However, Reuters Institute's 2019 *Digital News Report* on Hong Kong (Chan et al., 2019) placed TVB news as the top news media outlet in terms of audience, despite controversies over its editorial independence. *Apple Daily* came second among online portals and third among television, radio, and print media. *Yahoo! News*, which purchases content from other sources, had the third-largest online news media readership in Hong Kong.

RTHK, the sole public service broadcaster, displayed the highest level of news credibility and was very popular among the public, although there were continual controversies over government interference and editorial independence. RTHK also makes audio and video podcasts available for online access and through mobile apps, which has contributed to the high penetration of podcasts in Hong Kong.

(F3) Diversity of news sources

2 POINTS

The respondents stressed that they performed independent research on publicity materials and did not rely on news agencies over local news sources. However, there were serious issues relating to political censorship, especially through the selection or omission of sources, among some media organisations.

The respondents were unanimous in stating that publicity materials did not play a significant role in news reporting. Although they sometimes used publicity materials as part of their daily routines, they researched the content and only adopted it as a secondary source for stories. In Hong Kong, international news relies heavily on news agencies. However, the journalists interviewed for this study worked on local news, and none of them mentioned news agencies as a source.

Content exchange with other news media outlets is not a common practice in Hong Kong, although some media organisations did exchange video content, especially while covering the anti-extradition movement. The respondents suggested that, with the protests being widespread and many newsworthy events taking place simultaneously, it was impossible for a single organisation to have reporters everywhere and, even if they did have reporters at the scene, many events could be missed. When important shots were lacking, this was compensated for by using visuals obtained by other news media. They emphasised that they did give acknowledgement to other news media for the video content and research adopted for news stories.

The interviewees said they usually worked on their own stories, and that there was rarely any content syndication. In Hong Kong, online news media and free newspapers made heavier use of content syndication, due to their limited resources and the short news cycles involved in responding to the needs of Internet users.

There were some reports of outlets occasionally collaborating with other local news media, especially on major political topics. International journalism networks have been established over recent years, and some newspapers, such as *Ming Pao*, have worked with the International Consortium of Investigative Journalists on important investigative stories, such as the *Panama Papers*.

Some interviewees admitted to self-censorship over the selection or omission of sources on political grounds. This situation was more evident among the news media with a pro-establishment stance. For example, a number of experts with pro-democracy stances were blacklisted, and reporters were asked to interview pro-establishment experts. Editors justified these practices as airing a range of voices on the stories or avoiding extreme and irrational comments.

(F4) Internal rules for practice of newsroom democracy 1 POINT

Democratic practices in newsrooms varied between different media organisations. Generally speaking, newsroom journalists did not have a say in appointing the editor-in-chief or other positions. However, some newsroom journalists had a greater role in portraying and framing political issues than others.

In Hong Kong, only a few local news media organisations have their own labour unions, such as *Ming Pao*, Next Media, and RTHK. The respondents admitted that journalists generally did not have a say in the appointment of an editor-in-chief or the senior management team. Only one respondent suggested that newsroom journalists had replaced their editor-in-chief because of the threat of a strike, along with some other reasons. Newsrooms do not have any guidelines to ensure democratic practices. The situation became worrisome only after 1997, when Beijing began to exercise indirect control rights over Hong Kong newsrooms via allocative control, such as the appointment of staff. At present, media critics are questioning the appointment of a former head of the China news division of the well-known pro-Beijing media organisation TVB as the head of the Now TV news department, which had been recognised as the most-credible television news organisation. It has been alleged that the appointment was a political manoeuvre (Mingpao, 2020).

Regarding the framing of political issues, democratic practices in newsrooms are less common in organisations that are more inclined towards the pro-establishment camp. In the most extreme case, political news framing is rarely discussed; in other cases, permission to discuss framing depended on the political sensitivity of the news story and the political stance of the media outlets.

(F5) Company rules against *internal* influence on newsroom/editorial staff 2 POINTS

The separation of newsrooms from management is not practiced by any of the media organisations sampled, and there is a diversity of relationships between media owners and the newsroom. In Hong Kong, generally speaking, newsrooms are totally separated from the advertising department.

Not all leading Hong Kong news media practiced a strict separation between newsroom and owners. In the most extreme case, an owner was appointed as editor-in-chief. In some other cases, owners of media organisations gave direct instructions to newsroom editors and journalists and could potentially intervene across the full range of news sectors.

Some organisations did exercise a total separation of their newsrooms from owners, with the owners rarely visiting the newsroom or intervening in editorial

matters. One online media portal is operated by a trust fund to guarantee that the board members stay out of editorial decisions.

Although Hong Kong has a free market economy, and “freedom of speech, of the press and of publication” is enshrined in article 27 of the Basic Law, a 2017 survey of journalists conducted by the HKJA and The University of Hong Kong found that 30 per cent of newsroom workers practiced self-censorship. This was consistent with the result of our interviews, in which five out of twenty interviewees confirmed that self-censorship was a common practice in their companies (HKJA, 2017).

The freedom of newsroom workers is subject to the approaches of their owners. The central government, in full realisation of how commercial interests are deeply linked to political interests, exerted indirect influence by co-opting media owners or advertising pressure.

Since Hong Kong became a part of China in 1997, the Chinese government has exerted indirect influence on Hong Kong news outlets by the co-option of media owners. A large proportion of them have significant interests linked to, and close connections with, China. A third of these news media owners have been awarded political titles or awards (see Table 2). Scholars suggest that the central government has indirect interference on the Hong Kong newsrooms via allocative control, rather than operational control (allocative control is control via allocating basic personnel and resources, while operational control refers to direct control of newsroom daily operations). Such allocative control might result in self-censorship. The most recent example of allocative control is the replacement of the retiring head of Now TV news with a former management staff member of TVB, which is recognised by many as one of the most influential pro-government media outlets. Another example is the replacement of i-CABLE Executive Director, Mr. Fung Tak Hung, with former journalists from ATV (Asia Television Limited), which is also widely recognised to be a pro-government media outlet. The replacement of the news department heads in two credible broadcast media outlets after the enactment of the new national security law has worried media scholars and critics, since these appointments are suspected to be political (Standnews, 2020).

On the one hand, a third of media owners in Hong Kong have been granted political appointment or awards. They have been appointed to the national People’s Congress and the Chinese People’s Political Consultative Conference (CPPCC) (HKJA, 2013; see also Table 2). On the other hand, the Chinese government also exerted pressure on media organisations by rewarding or withholding business opportunities.

Table 2 *Selected list of past or present owners or major shareholders of media organisations*

Name	Origin	Media position	Titles in political society
WANG Jing	Mainland	Major shareholder, ATV (until 2015)	CPPCC (2003–2013)
LIU Changle	Mainland	Major shareholder, ATV (until 2007)	CPPCC (2003–2023) / GBS 2016 / SBS 2010
CHAN Wing-kee	Hong Kong	Major shareholder, ATV (until 2016)	CPPCC (2003–2018) / NPC (1993–2003) GBM 2016 / GBS 2000
LI Ruigang	Mainland	Vice-Chairman, TVB (since 2016)	Deputy secretary general of the Communist Party in Shanghai (2011–2012)
Henry CHENG	Hong Kong	Major shareholder, Cable TV (since 2017)	CPPCC (1993–2018) / GBS 2001
David YAU	Hong Kong	Major shareholder, Cable TV (since 2017)	CPPCC (2013–2023)
Douglas WOO	Hong Kong	Major shareholder, Cable TV (until 2017)	Member of Beijing Municipal People's Political Consultative Conference (2013–2023)
Peter WOO	Hong Kong	Founding Chairman, Cable TV (until 2017)	CPPCC (1998–2018) / GBS 1998
LI Ka Shing	Hong Kong	Owner, Metro Broadcast (under CK Hutchison Holdings)	GBM 2001
Victor LI	Hong Kong	Owner, Metro Broadcast (under CK Hutchison Holdings)	CPPCC (1998–2023)
Richard LI	Hong Kong	Owner, NOW TV Chairperson, HK Economic Journal	Member of Beijing Municipal People's Political Consultative Conference (2013–2018)
Charles HO	Hong Kong	Chairperson, Sing Tao News Corporation	CPPCC (1998–2023) / GBM (2014)
FUNG Siu Por	Hong Kong	Chairman, HK Economic Times	GBS (2003)
MA Ching-kwan	Hong Kong	Honorary Chairperson, Oriental Press Group Ltd.	CPPCC (2003–2013)
MA Yun	Mainland	Major shareholder, SCMP (since 2016)	Zhejiang Province People's Political Consultative Conference (2008–2012)

Source: Lee, 2018

In the case of public service broadcasting, the situation appears to be more complicated. In the past, RTHK has enjoyed a high degree of editorial independence, the editor-in-chief gives only general directions to their staff, and intervention from commercial interests is prevented. RTHK, the public broadcasting service, was founded in 1928 and is sometimes compared to the BBC, as it has guaranteed editorial independence. Nevertheless, RTHK faces many challenges because of its willingness to take a critical stance against the government and the police.

The board of advisors can potentially interfere with editorial independence, and the government has already been criticised for drying out RTHK by setting up a very tight budget and allocating scant resources for their productions, as a kind of political suppression. However, interviewees suggested that RTHK still maintains a high degree of editorial independence. Recently, all RTHK staff working at the Education Television Centre were asked to vacate, along with their equipment. RTHK therefore needs to find additional office space, without being provided with additional resources (Ma, 2020).

RTHK recently found itself at the centre of a political storm. The broadcaster's guaranteed funding holds ground only for a short period, and its finances can change from one year to the next. The interviewees admitted that RTHK lacked the resources to produce news stories, and no additional human resources are being added, despite applications continuing to be filed. An RTHK reporter was arrested over a programme about a mob attack in Yuen Long. Several scholars worry that this event has had a chilling effect on investigative journalism. Leung Ka-Wing, the editor-in-chief of RTHK and an experienced journalist, departed his role prematurely. A senior civil servant took over Leung's post. This appointment indicated the tightening of the government's control over RTHK. Several programmes were removed during the first few months of his appointment.

Moreover, all the interviewees suggested they still try their very best to maintain journalistic professionalism, including having hot debates with their superiors and insisting on adding opposing views to their news reports. As Hong Kong is still an open market, journalists generally see themselves as an autonomous agent serving the public and monitoring the powerholders. Market concerns and professionalism are at odds, with the former acting as a counter force to compel self-censorship in the newsroom (Lee, 2018; see also Indicator E2 – Media ownership concentration regional (local) level).

Internet technology provides an opportunity to increase the diversity of the media and to counteract the control of political power and capital. However, the central government also exerts influence on online media by co-opting with media owners (see Table 3) or personal threats.

Tony Choi, one of the founders of *House News*, supported the Occupy Central movement publicly. He suddenly asked to close down the *House News* website and wrote publicly, "I am scared. I made the wrong judgment. I feel guilty". Tony Choi and others established *Stand News*, another online media house. Learning from previous experience, a single legal holder does not own online media. A trustee committee owns *Stand News* with eight board members (Steger, 2014).

Table 3 *Ownership of the major digital news media in Hong Kong*

Online news media	Founder	Funding
HK01	Yu Pun-hoi: born in Hong Kong, this entrepreneur has invested in China and has a PhD in Marxism from Beijing University	Private investors: the company does not disclose its ownership structure. According to its chief editor, its estimated annual operation costs are more than HKD 60 million
FactWire	Ng Hiu-tung: this former journalist was born in Hong Kong	Crowdfunding
Initium	Will Cai Hua: born in Mainland China, Cai is a former judicial clerk for the Chinese Supreme Court and currently a partner at the US law firm Skadden (in Hong Kong)	Private investors: the company does not disclose its ownership structure
Bastille Post	Lo Wing Hung: born in Hong Kong, Lo is a former chief executive officer of Sing Tao News Corporation Limited and is currently its executive director	Private investors: the company does not disclose its ownership structure
Post 852	Yau Ching Yuen: Yau was born in Hong Kong and is a former deputy chief editor of the Economic Journal	Public donations
Orange News	Joint Publication: the company is fully owned by the Central Government Liaison Office in Hong Kong	Chinese government funding
CitizenNews	Group ownership: the site is owned by veteran Hong Kong journalists	Crowdfunding
Hong Kong Free Press	Tom Grundy: Grundy is a British freelance writer and activist	Crowdfunding
Inmediahk	Ip lam-chong: born in Macao, Ip is an assistant lecturer at Lingnan University	Public donations
Speakout	Barry Cheung Chun Yuen: born in Hong Kong, Cheung is a businessman and a former unofficial member of the Executive Council of Hong Kong	Private investors: the company does not disclose its ownership structure
HKGpao	Robert Chow Yung: born in Hong Kong. He is a former RTHK radio host and a pro-government activist. He is a co-founder of Silent Majority for Hong Kong and the Alliance for Peace and Democracy	Private investors: the company does not disclose its ownership structure
The Stand News	Group ownership: the site is owned by a board of trustees with eight members	Public donations

Source: Luqiu, 2017

All the interviewees admitted there was occasional collaboration with the advertising department in some news sectors, such as culture, finance, and tourism. However, they stressed that this type of article or video was always explicitly marked as sponsored, to notify the audience. Staff is rarely mixed across these departments.

(F6) Company rules against *external* influence on
newsroom/editorial staff

1 POINT

The external influence on newsrooms varies among news media organisations. Some respondents reported no direct influence of external parties on their newsroom work and content, although advertising boycotts due to political concerns have affected revenues.

With the exception of the public broadcaster, which is free from the pressure of advertisers, the leading news media outlets in Hong Kong are financed by subscription fees or donations, on the one hand, and advertising and sponsorship, on the other.

With regard to the relationship between advertisers and the newsroom, most media companies do not disclose their advertising income. There is no database containing such information, neither could any statistical data be obtained during the interviews. A survey conducted by the market research company NielsenIQ projected that expenditure on digital advertisements would equal that of traditional media campaigns in 2019, as a budget shift from offline to online advertising continued. Nielson further reported that 13 per cent of overall advertising budgets were spent on television advertising, while 11.7 per cent was spent on print (NielsenIQ, 2019).

The withdrawal of advertisements as well as boycotts of several news companies for political reasons or as a protest against their reporting is a public secret in Hong Kong. This has been occurring for more than a decade. In fact, interviewees suggested that the conglomerate controlled by Asia's richest man, Li Ka-shing, had stopped placing advertisements in Next Media company, which publishes *Apple Daily*, long before 2003. Other companies followed suit due to an anti-Beijing political stance. A similar situation was also faced by other media organisations, such as *Stand News*.

Respondents from other media organisations also recalled the occasional withdrawal of advertisements because of their investigative reporting, although this was less frequent for outlets other than *Apple Daily*. Despite these challenges, most respondents said they stood firm against any interference from advertisers over their editorial independence, and only very few respondents admitted they had chosen self-censorship over news content due to advertising pressures.

The government has also used public funding to advocate political views. For example, the Hong Kong government spent HKD 245 million on front-page advertisements in seven daily newspapers to promote a positive image of the enactment of the new national security law. After months of protests, when the government asked international public relations firms to help restore its image in 2019, they rejected the project.

(F7) Procedures on news selection and news processing 1 POINT

Only a few media organisations have formal rules or training on news selection and news processing. Most of the respondents emphasised that new journalists learn through experience and by following the newsroom practices of senior staff.

Formal rules or training are rare in Hong Kong newsrooms, with respondents stating that their newsrooms relied mainly on the individual professionalism of journalists. Professional practices are imprinted in the working process, and new staff usually learn by observation and experience. A few media organisations do provide occasional in-house journalistic training for their staff, but the more usual practice for self-motivated newsroom workers is to voluntarily join courses offered outside their companies.

The respondents emphasised that the discussion of news value is part of their work routines. Reporters or editors may initiate story ideas, and three to five individuals sometimes check the articles or videos before publication. More checks and edits are run on print versions than online news stories. Although the already-cited article 27 of the Basic Law states that “Hong Kong residents shall have freedom of speech, of the press and of publication; freedom of association, of assembly, of procession and of demonstration; and the right and freedom to form and join trade unions, and to strike,” some respondents suggested that senior reporters tended to intervene in their editorial decisions if they touched on politically sensitive issues.

(F8) Rules and practices on internal gender equality 2 POINTS

Employment conditions, including salaries, are equal for male and female journalists.

According to a speech by the Chief Executive of HKSAR (Lam, 2020), females fill around 35 per cent of managerial positions in Hong Kong, and the work-force participation rate for women (51%) is much lower than that of men (68.5%). This rate is behind those of Hong Kong’s regional neighbours, including Australia, Malaysia, and Singapore. However, in newsrooms, the gender

equality situation appears to be better than the overall employment pattern in Hong Kong.

According to an HKJA study conducted in 2011, the ratio of female and male newsroom staff was almost balanced at 51/49. While there is no updated data available, the current ratio appears to be similar. There was a general impression among the respondents that there were more female journalists present in the newsroom than male journalists. There is believed to be no difference between male and female journalists in terms of promotion opportunities and salaries, although there are no formal rules or regulations that enforce equal standards. Female journalists have equal opportunities to take on leading positions in the newsroom, and many female journalists have gone on to hold leading positions, such as editor-in-chief or managing editor, within leading news companies. However, almost all the editors-in-chief of the leading companies are male, reflecting a continuing trend of men holding most managerial positions in Hong Kong news media.

Equality in pay might be due to the generally low salaries paid to journalists in Hong Kong. The 2011 HKJA survey found that the monthly salary of 75 per cent of the respondents was below HKD 20,000, with a median salary range of HKD 12,000–15,000, despite around 60 per cent of the respondents holding degrees, and 16 per cent holding postgraduate qualifications. For comparison, the median monthly income of the general working population in 2011 was HKD 11,000. 40 per cent of the senior editors – a group that includes team leaders, assignment editors, and deputy assignment editors – were considering changing jobs (HKJA, 2011). Our interview with the chairperson of the HKJA suggested that the situation has not improved, and many new reporters quit the industry within a year or two.

All interviewees reported challenges for new mothers in the newsroom. Maternity leave has only recently been increased to 14 weeks, which is still a lot less generous than in the neighbouring Singapore and Australia. The newsrooms may accommodate new mothers with a temporary breastfeeding room, but do not have a fixed breastfeeding space.

(F9) Gender equality in media content

1 POINT

Past research has found that media construction of gender stereotypes remained prevalent in Hong Kong. The respondents accepted the importance of gender equality, but they did not see it as a serious concern and were not particularly aware of gender equality when reporting news.

Unlike many other developed countries, Hong Kong does not track the media portrayal of women and men. A study by the Equal Opportunities Commission (2009) suggested that the image of females presented in the local print

media was generally negative, with the portrayal of female artists even being sexualised. Women were also usually portrayed as staying at home (Furnham & Chan, 2003), while men were more likely to be depicted as working professionals (Moon & Chan, 2006).

Studies of gender portrayals in Hong Kong news media have been rare. One study conducted in 2004 found that female officials were depicted in a highly positive light in Hong Kong newspapers. Female leaders were assessed on whether they mixed masculine and feminine traits, that is, whether they were equally successful at work and as mothers and wives (Lee, 2004).

Respondents accepted the importance of gender equality but denied that it is a serious problem. Some appeared not to be particularly aware of gender inequality when reporting news, while only one news media organisation was reported as working consciously on promoting gender equality. An interviewee explained, “I don’t see gender inequality as a big problem in Hong Kong, and we rarely pay attention to it”.

(F10) Misinformation and digital platforms (alias social media)

2 POINTS

There are no formal defence mechanisms or regular training for defeating fake news, although all of the respondents admitted that misinformation on digital platforms is a serious problem, particularly in times of social unrest and the Covid-19 pandemic.

All of the interviewees from leading news media outlets in Hong Kong acknowledged the potential threat posed by the large amount of misinformation and fake news circulating on digital platforms. They emphasised their great concern over this issue and that they ensured news was accurate before publication. The defence against misinformation generally relied on journalistic professionalism, such as locating the original sources and a practice of double-sourcing. None of the news media organisations collaborated with external fact-checking institutions, nor did they have any internal departments for fact checking. Likewise, algorithms are not used in fact-checking.

The battle against misinformation online has intensified since the anti-government protests started in June 2019, with fake news becoming prevalent. Misinformation and rumours have deepened the division of society and polarisation of public opinion. The situation has been worsened by the waning confidence in the Hong Kong government amongst the public (Banjo & Lung, 2019). A study conducted by The University of Hong Kong (2019a) found that 46 per cent of respondents distrusted the Hong Kong government. An injunction recently granted by HKSAR’s High Court bans the “disseminating, circulating, publishing or re-publishing” of online materials that incite violence.

(F11) Protection of journalists against (online) harassment 1 POINT

Journalists generally rely on the support and protection of their employers in cases of harassment. The HKJA and other news worker groups have made a joint declaration against police harassment of journalists.

Harassment of Hong Kong journalists was an exception in the past, but both physical and verbal harassment have become a lot more commonplace since the anti-government movement broke out in June 2019. Journalists rely on the support and protection of their employers, the HKJA, and labour unions.

All of the respondents mentioned that their own media companies had invested more in safety gear to protect journalists, with one company even procuring bulletproof jackets. Editorial departments of some media outlets condemned the police for brutality against their reporters. Some respondents mentioned that their management teams promised to discuss police harassment with the police at the managerial level, and many had even boycotted police press conferences. Many interviewees believed there was nothing more their organisations could do for them, although some urged their senior colleagues to speak out for them.

At the same time, the HKJA and other news worker groups have issued numerous statements and written an open letter to the HKSAR Chief Executive urging the police to stop their harassment of reporters. Reporters also protested against police brutality at a police press conference, despite which, it has not abated throughout the continuing protests.

Some respondents mentioned that their companies had reminded their staff about the need to regulate and ensure the privacy of their social media accounts to avoid doxing. Some outlets had also avoided the use of bylines on articles over sensitive issues or chosen not to show reporters' faces on camera to prevent their identities being disclosed. *Apple Daily* successfully applied for a court order to protect their journalists from doxing activities.

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 2 POINTS

Hong Kong is a city; therefore, this indicator is not applicable.

(E2) Media ownership concentration regional (local) level 2 POINTS

The Hong Kong government has a restrictive licensing policy that results in a broadcasting oligopoly in Hong Kong. TVB has long held a virtual monopoly on the free-television market. Across all media organisations, there is no major concentration of ownership under a single giant media conglomerate. However, there is another form of ownership concentration, that of a small number of businessmen with vested interests in mainland China. They have operated across the news media with the same political and economic constraints, although the situation is currently in the process of being challenged by the rise of online and alternative media.

For a long period before the opening of the television market in 2013, there were only two domestic free-television broadcasters in Hong Kong: TVB and ATV. TVB has long been dominant in free-television services. The introduction of three pay-television broadcasters did not break this near-monopoly. However, on April 2016, ATV finally ceased its 58 years of broadcasting with a reputation for poor production quality (Cheung, 2016).

In 2013, to open the market, the Hong Kong government granted two additional free-to-air television licences to HK Television Entertainment – (a subsidiary of PCCW) and i-Cable’s fantastic TV, the dominant pay-television companies. However, this too had little impact on TVB’s dominance (Chan et al., 2019). The rejection of HKTV for a free-to-air television licence also roused suspicion regarding political suppression (Cheung, 2016).

Two commercial broadcasters (Hong Kong Commercial Broadcasting Company Limited and Metro Broadcast Corporation Limited) provide thirteen local radio channels and one public service broadcaster (RTHK). Five of these channels have secured 80 per cent of the radio audience (Cheung, 2016).

In contrast to broadcasting, the Hong Kong newspaper market is highly competitive. Serving a population of seven million are around 15 well-known paid daily newspapers and free newspapers in Hong Kong. An intensely competitive newspaper market is supposed to lead to a more liberal, democratic, and diversified media environment; however, the media do not always work in accordance with commercial logic. Many newspapers are under the control of a small number of businessmen with vested interests in mainland China. These media outlets share similar political and economic constraints, and have formed a part of a political united front (Chan & Lee, 2007). According to the HKJA, 26 mainstream media outlets are closely related to Chinese interests, being either under Chinese control or having stakes in mainland China. Over 85 per cent of media owners or top newsroom managers have been incorporated in various ways into the Chinese or Hong Kong establishments (HKJA, 2017; see also Indicator F6 – Company rules against *external* influence on newsroom/editorial staff).

The concern over media ownership concentration and Chinese control has grown continuously, as more Chinese money has been invested in Hong Kong media. Two significant television broadcasters, TVB and i-Cable, recently came into the ownership of individuals or companies with close connections to mainland China. The pay-television provider i-Cable almost went bankrupt in 2017, but received an injection of funds from a group of investors, resulting in mainland Chinese investment making up 35 per cent of its ownership. There has also been a report suggesting that the buyer of TVB is a mainland Chinese tycoon, although the transfer took place through cross-holdings and partnerships.

However, certain pro-democracy news media outlets continue to remain, and these help to push the boundaries of political discourse (Lee, 2018). Digital media has also opened a door to break the media ownership concentration of businessmen with close mainland China connections. As stated above, a large majority of the Hong Kong population consumes news online (including through social media), and over 40 per cent said that online media is their main source of news. Legacy media represents just one of the many forms of media content providers, and digital media provides an opportunity for the emergence of alternative small-scale media outlets. There are more than twelve major digital news media outlets in Hong Kong, mostly supported by private investors or crowdfunding. Although online alternative media face various limitations, such as lack of resources, they somehow continue to sustain a resistance to central government control (Luqiu, 2017).

Alongside the Chinese language and local news media outlets, many international news media organisations have also been set up in Hong Kong. For example, the *Financial Times*, *The Wall Street Journal*, *TIME*, and *The New York Times* are all available in the Hong Kong market (HKSAR, 2019).

(E3) Diversity of news formats

3 POINTS

Hong Kong has a large variety of different news formats covering different regions of focus, including local news, Chinese and Asian news, and world news, as well as all news sectors, such as politics, finance, culture, entertainment, and sports. With regard to news formats, other than traditional long-form and feature stories, many new media formats are now emerging in what is becoming a small and competitive market. These include animated news, virtual-reality news, and live-streamed news broadcasting.

A large variety of news formats are available in Hong Kong, including news video highlight packages, long-form news, and feature stories, news forums, and news-based satire programmes. However, the variety in television news formats has recently come under threat with the decline in press freedom. RTHK decided

to briefly suspend its long-running satirical show *Headliner*, which came under attack for insulting the police. The Communication Authority issued RTHK with a warning, and the government asked for a full review of RTHK's programming, prompting fear among newsroom workers over increasing political pressure (Pomfret & Torode, 2020).

The post-1997 Hong Kong media market is highly competitive. Private media outlets face challenges from the 24-hour news cycle of international and local news media accessed via cable or satellite, Internet broadcasting, and various other news media. The media have become highly market-oriented and present news in sensationalist forms, such as infotainment, news with sexual and violent content, and celebrity news (Ngok, 2007). One such example is the animated news produced by *Apple Daily*. Launched in 2010, animated news reconstructs stories through a mode of mixing news footage with melodramatic animation. While certain practitioners argue that the animation format fills missing scenes in covering a news event, media critics worry that such a practice may compromise the objectivity and accuracy of news stories (Lo & Cheng, 2020). To appeal to their audience, many new media formats have also now emerged in what is a small and competitive market. In addition to animated news, this includes virtual-reality news and live-streamed news broadcasting. Media outlets also cover a wide range of topics, including politics, finance, culture, tourism, current issues, and weather. Phone-in talk shows also serve as a form of political infotainment (Lee, 2002).

(E4) Minority/Alternative media

1 POINT

Minority ethnicities are generally under-represented and negatively portrayed in Hong Kong. The sole public service broadcaster has worked on programmes for the purposes of cultural diversity and produced programmes for ethnic minorities. The rise of the Internet provides an opportunity for ethnic media and for platforms on which minorities can interact.

The demographic composition of Hong Kong is quite complicated, despite 92 per cent of the population being ethnic Chinese. The city has a long history of immigration and has long been a magnet for immigrants, refugees, and workers from all over the world. In particular, the Cultural Revolution sparked a large-scale migration of Chinese into Hong Kong (Erni & Leung, 2014). Only 60 per cent of the population was born in Hong Kong, in addition to there being nearly 600,000 non-Chinese residents. When the term “ethnic minorities” is used in Hong Kong, it usually refers to residents who have moved from South or Southeast Asian countries, such as Indonesia, Philippines, Thailand, and Nepal. Over 75 per cent of the members of ethnic minority groups who are in work perform simple and routine tasks, with the most common example being

that of domestic workers. Despite the large number of domestic helpers, there are now larger numbers of young people of ethnic minorities who were born in Hong Kong and are able to read and write Chinese (Census and Statistics Department, 2016). Caucasians are not referred to as an ethnic minority: they usually have a higher socioeconomic status, and are considered expatriates (Yeo, 2018). All of this, in combination, results in a postcolonial-Chinese multicultural city straddling the cultures of British colonialism, Chinese immigrants, and ethnically non-Chinese populations (Erni & Leung, 2014).

To appeal to the majority of the population, ethnic minorities are under-represented or presented negatively in mainstream media. When people from ethnic minorities appear in news stories, it is usually in relation to negative incidents, such as fights, robberies, and sex crimes (Erni & Leung, 2014). Stereotypical images of ethnic minorities also appear frequently in advertisements and in school textbooks (Yeo, 2018). A survey in 2014 found that only 25 per cent of Hong Kong Chinese respondents believed there was discrimination against ethnic minorities, yet over 60 per cent said they held a negative impression of ethnic minorities (Ku et al., 2005). Even if indirectly, this is indicative of prevalent negative portrayals of ethnic minorities in Hong Kong's mainstream media. The survey also suggested that over 40 per cent of respondents did not have any acquaintances from ethnic minorities.

On the other hand, South Asian youth do not rely greatly on local mainstream media, preferring international imported programmes via cable and satellite television networks. The recent rise of the Internet provides even more opportunities for them to access programmes from other countries in addition to their capacity to consume local news being dependent on their Chinese language literacy.

RTHK, modelled on the BBC, is the one of the few exceptions in Hong Kong in terms of catering to the needs of minority ethnicities. As a public service broadcaster, it has the mission “to provide a platform for free and unfettered expression of views, [to] serve a broad spectrum of audiences and cater to the needs of minority interest groups, [and to] contribute to the openness and cultural diversity of Hong Kong” (Radio Television Hong Kong, 2020). Accordingly, RTHK aims to use its platform to promote cultural diversity; for example, five radio programmes are produced in minority languages, including Bahasa Indonesia, Hindi, Nepali, Thai, and Urdu. RTHK also produces radio programmes depicting the lives of ethnic minorities in Hong Kong, and television news documentaries that show the problems that people from ethnic minorities face in Hong Kong (RTHK, 2020).

The rise of the Internet, including that of social media, provides opportunities for ethnic minorities to develop alternative media, and combined, these counterbalance mainstream media hegemony. For example, *HKNepal.com* provides news about Hong Kong, Nepal, and local community organisations, and on recent important global events and issues: “They attract discussion from

Nepalese netizens from Hong Kong and overseas who have relatives in Hong Kong or are interested in Hong Kong affairs” (Erni & Leung, 2014: 73), and foster a global network of the ethnic community.

With regard to the printed media, there are newsletters and magazines in minority languages, including Urdu, Nepali, and Hindi. These are used to report on local Hong Kong news and news about the home countries or about what occurs within the communities of ethnic minorities (Ku et al., 2005).

Other minorities in Hong Kong face similar problems with media portrayals. LGBT (lesbian, gay, bisexual, and transgender) people are among them. In many societies, LGBT people are thought to make up around 5–10 per cent of the population, although there are no official data. There are no laws in Hong Kong to protect LGBT people from discrimination based on sexual orientation. A study conducted in 2006 suggested that homosexuality was then generally not accepted by the general public in Hong Kong (Yeo, 2018), although a more recent study found that attitudes towards LGBT people have since changed. A study carried out by The Chinese University of Hong Kong suggested that only twelve per cent of Hong Kongers were opposed to legal protections for LGBT people, and more Hong Kongers had become supporters of same-sex marriages and developed an increased level of understanding and support for transgender rights. This, perhaps, is representative of an increasing number of Hong Kongers coming into contact with homosexual people (Suen et al., 2020).

As with ethnic minorities, LGBT people are generally under-represented in the Hong Kong media and negatively portrayed in films, magazines, and television programmes. Again, the rise of the Internet and social media provides an opportunity for the LGBT population in Hong Kong to interact online (Yeo & Fung, 2018).

Several media outlets remain that represent political minority views and take controversial stances, such as In-Media. However, with the implementation of the new Hong Kong national security law, it has become almost impossible to discuss most politically sensitive topics. For instance, the Hong Kong democracy party Demosisto, founded by former student activists, has been disbanded under the new security law.

(E5) Affordable public and private news media

3 POINTS

Newspapers, online news outlets, and television broadcast news can be accessed at low prices in relation to the average monthly income. In fact, most media outlets’ news content is freely available online, and Hong Kong has very high Internet and mobile phone penetration rates.

In 2019, Hong Kong’s median monthly household and individual income stood at HKD 35,500 and HKD 18,200, respectively. This was up from HKD 24,890

and HKD 15,500, respectively, in 2016. The two lowest-income groups largely comprise seniors, with a median monthly household income of HKD 5,650, while the two highest-income groups have a median monthly household income of HKD 79,000 (Census and Statistics Department, 2016, 2019).

Hong Kong's newspapers generally sell for HKD 10, in addition to most of them making news content freely available online. Moreover, all major private local television broadcasters and public service broadcasters provide free news content online via websites or mobile apps. News outlets also share content via social media platforms. A survey conducted in 2016 found that 77 per cent of people aged over 18 accessed news through social media (Huang & Song, 2018).

As mentioned previously, Hong Kong has very high Internet and mobile phone penetration rates. As of January 2020, the mobile subscriber penetration rate stood at 283.7 per cent, and the household broadband penetration rate stood at 93.6 per cent (Office of the Government Chief Information Officer, 2020). Broadband services are affordable, often coming in at less than HKD 100 per month. Given the accessibility of online news, Hong Kong's general public has widespread and affordable access to local news media (Telcocheck, 2020).

(E6) Content monitoring instruments

1 POINT

Independent media monitoring instruments and institutionalised regulation of media are rare in Hong Kong.

The Communication Authority is a statutory body with a mandate of regulating the broadcasting and telecommunication industries in Hong Kong. All television programme service licensees are obliged to act in accordance with relevant laws, including the Broadcasting Ordinance (Cap. 562), the Broadcasting (Miscellaneous Provisions) Ordinance (Cap. 391), and the related subsidiary legislation (Communications Authority, 2020). These regulations set out standards related to programming, advertising, and technical issues for the licensees. Programming codes relate to issues of taste and decency, sex and violence, and impartiality and fairness, while advertising codes deal with issues related to advertising and sponsorships on broadcast outlets. Technical codes are concerned with technical quality.

Other key laws relevant to telecommunications include the Personal Data (Privacy) Ordinance (Cap. 486), which regulates the protection of personal data, and the Competition Ordinance (Cap. 619), which regulates competitive behaviour. There are few regulations applicable to the Internet, aside from copyright law and the regulation of pornographic content.

Hong Kong has no media content monitoring instruments, although The Chinese University of Hong Kong and The University of Hong Kong conduct

regular surveys to gauge the public's evaluation of media credibility. No universities or independent supervising bodies have undertaken research to measure the quality of Hong Kong media content.

(E7) Code of ethics at the national level

2 POINTS

There exists a self-governed code of ethics, yet not all media organisations adhere to it. Interviewees stressed that they respect the code of ethics, although its details generally escaped them.

The Hong Kong Press Council is a self-governing body founded by professional journalists in Hong Kong in 2000. It is an independent, non-profit organisation that aims to enhance the professional and ethical standards of journalism by handling complaints against local newspapers from the general public. This organisation's code of ethics was drafted by four major journalist bodies: the Hong Kong Journalists Association, the Hong Kong Federation of Journalists, the Hong Kong News Executives' Association, and the Hong Kong Press Photographers' Association. However, the two most popular newspapers, *Apple Daily* and *Oriental Daily*, are not members of the Hong Kong Press Council, while many of the complaints the organisation receives actually concern these two papers. In 2018, the organisation began to handle complaints about online media. The number of complaints received in 2017 totalled 32. When complaints are found to be justified, the organisation issues a public statement critical of the media organisation in question. However, the Hong Kong Press Council is not legally protected from defamation laws (Hong Kong Press Council, 2020), and the HKJA has established its own code of ethics in an effort to raise professional standards.

While most interviewees stressed that they respected the codes of ethics set out by the aforementioned bodies or by their companies, they generally were unable to recall or recount their details. However, they reported that they adhered to the professional journalistic principles they learned at their universities or observed in their newsrooms.

(E8) Level of self-regulation

1 POINT

Self-regulation occurs rather informally; institutionalised or codified rules and procedures are rare.

Most interviewees admitted they did not remember the mission statements of their media companies and rarely read their companies' handbooks on ethical principles. They said they relied more on the informal, internal culture of

self-critiques and newsroom standards. Some stressed that they abided by the journalistic principles of fairness, balance, and objectivity; some of those working in the pro-establishment media said their superiors used this principle to ensure the pro-establishment camp's voice is represented. Despite these self-censorship practices, all interviewees emphasised the importance of accuracy. In political stories, they said they strove to present a balance of views, but that this was sometimes impossible. No formal system for hearing complaints about alleged violations of ethical standards in their newsroom was reported, yet some interviewees indicated that journalists who violate ethical standards are liable to be – and have been – sanctioned.

(E9) Participation

2 POINTS

Hong Kong newsrooms are not open to participation by the general public. Audience participation in the newsroom is very limited.

All of the interviewees admitted that their newsrooms' decisions were not open to citizen participation. This reflected the general approach to media in Hong Kong, although news outlets did use various means to involve citizens, such as inviting letters to the editor and organising regular focus groups to provide critical comments on the performance of the news media. Interviewees indicated that they valued audience comments and regarded the audience reaction as a key success metric. As an example, one interviewee said that their organisation had begun to do more live-streaming, and that this was based on audience comments. Nevertheless, newsroom decisions are not open to citizen participation. If requested, newsrooms welcome group visits (such as school field trips). In one case, a media company operated a cafe for a year for the purpose of interacting with its audience, but the cafe had to close after it proved unsuccessful as a business model.

The interviewees also indicated that their organisations provided avenues for audience crowdsourcing for important stories. All of them said they incorporated user-generated content into their news stories, such as video and audio materials, as well as comments left on social media. They reported that they did so based on their own journalistic judgment. Their social media handles are open to Internet users' comments on their news stories. Some news media columns also accepted articles from their audiences.

Since 1980, RTHK has organised a public forum called City Forum, which is a live broadcast programme that invites prominent political actors, professors, and scholars from different leanings to comment on current affairs. This forum also invites citizens to discuss and debate issues. Radio broadcasters also make various efforts to invite audience comments during talk-show pro-

grammes. However, a small number of leading media companies reported that they never use Internet users' comments and materials, as they believe them to be unreliable; their employees criticise this practice as a form of self-censorship.

(E10) Rules and practices on internal pluralism

1 POINT

Some Hong Kong newsrooms, including public service broadcasting stations, have codified rules on internal pluralism, but they do not necessarily follow the rules. A large majority of leading newsrooms are making efforts to extend the range of voices represented by the media. However, a third of respondents suggested that their companies engaged in self-censorship and did not give experts from all sides equal chances to present their case.

Different newsrooms have diverse rules and practices on internal pluralism. A large majority of interviewees suggested that there were internal debates on how the news should be presented, but some interviewees said that they were unable to go against the opinions of their supervisors. Most of the interviewees indicated that they made a serious effort to present the voices of experts or actors from different perspectives; at least half of the interviewees, however, admitted it was difficult to achieve an internal plurality of voices practically. First, some indicated that their interview invitations were often rejected. Second, there was self-censorship in media organisations, with one interviewee expressing the view that seeking balanced viewpoints is abnormal in a political story (but not necessarily in a non-political story). In another example of self-censorship, one media outlet maintains a blacklist of pro-democracy experts who are banned from interviews. Third, some interviewees who work in organisations aligned with a certain party or ideology indicated that – while they were free to use information and views from the other side in the course of their reporting – the final product was subject to cuts and edits to bring it in line with the organisation's ideology. Fourth, most respondents admitted they were rarely able to seek out new voices due to tight editorial deadlines.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers” 1 POINT

There are no institutionalised mechanisms for scrutinising the performance of leading news media, although universities, media bloggers, and professional journalists' bodies serve as independent observers monitoring their performance, especially in terms of self-censorship and news credibility. The performance of the media is always subject to debate.

There have been continuing efforts from academics and professional bloggers to scrutinise the performance of media outlets, with self-censorship and news credibility usually being their core concerns. They engaged in such scrutiny by conducting regular surveys of the public on media credibility and analysing the political pressure faced by practitioners. However, no regular mechanism of media content surveillance or reporting was reported.

In addition, political key opinion leaders, experienced reporters, the HKJA, and other media observers organise irregular public forums on media performance. Between 1990 and 2008, RTHK produced a programme called Media Watch, the only programme in Hong Kong devoted to monitoring the local media's performance and discussing recent developments in the media landscape. Media organisations have occasionally criticised one another and reported on related controversies.

The interviewees also suggested that they received complaints from the general public about their news content or presentation. Television and radio broadcasters faced greater pressure, because the Communication Authority allows the public to lodge complaints against broadcasting service providers, and such complaints have an influence on their broadcasting licences. On the one hand, this type of feedback can facilitate improvement in broadcasters' performance, while on the other, harsh attacks also act as a form of political suppression. In one instance, a satirical show by RTHK recently came under fierce attack.

(C2) Independence of the news media from powerholders 1 POINT

By law, the freedom of the press is protected, but press freedom continually deteriorates because of political pressure.

The Basic Law, with its promise of “one country, two systems”, is a mini-constitution that guarantees Hong Kong citizens' rights to freedom of speech and a free press. Since the handover, however, Beijing has exerted political pressure and indirect influence on Hong Kong's media via political, economic, and physical threats (HKJA, 2017).

The chairperson of the journalists' association admitted that attempts to directly influence journalists or newsrooms are sometimes made by politicians or their seniors. This generally reflects the current situation of Hong Kong news media.

There is further political pressure on RTHK from complaints lodged over news programmes from the pro-establishment camp. Two recent examples are the controversy over an interview with a World Health Organization advisor and the reaction of the Hong Kong police to a satirical programme. In the first

case, RTHK's reporters interviewed Dr. Bruce Aylward of the World Health Organization and asked if the organisation would reconsider Taiwan's membership. Dr. Aylward refused to answer the question and then ended the call. Edward Yau, the Secretary for Commerce and Industry, criticised the interview on the basis that it would endanger a sense of identity (Hamlett, 2020). In the second case, police chief Chris Tang wrote a public letter addressed to the director of RTHK following the screening of a satirical programme mocking the Hong Kong police. Production of the show was suspended in response (Gunia, 2020). The interviewees from RTHK acknowledged they had put a lot of effort into dealing with complaints from pro-establishment viewers alleging anti-government coverage during the anti-extradition bill movement, despite their news programmes winning local and international journalism awards. Several times, interviewees reported becoming more "cautious" and trying to maintain their "professionalism" as strategies to combat the political pressures they were facing.

The interviewees suggest that commercial interests are highly related to political interests. They said that Hong Kong news media experiences other types of political pressure by experiencing advertising boycotts due to their political stands, and they cannot access sources from pro-establishment parties or political actors. Most of the interviewees denied intervention from the advertisers.

The news media outlets also experienced political pressure in a more flagrant way. In 2018, the *Financial Times* Asia Editor Victor was denied entry to Hong Kong. This was because, when he worked as vice president of the Foreign Correspondents' Club, it held a talk by a pro-independence activist. HKFP's staff and the editors' families received threatening letters. Hong Kong Causeway Bay booksellers were abducted or lured from Hong Kong because they published and sold politically sensitive books. One of the publishers, Lam Wing-kee, escaped and told the public they were detained in China.

New laws with a potential to threaten the freedom of press were introduced, and a national anthem law was passed amid controversy and opposition. A Hong Kong extradition bill was proposed to transfer suspects to mainland China, despite the totally different judicial systems, provoking the largest mass protest in Hong Kong's history. Almost all the interviewees admitted that they or their colleagues have experienced brutal acts by the police (HKJA, 2020a).

The enactment of the Hong Kong national security law also threatens the press freedom in Hong Kong. A recent survey of journalists found that 98 per cent disagreed with the plan to enactment the law. Almost 90 per cent of respondents in the survey are afraid of the deterioration of press freedom, and over half of them were very worried that the passage of the national security law would pose a threat to their personal safety. Over 70 per cent suggested their media will cut or avoid reporting sensitive topics, such as Hong Kong Independence, after the enactment of the law (HKJA, 2020b).

The ownership of Hong Kong media is not highly concentrated, and yet, many Hong Kong media organisations have similar interests in terms of their alliance with the Central Government (see Indicator E2 – Media ownership concentration regional (local) level). Luckily, there are still a plenty of local and international media organisations with different political stands, allowing journalists to change from one media company to another. There is also public outcry about self-censorship from news media workers and the general public.

Since June 2019, another external influence has been police brutality against journalists and attacks by supporters of different political camps. A study conducted by the HKJA revealed that only 28 out of 222 surveyed journalists said they had not experienced police violence while covering the recent protests, and over half said they had been treated violently by the police on five or more occasions. The attacks included “physical and verbal abuse and the deliberate obstruction of journalists’ reporting, such as pushing reporters, and pulling off their gas masks, and aiming pepper spray, rubber bullets, as well as water cannon at them”, with frontline reporters saying they had developed skin conditions, such as rashes, redness, or itchiness, after tear gas exposure (HKJA, 2020a). Dr. Kwong, a district councillor who also works as a doctor, interviewed more than 170 reporters in August 2019 and found that over 96 per cent of respondents said “they had difficulty breathing, persistent coughing or coughed up blood” (Chan, 2019).

In the same HKJA study, 82 of the 222 journalists said they had been violently attacked by supporters of different political stances while covering the anti-extradition movement. Half of these reported being subject to attacks from supporters of the police and 37 per cent from protestors. Most of these attacks involved verbal abuse, pushing, and deliberate obstruction of reporting, although a few said that they had been attacked by triad gang members (HKJA, 2020a). Recently, police had unreasonably forced reporters to kneel or squat down.

Alongside the physical abuse suffered while covering the protests, the interviewees suggested that their colleagues in the same newsroom or other news organisations had become doxing targets, experiencing online harassment, and having their personal data leaked. The leaking of data resulted in harassment by phone, and online threats by “little pink thumbs”.

The implementation of the new national security law also has profound impact on news media. Jimmy Lai, the 71-year-old media tycoon and prominent pro-democracy figure, was arrested on 10 August 2020 and was accused of committing foreign collusion crimes in breach of Beijing’s national security law and conspiracy to defraud. Nine others were also arrested, including Lai’s two sons and four senior executives at his company Next Digital Media, the publisher of pro-democracy *Apple Daily*, Hong Kong’s largest daily tabloid. Hundreds of police stayed at the *Apple Daily* building, and in an unprecedented hour-long raid, they searched the news materials without court permission. Later,

police barred news organisations – including Reuters, Agence France-Presse, the Associated Press, and the public broadcaster RTHK – from attending a press conference about the search.

Eight press associations, including the HKJA, Hong Kong Press Photographers Association, Independent Commentators Association, and Journalism Educators for Press Freedom, as well as Hong Kong Citizen News Union, Ming Pao Staff Association, Next Media Trade Union, and RTHK Program Staff Union, issued a joint statement urging the police to explain the purpose and legal basis of the search.

(C3) Transparency of data on leading news media 2 POINTS

Not all news media outlets have disclosed their ownership structures, circulation information, and advertising revenues. Only the media organisations listed on the stock market have disclosed this information under the Securities and Future Ordinance.

In Hong Kong, most traditional leading news media outlets are listed corporations or have listed corporations as their parent companies. They are obliged to disclose their interests and issues of substance to their shareholders and report their financial performance annually under the Securities and Future Ordinance. Such information can be found easily online. Some media organisations, such as *Stand News* and HKFP, have disclosed their leadership structure, although they are not legally required to do so.

Table 4 A sample of listed corporations

Name	Stock code
Sing Tao News Corporation Ltd (<i>Sing Tao Daily</i> , <i>Headline Daily</i> , and <i>Standard</i>)	1105
Television Broadcasts Ltd (TVB)	51
Next Digital Ltd. (<i>Apple Daily</i> and <i>Next Magazine</i>)	282
Nan Hai Corporation Ltd. (<i>HK01</i> and Duowei Media (HK Limited))	680
Oriental Press Group Ltd. (<i>Oriental Daily</i>)	18
i-CABLE Communications Ltd. (<i>i-Cable</i>)	1097
Hong Kong Economic Times Holdings Ltd. (<i>Hong Kong Economic Times</i> , <i>Sky Post</i>)	423
Media Chinese International Ltd. (<i>Ming Pao</i>)	685
PCCW Ltd. (Now TV, Viu TV)	8
Alibaba Group Holding Ltd. (<i>South China Morning Post</i>)	9988
Sing Tao News Corporation Ltd (<i>Sing Tao Daily</i> , <i>Headline Daily</i> , and <i>Standard</i>)	1105

(C4) Journalistic professionalism

2 POINTS

Reporters generally have strong educational backgrounds and hold similar professional ethics and principles. About half of the interviewees believed that their companies allot satisfactory time and resources for investigative research.

Journalists in Hong Kong have a high education level, with almost 60 per cent of Hong Kong reporters holding undergraduate degrees and 16 per cent having received postgraduate education. Men outnumber women in the profession; in 2016, the male-to-female ratio was 51/47 (HKJA, 2016). However, women outnumber men in terms of advanced education level; 58 per cent of all female journalists are college graduates, whereas only 42 per cent of men have post-secondary education.

Roughly half of the respondents said that their companies allot satisfactory time and resources for investigative research, and their companies have teams established to manage and contribute investigative reports. As the sole public service broadcaster, RTHK does not have sufficient resources to engage in investigative reportage. With its limited resources, RTHK can only handle regular programmes; however, a few of its journalists still manage to produce diligent, informative investigative reports.

The interviewees said that their workloads continue to increase and that they are required to have multimedia skills. There is no continuous education or training for journalists on professional ethics, but there is training on an ad hoc basis; for example, some media organisations provide training on the ethical coverage of large protests. The chairperson of the journalists' association stated that Hong Kong journalists maintain good professional standards, even though they work for media organisations with political stances differing from their own.

(C5) Journalists' job security

1 POINT

Journalists tend to work for their employers briefly, and the main reason is low wages.

The HKJA conducted a survey of 400 reporters in 2016 and found that more than 30 per cent of respondents had a monthly income of less than HKD 15,000. They generally had long working hours and strong educational backgrounds (see Indicator C4 – Journalism professionalism). The median monthly income in Hong Kong in 2016 was HKD 15,500. Low pay was the main reason for journalists remaining in the industry for only a short time. The reporters explained that journalists work under great pressure because of the short news cycle and political stress. More than 50 per cent of respondents predicted they would stay in the industry less than five years, and 40 per cent of management-level journal-

ists had considered leaving the news industry (HKJA, 2016). The chairperson of the HKJA admitted that low wages present a significant obstacle to retaining good, experienced journalists, an issue that deteriorates the quality of news. The interviewees generally found reporters' wages to be very unsatisfactory: "our staff worked very hard to report on the anti-government protests over the past year, yet they only received half of a monthly income as bonus", one stated.

There are no professional rules to protect journalists from dismissal or the termination of their contracts due to changes in ownership or political pressure. The chairperson of the HKJA rarely heard that journalists were fired because of their political stances; however, the rise of freelance journalism in the news field may signal otherwise. *Apple Daily* laid off many staff members in 2017 and rehired them as freelance reporters. This move affected a wide range of sections, including entertainment, sports, and features.

Once experienced news reporters leave the newsroom, junior staff members usually replace their positions. The obvious reason for this replacement is the considerably higher cost of experienced journalists in comparison with beginners.

(C6) Practice of access to information

1 POINT

Article 27 of the Basic Law guarantees Hong Kong residents freedom of speech, the press, and publication. It is becoming more difficult for journalists to access public information. There are significant differences between promises and practices.

Hong Kong citizens are guaranteed freedom of the press under the Basic Law; however, journalists are finding that in practice, it is very difficult to access information. A survey conducted by the HKJA in May 2020 found that Hong Kong press freedom had dropped to a record low in the eyes of the general public and newsroom practitioners (HKJA, 2020c). The HKJA offered three reasons for the plunge. First, Hong Kong does not have laws ensuring reporters' access to information, such as a freedom of information law or an archive law. Second, newsroom workers found it laborious to access information for their news reports. For example, the High Court granted an interim injunction to stop the publishing of the personal data of police officers (Hong Kong Police Force, 2019). Third, journalists have experienced verbal assault or physical violence when they report stories.

There are many examples of journalists being denied information in Hong Kong. For instance, when an Indonesian journalist was shot and her right eye injured, an Indonesian journalist wanted to know who had shot her and the police would not give her any information. Other reporters have been arrested for reporting on anti-government protests, and one group of reporters was asked

to kneel and stop filming the protests. Moreover, neither journalists nor first-aid providers were allowed access to the Prince Edward Mass Transit Railway station after the attack on 31 August 2019.

In addition to discussing the intimidation of reporters covering the protests, most interviewees expressed concern over difficulties in accessing government information on a daily basis. For example, the government has refused to disclose the names and titles of police officers. Some government officials have refused to provide any substantive information to the general public, and searching for public information, such as marital status, birth information, and voter information, is becoming more difficult.

(C7) The watchdog and the news media's mission statement

2 POINTS

The mission statements of news organisations do not contain provisions for acting as watchdogs. However, Hong Kong newsrooms value the watchdog function of media.

In our survey, a large majority of news media organisations agreed that the investigative and watchdog functions were important to Hong Kong journalists. Most interviewees explained that investigative reports were welcomed and supported by the public, and half of the newsrooms have established teams to engage in investigative reporting on a regular basis. Other members of the surveyed newsrooms have received extra funds and time for investigation when they demonstrated their commitment.

Only one editor-in-chief explained that his company did not allocate many resources for investigative reporting, because investigation was not the foremost duty in a partly free society. He felt that investigation could not lead to changes in the roots of societal problems or answer bigger questions. His company preferred special and analytical reports to investigation.

Recent Hong Kong investigative reports have won international awards and helped reveal police brutality during the protests. RTHK produced a programme called *721 Yuen Long Nightmare*, which showed how a triad member attacked citizens with steel rods and left hundreds of people injured – the police were accused of arriving too late.

Several news media outlets in Hong Kong have occasionally partnered with other international bodies such as the International Consortium of Investigative Journalists (ICIJ) to conduct investigations. One of the most prominent examples was the investigation of the *Panama Papers*.

All the interviewees expressed to us that although mission statements on watchdog journalism did not exist yet, the importance of journalists' probing is self-evident.

(C8) Professional training

1 POINT

Most of the newsrooms in Hong Kong have not institutionalised continuing professional education. Most newsrooms neither regularly provide training nor request that their journalists take courses.

The interviewees admitted there was a need for further training on Big Data analysis and artificial intelligence due to the digital transformation. However, only the public service broadcaster and a few private news media companies in Hong Kong provided staff training, which, nonetheless, did not concern data analysis or machine learning. Most journalists must take the initiative to learn new skills via international journalistic institutions or universities, they added. Senior employees may encourage their staff members to join a training programme if they find it useful, but reporters are not required by law or by their employers to undergo further training – it is entirely voluntary, and financial support is usually not provided. Hong Kong does not have any institutions that regularly run any training courses for professional journalists, and the supply for journalistic courses in Hong Kong is insufficient.

(C9) Watchdog function and financial resources

2 POINTS

Over half of the interviewees stated that their media companies have provided specific and sufficient resources for performing investigative journalism.

According to our respondents, most leading companies have made resources available for investigative reports. About half of them have established teams for conducting investigations on a regular basis, although the exact figures are not publicly disclosed. The interviewees said that the investigative teams have more resources, such as time and funds, to work on the stories. They have more flexible schedules and are not required to submit stories daily. However, the calculation of resources is inevitable. More funds are also available for investigative teams to buy tickets to conduct research overseas.

Most of the respondents suggested that reporters in their companies are encouraged to engage in investigative reporting, even though they are not part of the investigative team. Resources and time could become available for them if they have a good story idea.

Conclusions

The 2020 research on the three dimensions of this MDM 2021 report documents a critical turning point in the deterioration of Hong Kong press freedom. Law in Hong Kong formally secures freedom of information; however, stark differences remain between principle and practice. Hong Kong press freedom has continually declined over the past decade, due to invisible political pressure from the Central People's Government, owners, and advertisers. They continue to influence the selection and processing of news, and their pressure is worsening the practices of newsroom democracy, particularly in the case of politically sensitive issues. The change in newsrooms has been subtle and gradual. Market forces and journalistic professionalism have helped to defend the freedom of press and democracy.

Hong Kong media has also experienced a fierce economic battle over advertising money and a rapid transformation due to digitalisation. News is available at an affordable cost, and Hong Kong citizens are exposed to a large variety of local and international media. These developments have lessened the self-censorship of media to some extent due to audience and market demands.

Until recently, large-scale police violence against journalists threatened reporters' personal safety and coverage of news even in front of a live camera. To protect journalists, personal protective gear has been upgraded, complaints over police activity have been lodged, and declarations and accusation letters have been issued. However, reporter intimidation continues to occur on a regular basis.

The plan to enforce national security in Hong Kong has further deepened the anxiety of Hong Kong journalists. More than 90 per cent admitted that they fear their personal safety will be threatened further and that media organisations will face political crackdowns.

A gender gap in newsroom working conditions is not evident, and journalists said they are treated equally, regardless of gender. Local media continues to dominate the Hong Kong media market, although alternative and minority media exist. Stereotypical images continue to prevail in media content in Hong Kong due to market demands and lack of awareness. Internal pluralism is subject to the media organisations, but concerned journalists in some newsrooms actively defend it.

The watchdog and investigative functions of the media are highly valued by Hong Kong journalists, though the commitment to investigative reporting is subject to the individual policies of media organisations. Some have a relatively high professional ethos. Hong Kong journalists are concerned with maintaining their independence from the powerholders. Recent investigative reports have served democracy quite well by exposing the problems of police brutality and unlawful acts.

Journalists have worked very hard to continue meeting their standards during the political turbulence, and based on our indicators, the Hong Kong news media serve democracy to some extent. The newsroom now faces a greater challenge with the enactment of the national security law, highlighted by the example of when the pro-democracy media tycoon was arrested, his organisations' newsroom was made to undergo an unprecedented hour-long raid and news organisations were barred from interviews about the search. Hong Kong's leading news media are finding themselves under unprecedented political pressure following the largest and longest anti-government protests in the history of Hong Kong.

When we started collecting data for this project, the anti-extradition movement had just started, and freedom of the press was declining rapidly. By the time we had finished collecting data, the newsroom was facing even greater challenges with the enactment of the national security law. We are afraid the worst is yet to come.

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ICELAND

A small media system facing increasing challenges

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Introduction

Iceland is a very small country with a population of just over 360,000 people (Statistics Iceland, n.d.-c). It is an island situated in the North Atlantic Ocean, midway between North America and Europe. The Icelandic language is distinct, although it is similar to Scandinavian languages.

Iceland is an affluent country and a stable parliamentary democracy. Its political and socioeconomic structures differ in some respect from the Nordic welfare model, with a more limited welfare system, less developed corporatism, and a confrontational rather than consensual political culture (Jónsson, 2014; Kristinsson, 2018). The country became a sovereign state in 1918 but remained in a royal union with Denmark until 1944, when the parliamentary republic was founded. Historically, there have been four main parties in the Icelandic party system: a conservative party, an agrarian and centre party, a social democratic party, and a left-socialist party (Harðarson, 2008; Önnudóttir & Harðarson, 2018). In the aftermath of the 2008 global financial crisis, which hit Iceland particularly hard, causing economic and political turmoil, the economy recovered remarkably quickly (Jónsson & Sigurgeirsson, 2017), but the political unrest lasted longer. In the last decade, elections have been frequent and new political parties have gained footholds alongside the four traditional ones. Today, there are eight parties represented in Althingi, the national parliament of Iceland (Jóhannsdóttir & Ólafsson, 2018). The present government is a three-party coalition of an unusual combination, as it is the first coalition encompassing both the conservative party and the party farthest from it for almost 70 years. Politically, Iceland is considered a mature liberal democracy, labelled a “full democracy” and ranked only second after Norway on the Economist Intelligence Unit’s Democracy Index 2020 (EIU, 2020).

Freedom in the World 2021: status “free” (score: 94/100, down 3 points from 2017). Iceland’s country report 2021 is not available yet, but in the 2020 report (score 94), “links between elected representatives and business interests remain a concern, as does the concentration of private media ownership. Reports of systematic exploitation of immigrant labor have escalated considerably” (Freedom House, 2021).

Liberal Democracy Index 2020: Iceland is placed at the top of the Top 10–20% bracket – rank 19 of measured countries, up from 23 in 2019 (Varieties of Democracy Institute, 2020, 2021).

Freedom of Expression Index 2018: rank 14 of measured countries, considerably up from 41 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 15 of 180 countries, fluctuating between 9 and 21 from 2013–2019 (Reporters Without Borders, 2020).

The Icelandic media system shares characteristics with the democratic corporatist countries (Hallin & Mancini, 2004), like a tradition of widespread newspaper reading and strong public service broadcasting. It is, however, also characterised by a combination of high levels of political parallelism and commercialisation and a less developed and weaker journalistic profession than in the other Nordic countries. Private media have not been burdened with public service requirements, nor has it received subsidies (Jóhannsdóttir, 2020).

Perhaps the most striking feature of the Icelandic media system is its small size. All media companies in Iceland are small in international comparison. National media also dominate the landscape. There are several regional and local newspapers published in the country; however, local media has always been weak in Iceland (Guðmundsson, 2004; Statistics Iceland, n.d.-d). Nationally, there are two daily newspapers, of which one is for free – interestingly, free newspapers have had a uniquely strong position in Iceland (Bakker, 2013). In addition, there are a couple of weekly newspapers, and one biweekly newspaper. Legacy media have all firmly established themselves online. Online news sites with no links to legacy media also play an increasingly prominent part in news provision. There are several television and radio stations, but only two provide news services. Iceland is technologically advanced and has been at the forefront in the development of information and technology infrastructure (International Telecommunication Union, 2017). Internet access is almost universal (Internet World Stats, 2020) and in addition to domestic media, Icelanders have access to countless foreign media publications of all kinds. The Icelandic Public Broadcasting Service, Ríkisútvarpið (RÚV), enjoys a strong and stable position in the media market. With one television channel, RÚV’s audience share has seldom been less than 50 per cent; currently, it stands at around 65 per cent. Meanwhile, its Radio One and Radio Two have just over 50 per cent audience share combined (Gallup, n.d.-c). Trust in RÚV is also consistently higher than in any other media organisation. RÚV is financed by a broadcasting tax, and

advertisements account for approximately one-third of its revenue (Jóhannsdóttir & Ólafsson, 2018).

In the past decade, the private media have been in turmoil, with frequent ownership changes and mergers. Most private news media companies have been running on loss or very meagre returns for years. At the time of writing this report, three private media companies, together with RÚV, dominate the media market in terms of revenue, audience share, and number of journalists employed (Ólafsson & Jóhannsdóttir, 2021). First is Sýn, a publicly traded tel-economy company owning several television and radio stations (among them Channel 2, the only commercial television channel with a news desk) and the second-most read online news site in Iceland, *visir.is*. Second is the media house Torg, which owns the free national daily, *Fréttablaðið*; an associated website, *frettabladid.is*; DV, a weekly subscription newspaper and website; and a television station (*Hringbraut*) which mostly produces lifestyle and consumer magazine shows and current affairs talk shows. Torg's sole owner is an investor with ties to a centre-right political party. The third big private media company is Árvakur, which publishes Iceland's oldest newspaper, *Morgunblaðið*, and *mbl.is*, Iceland's most-read online news site. It also runs the radio channel K 100. The company has historical links to the conservative party and is now owned by a group of investors with ties to the fishing industry (Jóhannsdóttir & Ólafsson, 2018).

As mentioned earlier, media subsidies have been absent in Iceland. However, the Minister of Education, Science and Culture introduced a bill in the parliament last year, proposing public support for private media organisations (Ministry of Education, Science and Culture, 2020). The bill has not been passed yet, and surprisingly, has mostly been opposed by members of the parliament from the government's own ranks. Private media companies have also criticised it heavily for not limiting RÚV's position on the advertising market.

Covid-19

On 16 March 2020, the government imposed several restrictions on liberal freedoms in order to curb the spread of Covid-19. The restrictions were not as strict as in many other countries, for example, Iceland's borders were not closed, but passengers were tested or required to quarantine on arrival. Public gatherings were restricted, but primary schools stayed open, as did shops and services. These restrictions have changed continuously since, in tune with the spread of Covid-19 across the country (see also Ólafsson, 2021a).

During this time, the use of and trust in traditional media seems to have increased, at least momentarily (Market and media research, 2020). In general, the Icelandic news media is believed to have risen up to its public service obligations and has been praised for its extensive coverage and mediation of necessary

information about the pandemic to concerned citizens (Bernharðsdóttir, 2020). Financially, the Covid-19 pandemic, however, has worsened commercial media's situation. Advertising revenue decreased considerably due to the economic setback that followed the pandemic (Valsson, 2020). So far, news media companies have not laid off any journalists, however, other measures have been taken: the evening news at Channel 2 is now only available to subscribers (from January 2021), having been open to all from the start in 1986; one national newspaper, *Fréttablaðið*, has cut down its publication days from six to five days a week; and DV halted the publication of their printed newspaper (DV, 2020). The biggest magazine publisher also laid off 14 of its staff (Halldórson, 2020). In May 2020, the parliament passed laws providing substantial and unprecedented financial support for various sectors of the Icelandic economy, including private news media, which received up to ISK 400 million (approx. EUR 2.6 million) in September 2020 (Ministry of Finance and Economic Affairs, 2020).

Furthermore, the Icelandic National Security Council established a working group to map the extent and nature of information disorder concerning Covid-19 in the country during the first wave of the pandemic. The group conducted surveys and found that most Icelanders had received information about Covid-19 from domestic news media and reported high levels of trust towards Icelandic scientists and other experts that disseminated information about the pandemic. Moreover, Icelandic media outlets were trusted by over 80 per cent of Icelanders to disseminate reliable information about Covid-19, and most people had seen or heard false or misleading information about the virus and the disease through social media (Prime Minister's Office, 2020).

Leading news media sample

Our media sample for the Media for Democracy Monitor (MDM) 2021 consists of media outlets from the four biggest media houses in the country (discussed above), which represent different types and ownership. These are the private Channel 2 and *visir.is* (owner Sýn); *Fréttablaðið* (owner Torg); *Morgunblaðið* and *mbl.is* (owner Árvakur), and RÚV, the public broadcasting service. Our sample also included a small, national news organisation, Stundin, and *Vikurfréttir*, a regional newspaper. Stundin, founded and owned by journalists, runs a subscription-based online news site and a biweekly printed paper, *Stundin*. *Vikurfréttir* and its online version, *vf.is*, was founded by a journalist who is the paper's editor-in-chief; however, it recently stopped its print publication and is only available online now.

Editors-in-chief, journalists from the above outlets, and also the chair of the National Union of Icelandic Journalists were interviewed for this report.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

The mainstream news media are accessible throughout the country and there are no major regional differences. The number of news media available to Icelandic citizens is somewhat limited though, due to the smallness of the population and hence its media market.

All types of news media are available and widely used by Icelanders. At present, there are two national dailies available, one subscription-based and the other a free paper. Both are based in the capital, Reykjavík. In addition, there are around 20 non-daily newspapers published, half of which are free of cost (Nordicom, 2019a). All but the smallest of the printed papers have a digital equivalent online. Statistics about the media industry in Iceland are limited, as public authorities do not monitor the market to the extent done in, for example, the other Nordic countries, and the industry itself has not agreed upon the gathering of key indicators (Ohlsson & Facht, 2017). Several media outlets have opted out of circulation audits and web traffic surveys, and the data is, therefore, incomplete. For example, no recent subscription data is available for print or digital newspapers.

The Internet is universally accessible in Iceland and also widely used, with nearly 99 per cent of 16–74-year-olds using it regularly (Eurostat, 2020). In 2018, 78 per cent of Icelandic households were equipped with fixed broadband connections (digital subscriber line, optic fibre) (Post and Telecom Administration, 2019). A large number and variety of online news sites are also usually available.

In 2018, there were 14 television channels licensed in Iceland, one of which was provided by the public broadcaster RÚV (Nordicom, 2020). Only two operate a news service: RÚV and the commercial channel, Channel 2. Channel 2 is subscription and advertising based, and its news broadcast was open and free for all until January 2021. Both RÚV and Channel 2 are accessible throughout the country, and both also have an online platform for streaming and on-demand television and archive. In the radio market, there were 18 stations with a registered licence. Four of them have a nationwide penetration, the two public stations Radio 1 and Radio 2, and Bylgjan and FM95,7 operated by the telecom/media company, Sýn. Sýn also runs five other quasi-national radio stations, that is, they reach two or more regions of the country and 60–70 per cent of the population. 18 regional radio stations are licensed to broadcast (Nordicom, 2019b). Nearly all are also accessible online.

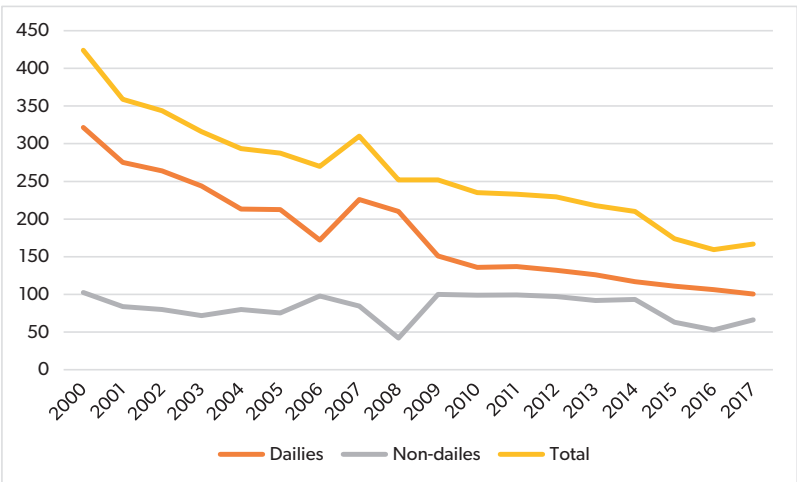
Icelanders are enthusiastic social media users. Facebook is by far the most popular social media platform, and according to an Icelandic survey from 2018, a total of 93 per cent of Icelanders used Facebook regularly (Ólafsson & Jóhannsdóttir, 2021).

(F2) Patterns of news media use (consumption of news) 3 POINTS

Online news and television news are the prime sources of news for Icelanders. Interest in news is high, irrespective of gender and in all age groups. There is a considerable age difference in platforms used, and among the 18–24-year-old age group, social media is a very popular source of news.

Newspaper circulation and readership in Iceland has traditionally been very high, but it is steadily declining, as shown in Figure 1.

Figure 1 Newspaper circulation, 2000–2017 (per thousand inhabitants)



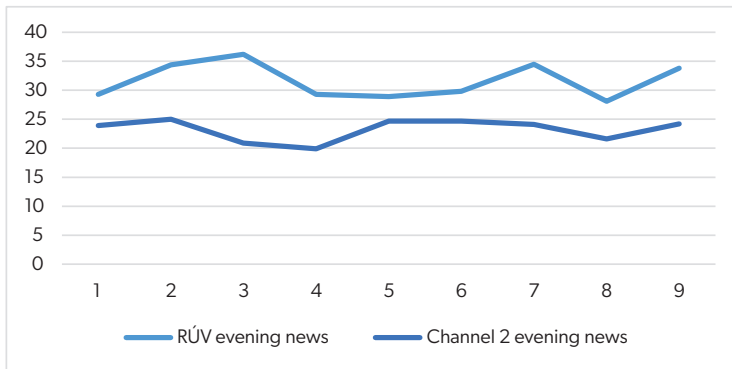
Source: Nordicom, 2019a

As of February 2020, in the 18–80 age group, the two national dailies, *Morgunblaðið* and *Fréttablaðið*, were read by 23.4 per cent and 37.2 per cent, respectively (Gallup, n.d.-a). A free national weekly newspaper, *Mannlíf* (now only available online), reached 16 per cent, while two national paid non-dailies, *DV* and *Viðskiptablaðið* (a business paper) reached around 5 per cent each. These were the only papers that participated in Gallup’s present readership survey. The free paper, *Fréttablaðið*, is delivered to people’s homes in the capital area, in addition to being available at key locations for free pickup in other areas, and,

unsurprisingly, it is more widely read in the capital area, or by 46 per cent as of February 2020. Compared with those who were older, printed papers were read less by the young. Of these, *Morgunblaðið* reached 12.6 per cent among 18–49-year-olds, and *Fréttablaðið* was read by 27 per cent in this age group, as per data from February 2020 (Gallup, n.d.-a).

Meanwhile, for decades, the reach of public broadcaster RÚV's main news broadcast at 19:00 had been fairly stable, with around 30–35 per cent among 12–80-year-olds. Within this demographic, it was followed by Channel 2's main and only news broadcast, which showed an average reach among 20–25 per cent (Gallup, n.d.-b).

Figure 2 Evening television news broadcast reach, weeks 1–9, 2020 (12–80-year-olds)



Source: Gallup, n.d.-b

Online news reaches more and more people. The most-read online news are those run by established private media organisations. On average, close to 200,000 people use *mbl.is* and *visir.is* each day (total population is 360,000). The public broadcaster, RÚV, has not been nearly as successful online as on traditional platforms and typically is in the fourth place of most-read online news sites, with 80,000–100,000 users per day (Gallup.n.d.-d).

Iceland has not participated in the *Reuters Digital News Report*, but Jóhannsdóttir (2021) conducted a survey using the report's questionnaire among a representative sample of Icelandic populace aged 18 years and older in 2017. The findings showed that Icelanders were enthusiastic news consumers. Nearly 87 per cent reported they accessed news several times a day – men more often than women (92% vs. 82%), but age and education did not make a significant difference in the frequency of access. A majority of respondents (61%) said they were extremely or very interested in news. At least 72 per cent of men were extremely or very interested, compared with 50 per cent of women, and those under 25 were seen to be less interested than their older counterparts.

The majority used online news (41%) and social media (17%) as their main news source, compared with the traditional platforms: television (23%), radio (12%), and printed newspapers (7%). It was also observed that the age gap in platforms used was considerable. Only among those 55 and older were traditional platforms the main news source of the majority (72%). Among those between 18–24 years old, social media was a main source of news (38%) as was the use of online news (42%), and only 20 per cent used traditional media as their main source of news.

The findings showed that news consumption was a cross-media experience, and people accessed news both online and offline. In a typical week, on average, they accessed news on eight different media outlets. Traditional Icelandic news media organisations are dominant in people's news consumption. Nearly 97 per cent consumers access online news sites, which are outlets of either legacy broadcasting or print media organisations.

Overall, the study shows that news is widely consumed in Iceland irrespective of age, gender, or education (Jóhannsdóttir, 2021). However, little is known about the reach of news among Iceland's growing immigrant population. In 2019, 14.1 per cent of its population were immigrants, and 38.1 per cent of those were from Poland (Statistics Iceland, 2019). The biggest media outlets have recently started to offer news in English or Polish to cater to the needs of immigrants; however, no statistics or research is at hand on the availability or use of news among them.

(F3) Diversity of news sources

2 POINTS

Editors-in-chief and journalists emphasised the predominant role of journalistic research over news agency and public relations material. National and international collaboration is increasing.

No news agency operates in Iceland, and use of agency material is, therefore, primarily for foreign news coverage. Most interviewees acknowledged the importance of news agencies (Reuters, AP, etc.) in the working process, but did say that they increasingly rely more on other sources and media outlets. Several interviewees discussed this in relation to it being much easier to access information online than before. None of the media outlets have permanent foreign correspondents. The importance of news agencies was particularly emphasised by the broadcast journalists, and the smaller outlets seem to use them the least. The public broadcaster participates in a network organised by Nordic PBS broadcasters and in the European Broadcasting Union network.

Concerning public relations material, interviewees mentioned that it was certainly used more than before. However, it does not usually change how they

use sources in their work. Some interviewees mentioned that public relations material does clearly find its way to the main online news websites, but in general, journalists said it does not change how they work.

Content exchange with partners and other media has increased in recent years. For example, one online-only news company regularly produces news and current affairs programmes for a small private television channel and publishes content in collaboration with a weekly newspaper. The public broadcaster has collaborated on several occasions with private media organisations on investigative projects. Icelandic news media have also worked with international news media on larger investigative stories, such as the *Panama Papers*. Individual journalists are active within international journalism networks such as the International Consortium of Investigative Journalists.

(F4) Internal rules for practice of newsroom democracy 2 POINTS

Journalists have much say concerning how issues are framed. They seldom have any influence on decisions about hiring the editor-in-chief.

According to all respondents, journalists have much say when it comes to how issues are framed in Iceland. Most newsrooms hold editorial meetings in the mornings where the issues of the day are discussed. There, editors present topics they want covered, but journalists are usually expected to bring ideas on topics for news stories. Interviewees mentioned that a lot of time was often spent discussing particular issues, and journalists had enough agenda-setting power in how issues were framed and covered. The decision-making process in editorial meetings was often quite informal and democratic, and following the meetings, there was usually an active and ongoing dialogue with the editors, news editors, and desk editors whilst the journalists worked on their stories. For example, if the journalists could not reach someone for an interview, there would be a follow-up discussion focusing on other suitable alternate interviewees.

Journalists in Iceland usually have no say in who is appointed as editor-in-chief. Some media outlets advertise the position (like RÚV and Sýn), whilst owners sometimes hire directly without the position being made public (like Árvakur and Torg). With smaller media outlets, the editors are commonly also owners.

RÚV and Sýn both have internal rules in place to make sure that male and female journalists are treated equally. Interviewees from other outlets highlighted that no formal rules were in place to make sure that gender equality was respected in the workplace.

(F5) Company rules against *internal* influence on newsroom/editorial staff

3 POINTS

Main news media all have established rules to guard their newsrooms from internal influences. Journalists mostly enjoy editorial independence.

The Media Act (no. 38/2011) obliges all media to have an editorial policy statement and rules of editorial independence published on the Media Commission (MC)’s website (Parliament, 2011). Many of these touch upon possible interventions on newsrooms and editorial work, and most of them stress independence from owners and external parties. Additionally, the most prominent news media houses also have internal rules of conduct or a code of ethics (CoE) and through these, have some protections against internal and external influence. The CoE of the National Union of Icelandic Journalists (NUIJ), however, does not cover external influences.

In the Public Service Broadcasting Act (no. 23/2013), an emphasis is placed upon professionalism in RÚV’s work (Parliament, 2013). RÚV abides by rules of editorial independence (Media Commission, 2020a) sanctioned by the MC, which, for example, bans RÚV’s board from interfering with news and news-related programmes. In RÚV’s “Rules on news and related programmes in RÚV”, reporters are also protected against interference from the state and its board.

Torg’s news media outlets portray a self-regulation system on the MC’s website (Media Commission, 2020b). It is clearly stated there that the interests of owners should never be considered when news is gathered and processed – editorial independence shall be upheld, and editorial products should be independent from boards and owners. If a board member or owner is the subject of coverage, a specified procedure shall commence that secures a fair handling of possible nuances, where a board member or owner shall be treated as an unrelated party. Between the news staff and owners, there is a “Guarantor” that treats complaints or accusations about rules being broken.

Morgunblaðið’s “Rules on Editorial Independence” have not been approved by the MC (Media Commission, 2019b). They state that decisions on content published in the paper and related outlets are in the hands of editors or their representatives. The editors and journalists are independent of others in their work, and journalists will, at each and all times, be offered the best possible conditions to uphold the editorial policy. Also stated is that cautions and layoffs are presented according to laws and regulations that apply.

Sýn’s news media have a Policy Statement and rules on editorial independence (Media Commission, n.d.-b), which state that reporters are independent from the owners and the board. The editor-in-chief is obligated to report any attempt to unduly influence editorial decisions to the company’s chief lawyer

at all times, and besides those legally sanctioned rules, the outlets also rely on the NUIJ's CoE.

The biweekly newspaper and online news site, *Stundin*, adheres to the media law by having a policy statement and rules of editorial independence (Media Commission, n.d.-a), in addition to relying on the NUIJ's CoE. The policy statement states that diversity in ownership contributes to the independence and objectivity of *Stundin*, and in the rules of editorial independence, it postulates that the staff shall own a majority of the shares (with no one shareholder owning more than 15%). There is also a guarantee that the board will secure editorial independence, hold special interests at bay, and not propagate the owner's interests in the production of news. The editors have sole power over hiring and firing.

The online news site and biweekly business paper *Kjarninn* also has a policy statement and rules of editorial independence, in adherence to the media law (Media Commission, 2019a). Otherwise, it relies on the NUIJ's CoE. The policy statement reminds journalists that their loyalty lies only with the readers and no one else, and the independence of editors and journalists is emphasised as well as an absolute division between editorial staff and departments of income. Journalists at *Kjarninn* cannot be fired without a written explanation.

Most other media outlets in Iceland have limited self-regulation tools, aside from what the Media Law requires and accepting the jurisdiction of NUIJ's CoE. Many of them are local and small, with one or two staffers – and those often being the owners.

With regard to ownership, the journalists interviewed said they never discussed editorial matters or news items with owners or board members, with the exception of the smallest media organisations where editors are also owners. Overall, most journalists and editors said that owners (who are not editors) usually did not interfere with editorial decisions or the daily operations of the news outlets.

(F6) Company rules against *external* influence on
newsroom/editorial staff

3 POINTS

All main news media outlets have rules thwarting the direct influence of external parties on newsrooms and media content. Editors and journalists alike strictly deny such influence. No advertisers can be said to have dominance in leading news media. Leading Icelandic news media houses separate newsrooms from their advertising departments. All declare explicitly in their formal editorial rules that the interests of advertisers shall never be considered in news production.

According to the interviews, people working in advertising departments at larger media outlets sometimes talk to journalists in an informal manner, but

employees from the advertising departments are never present during editorial meetings. Leading newspapers in Iceland often have special sections dedicated to, for example, travel and leisure, but the content there is not written by journalists, but people who are employed specifically to write for those paid sections.

Meanwhile, in the many smaller media outlets in rural areas, there are few tools to deal with external influences. They face the daily battles of being in a small close-knit society where a positive outlook prevails and the biggest advertisers are the municipality and one or two of the area's biggest business companies. Guðmundsson (2004: 53) concluded in his research on local media that proximity to advertisers and the community could matter: "Thus it is clear that the media is less likely to interfere in disputes in the region, and in some cases, ads have been used to control content".

Most private news media rely on both subscription and advertising, apart from the free paper *Fréttablaðið* – and as mentioned above, the leading online news sites are free of charge. Advertising has grown in importance to most media. *Kjarninn miðlar* is free of charge and its content is available to all, but it also receives monthly voluntary donations amounting to half of its revenue (RÚV, 2017). The public broadcasting service RÚV is mostly funded by the broadcasting tax, but has around 30 per cent of its revenue from advertising.

In April 2021, Statistics Iceland (SI) released its findings on the media advertisement market in Iceland for 2019 (Statistics Iceland, 2021). For the second time, advertising revenues to foreign companies were calculated, and it is estimated that in 2019, about 40 per cent of advertising payments went to foreign companies, compared with 34 per cent the year before.

According to SI's findings, national media has not just lost its share of the total advertising revenue. In 2019, advertising payments in national media amounted to ISK 11.5 billion, a 17 per cent drop from the previous year, calculated in fixed prices. These payments in 2019 were 41 per cent lower than they were at their highest in 2007, calculated in fixed prices.

Daily and weekly newspapers have traditionally been the most important advertising medium in this country, but have lost a huge share of the market in recent years. In 2019, about 52 per cent of advertising revenues went to television stations, about 21 per cent to daily and weekly newspapers (25% the year before), and 14 per cent to radio (13% in 2018). The share of national online media in advertising revenues has grown slowly but steadily, and it is now estimated that ISK 14 out of every 100 spent on domestic advertising goes to them.

According to findings from the Worlds of Journalism Study (Ahva et al., 2017), Icelandic journalists themselves did not feel that political or economic factors have much influence on their work. Comparative research concerning Nordic journalists found that fewer Icelandic journalists, proportionately speaking, found that external economic or political factors impinged on their work (Ahva et al., 2017). In this regard, Icelandic journalists ranked the high-

est overall in the absence of external influences within their work, with those from Norway and Finland, respectively, following.

All our interviewees – editors and journalists alike – rejected any influence of advertisers on specific editorial content. Advertising clients are diverse, and interviewees were unable to recall the largest advertisers. Most said they were not interested in knowing anything about the advertising shares – it was up to the advertising department – and they focused instead on editorial content. Some of the interviewees did recall specific examples of some advertisers trying to influence news reporting by threatening to withdraw (or withdrawing) adverts, but everyone said these rare instances had not influenced news reporting. A list of the 30 biggest advertisers in print media and television confirmed that there was not a dominant position of any one particular company.

(F7) Procedures on news selection and news processing 1 POINT

Internal debate is mostly limited to daily news meetings and the procedures concerning news selection and news processing are usually informal and not based on formalised rules.

Stylebooks are not used in Icelandic newsrooms, and much emphasis is placed on individual journalists bringing their ideas to newsroom meetings. According to the interviewees, there is little focus on formalised rules concerning news selection, and individual journalists have much autonomy when coming up with ideas for news stories and how to cover them.

There is little training provided to new journalists, and instead they are expected to learn it on the job, with some guidance from senior staff members. News stories are usually not checked by many people, aside from the desk editors, before they are published. Several interviewees mentioned that if a story concerned a particularly sensitive matter, then it was usually checked by more people.

News originating from social media was sometimes disseminated without being critically reviewed, said the interviewees. This is often the case when public figures post something on social media platforms, which is commonly viewed as a press release (a politician announcing something, etc.). This happens the most on mainstream online news sites where the priority is usually speed (being the first to report the story). However, in cases of ordinary citizens posting something newsworthy on social media, journalists usually try to critically review it before it is published.

According to the interviewees, there was also little internal discussion concerning how equality, inequality, and diversity should be addressed in the Icelandic media.

(F8) Rules and practices on internal gender equality 2 POINTS

Employment conditions among male and female journalists are mostly equal in terms of conditions and pay. Women are under-represented in decision-making positions in media companies.

Around 60 per cent of the members of the National Union of Icelandic Journalists are men and 40 per cent are women (Statistics Iceland, n.d.-d). Statistics on the gender ratio in decision-making positions in media organisations in Iceland are lacking, and of late, there has been discussions on a lack of gender balance in that respect. At the time of writing, all except one of the editors-in-chief, assistant editors, news editors, and assistant news editors in two national newspapers were men. According to the Gender Equality Act (no. 10/2008), companies are obliged to work towards equal rights and opportunities, specifically regarding decision-making positions in their companies (Parliament, 2008). In a recent interview, the head of the Directorate of Equality said that the situation was worrying (Guðmundsson, 2020). The gender ratio is more balanced in broadcast news media. The executive board of RÚV is gender balanced and RÚV's news editor-in-chief is a woman, four of five members of Sýn's executive board are men, and the editor-in-chief at Channel 2 is a man, but the news editor is a woman. Both RÚV and Sýn have internal rules regarding gender balance (RÚV, 2018; Sýn, n.d.), freely accessible on their websites. Interviewees from other media organisations, meanwhile, said there were no formal rules regarding gender balance at their workplace.

The interviewees stated that gender inequality had diminished in Icelandic media. Most discussed the trend in relation to Iceland's position as one of the most equal countries in the world. The interviewees said that they believed working conditions of men and women were mostly equal. Some of them, however, mentioned that it was difficult to escape underlying wider societal gender stereotypes in most work settings.

While editors mentioned that equal pay was prevalent, some journalists stated that although the norm, it was difficult for them to know for sure. A couple of interviewees mentioned there were different types of contracts for journalists, depending on when they started and what kind of work they did. So, it was difficult to compare and know for sure if conditions and wages were equal or not. A survey for the National Union of Icelandic Journalists showed that on average, men were paid 5–8 per cent higher wages than women journalists (Jónsson, 2018). One possible reason for that could be shorter work experience of women journalists. According to findings in the latest Worlds of Journalism Study (Kolbeins, 2012), women's work experience was eight years on average, compared with fourteen years among male journalists. However, after amendments to the Gender Equality Act, which came into force in 2018, companies with 25 or more employees were required to obtain a certification

of their equal pay system and its implementation. Sýn and RÚV have already implemented it (Þórðardóttir, 2019; RÚV, 2019b), and others are in the process of obtaining it.

(F9) Gender equality in media content

2 POINTS

Journalists agree that gender equality in media content is important, but no formal rules apply except at the public broadcasting service. Women are under-represented as news subjects.

The journalists interviewed agreed that gender equality in media content was important, but there was a lack of monitoring, with one exception: the public broadcasting service RÚV monitors the gender ratio in its news content and all its programmes, and the findings are published regularly on its website (RÚV, 2020). At other outlets, journalists mentioned they tried to make sure there was gender equality in the content, but that it was an informal practice. There were no formal mechanisms to monitor this in private media.

In their country study on news and gender within the framework of the Global Media Monitoring Project (GMMP), Jóhannsdóttir and Einarsdóttir (2015) found that women were grossly under-represented in the news. Only 20 per cent of news subjects in news on traditional and online platforms were women, down from 28 per cent in GMMP 2010. However, women were no less likely than men to feature as news subjects in so-called hard news. The situation appears to have improved since, and in research done for the Icelandic Association of Women in Business, women were 33 per cent of subjects in broadcasting news and 35 per cent in current affairs programmes in 2017 (Beck, 2017). Preliminary results from GMMP's latest study in 2020 indicate that women were around one-third of the subjects in the main news media. According to RÚV's own content monitoring, the gender ratio was equal overall in all programmes in 2020, but in news, the story was different: 61 per cent of news subjects were men and 40 per cent were women (RÚV, 2020).

(F10) Misinformation and digital platforms
(alias social media)

1 POINT

Misinformation on digital platforms is of minor relevance and importance so far, and defence mechanisms are not developed and not seen as a priority.

Respondents from leading news media houses mentioned that while misinformation could be a problem, it wasn't much of an issue in Iceland. The interviewees said that they used their journalistic skills to identify fake news and believed that

checking sources helped them to identify misinformation. With regard to foreign news, most of the interviewees mentioned they used credible news agencies and foreign news outlets and trusted the verification procedures used by those agencies and outlets. None of the news media in our sample collaborated with external fact-checking institutions or ran an in-house verification department, not even the public broadcaster RÚV. Overall, interviewees mentioned that Icelandic news outlets were simply too small to invest in verification departments, and most thought it was unnecessary, since fake news was not perceived as much of a problem in the country.

(F11) Protection of journalists against (online) harassment 2 POINTS

Journalists can usually rely on support and protection from their employers in case of harassment, but guidelines are often lacking.

In Iceland, threats and harassment of journalists were rare, but there were some occasional mild and non-violent cases in the form of phone calls, emails, or posts and comments on social media. According to the journalists, none of them had experienced any serious threats, but several had received unfriendly comments offline and online, particularly the female journalists. On some occasions, these had been discussed with their bosses, who had offered support. The editors interviewed mentioned that their outlet would offer support to the journalists in case of harassment, and most discussed this in relation to contacting the police. The interviews illustrated that the public service broadcaster RÚV and the private media house Sýn appeared to have the clearest structure in case journalists needed protection.

Recently – and after interviews were conducted for this research – Iceland’s largest fisheries company, Samherji, has employed various methods against media and journalists that have reported on the company’s alleged illegal activities in Namibia, Africa, currently under investigation (Júlíusson, 2021). The company has, for example, published several videos on YouTube, as well as articles in newspapers and on the company’s website, to refute the reporting and accusing individual journalists of dishonesty and malpractice. An employee of Samherji also stalked one of RÚV’s investigative reporters for months, and bombarded him with threatening text messages. Massive charges were filed to RÚV’s internal Ethics Committee, charging ten RÚV journalists for violating a clause that forbids them from expressing views on contested matters on social media (a highly criticised clause) – one of the reporters was found to be in violation. These counter-measures from someone subject to critical, investigative reporting are unprecedented, and are of concern to Icelandic journalists, but it remains to be seen whether other actors will take up similar tactics.

Dimension: Equality / Interest Mediation (E)

(E1) Media ownership concentration national level 1 POINT

Competition is limited in the small Icelandic media market, and four big media companies are overall dominant in all news media sectors. There is, however, no cross-ownership to speak of in the media sector.

All media outlets must register with the Media Commission (MC) and send in updated shareholder lists of both the main firms and of companies that own their shares. Thus, media ownership is public information and readily available on the MC's website. Mergers are by law (Act no. 38/2011) notifiable to the Competition Authorities, and rulings have been quite frequent (Parliament, 2011).

Private media ownership in Iceland has been highly concentrated, especially since the end of the party press (Karlsson, 2004). However, recently, the trend of concentration has somewhat decreased. In 2017, the telecom company Sýn bought the broadcasting section of 365 media, which had until then been Iceland's biggest private media company. The print section of 365 Media (*Fréttablaðið*) was then sold to Torg in 2019 (Ólafsson & Jóhannsdóttir, 2021).

Sýn is a publicly traded company with many shareholders. Seven pension funds hold 46.3 per cent of the shares, three banks hold 17.7 per cent, and a businessman and investor, Hreiðar Már Guðjónsson, owns 9.2 per cent. He is also the company's director.

Árvakur is most prominently (64%) owned by seven companies in the fisheries industry. Two individuals with ties to the conservative party own 20 per cent and 12.3 per cent of shares, respectively, in the company. In 2008, 365 media (then owners of Channel 2, *Bylgjan*, *Fréttablaðið*, and other media outlets) and Árvakur made an agreement to merge, but this was thwarted by the Competition Authorities, as it would lead to grave competition problems. This demonstrates that competition and concentration are in fact critically monitored in Iceland; however, the same companies were allowed (with conditions) to buy a distribution company in 2018.

Torg is effectively owned by an investor and businessman, Helgi Magnússon, who holds 82 per cent of shares in the company. Additionally, 10 per cent of shares are owned by a private company and the remaining 8 per cent by two individuals.

These three private media organisations (Sýn, Torg, and Árvakur) dominate the national news media market along with the public broadcasting service RÚV.

Stundin is owned by Útgáfufélagið Stundin, which in turn is largely owned by five members of the editorial or marketing staff – in total 61 per cent of shares, but not one person owns more than around 12 per cent. The remaining shares are owned by various other individuals. None of *Stundin*'s owners are noticeable as owners in other media outlets.

The biggest shareholders in Kjarninn miðlar are Hjálmar Gíslason, with 17.7 per cent of shares, and Vilhjálmur Þorsteinsson, with 17.2 per cent of shares. The company was founded by two journalists, Þórður Snær Júlíusson and Magnús Halldórsson, and they own 21.3 per cent combined, with the former also being the editor-in-chief. These and other smaller shareholders are not to be found with a stake in any other media organisations.

Table 1 Audience reach of Icelandic print, television, and radio, January 2019

	Audience reach (%)*	Media	Type	Associated media company
Fréttablaðið	37.2	newspaper	national/free	Torg
Morgunblaðið	23.4	newspaper	national	Árvakur
DV	7.2	newspaper	national/weekly	Torg
Stundin	10.4	newspaper	national/biweekly	Útgáfufélagð Stundin
Mannlíf	16.3	newspaper	national/weekly	Birtingur
Viðskiptablaðið	6.3	newspaper	national/weekly business	Myllusetur
RÚV-TV	58.3	TV	PSM	RÚV
Channel 2	21.7	TV	private	Sýn
Bylgjan	33.6	radio	private	Sýn
RÚV-Radio 1	26.4	radio	PSM	RÚV
RÚV-Radio 2	23.4	radio	PSM	RÚV
K-100	5.2	radio	private	Árvakur
CR 2 (newspaper titles)	60.6			
CR 2 (newspaper companies)	67.8			
CR 2 (TV titles)	80			
CR 2 (TV companies)	80			
CR 3 (radio titles)	83.4			
CR 2 (radio companies)	83.4			

*Newspaper readers per edition, average weekly television viewing, and average weekly radio listening in per cent of population aged 12–80 years.

Source: Gallup, n.d.-a–c

The media market in Iceland is small, and competition is limited in all news media sectors. As noted before, data about the media industry in Iceland are limited (Ohlsson & Facht, 2017), with several media outlets opting out of circulation audits and web traffic surveys, making the data incomplete. It is, as a result, difficult to calculate concentration ratio accurately, though it is safe to

say that concentration in the television, radio, and newspaper market is very high (see Table 1). There are more competitors online, but *mbl.is* and *visir.is* tower over the others in maximum audience reach (see Table 2).

Table 2 *National concentration of websites with news content, 2019*
(Unique Users, Top 7)

	Associated media company	Reach	% (total pop. 14+)
Mbl.is	Árvakur	170,900	56.9
Visir.is	Sýn	161,600	53.8
dv.is	Mediaprint	116,800	38.9
Rúv.is	RÚV (PS)	65,600	21.8
Frettabladid.is	Torg	37,500	12.5
Stundin.is	Útgáfufélagið Stundin	15,600	5.2
Vb.is	Myllusetur	10,200	3.4

Source: Gallup, n.d.-a–d; Statistics Iceland, n.d.-d

(E2) Media ownership concentration regional (local) level 1 POINT

In most Icelandic regions, there is one dominant local media outlet, and in many areas, only one outlet published. The national media is instrumental for people getting news in general.

Local media has always been weak in the small Icelandic media market (Guðmundsson, 2004). On a regional level, ownership concentration is high, in the sense that in most areas there is only one media outlet to speak of, usually an online news site. Also, these media outlets have only one to two staff members, and they are often also the owners.

There are regional newspapers in the northern, eastern, and western parts of the country, all being small organisations with a maximum of three journalists, and mostly owned by individuals who are also editors. These media outlets are generally not included in regular audience or readership surveys.

There are no regional or local television channels, except for N4 TV in Akureyri (North Iceland). N4 reaches the whole country, but its target areas are the north, northwest, and east of Iceland. It does not operate with a news service, and none of the staff are credited as reporters or journalists. N4 also publishes a small “what’s on” magazine. The biggest shareholder in N4 is one of the biggest companies in the region, KEA, and other private companies in the area. In addition, Akureyri municipality holds considerable shares. None of these shareholders have any stake in any other media outlets.

(E3) Diversity of news formats

3 POINTS

Icelandic news media provide for a large variety of different news formats, from headline news online to long-reads in newspapers and background features on radio and television. All different categories are covered, including local, national, and international news, as well as politics, economy, current affairs, culture, and sports sections.

Iceland's news media provide for a large variety of news formats, though it has somewhat decreased in the last decade, particularly on regional and local levels.

RÚV's main television news show at 19:00 normally lasts for around 30 minutes and is also broadcast on its Radio 2 channel. The 19:00 news is followed by another 30-minute news and current affairs programme four days a week called *Kastljós*. The late-evening news at 22:00 is broadcast four days a week and lasts 15 minutes. Additionally, once a fortnight, RÚV airs the programme *Kveikur* that is dedicated to investigative and in-depth journalism. On Sunday mornings, meanwhile, there is a weekly live discussion format on current affairs.

The private Channel 2 has a shorter main news format (15–20 minutes) every night at 18:30, but it is not any more sensationalist than the public broadcasting news. The current affairs programme that follows, *Ísland í dag*, can, however, be said to be more sensationalist, as it focuses more on human interest stories and not just on politics or economic affairs. *Kompás*, an investigative programme, scrapped for economic reasons in 2009 on Channel 2, restarted in 2019, but it is only aired online on *vísir.is*.

Both RÚV's and Sýn's radio channels have short news flashes every hour. RÚV has two main news formats, at 12:20 and 18:00, 20–30 minutes long. Sýn's radio *Bylgjan* has a 15-minute main news format at 12:00, and broadcasts Channel 2's evening news at 18:30. Both offer two-hour-long morning and afternoon news magazines on weekdays. RÚV's Radio 1 also has a weekly foreign affairs magazine (*Heimskviður*) and a weekly discussion format on current affairs. Furthermore, public and private television and radio provide podcasts and are available as web-TV and radio. RÚV Radio 1 used to have regional news format broadcast before the main evening news in the northern, western, and eastern regions of Iceland, but that was cut in 2009.

There are many online news sites, with the most-read ones being affiliates of established media, but there are also online-only news sites (see Indicator E1 – Media ownership concentration national level). All online news sites have a variety of formats: short breaking news, long-reads, short television news formats, and podcasts.

It is a distinctive characteristic of the Icelandic press market that it has “produced neither elite-oriented quality papers nor extremely populist tabloids” (Karlsson 2004: 242). In a market as small as in Iceland, there is little room for readership segregation based on purchasing capacity and other socioeconomic

divisions, and Icelandic newspapers mostly cater to the general public for their readership.

(E4) Minority/Alternative media

1 POINT

There is no minority media to speak of in Iceland. A few news media outlets have news in English or Polish to cater to the country's growing immigration populations.

As late as the early 2000s, Iceland was a very homogenous country, though immigration has increased in the past two decades. In 2019, 14.1 per cent of the population were immigrants, compared with 2.6 per cent in 2000. The Poles are the largest immigrant group, and in 2019, 38.1 per cent of the immigrant population was from Poland (Statistics Iceland, 2019). The biggest media outlets have recently started to offer news in English or Polish to cater to the needs of immigrants. One monthly magazine is published in English (*The Reykjavík Grapevine*) and carries some news, but it mostly targets tourists rather than immigrants. Little is known about the reach or use of news among Iceland's growing immigrant populations. Icelandic sign language is recognised as a minority language, and RÚV TV main evening news are interpreted in sign language.

(E5) Affordable public and private news media

3 POINTS

All news media can be considered affordable for the average household in Iceland. The price of a "basic package" of the most common media outlets can be considered low when measured by average spending power.

The statistics on consumer spending in Iceland indicate that the average household spending on cultural aspects has decreased since the turn of the century (Statistics Iceland, n.d.-a). Moreover, no data is available on consumers' spending patterns on the media alone.

Iceland's most read newspaper, *Fréttablaðið*, is distributed for free to most households in the southwest part of the country, where about two-thirds of the people live, and placed at key locations for free pickup in other areas. Meanwhile, the newspaper *Morgunblaðið* relies on both subscriptions and advertisements, with the subscription cost now at ISK 7,530 per month, or ISK 90,360 annually. Online news are, however, offered free and open to all. The newspaper *DV* also relies on both subscriptions and advertisements, with a subscription now at ISK 3,290 per month, whereas its online site is partly pay-walled. *Stundin* also runs a pay-walled online site and a biweekly printed paper, offering both for ISK 2,490 a month.

The telecom and media house Sýn runs numerous television channels including Channel 2, in addition to many radio stations. Its television channels rely on both subscriptions and advertisements. Many package deals are offered, with the basic subscription set at ISK 6,990 per month. All content on Sýn's online news site *visir.is* is free of charge for readers.

The public broadcaster RÚV is subject to a special status by virtue of being owned by the state. Its biggest source of revenue is through a broadcasting tax, where everyone between 16 and 70 years of age, with income over the tax-free mark (which in 2020 is at ISK 152,000 a month) pays ISK 17,200 per year, or ISK 1,490 per month. So, for a household of two wage-earning adults with children under the age of 16, the broadcasting tax amounts to ISK 2,980 every month.

The average disposable income of individuals in Iceland in 2018 was about ISK 403,000 per month (Statistics Iceland, n.d.-b) and thus about ISK 806,000 for a household with two wage earners.

Paying the tax for RÚV, a subscription to *Morgunblaðið* and Channel 2, (in addition to receiving *Fréttablaðið* and almost all news websites for free) would add up to about ISK 17,500 a month, and thus represent about 4.3 per cent of the average individual's disposable income. This amounts to about 2.2 per cent for a household with two wage earners. Such an amount can be considered readily affordable. As for the lowest incomes, minimum wages (before taxes) for a full-time position is, according to Efling worker's union (Efling, n.d.), nearly ISK 335,000 per month. After tax and personal deductions, the net income amounts to about ISK 265,000 every month. For the media package mentioned above – costing about ISK 17,500 a month – this low-income individual would be paying about 6.6 per cent of their net income. While this may be considered an obstacle, in a household of two such individuals, the percentage goes down to 3.3 per cent. Overall, access to media can be considered as very affordable in Iceland.

(E6) Content monitoring instruments

1 POINT

Publicly available institutionalised and independent media monitoring instruments are rare in Iceland.

Icelandic authorities do not and have never inspected media content. No publicly accessible media content monitoring is in place. A private company, Creditinfo Fjölmiðlavaktin [The media watch], collects all sorts of media content in their database, but access is restricted, and analysis is sold to commercial customers only. This database is highly useful for research purposes, and the company has on occasion worked with or given researchers access to

the data, most notably when researchers from the University of Iceland and University of Akureyri analysed economic coverage in the media in the run-up to the financial crisis in 2008 (Guðmundsson et al., 2010; Guðmundsson & Jóhannsdóttir, 2010). Creditinfo also worked with the Association of Women in Business in mapping and monitoring gender representation in broadcasting news and news programmes in 2013 (FKA, 2020). Occasionally, Creditinfo publishes rankings, such as the representation of politicians in Icelandic media (“Who has been mentioned most often?”).

Additionally, Statistics Iceland collects and publishes data on the amount and share of Nordic and European programmes within the entire programming of both the public broadcasting service and private television (Statistics Iceland, n.d.), but this data is not updated often (the latest data from 2010), for lack of resources and funding. These reports also focus on numbers, counting minutes and genres, but not on content and quality itself.

The public service broadcaster RÚV is obliged by law (Act no. 23/2013) to publish an annual analysis of its programme (Parliament, 2013). These annual reports are produced internally and published on RÚV’s website (RÚV, 2019a).

Some external content research has been done at universities in addition to those mentioned above. Jóhannsdóttir (2018) and Guðmundsson (2012) studied commercialisation in the press, and Jóhannsdóttir and Einarsdóttir (2015) examined gender representation in the news media, to mention a few. However, no systematic and continuous monitoring or analysis of media content and quality is to be found.

(E7) Code of ethics at the national level

2 POINTS

A code of ethics exists at the national level and is respected by most news media outlets.

The National Union of Icelandic Journalists (NUIJ) has had a Code of Ethics (CoE) since 1965, with a functioning Ethics Committee ruling on complaints from that time, with a total of 251 complaints being ruled on in this period. In these 55 years, the CoE has changed relatively little. It has been concise and general from the beginning, with only five clauses on “dos and don’ts” in journalistic work, and one clause on the handling of complaints by the NUIJ Ethics Committee. This is very different from the vast majority of CoEs in most Western countries, especially the other Nordic countries, where the codes are much more detailed. The NUIJ’s CoE has clauses that promote fair, balanced, and impartial reporting. It stresses the public’s right to information, freedom of expression, and criticism, and the highest possible standards in gathering information, including the avoidance of reporting that may cause unnecessary pain or humiliation. It warns

against bribes and threats, promotes caution when publishing names, observes the general rule that every person is innocent until proven guilty, warns against conflicts of interest, and informs journalists not to confuse editorial material of clear informative, and educational value with advertising in pictorial or written form. In its rulings, the Ethics Committee has throughout the years stressed fairness, impartiality, and holding those in power accountable.

The CoE is generally accepted by journalists and media outlets, even if some of the rulings have, through the years, been debated and criticised. According to most of the journalists interviewed, they were familiar with the rules and used them as a roadmap, to a certain extent. It was the same for the editors interviewed. Since the rules are quite broad, some journalists and editors stated that they mostly represented common sense, and so it was not necessary for them to look them up regularly. But, if there were some difficult issues to address, the rules were a good guide to use as a compass, according to most of the interviewees.

Besides the NUIJ Ethics Committee, the public broadcasting service RÚV has a special in-house CoE, and the reporters there are in a separate union. The CoE at RÚV, and a ruling committee, was set up in 2016, but has had a very slow start, with only three cases submitted. The first two were dismissed, but the most recent one found one journalist in violation of RÚV's code of conduct on social media (see Indicator F11 – Protection of journalists against (online) harassment).

There are no other journalist associations which disseminate good practice – for example, improving skills and raising ethical standards or other provisions regarding the accountability of the media to civil society – aside from the courts. It should be added that the Media Commission (MC) also receives complaints on the media and makes rulings. For years, these cases mostly had to do with advertisements, children's material, and so on, but two recent rulings were on complaints over editorial practices. The NUIJ did not respond well to this change and said that it overlapped with the function of the NUIJ Ethics Committee, and the union withdrew its representative on the MC's ruling committee. This feud is unresolved.

(E8) Level of self-regulation

2 POINTS

Self-regulation occurs rather informally, with the public service media a notable exception.

The media law and the corresponding MC oblige all media outlets to write and send in an editorial policy statement and rules of editorial independence, as discussed above – and many of these touch upon democratic values and journalistic obligations to report in a politically balanced way.

The most prominent media outlets on the national level have, in addition, sets of internal rules of conduct or code of ethics, whilst at the same time adhering to the National Union of Icelandic Journalists' Code of Ethics. These internal rules are not always displayed on their websites, but some can be found on the MC's website.

Most of the journalists and editors interviewed from the private media outlets mentioned that internal rules exist, but these are quite informal and not all of them are written down. They were often discussed in relation to the working culture and journalistic practices at each outlet. An exception to this was Sýn; according to the interviewees, the internal rules there seem to be taken more seriously and were discussed as a more detailed version of the NUIJ' CoE.

In contrast to most of the private media, there are much stricter and clearer rules in place at the public broadcaster RÚV. Those interviewed from RÚV highlighted these rules and that journalists working there take them seriously. A special Act (Act 23/2013) applies to RÚV which emphasises impartiality (Parliament, 2013), and RÚV's rules on editorial independence emphasise quality, impartiality, and fairness. There are many other rules, including the work rules for RÚV's news department, with clauses on, for example, conduct toward news subjects, coverage of accidents and other sensitive material, coverage of court cases and police investigations, on impartiality, objectivity, and corrections, on conflict of interests, and on sources, information gathering, and precision. The right to reply is stressed.

Most of the media outlets that reach the whole country and have news desks have internal rules or CoE that stress balanced coverage, allowing all viewpoints to be heard. On the other hand, there are rather limited formal systems for hearing complaints about alleged violations of ethical standards, with RÚV a notable exception. Nowhere is there a special ombudsperson, and as far as can be seen, none of these media outlets have rules or clauses that guarantee gender balance in news subjects.

(E9) Participation

2 POINTS

Audience participation in news mostly consists of posting comments online through social media and letters to the editor.

Icelandic audiences can participate by posting comments on some news sites (not all of them allow comments). In order to comment, audiences normally need to do this through linking their social media accounts, usually Facebook, as anonymous comments are usually not allowed on the mainstream sites. According to the interviewees, the comments were reviewed when there was time and on ad hoc basis, but normally, there wasn't a systematic review process in place.

Audiences can also publish letters in the main newspapers and on news sites. There was usually one member of staff (not a journalist) who read through the letters to make sure they could be published, said the interviewees. They added that the newspapers and websites try to be as open as possible when it came to publishing such material. Icelandic newspapers are considered very open to articles from ordinary people and devote considerable space to them. E-mail addresses for the news media outlets and journalists are publicised, and people are encouraged to get in touch. The Icelandic news media is also very open to using photos and video recordings from Icelandic audiences on the scene when a newsworthy event takes place.

The public broadcasting service RÚV has, in recent years, made various efforts to connect with its audiences, for example, by holding open meetings throughout the country for people to discuss programme matters and continuing to invite people to comment and ask questions on its online site. RÚV also organises events at its premises and welcomes group visitors (such as schools). Its online news site, however, is not open to reader comments.

Furthermore, research indicates (Jóhannsdóttir, 2021) that Icelanders are reluctant to embrace the participatory possibilities enabled by digital media. Only a small minority actively engages with the news.

(E10) Rules and practices on internal pluralism

2 POINTS

Icelandic newsrooms do not have codified rules on internal pluralism, but journalists try to make sure that there is diversity in the range of voices represented.

The newsroom journalists interviewed said they try to make sure that there is diversity in the range of voices represented in the media. The choice of experts used is regularly discussed in newsroom meetings, and journalists often look for new faces they haven't interviewed before.

However, most interviewees admitted they often don't have time to search for new experts. Experienced experts know how to fulfil the needs of the media. This was particularly emphasised in relation to certain people knowing how to perform for television. Since the population in Iceland is so small, there are often just one or two experts in particular fields. The Icelandic news media therefore needs to rely on a much smaller pool of experts than found in larger states.

In general, journalists are free to interview who they like, and diverse opinions are usually welcomed in news outlets.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers” 1 POINT

Self-observation by journalists in the media and public debates about journalism are not frequent, but sometimes occur in relation to specific issues. No systematic news media monitoring is done in Iceland.

The Media Commission (MC) is the only institutional mechanism in place for media monitoring, and its scope is limited. The MC shall, by law, monitor the status of and developments on the media market and collect relating data, monitor registration obligations and the granting of licences to provide audiovisual media services, and ensure that information on all the media service providers are available. Five persons are appointed to the MC, including one by the National Union of Icelandic Journalists (NUIJ). At the time of writing (August 2020), there is criticism from the NUIJ over the functioning and rulings of the MC, and the representative of NUIJ resigned from the commission in April 2019. The NUIJ felt that in contrast to the function of MC rulings for the first five to six years, the rulings have, on at least two occasions, drifted beyond the institution’s scope and into ethical journalistic conduct that should be covered by the self-regulation function of NUIJ’s Code of Ethics Committee.

The public broadcaster RÚV is monitored by the MC but also falls under the scrutiny of the Ministry for Education, Science, and Culture through the Public Service Remit (negotiated every four years). The ministry can ask for information regarding the Remit at any time, and representatives of both parties have meetings twice a year on how it is carried out and whether changes should be made.

A government bill proposing public financial support for private media was tabled in the parliament last year, but it has not been passed at the time of writing this report (Ministry of Education, Science and Culture, 2020). It is unclear whether the bill will be passed, but if it becomes law, monitoring of the media will increase.

The National Union of Icelandic Journalists publishes a magazine twice a year with coverage of media matters. It also has a CoE ruling committee that scrutinises possible violations based on complaints. From 2017 to 2019, 21 complaints were filed, of which 4 were considered to include a breach of code (see also Indicator E7 – Code of ethics at the national level). As for other monitoring activities, academics at universities are doing research, but to a rather limited degree. Statistics Iceland collects and publishes statistical facts on media turnover, distribution, consumption, and so forth, and there are firms like Gallup that measure media usage. As for media blogs, journals on media coverage, and journalism, relevant media bloggers, newspaper space, television and

radio programmes on news coverage, and other such independent and private monitoring, they are non-existent in Iceland. There is a popular Facebook page (Fjölmíðlanörðar [Media nerds]) with a lot of discussions, but little real impact.

(C2) Independence of the news media from powerholders 1 POINT

Law and internal rules protect journalists' independence, but ownership structures indicate that political and economic interests still play a big role in some leading news media.

For decades, Icelandic media was interwoven with party politics. That “system” began to unravel in the 1960s and 1970s, but the party press lasted well into the 1990s (Harðarson, 2008). Today, there are no formal links between media and political parties. To enhance professionalism, journalists and their union have sought to introduce codes and internal rules to keep political and economic powerholders at bay (see Indicators F5 & F6 – Company rules against *internal* and *external* influence on newsroom/editorial staff).

The board of the public broadcasting service RÚV is appointed by the parliament, in accordance with the parties' strength. It was a forum of heated party political battles for many years. However, in the last two or three decades, board meetings have become more balanced and focused on the overall running of the company, rather than nit-picking about the tone of news coverage or discussions and guests in news-related talk-shows. The most prominent example of a board member defending his party in news coverage came in 2015, when RÚV and other media houses covered the ties of then Prime Minister Sigmundur Davíð Gunnlaugsson to an offshore tax-haven company (registered to his wife). His party's representative on RÚV's board criticised RÚV's news coverage on this – but there is no indication that this outcry had any influence on the coverage. RÚV's board consists of nine members: five from the three-party majority (the conservative Independence Party, the centrist Progressive Party, and the socialist Left-Green Movement) and four from opposition parties.

As for private media, today's media market has progressively parted ways with erstwhile political affiliations. However, there have been at least two exceptions of late, where politically labelled individuals have sought to invest in media outlets or companies with semi-political objectives.

The newspaper *Morgunblaðið* is majority-owned by a group of investors from the fishing industry today. These companies want to uphold a national fisheries policy that supports their interests and stand against Iceland joining the EU. This has been consistent with that of the conservative Independence Party that has for the most part dominated Icelandic politics for decades. *Morgunblaðið*'s owners hired Davíð Oddsson as one of two editors in 2009.

Oddsson had been the party's chairman and prime minister of Iceland for a long time. Three other well-known political-party personalities hold sizeable shares (although not a majority) in *Morgunblaðið*'s mother company, Árvakur. In another case from a few years back, some individuals stemming from the centrist Progressive Party sought to acquire an influence in media. Most notable of them was Björn Ingi Hrafnsson, former Reykjavík municipal council member for the party, and former advisor to Sigmundur Davíð Gunnlaugsson, the former prime minister. Hrafnsson became influential in at least two other media outlets but financially over-reached within them, with the plans ending in bankruptcy.

There are at least two instances of weaker political connections holding shares in media companies that are worth mentioning. First is Vilhjálmur Þorsteinsson, who is a 17.1 per cent shareholder in the online newspaper *Kjarninn* and a member of the Social Democratic Party, though not currently in the leadership. Second is Helgi Magnússon, the new owner of Torg (publisher of *Fréttablaðið* and *DV*), who has ties with the centre-right party Viðreisn and is indeed considered one of its founders. Magnússon proclaimed after buying Torg that he was an investor and would not seek to influence the journalistic output (Júlíusson, 2017; Rögnvaldsson, 2019).

Active or former leading politicians are not major shareholders or board members in other leading news media houses. And there is no doubt that for these media outlets, it is considered important to hold at bay any attempts of political influence on editorial output, as can be seen in their editorial policies and internal rules, as well as the NUIJ's CoE. The same applies to influence from economical stakeholders. But even if such rules and policies call for a strict separation of party politics and economic interests from editorial work, it seems clear that such factors can have an impact, direct or indirect (Ólafsson, 2019).

It does seem plain and visible that the powerful owners of *Morgunblaðið*, who comprise majority shareholders from the fisheries industry, aim to uphold their interests within the paper's op-eds, at least. Such an exercise of influence by shareholders in editorial work within *Morgunblaðið* is the most evident among all media outlets. The ownership of Sýn (Channel 2, several television and radio stations, and online *visir.is*) is much more distributed, with no clear majority owner. The biggest shareholders are pension funds, banks, and insurance companies; however, none of them has a share larger than 13.6 per cent.

All major Icelandic media outlets have formal editorial policies, in accordance with the Media Law, as well as in-house rules of ethics or conduct. The emphasis on editorial independence and thwarting outside influence is clear, and Icelandic journalists resist such influence. On the other hand, RÚV's board is politically appointed, *Morgunblaðið*'s has ties to the conservative Independence Party and fishing industry giants, and the media organisation Torg, owned by an investor with political ties, also undermines the independence of its media outlets.

The economic situation of private news media in Iceland is also of grave concern. Most private news media companies have been run at a loss or with very meagre returns for years, and some have lost hundreds of millions ISK. This is recognised in the government's new bill on public support for private media, but as mentioned above, the bill has not been approved.

(C3) Transparency of data on leading news media 2 POINTS

Information about media ownership is transparent online. Important data on the media market is, however, often lacking.

Information on media laws and regulation are easily accessible online, provided by parliament and relevant ministries. All media are required to provide the Media Commission (MC) with detailed information regarding ownership, and rules on Editorial Independence and Mission Statements are published annually on the MC's website (*Fjölmiðlanefnd.is*). Information on ownership is also found in every edition of printed papers and on web pages of the media companies, along with information on board members, key management, and editors.

Recently, it was revealed that the former owner of the newspaper *DV* (now owned by Torg) had kept the paper afloat for years with loans from a well-known investor and billionaire, who had been *DV*'s sole creditor and de facto the influential "owner" (Kjarninn, 2020). This has led to calls for amendments to the Media Act, requiring media companies to not only disclose their owners but also their biggest creditors.

The public broadcaster RÚV is required by law to publish business reports containing information on its financial performance and on its programming annually (RÚV, 2019a). The MC also evaluates RÚV's fulfilment of its Public Service Remit (latest report 2019) and makes this evaluation available online every year (Media Commission, 2020c).

Public authorities do not monitor the media market to the extent done in many other countries, and the industry itself has not agreed upon the gathering of key indicators (Ohlsson & Facht, 2017). The Media Commission is also, by law, obligated to collect data on the status and development of the media market. However, it has done so to a very limited extent as it has been chronically underfinanced and understaffed (Jóhannsdóttir & Ólafsson, 2018). Statistics Iceland also collects data on the media market, but its resources are also insufficient.

Only publicly traded companies are obligated to publish their business results, and the only media company on the stock market is the telecom and media company Sýn. It publishes its annual report online (the latest from 2019).

Private media companies are not obliged to publish their business results and refrain from doing so. However, all private companies are required to send

annual business reports to the Iceland Revenue and Customs, and transcripts have recently been made available online at no cost.

(C4) Journalism professionalism 2 POINTS

The share of higher education among journalists is increasing, but time and resources for professional journalism are on the retreat.

The education of journalists has greatly improved, and over two-thirds of Icelandic journalists have a university degree (Kolbeins, 2012); however, in an international context, this is not particularly high. Data from the Worlds of Journalism Study show that in 53 of the 67 analysed countries, 75 per cent or more of the journalists have university education. Furthermore, formal education in journalism is not nearly as common in the Icelandic media as in most countries. According to the Worlds of Journalism Study, only 25 per cent had specialised in journalism or communication studies. Out of the 67 countries that took part in the study in 2012, only in Bhutan (23%) and Japan (12%) are the percentages of journalists with journalism degrees lower than in Iceland (Worlds of Journalism Study, n.d.).

Staff shortages also seriously limit Icelandic journalists' possibilities for "high-class journalism". A study on the state of journalistic professionalism in Iceland showed that although oriented towards public service, journalists "are undermined by the realities of the media market" (Guðmundsson & Kristinsson 2019: 1700). Journalists are seldom specialists, which may make them more dependent on their sources (Ólafsson, 2020; Jóhannsdóttir & Ólafsson, 2018).

Our journalist interviewees said that resources were diminishing, and that could be even more exaggerated in Iceland than in larger states because most media outlets are very small. Journalists have little time and resources for investigative journalism, nor do they have much time to engage with further education to increase their professionalism as journalists.

(C5) Journalists' job security 1 POINT

Economic pressures mean that many experienced journalists have been laid off. Job security is low and short-term contracts common.

Journalists' job security has decreased in the last decade, particularly in the private media. It was pointed out by interviewees that there was a key shift in Iceland following the 2008 financial crisis. Many senior journalists were let go and younger journalists were hired to lower costs. Many journalists are on short-term contracts and there is very little job security overall.

In 2012, the average work experience of Icelandic journalists was twelve years (Kolbeins, 2012). Newer data isn't available, but it is unlikely that it has increased in the private news media since, as layoffs have been frequent, and many journalists quit for better pay and less stressful jobs (for example, in public relations) (Ólafsson, 2019). Moreover, freelance journalism in the news field is not a common practice in Iceland.

Journalists can easily be dismissed from their jobs. The Media Act does not contain any clauses protecting journalists from writing against their convictions, and neither are there any special privileges or financial compensations for journalists in case of dismissal or termination of contract that occur due to changes in ownership or the political orientation of the medium. The National Union of Icelandic Journalists has repeatedly called for more protection for journalists, but so far, this has been in vain.

(C6) Practice of access to information

2 POINTS

Public information is accessible by law, but not always in reality. Journalists often must spend time and effort to get access.

The Media Act (no. 38/2011) does not cover access to public information *per se*, except for touching upon the media's part in securing the public's right to information in Iceland (Parliament, 2011). The Information Act (no. 140/2012; see Parliament, 2012) and the Administrative Procedures Act (no. 37/1993; see Parliament, 1993) cover the media as well as the public's right to information, so it was not considered necessary to address it in the Media Act. Journalists have no special privileges on paper, but the media's important role in information gathering and publishing is acknowledged and upheld in laws.

The Information Act was first passed in 1996, but has been amended several times; most significantly in 2012 and 2019. From the start, this law was passed to secure as much right to public information as possible, with the then prime minister wording a strong message that its content was aimed at ensuring all exceptions were to be interpreted narrowly. This meant that all concessions for doubt would be interpreted in favour of the public. Soon, however, there was criticism, especially by the media, on how many exceptions there were in the law and of (some) governmental bodies being excessively protective of information. Even so, the law covered a long-awaited ground in many cases: when governmental departments, institutions, and publicly owned companies refused to hand out or give access to public information (documents and other information), inquirers could submit an appeal to the Information Ruling Committee (IRC) (Government of Iceland, n.d.).

Criticism continued over the next few years, but it was not until after the 2008 financial crisis that pressure was really put on authorities to amend the law

significantly. The media and people with financial interests began to demand access to documents pertaining to the crisis, but the law did not support this surge. And indeed, the left-wing government of 2009 to 2013 began work on a new law with significant increase of access and more beneficial procedures. There were four key changes: 1) the older strict demand to name exactly all documents sought after was eased; 2) the number and types of authorities the law covered was increased (adding government-owned companies, 51% and over); 3) provisions were made to shorten the time rulings took; and 4) there was a clause ordering state and municipal governmental bodies to start the construction of registers of all cases and documents, to be available online. The amendments came into effect in 2013. The 2019 changes added the legislative and the judiciary branches to the “pool” and an “advisor” position was founded to advise the public on procedures and public officials on how to deal with inquiries. Moreover, provisions were made to bring about speedier resolutions by the IRC (with a 150-day limit, as a stepping stone, down eventually to 90 days).

IRC reports have not always specifically stated when cases originate from the media or others (rulings are published with complainant nameless), but increasingly, this has been mentioned and covered in rulings and statistics. Reports show fluctuations in the number of complaints, and in recent years, overall rulings have varied from 21 (2008) up to 74 (2012), and there has been an increase in time that does not help attempts to shorten the time it takes IRC to rule on complaints.

The journalists interviewed stated that access to information had definitely improved in Iceland in recent years; there used to be more reluctance to hand over information, but now the law is much better and journalists can usually get the information they need. It was stated, however, that this could be a very long process, particularly if the IRC needs to be involved. There is sometimes reluctance to hand over information, so journalists sometimes need to spend time and effort to access it. In order to exercise the watchdog function, journalists need unrestricted access to public information. This access is certainly not “unrestricted” in Iceland, but the information law in most cases secures that journalists get important information.

(C7) The watchdog and the news media’s mission statement

2 POINTS

The watchdog function of media in Iceland has grown significantly in recent years, and some outlets and programmes have investigative journalism as their brand. Investigative journalism is, however, expensive, and media outlets are grappling with resource constraints.

For most of the last century, Icelandic media outlets consisted of small political party-owned or affiliated newspapers, on the one hand, and a heavily politically

monitored national broadcasting service, RÚV, on the other. There was basically no tradition of professional and politically impartial investigative journalism. This began to change in the 1970s and 1980s, when the professional watchdog role began to gain strength, the party mouthpieces started to disappear, and the political grip on RÚV subsided.

Investigative journalism has, to some extent, gained momentum in the media. Outlets like *Stundin* and *Kjarninn* consider investigative journalism to be their main objective. RÚV has a small team of investigative journalists, and its television programme *Kveikur* produces investigative reports and in-depth coverage on issues of public relevance. The investigative program *Kompás* (published online only at *visir.is*) also regularly produces in-depth coverage on powerholders and social matters that need immediate attention. After the 2008 economic crash, the Icelandic media produced powerful coverage on corruption and mismanagement, sometimes with different outlets joining hands or working with foreign media, such as with the *Panama Papers*. The National Union of Icelandic Journalists (NUIJ) has annually awarded investigative journalism (and other kinds of journalism) since 2003. The interviewees stated that the watchdog role of the media is very important, and it is a clearly a part of Icelandic journalists' identity. The momentum concerning investigative journalism is evident, but at the same time fraught with difficulties (see Indicator C9 – Watchdog function and financial resources).

(C8) Professional training

1 POINT

There are not many higher education opportunities in Iceland for journalists, and course attendance is low.

Compared with larger countries, there are not many higher education opportunities for journalists in Iceland. The NUIJ sometimes organises educational courses, often in cooperation with the University of Iceland and University of Akureyri and the Nordic Journalism Center (NJC), but attendance is often low. According to NUIJ's collective wage agreement with Confederation of Icelandic Enterprise, journalists are entitled to a two-month paid leave every five years for further education. No information is available on the extent to which that is used, but several journalists are known to have attended NJC courses during their leave.

The journalists interviewed had not attended any training recently, but mentioned that they knew that it was possible to apply for training courses and in some cases, to go abroad for this. Most said that they had not really thought about this recently, as there is very little time to plan these types of activities with so much going on in their daily work life.

(C9) Watchdog function and financial resources

2 POINTS

News media in Iceland lack resources to conduct quality in-depth reporting, and analysis on their daily reporting and investigative reporting is seriously hampered for lack of time and finance.

Investigations are expensive, and the media outlets are most often run with a loss. There are no official funds to apply for, and only very few journalists work at most of the outlets.

Both editors and journalists highlighted the fact that there were little resources available for in-depth or investigative reporting in Iceland. On a daily basis, investigative reporting is mostly based on ad hoc resources. Occasionally, editors ask a particular journalist to look into certain matters, and journalists can ask for time to work on a specific story, but this often means that the journalists end up spending considerable time working on the story in their own time. The Public Broadcasting Service RÚV was most often mentioned as an important exception. Overall, the consensus in the interviews was that there were far too little resources available at the newsrooms of the Icelandic media – and in particular, the private media – to produce quality in-depth and investigative reporting (Ólafsson, 2021b).

Conclusions

This is the first time Iceland has participated in the Media for Democracy Monitor project; therefore, the findings cannot be compared to previous results. It is, however, clear that the economic situation of the news media in Iceland has taken quite a downturn in the last decade, and the financial situation of private media organisations is of grave concern. There is a risk to media diversity, and news media's independence and role as a public watchdog and informer is also in danger. This has been acknowledged by the authorities but not yet followed up by action, except as a one-time support in response to the Covid-19 pandemic.

The news media is widely available throughout the country and can be considered affordable for most people. As a result, news consumption is wide and equal in an international comparison. Audience participation in news is, however, limited.

Competition is also limited in the small Icelandic media market, and four big media companies are dominant in all news media sectors. Media ownership concentration has slightly decreased in recent years, but is still considered very high.

The legacy news media houses have all established rules to guard their newsrooms from internal and external influences, and journalists claim they enjoy editorial independence and strictly deny any undue influence from owners,

advertisers, or other powerholders on their work. Ownership structures and the very precarious financial situation do, however, indicate that political and economic interests may still play a big role in some leading outlets.

On a positive side, and in spite of the above, it can be said that the watch-dog function of media in Iceland has grown significantly in recent years, and considerable investigative reporting has been carried out. Many examples of corruption and wrongdoing have been exposed.

Professional ethos has remained strong among Icelandic journalists, and that is reflected in the established ethical guidelines and professional norms. On an international level, proportionately, very few Icelandic journalists have a journalism degree, and further education opportunities are limited. Economic hardship has led to decreased job security in the last decade – particularly in the private media sector – and layoffs have been frequent and short-term contracts common. An increase in harassment and targeting of journalists observed in many countries is, however, not a major problem in Iceland. Overt threats and harassment of journalists are rare, and only happen occasionally in a mild and non-violent manner. Iceland ranks high on most international gender equality measurements, and in journalism, the employment conditions and pay among men and women journalists are mostly equal. However, women are still under-represented in decision-making positions in media companies. Journalists agree that gender equality in media content is important, but no formal rules apply except at the public broadcasting service.

The legal framework around freedom of expression and access to public information is generally considered adequate, though journalists complain it is often time consuming to get access. Information about media ownership is transparent and available online, but important data on the media market and its development is, however, often lacking. Systematic continuous monitoring and analysis of media content and quality is non-existent, and there is lack of organised media criticism.

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ITALY

A highly regulated system in search of equality

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Introduction

Italy is a Southern European country, a peninsula extending into the central Mediterranean Sea, northeast of Tunisia, with a population of 60,359,546 (30,974,780 female and 29,384,766 male). The most inhabited municipalities are Rome (2,856,133), Milan (1,378,689), Naples (959,188), and Turin (875,698) (ISTAT, 2020). The Italian population includes small clusters of German-, French-, and Slovene-Italians in the north alongside Albanian- and Greek-Italians in the south. Besides the official language, Italy recognises twelve linguistic communities, protected by the Constitutional Charter of 1948 and fully recognised by the approval of the 1999 *Norme per la Tutela delle Minoranze Linguistiche Storiche* [Norms on the Protection of Historical Linguistic Minorities].

Italy borders Austria, France, Holy See (Vatican City), San Marino, Slovenia, and Switzerland. Its geographical position in the Mediterranean has been strategic for centuries in relation to trade, political developments, and intercultural exchanges. Today, its position places the country on two of the most important migratory routes, the Mediterranean and the Balkan ones; and raises major geopolitical challenges in the country's international relations, particularly with Libya, Turkey, Egypt, and Lebanon.

¹ MDM 2021 IT coordinators

The State is organised in a centralised manner, with significant regional decentralisation resulting from the 2001 modification of the Title V of the Constitution, according to which the existing 20 regions have gained more autonomy and powers of intervention in specific policy areas.

The (current) 18th Italian legislation was inaugurated following the 2018 general elections, in which a coalition government emerged composed initially by the Five Star Movement and the League (centre-right), which has been substituted by the Democratic Party and other centre-left parties in 2019. The transition from a government in which the two major Italian “populist” forces were represented to a new coalition that excluded the right-wing party was far from painless, but Prime Minister Giuseppe Conte, an independent figure close to the Five Star Movement, guaranteed a certain degree of continuity until the political crisis of January 2021, following which a new cabinet was appointed. Led by former European Central Bank president Mario Draghi, the current government is composed of both politicians and technocrats and is supported by a large majority of the Italian parliament, including right, centre-right, and centre-left parties.

Politically, Italy is considered a representative democracy in the form of a parliamentary republic.

Freedom in the World 2021: status “free” (Score: 90/100). According to Freedom House’s annual study of political rights and civil liberties worldwide, the most critical indicator for Italy is the one related to the rule of law, due to concerns about judicial corruption, lengthy delays in judicial procedures, reports of excessive use of force by police, and discrimination and violence against LGBT people and migrants (Freedom House, 2021).

Liberal Democracy Index 2020: Italy is placed high in the Top 10–20% bracket – rank 21 of measured countries, fluctuating between 16 and 25 in the period 2016–2019 (Varieties of Democracy Institute, 2017, 2019, 2020, 2021).

Political Corruption Index 2019: ranks Italy amongst the bottom 20–30% of measured countries, notwithstanding the fact that corruption has decreased in the past ten years (Varieties of Democracy Institute, 2019).

EIU Democracy Index 2020: Based on five categories (electoral process and pluralism; the functioning of government; political participation; political culture; and civil liberties) and four types of regimes (from full democracy to authoritarian) – classifies Italy as a “flawed democracy”. The country ranks 29, up from 35 in 2019, the lowest score since 2006. This is explained by a high degree of popular discontent with traditional mainstream parties, which led to a fragmentation of the political scene, difficulties in government formation, and struggles for cabinets to remain stable and effective (The Economist Intelligence Unit, 2019, 2020).

2020 World Press Freedom Index: Italy ranks 41 out of 180 countries (gaining two positions since 2019). The report underlines some obstacles to full freedom of the

press in Italy such as the mafia and its acts of intimidations against journalists, with 20 professionals under full protection by the police because of threats at the time of writing, and verbal and physical attacks on journalists by members of fascists and far-right extremist groups (Reporters Without Borders, 2020).

Article 19's Expression Agenda has evaluated Italy on five criteria: civic space, transparency, digital freedoms, media freedoms, and protection. The overall picture is positive, especially in civic space and transparency, with the more critical situation being the digital dimension (Article 19, 2020). As highlighted by Freedom House's comprehensive study of Internet freedom around the globe – *Freedom on the Net* (Freedom House, 2020) – Italy, with a score of 75 out of 100, lags behind other European countries in terms of overall connectivity, despite several attempts made to close the digital divide.

According to the *Reuters Institute Digital News Report 2019*, Italian citizens get information mainly through traditional media. Newspaper readership continues to fall steadily, while television news viewership has been more stable than in other countries. Furthermore, trust in news is particularly low amongst the Italian public, at 40 per cent for news. This longstanding trend is mainly due to the partisan nature of Italian journalism and to the strong influence of political and business interests on news organisations.

The most recent Censis data (2020) confirm the crisis of the print media (read by 50.4% of the total population, mainly in the age group 65+) and substantial stability in television use (94.2% of the total population, with homogeneous distribution by age), and a significant increase in Internet use (79.3% of the population, mainly in age groups 14–29 and 30–44). According to the economic-statistical service of Agcom (2018c), the communications guarantee authority, 54.5 per cent of the population access information through algorithmic sources such as social network sites, search engines, news aggregators, and information portals, and 39.4 per cent through editorial sources such as websites and apps of newspapers, periodicals, national and local radio and television, and digital native newspapers.

As reported by the *Reuters Institute Digital News Report 2019*, after the 2018 general election, minor changes in the Italian media environment took place to reflect the new balance of power within Italian politics, while the print sector continued to weaken.

As far as the press is concerned, the sector has always been linked to political and cultural elites, and its mass diffusion has been somehow anticipated by that of television, which has been the basis of media consumption of Italians for many years, becoming, for the weaker social groups, a real single-medium culture. The effects of the historical absence of “pure publishers” (entrepreneurs active only in the publishing industry) and traits of more recent editorial concentration can be observed in the current ownership structure of the major print publications and radio and television companies.

The most read newspapers are *Corriere della Sera* (whose publisher, RCS MediaGroup S.p.A., is a 60% subsidiary of entrepreneur Urbano Cairo), *la Repubblica*, and *La Stampa* (both owned by Gedi, who also owns three of the major national radio stations – Radio DeeJay, Radio Capital, and Radio m2o – and whose majority shareholder, CIR, is a holding company active in the automotive and health sectors).

In the television sector, the historic duopoly between the radio and television public service Radiotelevisione Italiana (RAI)¹ and the main private group Fininvest² has been threatened over the past few years by the appearance of new players. These include a television channel owned by the Cairo Communication Group, La7, and a pay-TV platform published by the homonymous English company, Sky Italia. The ownership structure of the media system is at the basis of the “conflict of interests”, an issue which, with the political success of Silvio Berlusconi between 1994 and the first decade of the 2000s, constituted a worldwide-known legal and political case.

In 1997, an Autorità per le Garanzie nelle Comunicazioni (Agcom) [Communications Guarantee Authority] was established. Amongst its tasks are the monitoring of radio and television broadcasting, the protection of political and social pluralism, and the verification of compliance with the so-called *par condicio* [same opportunity] to all parties and movements in accessing media.

The *Reuters Institute Digital News Report* also provides a general overview of the current situation and recent developments. While broadcasters’ revenues have been relatively stable from 2013 to 2017, newspapers and magazines experienced a 21 per cent reduction during the same period. In terms of overall revenue share within the Italian communication system, the main players are the international broadcaster Comcast Corporation/Sky (15%), Berlusconi’s broadcasting group Fininvest/Mediaset (15%), and the public service broadcaster RAI (14%). Other relevant players are international platforms like Google (4%) and Facebook (3%), together with domestic players such as Cairo Communication, the publisher of the television channel La7, which also controls *Corriere della Sera* (4%), and Gedi, the publisher of *la Repubblica*, *La Stampa*, and several other local newspapers and radio stations (3%).

The online news market is dominated by legacy players. The websites with the widest online reach are those of established commercial television broadcasters (Mediaset’s *TgCom24* and *SkyTg24*), the main newspapers (*la Repubblica*, *Corriere della Sera*, and *Il Fatto Quotidiano*), and the main Italian news agency (Ansa). However, 2018 showed impressive results for the digital-born outlet *Fanpage*, an online newspaper owned by the Ciaopeople group and known for its investigative journalism vocation, which is currently among the top five online news players. CityNews, a local information publishing group based on the logic of participatory journalism that operates at a regional level, is also worth mentioning. Finally, in December 2018, Enrico Mentana, the editor of La7 television newscast, launched *Open*, a digital-born news outlet.

Gender equality

Gender equality should be considered as a core element in a country's democratic development. It relates to women's enjoyment of fundamental rights and freedoms, including the freedom to voice their concerns, and the possibility to participate in public life and access managerial and decision-making positions, so as to contribute to the country's governance.

According to the Gender Equality Index³ of the European Institute for Gender Equality (EIGE), with 63 out of 100 points, Italy ranks 14th in the EU. Between 2005 and 2017, Italy's score increased by 13.8 points, showing meaningful progress at a faster pace with respect to other EU members. Its rank has improved by twelve places since 2005, but its score remains 4.4 points lower than the EU average (67.4).

Violence against women is both a consequence and cause of persisting gender inequalities in the areas of work, health, finance, power, knowledge, and time. Italy recorded 76 women victims of intentional homicide by an intimate partner in 2016. The country does not provide data on women victims of intentional homicide by a family member. There were 747 registered women victims of human trafficking in 2016. Italy signed and ratified the Council of Europe's Convention on Preventing and Combating Violence against Women and Domestic Violence (Istanbul Convention) in September 2013.

Covid-19

When the Covid-19 pandemic hit outside Chinese territory in early 2020, Italy was the first country in Europe to impose several restrictions on the free circulation of people, schools, universities and economic and commercial activities.

During the so-called lockdown, which in some areas of the country started at the end of February and was partially lifted only at the beginning of June 2020,⁴ the total television audience increased considerably, both during the day (about +2 million users) and in prime time (about +4 million users). According to the Italian Institute of Statistics (ISTAT, 2020), in March and April, 53 per cent of people aged 18–34 and 50 per cent of people aged 35–54 watched television to a greater extent than in the previous period.

Newsstand sales decreased, although the Italian government let newsstands remain open even during the first phase of the pandemic. According to Comscore, Italian Internet users have considerably increased their visits to newspaper apps and websites, possibly more than other European users: during the first lockdown week, +140 per cent compared with a normal week before Covid-19, and during Easter week in April 2020, +90 per cent compared with a normal week before Covid-19.

Only radio listeners decreased during this period, given the considerable amount of Italians who have the habit of listening to the radio while driving their cars, during their daily commute to work, which was impossible during the lockdown period.

The average daily time spent online by every Internet user has increased remarkably, +3 per cent from February to March 2020, by tablet and smart-phone, and +16 per cent by computer, due to the shift online of classrooms (schools and universities) and working activities (smart work and *lavoro agile*). Even then, according to the March 2020 Audiweb report, about 25 per cent of the Italian population (two years or older) was offline in the average month.

Following the law decree 18/2020, the Italian Communications Guarantee Authority (Agcom) established four permanent working groups involving the main stakeholders, aimed at sharing proposals for managing priorities arising from the emergency. These working groups are specifically dedicated to 1) Electronic Communication Services and Consumers; 2) Postal Services; 3) Media Services; and 4) Online Platforms and Big Data. At the same time, Agcom has approved the following:

- a package of measures addressed to electronic communications networks and services providers aimed at coping with increases in the consumption of electronic communications services and of the traffic on the network, as well as at meeting the needs of different sectors, in particular the health sector;
- and a resolution containing provisions regarding the correctness of information about Covid-19. Agcom invited all audiovisual and radio media services to ensure correct and adequate information on the medical emergency and to provide verified information from authoritative sources. Also, video sharing platforms were asked to adopt measures to counter the spread of incorrect or not fact-checked news about Covid-19.⁵

Meanwhile, the Online Platforms and Big Data working group is focusing on the implementation of initiatives aimed at combatting online disinformation on medical and health issues related to Covid-19, through collaboration with online platforms themselves. Facebook has launched a project aimed at tackling disinformation on WhatsApp, in partnership with Facta, the new branch of the Italian fact-checker Pagella Politica.

Furthermore, Agcom publishes monthly special issues of its Online Disinformation Observatory specifically dedicated to Covid-19 and has set up a Data Science Task Force on online disinformation, in partnership with research institutes and academic institutions.

The Under-Secretary of State for Press and Publishing has launched a special Covid-19 Fake News Task Force, involving journalists, fact-checkers, scholars, and scientists. Following journalists' and (online) publishers' requests, law decree

34/2020 has extended the chance to get a tax credit for advertisers spending in print, radio, and television advertising spaces. It also introduced a specific tax credit for online publishers' IT expenses, and other measures affecting press distribution and newsstands.

In order to verify the impact of the emergency on the role of journalism and editorial routines, we conducted some follow-up interviews with selected leading media representatives. Particularly significant was the testimony of the editor-in-chief of *Tg1* (RAI), who highlighted four dimensions of the impact of Covid-19 on Italian news.

The first is related to the agenda-setting capacity of institutional actors and the response in terms of adaptation to media logic:

In terms of awareness, the media moved in sync with the overall perception of the phenomenon, which in turn was determined by the way institutional communication was handled by the government. They [the government] dictated the timing and generated the perception of the risks associated with the pandemic. Two antithetical tendencies emerged: on the one hand, there was a very strong demand for the restoration of journalistic mediation, all the more so in the face of what has been defined as “infodemic” [...] on the other hand, however, especially with regard to the specific nature of the television medium, distortions emerged linked to trends already in place before the virus: the logic of infotainment, cannibalisation of programming [...] In the first phase of the emergency it was rather difficult to distinguish journalistic content from infotainment. Then the pandemic made its way into the “light entertainment” programs – as on 23rd February 2020, when the Prime Minister, from the Civil Protection press office, connected with all the television broadcasts on air [...] all of them, even those that were not necessarily information or infotainment.

Between the need to refer to expert knowledge in times of emergency and the pervasiveness of media logic, a second element of interest was reported, related to the role of experts:

Journalism, at least in the first phase, had to rely heavily on the mediation by experts – epidemiologists, virologists [...]. The dynamic that accompanied the narration of the pandemic in the first phase was to identify a sort of consultant: each media outlet, each transmission chose one or two experts, and trusted their approach [...]. This situation produced a sort of loyalty to specific experts, and ways of creating attention to the solution of the problem, but it has also created a very strong distortion [...]. The scientists who were found to be the most credible were those visible on television [...] but we know that there are other parameters through which to assess the credibility of scientific approaches [other than those] of the logic of dichotomous opposition, of the opposition of a hypothesis “b” to a hypothesis “a”, which meets the requirement of controversial journalistic narrative.

The third dimension highlighted by the editor-in-chief of *Tg1* concerns the strengthening of measures to combat disinformation, which unfortunately seem to confirm a tendency towards formalism rather than actual behavioural change and actual impact on journalistic narrative:

RAI has set up an Observatory on Fake News in conjunction with the management of the emergency phase, equipped with a task force that has been a useful opportunity to accelerate an obligation of the Service Contract, which provides not only for the monitoring of fake news but promotes campaigns to raise awareness of television and radio audience on the risks of fake news. Honestly, I do not know what the Observatory has produced so far because nothing has been communicated to us [...] on the other hand, coordination between networks and newspapers is difficult even under normal conditions.

A short experiment of the integration of news programmes with citizens' participation also signals an attempt to open spaces for innovation in newsmaking:

As *Tg1* we have strengthened the social media management area [...] this has allowed us to receive more feedback than normal. Then we also used a quite interesting solution, always in the first phase of the pandemic: we invited viewers to send videos that portrayed their domestic life [...] in this way contributing to make that little piece of mediated public sphere domestically an element of the overall narration of the pandemic.

The overall picture remains unclear as the country moves into the “second wave” of the pandemic in 2021. The analysis shows that Italian journalism has to come to terms with a situation that openly challenged the logic of infotainment and, at the same time, with a renewed centrality of institutional communication. News media have been forced to accelerate processes linked to the so-called platform society, such as those of contrasting fake news and involving citizens, but until the end of 2020, no organic or sustained consequences were seen. Nevertheless, strategies and tactics adopted in the emergency remain as important innovations and may contribute to an innovation of daily practices and routines.

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Leading news media sample

Table 1 outlines the intended news media sample for the 2021 Media for Democracy Monitor (MDM).

Table 1 *Leading news media sample*

News outlet	Company	Owner / majority shareholder	Director
Tg1	RAI	Ministry of Economy and Finance	Giuseppe Carboni
Tg5	Mediaset	Fininvest S.p.A.	Clement Mimun
TgLa7	La7	RCS MediaGroup	Enrico Mentana
SkyTg24	Sky Italia		Giuseppe De Bellis
Corriere della Sera ^a	–	RCS MediaGroup	Luciano Fontana
la Repubblica	–	Gedi Gruppo Editoriale S.p.A.	Maurizio Molinari
Il Fatto Quotidiano	–	Società Editrice Editoriale Il Fatto S.p.A.	Peter Gomez

^aAt the time of writing (November 2020) the Italian team did not manage to carry out the planned interviews with one editor-in-chief and one journalist from the *Corriere della Sera* and *FanPage*. This was partly due to the Covid-19 crisis that emerged at the time when these interviews were planned.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 2 POINTS

A wide and stable variety of news media is available to Italian citizens. Some parts of the country are not served by local or regional news media. The distribution of news media varies along different media and news outlet types.

The public service company RAI is considered the most important source of local news for the inhabitants of 14 regions out of 20, mainly thanks to the regional newscasts coordinated by the news organisation TgR. According to Agcom's elaboration on Auditel data, the average share of TgR's evening programme – on air from 19:30 to 20:00 on RAI3 – was 12.5 per cent in September 2019. In the other six regions, the most important sources of local news are the media companies Monrif, Gruppo editoriale (Gedi), and Caltagirone, Tosinvest, who are also relevant at the national level.

Looking at specific regions, and considering the nationwide news outlets established in the different regions including digital news, Lombardia and Lazio stand out for the number of news media companies. If we focus instead on local news outlets, Sicily is the region where the largest quota of news media outlets is available, followed by Puglia and Lombardia.

In general, we can find local radio stations and online news outlets in every region, yet the same cannot be said for local newspapers. Furthermore, journalists working for local news outlets are more likely to be threatened, as their weaker economic conditions exacerbate their vulnerability (see Indicator F11 – Protection of journalists against (online) harassment). Likewise small local companies, already hit by the 2010 crisis, are more fragile when facing threats, and often unable to bear the costs of proceedings resulting from legal actions (Agcom, 2017).

Regarding print media, looking at the data provided by Accertamenti Diffusione Stampa – the company certifying and releasing the data concerning circulation and distribution of dailies and magazines in Italy – the availability of the most important national newspapers is different in each region. If we can count more than 50 national or multi-regional newspapers spread in Lazio and Lombardia, in Molise only 19 newspapers are circulated, and in none of the southern regions can we find more than 24 newspapers. Several of them have been closed or acquired by other publishers, effectively reducing the number of local news media outlets available in some regions, so that in Valle d'Aosta and Calabria, no local newspaper is available.⁶

When it comes to radio and television, according to article 15.3 of the Contratto di Servizio [Service Contract] 2018–2022 between the Italian Ministry of Economic Development and RAI (2018), the public service company is required to cover at least 95 per cent of the Italian population. According to RAI Way – the company that owns the RAI radio and television broadcasting network and is in charge of managing these broadcasting systems – 99 per cent of the Italian population is covered by the RAI digital terrestrial television signal. Furthermore, according to article 19.4 of the same contract, RAI should also guarantee free access to all the programmes in simulcast by satellite network. Thanks to Tivù, a consortium between RAI and private broadcasters, the areas not covered by digital terrestrial television signal are covered by the satellite network signal. The private broadcast Tivù guarantees adequate coverage by satellite as well.

The other network providers, EiTowers (linked to Mediaset) and Persidera (hosting Discovery and Gedi television channels), are not obliged to provide data on population coverage, but on their websites, every citizen can find information about the coverage of the area in which they live.

The main Italian broadcasters have developed multiplatform delivery systems, making their programmes also available on the web, through specific apps, for

instance RAIPlay (the app developed by the public service media company RAI). However, according to Internet audience measurement systems, these apps and web portals are not widely used for news consumption.

According to Agcom, there were 17.38 million broadband and ultra-broadband fixed lines in Italy in September 2019. 37.5 per cent of these lines were faster than or equal to 30 Mbps. Moreover, there were 54.6 million SIM cards, generating 3,023 petabytes of mobile data traffic at the same date. As reported by Audiweb, the Joint Industry Committee detecting and distributing Internet audience data in Italy, in November 2019, the total Italian monthly digital audience connected by personal computer, smartphone, or tablet was 41.6 million people. They spent an average of 118 hours and 20 minutes online per month. The total Italian daily digital audience was 34 million people. On an average day, 30.3 million Italians have used their smartphone to connect for over four hours per person.

Search engines, video platforms, and social networks reach 96.5 per cent of monthly users (40.1 million), while general interest portals are used by 37 million users (89.1% of monthly users). Current events and global news websites reach 36.1 million users (86.8% of monthly users), more than e-commerce websites (35.2 million, 84.7% of monthly users), instant messaging (35.1 million), and e-mail (33.9 million).

Francesco Marrazzo

(F2) Patterns of news media use (consumption of news) 2 POINTS

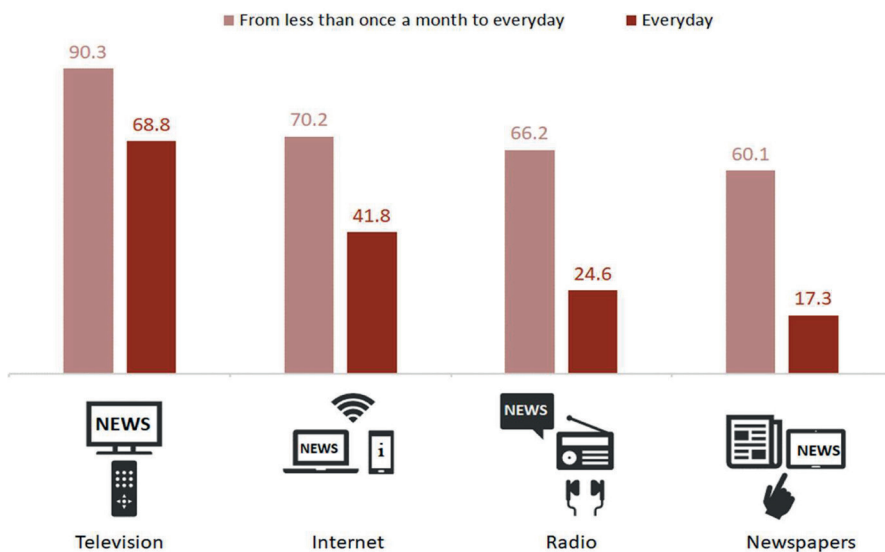
Almost the entire Italian population accesses the media for information, and over 80 per cent of Italian citizens access information regularly. Only 5 per cent of Italians are not informed at all. Older people tend to consume only one news-media type, while younger people are more prone to searching for information from different sources or media.

According to Agcom (2018d) (see Figure 1), almost the entire population accesses media to be informed, and over 80 per cent of citizens access information daily. Only 5 per cent of Italians are not informed at all, at least not through mass media.

Specific factors lead to the division of the population into groups with different kinds of information access, leading to the risk of media exclusion or marginalisation of certain segments of the population. In particular, low education and poor economic conditions appear to define the perimeter of social groups that risk marginalisation in the informational ecosystem.

The information diet of Italians is characterised by marked cross-media consumption, with more than three quarters of the Italian population consuming media this way.

Figure 1 Media usage to acquire information, 2017 (per cent population)



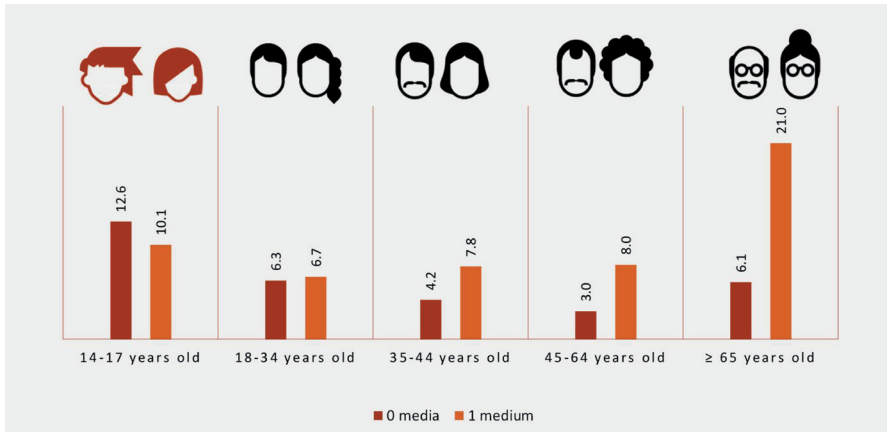
Source: Graph from Agcom, 2018c: 14

Television is confirmed as the medium with the greatest informative value, both in terms of frequency of access for information purposes and for perceived importance and reliability. At the same time, the Internet is considered an important source of news, yet the perceived reliability of online information sources remains, on average, lower than that of traditional sources.

The ranking and frequency of access to media used to obtain information do not change when it comes to political news, with television and the Internet remaining the privileged sources. However, with regard to political information, citizens have a narrower consumption habit, which is less cross-media and hybrid compared with general information consumption.

The age group of users has an impact on whether they have a single-medium informative diet. Compared to other age groups (see Figure 2), the class of individuals aged 14–17 registers the largest share of subjects who do not get informed, at 12.6 per cent, compared with 5 per cent for the total population. An additional share of minors, about 10 per cent, accesses only one medium to get informed. This value is higher than that of all the other age groups, with the exception of people over 65, most of which, according to Audiweb data do not access the Internet.

Figure 2 News consumption by age groups, 2017 (per cent)



Source: Graph from Agcom, 2018c: 34

Considering audience data and studies released during the Covid-19 pandemic, young people and especially minors accessed television and online newspapers more than ever during the total lockdown period (Gevers, 2020; ViacomCBS & MTV, 2020). Hence, we can probably say that older people are more likely to maintain a single-medium informative diet, compared with younger subjects.

When considering news outlets' audiences, according to Agcom's elaborations on Auditel data, the RAI first channel *Tg1* is still the most important evening newscast in Italy.⁷ According to Audipress (2020), there were 15.759 million newspaper readers on an average day in the last trimester of 2019, with sports newspapers representing one-fifth of total reads. The four most-important quality newspapers (*Corriere della Sera*, *la Repubblica*, *La Stampa*, and *QN-Il Resto del Carlino*) are read more than a million times on an average day (almost a third of the total quality newspapers reads). Looking at news websites, according to Comscore in November 2019, Citynews was the leading publisher (a syndication including digital native news outlets active in the most important Italian cities, e.g., *PalermoToday*, *QuiComo*, *PadovaOggi*, *IlPescara*, *CasertaNews*, etc.), thanks to an online monthly audience of 26 million, followed by *Fanpage* (about 20 million) and *TgCom24* (about 19 million). Looking at newspapers websites, *Quotidiano.net* (*Il Resto del Carlino*, *Il Giorno* e *La Nazione*), *FattoQuotidiano.it* (that is a news outlet different from the print newspaper *Il Fatto Quotidiano*, with a different managing director), and *Corriere della Sera* (which has recently introduced a metered paywall system on its website) are the best performers (each with more than 17 million monthly users).

Francesco Marrazzo

(F3) Diversity of news sources

1 POINT

Within the Italian news media system, approximately seven out of ten news stories are based on just one source. Government sources enjoy considerable importance, and personal contacts are one of the most-used sources. News agencies and press releases are also referred to. No systematic data is available concerning the use of press releases.

The data available for Italy offer some insights on the distinction between elite and institutional sources (e.g., politicians, officials, governments), civil society sources (labour unions, environmental groups), and non-elite sources, and prospective ones that do not possess the authority to attract media attention (Kleemans et al., 2017; Manning, 2001). A comparative content analysis involving eleven countries showed that in Italy, approximately seven of ten news stories made use of just one source. With regard to official sources in the news, “Italy has the single most dramatic result”, and government sources enjoy considerable attention and are regularly over-represented (Tiffen et al., 2014: 383).

Agcom periodically retrieves data from journalists, revealing that personal contacts are still the most common source of information. As Cornia (2014: 54) puts it, journalism in Italy is highly opinionated because it usually reports the opinions of political sources. The use of personal contacts as sources is the practice that most embeds political parallelism (Mancini, 1999). As Esser and Umbricht (2013) affirm, the importance of personal contacts in Italian journalism is also due to the polarised multi-party system that provides access to a broader range of voices in the political debate.

Additionally, Agcom shows that the use of news agencies is a prerogative of the richest newsrooms, generally digital media linked to traditional media outlets. Italy presents an important and well-rooted national news agency, Ansa, which is enlarging its audience in the digital environment.

Press releases are a different matter. There are just a few studies on Italian journalists’ uses of press releases, but according to Agcom’s data, nearly two-thirds of journalists use press releases as one of their main sources for producing news. This is the case for magazines in particular, whose news is more specialised (e.g., fashion, sports, electronics, software) and where there is a more direct link between journalists and public relations professionals.

However, recent studies of the local online journalism environment (see Splendore, 2017c) show that the chances of minor (in terms of power and influence), non-elite, and non-professionalised sources becoming accessible and reliable are greater in digital than in traditional media environments.

Interviews with newsroom members of leading media confirm the importance of news agencies. “For television news, agencies are crucial, we are around two-

thirds of all the material. In foreign news, not having correspondents, almost everything comes from the agencies”, explains newsroom member of *TgLa7*. “Agencies are fundamental, they represent a large part of the work we do”, confirms newsroom editor from *SkyT24*. With regard to the specific domain of politics, however, it is the personal contacts that are predominant, compared with the agencies or other types of sources. “Talking about politics [agencies] count a little less, that is mainly made up of personal sources”, the newsroom member of *TgLa7* explains again. This position is confirmed by his colleague at *Tg1*: “We produce the Italian parliamentary video material in autonomous way”. Another interesting hint on the diversity of sources that can be used comes from *Tg1*. Being a public service provider, it is a member of the European Network of Public Broadcasters (EBU), hence it can rely on “forms of partnership and collaboration between public services and TV that adhere to the network. The exchange of images and films is absolutely horizontal and symmetrical”.

Sergio Splendore & Mauro Bomba

(F4) Internal rules for practice of newsroom democracy 2 POINTS

National and internal rules are in place to guarantee equality, impartiality, objectivity, and internal democratic practices in the newsroom. By law, all news media with at least ten journalists are expected to have a newsroom council (and a trustee for smaller companies). The publisher of a news organisation appoints editors-in-chief who then nominate managing editors.

When effective rules exist to guarantee internal democratic practices, democratic freedom is more likely to be safeguarded, and democracy promoted. In the Italian news media sector, the requirement of impartiality and objectivity is regulated by the *Testo Unico dei Doveri del Giornalista* [Consolidated Text of the Journalist’s Duties]. Approved in January 2016, it stems from the need to harmonise previous documents dealing with deontological issues. Several principles derive from previous laws. For example, the professional law 69/1963, which regulates journalistic practices in Italy, establishing the obligation for journalists to “respect the substantive truth of the facts observed” (Republic of Italy, 1963: art. 2). Inaccurate information must be corrected and violation of those rules entails disciplinary sanctions. This is the case, for example, when journalists are guilty of facts that do not conform to their professional dignity or facts that compromise the reputation of the *Ordine dei Giornalisti* [Order of Journalists] (Republic of Italy, 1963: art. 48).

For the public broadcasting service RAI, rules concerning pluralism, completeness, independence, and impartiality of information are prescribed by state laws and controlled by Agcom, and sanctions are prescribed.

A recent study involving Italian journalists from different news organisations⁸ has shown the value of several principles linked to impartiality. For example, concerning professional role orientations, the journalists interviewed found it most important to report “things as they are” and “to be a detached observer” (Spendore, 2016).

As far as newsroom councils are concerned, all news media outlets with at least ten journalists must have a council, even if their function is sometimes limited to formal consultations or providing preliminary opinions. If the number of professional journalists is under ten, a trustee is to be put in place to perform the same tasks.

According to the Contratto Nazionale di Lavoro Giornalistico [National Journalistic Employment Contract] (FIEG & FNSI, 2014: art. 6), the appointment of the editor-in-chief is the responsibility of the publisher, who communicates the decision to the newsroom council at least 24 hours before its establishment. Furthermore, the editor-in-chief appoints *caporedattori* [managing editors] as well as the *vicecaporedattore* [deputy managing editor]. Among the news media considered in the present study, an exception is represented by the designation of the editor-in-chief of the public newscast *Tg1*, who is appointed by the management board of the public service broadcaster RAI. The board is composed of seven members, four elected by the Parliament, two by the government, while the seventh one is chosen by RAI’s employees. It is important to note that the configuration of RAI’s management board is expected to:

[To] facilitate the presence of both sexes and an adequate balance between members, characterised by high professionalism and proven experience in the legal, financial, industrial and cultural fields, as well as taking into account the authoritativeness required by the appointment, and the absence of conflicts of interest or ownership of positions in competing companies. (RAI, 2016: art. 21)

Apart from this statement on the gender balance to be ensured in the composition of RAI’s management board, there are no specific rules to support the careers of female journalists and their access to managerial positions. Finally, there is no system to monitor the presence and participation of women in decision-making at all levels.

Rossella Rega

(F5) Company rules against *internal* influence on
newsroom/editorial staff

2 POINTS

Management units, sales departments, and newsrooms are formally separated, and the National Journalistic Employment Contract states that the powers of the editor-in-chief “are determined by agreements stipulated between the publisher and the editor-in-chief”, who is responsible for elaborating the editorial line with a degree of autonomy. There are nevertheless (rare) situations where pressure is exercised by owners or sponsors.

The analysis of the degree of independence of an editorial office from ownership, management, and advertising agencies should start from the Contratto Nazionale di Lavoro Giornalistico [National Journalistic Employment Contract] (published in 2009 and then updated in 2013 and 2016; see also the Collective Agreement for the Regulation of Employment Relationships of Journalistic Nature in the Periodicals of Information Distributed Locally, in National Non-Profit Newspapers, and in Mainly Local Online Newspapers, 2018–2020).

Regarding ownership, the National Contract states that the editor-in-chief’s powers “are determined by agreements to be stipulated between the publisher and the editor-in-chief” (FIEG & FNSI, 2014: art. 6). The publisher communicates these agreements “with particular reference to political guidance, organisation and development [of the publication]” to the editorial body, “together with the appointment of the editor-in-chief” (FIEG & FNSI, 2014: art. 6). Therefore, the role of the publisher formally ends with the nomination of the editor-in-chief and the approval of the editorial plan. As stated by the editor-in-chief of *SkyTg24*, “there is an editorial line that is mediated by the editor, which he/she interprets and translates for the editorial staff [...]. There is no direct contact with the publisher”. A position confirmed for the *RAI Tg1*: “There is no direct conditioning of the publisher in editorial choices”. However, the indication of an editorial plan is not always transparent, as is the case of *TgLa7*: “Publisher and director do not have this approach, they have never submitted an editorial plan even if the contract provides for it. No one has ever put him on notice because he does his work well”.

The National Contract does not contain explicit references to the management of an editorial company and its relations with the editorial staff, hence diverse situations emerge. The ownership structure of the leading media selected for the 2021 MDM study is the following:

- the public radio and television service (*Tg1*) have company management by political appointment (RAI management boards);
- the management of commercial television depends on the ownership (RTI S.p.A. for *Tg5*; Cairo Communications for *TgLa7*; Sky Italia S.r.l. for *SkyTg24*), creating a situation of coexistence. Other large publishing

groups like Cairo Communications for *Corriere della Sera* and Gedi for *la Repubblica* operate similarly;

- and the cases of *Fanpage* and of *Il Fatto Quotidiano*, published by Società Editoriale Il Fatto (SEIF, a joint-stock company without a controlling shareholder), are different.

Finally, the independence of a newspaper from the pressure of advertisers is formally guaranteed by the separation of functions between publishing companies and advertising agents. Respondents tend to exclude forms of conditioning “No interference, no boycott”, the journalist from *TgLa7* explains. “There have never been successful cases of boycott intervention”, says the editor-in-chief of *SkyTg24*, who however admits the possibility of pressure: “Some company or some political subject complained. The only thing we did was to see if what we said or did was true and if there was accuracy in the work”. Nevertheless, journalists are not always completely free from interference, even if it happens more often at the corporate level than within the editorial staff. Newsroom members of *Tg1* say: “Some time ago, I remember that a well-known pasta brand complained about one of our pieces. I do not remember if there were any repercussions. They complained to the company, not to journalists”. Prevention rather than cure is an approach that the editor-in-chief of *Tg1* says applies to the whole Italian information sector: “Can those that receive important advertising from companies afford the luxury of attacking these companies head-on? It doesn’t mean not to give the news, but to renounce forms of aggression or speculation in advance”.

This is, however, not an attitude which can be applicable to all. In the case of *Il Fatto Quotidiano* newspaper: “We don’t have a lot of advertisements precisely because we touch a series of realities that then react by not considering us for ads”. The editor-in-chief talks about some cases of cancelled advertisements:

There have been cases of boycotts. We did an investigation on hazelnuts, it means touching Ferrero [the company that produces Nutella]. Another case is the one concerning ENI [national company for energy production] and instances of corruption in Nigeria. They’ve taken away advertisement from us in some cases.

As for the representation of journalists, this is guaranteed by the establishment of the *comitato di redazione* [editorial board] (FIEG & FNSI, 2014: art. 34).

Recently, some important protests against the influence of management in editorial choices have emerged from editorial boards. An example is in the strike by the editorial staff of *la Repubblica* on 24 April 2020, who stopped the newspaper both at newsstands and on the web to protest the decision of the Gedi Group management board to replace the editor-in-chief Carlo Verdelli during the Covid-19 emergency, and on the very day that had been indicated

as “date of the death of the director Verdelli” by an anonymous person who had threatened him in previous months.

Christian Ruggiero & Mauro Bomba

(F6) Company rules against external influence on
newsroom/editorial staff

1 POINT

The Department of Information and Publishing of the Presidency of the Italian Council supports, through direct contributions, the editorial activity of newspapers and periodicals. Politics remains the main “external” factor influencing the quality of the journalistic product. Moreover, Italian newsrooms depend on a few large advertisers or sponsors. In this respect, legal provisions are in place to guarantee editorial independence, but the boundaries between information and advertising often tend to blur.

The Department of Information and Publishing of the Presidency of the Council (Italian Prime Minister’s Office) supports, through direct contributions, the editorial activity of newspapers and periodicals in accordance with the principle of pluralism of information, with particular attention to local publishing and to the digitisation of the publishing market. Until 2017, the same department also gave direct contributions for publications by political parties, political movements, and trade unions. This possibility was lifted by the legislative decree 70/2017.

Politics remains the main external factor influencing the quality of the journalistic product: a widespread tendency at the European level, but a peculiar characteristic in the Italian case (Hallin & Mancini, 2004; Mediaact, 2014). This factor is relevant especially for RAI and *Tg1* which, being public service providers, have a direct connection with politics:

This company since it was born has a peculiar characteristic: it responds to politics, there is a parliamentary commission that gives us an orientation that must be translated into an editorial plan. The director is chosen on the basis of his or her ability to interpret that editorial plan.

In some cases, the influence of politics also occurs more directly through pressure on in-house companies: “It happened that politics tried – the previous government did so explicitly – to tell the participants not to give advertisement to our newspapers”, the editor-in-chief of *la Repubblica* states.

The National Contract for Journalistic Work mentions the separation of functions between publishing companies and advertising agents, stating that “advertising messages must be clearly identifiable as such and therefore distinct, also through a specific indication, from journalistic texts” (FIEG & FNSI, 2014: art. 44). “The advertising agency is internal, but I don’t know what they look like”, explains a *TgLa7* newsroom member. No relationship with the adver-

tising dealership”, confirms *SkyTg24* editor-in-chief. There are also forms of branded content that link the work of the editorial staff and advertising agency. According to the editor-in-chief of *la Repubblica*:

In the digital world, branded content is becoming strata for which in a transparent way there are specials that are sponsored. That is, journalistic content that we produce in total independence, but the container is sponsored. We declare it to the reader.

Hence, special attention is given to reporting the presence of advertising content to readers, a principle also regulated by law (FIEG & FNSI, 2014: art. 44).

The jurisprudence on the mixing and merging of advertising and information goes back to 1986 and has evolved over the years in an attempt to regulate forms of “editorial advertising” (legislative decree 74; see Republic of Italy, 1992) and to contrast those of “hidden advertising” (law 223; see Republic of Italy, 1990). However, despite the obligation to properly report advertisements, the boundaries between information and advertising often tend to blur. This is evident in recent cases when complaints have been raised within the editorial offices themselves. For instance, on 5 November 2019, *Corriere della Sera* hosted a dedicated article on the new calendar realised by *For Men Magazine*. Since this magazine belongs to the Cairo group that also owns *Corriere della Sera*, it was a sign of proprietary interference in editorial work. The editorial board of the outlet sent an open letter to the editor Lucio Fontana:

This morning many colleagues have reported their discomfort in reading the sidebar article on page 23 on the calendar of *For Men*. We understand the need of our editor to publicise the initiative of one of his monthly magazines, but the choice to dedicate an article on the pages of the Italian chronicles with two photos, quotes, names, and details on the sponsors who have paid, seemed out of place to many, and unfortunately not only inside the newsroom.

The relationship between heavy advertising and media coverage emerged as particularly evident in the work of Gambaro and Puglisi (2010). The two researchers implemented a survey, carried out on six different Italian newspapers and thirteen Italian companies in the period from 2006 to 2007. The research showed that the number of articles dedicated to various companies was related to the number of ads purchased in a given newspaper by a given company. According to the authors, an increase in advertising investment of EUR 50,000 per month led to an increase of at least 13 articles dedicated to the investing company per month.

Christian Ruggiero & Mauro Bomba

(F7) Procedures on news selection and news processing 1 POINT

Italian journalism does not have procedures for news selection, nor media accountability measures. There is almost an overabundance of codes of ethics, but these codes are not compulsory, nor widely respected and, when norms are violated, there are no strict sanctions. The Worlds of Journalism Study shows that Italian journalists perceive having little autonomy in deciding which topics to work on and how to frame their news.

Italian journalism does not show a great deal of transparency (Mazzoleni & Splendore, 2011; Splendore, 2017b) and does not include specific procedures for news selection or accountability instruments. For instance, the introduction of press councils or newspapers' ombudspersons has hardly been on the agenda of domestic media players, and only two ombudsperson initiatives have been put in place. *Il Messaggero*, Rome's most important daily, initiated the first in 1986, and *la Repubblica* appointed a prominent journalist as ombudsman, Piero Ottone, former editor of *Corriere della Sera*. Both efforts, prompted by the wish to imitate foreign experiences, did not last long, because of a scarcity of contributions from the readers, but also because the ombudsperson was (and is) generally perceived as an odd institution in the Italian political and cultural context (Mazzoleni & Splendore, 2011: 91).

There is an overabundance of codes of ethics in Italy, concerning topics like minors and immigration. However, those codes are not compulsory or widely respected (Brinkmann et al., 2017) and, when violated, there are no strict sanctions on journalists. The opacity in the use of codes of ethics implies that it is very difficult to evaluate the scope of newsrooms' internal debates. Research based on legacy newsrooms (Splendore, 2013, 2017a; Splendore & Rega, 2017) and our interviews with journalists show that the most established newsrooms especially do not leave much space for debate. The Worlds of Journalism Study shows that Italian journalists perceive having little autonomy in deciding which topics to work on and which frames to use for their news.

This scenario seems to be largely confirmed by the interviews conducted with newsroom members. The clearest indications on the responsibility for the choice of the news come from *TgLa7*:

There are editorial meetings to set the schedule for the main editions, between the editor or a management delegate and the individual newsroom members. The editor in charge lists a number of priorities and opens a debate. There is an axiological evaluation and the schedule is built. We must always pay attention to the timing, according to the editions. The 20:00 edition is in the hands of the editor, he chooses the themes and times.

A more political reading comes from the *Tg1* newsroom member:

If the institutions speak, nine times out of ten this becomes a piece. If the oppositions speak there will be the piece on the opposition. If there is a theme

there will be a dedicated piece. Then institutional politics, the newscasts live on institutional politics.

Something that seems to be totally missing in the Italian landscape is a procedure concerning news originating in social media. The question is particularly important when statements are diffused by political leaders through social media. *Tg1* newsroom members declare:

We always try to pay attention to the type of social profile, whether it is official or not. Most of the time it is the party who reports the post or tweet or video of a politician. Sometimes, for example, when a leader of a right-wing party, in order not to get infected with Covid-19, invites us to do the “Roman greeting” [form of salutation with the right arm up, dating back to fascist period], you wonder if it’s true. In that case, you check with the person concerned, with the press office or by calling [them] directly.

TgLa7 newsroom member raises the issue in broader terms, calling into question the issue of disintermediation:

Politicians, company owners, stakeholders, anyone who has an interest in giving their own version of the facts that should be mediated, but this does not happen. The question is: how is a statement about Salvini’s social media exposure, or Renzi or anyone else, going to be in the news? Without having a chance to ask a question... in my opinion, yes, but only if that statement is relevant, if it’s the news. If it’s a normal controversy, we can do without... But it’s a bad habit.

Sergio Splendore & Mauro Bomba

(F8) Rules and practices on internal gender equality 1 POINT

Although the overall situation of gender equality in the country has improved over the past 15 years, the reality of journalism in Italy shows that gender inequalities are still widely present in the sector, and there is still a lack of awareness amongst professionals. Patterns of inequality persist in women’s participation in news reporting, job guarantees, pay gaps, and glass ceiling barriers to career advancement.

Indicators for the practice of gender equality in Italy have improved over the past 15 years, but inequalities are still widely present in the media sector, and this seems to be a non-issue in most newsrooms, as well as in media governance. According to Paola Dalle Molle (committee for Equal Opportunities of the Order of Journalists) and Fabiana Martini (council member of Assostampa), there have recently been slow but evident improvements in some areas. The first woman ever was elected vice-president of the Order of Journalists council in 2017, and an Equality Committee was appointed by the same Order in

November 2019, while Federazione Nazionale Stampa Italiana (FNSI) [National Federation of the Italian Press] has had a gender committee since the late 1990s. Notwithstanding, the overall situation in the profession still appears highly problematic at different levels.

The number of women working in the sector has grown over the years, as a result of the increasing number of women enrolled in communication and journalism courses, where they account for more than half of tertiary-level graduates for media-related careers (EIGE, 2013). But adequate attention is not given, in academic education as well as in vocational training, to aspects pertaining the specific conditions and needs of women and men as both subjects in the news and newsmakers or media managers (French et al., 2019).

The Agcom Journalism Observatory indicates that women represent 41.6 per cent of employed journalists (Agcom, 2017). According to the latest survey by the Order of Journalists, out of the 100,000 journalists in the country, women aged below 35 represent 46 per cent, aged 35–64 compose 43 per cent, and 64+ drops to 20.11 per cent. Meaningful changes have characterised the profession over three decades, yet different patterns of inequality persist in news topic addressed by women professionals (women still tend to report about society and culture, or health and legal issues, but not about the “hard news” such as politics and economy; a phenomenon referred to as “horizontal segregation”), as well as in job guarantees, pay gaps, and informal barriers to career advancement.

In a context where eight of ten journalists are freelance, with little protection and very low wages, women most easily fall into a specific category named *precarie* (precarious jobs, grammatically articulated in the feminine precisely because this emerges as a “gendered issue” – see also Indicator C5 – Journalists’ job security), with implications in terms of limited guarantees and available financial resources, limited turnover in the newsroom, but also fostering the emergence of self-sustained journalism models (Agcom, 2017). The average annual salary for women is EUR 52,081, versus EUR 66,611 for men. The average gap is above 19 per cent, but big differences are found in top and senior roles, where the average salary is around EUR 82,000 for men, but EUR 75,000 for women (INPGI, 2015).

Shortcomings are also evident in relation to the number of female journalists who make the news by signing articles, particularly those working in the print media, and in relation to the news topics addressed by women and men journalists, with political and economic news mostly reported by men (Azzalini & Padovani, 2016).

Unequal are also organisational cultures, accounting for the limited presence of women in decision-making positions in news companies as chief executive officers and members of the board, as well as at operational levels. According to the data collected for the EIGE (2013) report *Advancing gender equality*

in decision-making in media organisations, in a number of selected national media, across all management levels, women constituted around one-third of senior staff placed in decision-making positions. However, only 16 per cent of women were found in top-level positions (EIGE, 2013). None of the leading media outlets selected for the MDM 2021 study is led by a woman. Although public service companies, in general, comply more fully than private organisations with national provisions for gender equality, recent developments in the Italian public service RAI signal a persistent problematic unequal reality.

Furthermore, the EIGE (2013) study showed that no single woman was a member of the board of the Italian independent media regulator Agcom in 2012 (while the average female representation amongst the 213 board member positions across the EU was 31%). Today, the commissioners of Agcom are all men, except for Elisa Giomi, who was appointed in 2019 following public calls for gender inclusiveness in the management of public authorities.

Finally, looking at gender participation in leading positions in the various entities that represent the profession, only the Istituto Nazionale di Previdenza dei Giornalisti Italiani [National Welfare Institute of Italian Journalists] pension fund is currently governed by a woman. In 2017, the first woman ever was elected vice-director of the Order of Journalists (Elisabetta Cosci), two out of twenty Regional Order of Journalists are led by women, and there are three women out of eight members in the FNSI secretariat.

Considering the legal framework, codes of conduct, and good practices, no specific study has been conducted on the extent to which gender mainstreaming has been adopted in policies for the media sector, across levels, platforms, and companies, but little normative provisions have been put in place to address inequalities. The national legal framework for the media, law 112/2004, does not include any specific reference to gender equality or gender mainstreaming. Agcom has issued guidelines related to the respect of human dignity and non-discrimination (European Parliament and Council, 2016) and recent Agcom decisions deal with fair representation of the image of women in information and entertainment programmes, but do not include specific indicators (Agcom decisions 442/17/CONS & 157/19/CONS). Relevant but widely disregarded is the general Codice Nazionale per le Pari Opportunità [National Code for Equal Opportunities] (Republic of Italy, 2006) that specifically calls for “positive actions in the audiovisual sector”, stating that the public service licenced entity should promote actions to eliminate any condition of disparity (European Union, 2006: art. 49). Another development worth mentioning is the 2017 national Contratto di Servizio [Service Contract] that licences the RAI, which establishes the principle of equal opportunities in public media operations and prescribes regular monitoring activities. As of 2020, RAI seems to be the only media outlet that has adopted a specific gender equality policy alongside a policy to prevent and sanction gender-based harassment in the newsroom.

What emerged from the interviews conducted with editors-in-chief and journalists in the leading media is a prevailing gender-unaware attitude and often gender blindness (“Let me think... How many men and women do we have here in the newsroom? No, I don’t think we have problems in this respect...”). Interviews have also highlighted a diffused aggressive attitude within the newsrooms towards women professionals who are vocal and speak out on social media. The combination of a lack of awareness and unsupportive attitude within media outlets becomes particularly problematic (as discussed below and in other indicators) when there is a need to acknowledge and address instances of abuse and violence against women journalists, both offline and online.

Equal opportunities commissions are now a feature of media unions, while a number of civic networks are also active in conducting advocacy, such as *Pari o Dispare* [Even or Odd], the Observatory on Gender Discrimination, *Se Non Ora Quando* [If Not Now, When], a movement which attempts to improve the social position of women in Italy, and *Donne in Quota* [Women on High], a civic organisation that fosters women’s representation in society and politics. A relevant resource on these issues is a major EU-funded project, *Advancing Gender Equality in Media Industries*, co-coordinated by the University of Padova between 2017 and 2019. *Advancing Gender Equality in Media Industries* has created a set of unprecedented tools accessible online: a database of global good practices, a series of thematic learning units with video lectures and interviews with experts, and an app to carry out media monitoring activities translated in English, French, and Spanish.

Claudia Padovani

(F9) Gender equality in media content

2 POINTS

Italian news media are increasingly presented and produced by female journalists, yet it is still mostly men that make the news as subjects, while women continue to be marginalised in the news agenda. In comparative studies, Italy still scores below the European and global average, but some recent positive developments are worth mentioning.

In terms of media content, according to the Global Media Monitoring Project, over the past 20 years, the status of women in the Italian news media has hardly changed. Although the news is increasingly presented and produced by female journalists (36% in the Global Media Monitoring Project, 2015),⁹ it is mostly men that make the news as subjects (Azzalini & Padovani, 2015). In traditional media (radio, television, and newspapers), which have been monitored since 1995, the visibility of women as sources or subjects of Italian news has increased from 7 to 21 per cent (Azzalini & Padovani, 2016), below the European and

global average (25% and 24% of women subjects, respectively) (Global Media Monitoring Project, 2015).

Furthermore, women as sources of news are seldom included as authoritative expert voices (18.5%) or spokespersons (13.3%), while stereotyped representations are paralleled by the irrelevance of gender-related issues (4% of all news). This demonstrates a profound gap between the advancement of women in society and the image of women (and men) as reflected by news media (Azzalini & Padovani, 2015).

We can highlight that article 25 of the Service Contract that licences the RAI calls for the adoption of regular gender-monitoring of RAI content (besides what has been covered in Indicator F8 – Rules and practices on internal gender equality). A yearly report is produced by an independent company, and the latest report is available on the RAI website and results from a study conducted by the Osservatorio di Pavia. According to the Osservatorio (2018), gender inequality issues are being addressed in the planning of public service media RAI. One-fourth of the 263 analysed items refer to gender, with violence against women being the most-discussed item. Women and gender identities are represented respectfully (in 98.3% and 98.8%, respectively, of the analysed cases), and gender stereotypes appear to be challenged in 7.5 per cent of cases only. At the same time, the presence of women and men in television programmes is still unequal (37% versus 63%), while explicit or subtle stereotypes still persist (4.4% and 7.8%, respectively).

Despite progress made by the public service also with regard to the adoption of internal rules, recommendations, and guidelines regarding the promotion of gender equality in media content (i.e., Service Contract 2018–2022), no specific initiative can be reported from the other MDM leading media outlets.

Although a *Manifesto delle giornaliste e dei giornalisti per il rispetto e la parità di genere nell'informazione* [Manifesto of women and men journalists for the respect and gender parity in news and against all forms of violence and discrimination through words and image] was launched in 2017 by the Equality Commission of the FNSI, Unione Sindacale Giornalisti Rai (UsigRAI) and GiULiA Giornaliste (the *Manifesto di Venezia* [Venice Manifesto]), leading mainstream media lack recommendations and guidelines for gender-sensitive coverage of gender-based violence.

In fact, this is a specific and sensitive topic, particularly when cases of femicide are reported. From 2015 to 2017, a study by the University of Torino in partnership with the RAI Research Center investigated the ways in which femicide is normalised in the public and media discourses (press, local televisions, and some online environments, and social media). The coverage of femicide and gender violence still appears as highly stereotyped and not capable of, nor interested in, making public narratives more gender-sensitive.

Various civic and professional initiatives, as well as women's alternative media outlets, exist. Amongst Italian leading media specifically focused on media gender-transformative content, we report *Corriere della Sera's 27esima ora* and the web pages managed by Giornaliste Unite Libere Autonome (GiULiA) Globalist.

Gender and media monitoring activities are also carried out by observatories like Gemma (Gender and Media Matter, University of Rome), TV Fai-da-te (University of Bologna), and Inchiaro (University of Milan Bicocca). A recently established good practice is 100 Donne Contro gli Stereotipi [100 Women Against Stereotypes], a growing dataset of women experts created in 2016 to which journalists can refer when looking for diverse sources, in order to promote a balanced representation of women and men's competences in the news.

Claudia Padovani & Marinella Belluati

(F10) Misinformation and digital platforms (alias social media)

2 POINTS

Italian leading news media have not developed particular expertise and practices to identify misinformation and avoid spreading fake news. Among the newsrooms examined, the most common habit is to address the problem at the individual level. Outside news media organisations several actors and agencies are involved in projects aimed at fighting misinformation.

Despite the fact that disinformation and fake news are becoming a huge concern for journalism, Italian news media are not developing processes to identify misinformation and avoid spreading fake news. Among the examined newsrooms, the most common habit is to address the problem at the level of individual journalists. Hence, non-systematic approaches are found among Italian journalists as a result of their practical experience:

Over the years we have gained so much experience that the alarm bell rings and then a more in-depth verification is carried out and this often allows us to eliminate the risk of publishing a false news story, without any particular support in terms of tools and expertise. (editor-in-chief, *la Repubblica*)

In Italy there is no access to specific tools. I think this could be done, but I think it costs a lot. I think it is an Italian gap: we still miss a combination of information experts and technicians able to support this type of analysis and the elaboration of journalistic content. (editor-in-chief, *Il Fatto Quotidiano*)

There are no standardised editorial guidelines on how to handle misinformation, and so journalists “rely on common sense” (journalist, *SkyTg24*). There are no specific training courses on the use of automated tools for the verifica-

tion of information. Practices related to the reliability of sources are left to the discretion of the individual: “We are there to give news, verify it with sources, more than one, cross-check two or three sources, verify the news and at that point the news is considered reliable and therefore publishable. The assessment is personal and discretionary” (journalist, *La Repubblica*). “Having anti-fake-news algorithms in real-time is very complicated, the work must be manual” (editor-in-chief, *La Repubblica*).

There are two main problems highlighted by journalists in relation to misinformation: the problem of skills and experience of individual journalists and the problem of timing, because often problems related to misinformation relate to the hurry to publish a piece in the news:

There are two issues on disinformation: one is to strengthen the skills of journalists, also through the algorithmic management of the phenomenon [...], but we have an enemy to fight against which is not only disinformation but also time, because the biggest mistakes, at least in the mainstream, are made on the assumption of the lack of time to do verifications and this is all the more true for all-news channels evidently. (editor-in-chief, *Tg1*)

Maybe we gave ourselves the rule that it is better to be second in giving the news, but to do so in an accurate and correct manner, than to be first, but presenting news that is unreliable. (editor-in-chief, *La Repubblica*)

Finally, there is also a problem linked to the professional culture, which functions as an element of resistance to change and which is more visible among senior journalists. “The practice of automated verification of sources through fact-checking tools or services, internal or external to the editorial staff is unusual in the Italian journalistic culture compared to foreign models. This happens mostly manually”, said an editor-in-chief of *SkyTg24*. A journalist from *TgLa7* explained:

The truth is that there are stratifications in the editorial offices [...]. There are generations formed on books, certainly, but very much on the road and very often without academic preparation [...]. Then, there is a younger generation, to which I belong, which is quite disenchanted, perhaps even too cynical and independent, which was formed in schools of journalism.

Fake news is approached slightly differently by *Il Fatto Quotidiano*. What is highlighted in this case is that distortion of the news often depends on the interpretative frame:

It is difficult, however, given the quality of Italian newspapers, that fake news ends up on paper unless you take it as it is from the Internet. [The biggest problem is] the interpretation that is given to news as fake. In this case, the

disinformation concerns the curvature you give to the news. (journalist, *Il Fatto Quotidiano*)

Again, it is pointed out that there is often also an emphasis on the problem, especially by political actors:

On fake news, we have dealt with the subject. If I have to tell you, there was, on our part, a characteristic of the newspaper, which was to criticise the excessive emphasis of the use of fake news as an instrument of political battle. (editor-in-chief, *Il Fatto Quotidiano*)

It is worth mentioning that there are several actors involved in projects aimed at fighting misinformation. They are developing tools and creating and dedicating specific sections of their websites to contrast problems connected with fake news:

- Institutional observers: Agcom; Osservatorio Permanente Giovani-Editori; Social Observatory for Disinformation and Social Media Analysis; Luiss Data Lab; Pagella Politica; T6 Ecosystems srl; Official fact-checkers, non-institutional actors, and debunking projects;
- Official fact-checkers – institutions and newsrooms: Agenzia Giornalistica Italia; Carta di Roma; Open.online; Lavoce.info;
- Non-institutional actors – blogs, television programmes, and debunking project: Bufale.net; Butac; #Fake: la fabbrica delle notizie;
- Fact-checking projects during electoral campaigns: Mapping Italian News; Fact-Check EU;
- Actors and websites fighting scientific and health-care disinformation: Medicalfacts; Dottoremaeveroche; Osservatorio Terapie Avanzate.

Marinella Belluati, Alice Fubini, & Rossella Rega

(F11) Protection of journalists against (online) harassment – 1 point

Italy features as the country in Europe where journalists' safety is most threatened by online harassment, personal assaults, and intimidation, often connected to reporting on organised crime and mafia issues. No specific protection mechanism has been adopted against online harassment or threats (apart from the legal guardianship in the exercise of the journalistic profession); no mechanisms exist to protect women professionals from on- and offline harassment.

The overall situation of journalists in the country is dangerous, and this represents a huge challenge to media professionals' freedom of expression. According to a special report from the Index on Censorship, the European

Center for Press and Media Freedom, and the European Commission (2018), Italy is the country in Europe where journalists' safety is most threatened, with 83 cases reported between 2014 and 2018, including online harassment, personal assaults, and most of all intimidation, often connected to reporting on mafia issues (see also Mapping Media Freedom, 2020). At present, about 20 journalists are living under round-the-clock police protection, as indicated by the 2020 *World Press Freedom Index* (Reporters Without Borders, 2020). Although Italy scored two points higher in comparison with the previous year (41st position), attacks against journalists are still on the rise, particularly in Lazio and other Southern regions.

Women's freedom of expression is also challenged by acts of violence against women and gender-based violence, particularly against women working in the media sector (see IFJ, 2017; and global surveys conducted by the IWMF & Troll-Busters, 2014, 2018). In Italy, according to the association Ossigeno per l'Informazione [Oxygen for Information] (2019), 358 women journalists received threats, attacks, and suffered violence between 2014 and 2019. This figure represents 21 per cent of 1,706 professional journalists whose cases have been identified, which are nevertheless only a minor segment of a much larger phenomenon. However, a different study shows that in the first three months of 2019, the percentage of women journalists threatened had already escalated to 24 per cent, with 18 women threatened out of a total of 73 (Della Morte, 2019). The FNSI promoted the first quantitative study to assess the status of sexual violence and harassment of women journalists in the media sector (FNSI, 2019). The results indicate that 85 per cent of 1,132 female journalists surveyed experienced some form of sexual harassment or abuse during their professional careers, and 42.2 per cent experienced these abuses in 2019.

In terms of institutional responses and newsroom practices, according to the interviewed journalists, no specific protection mechanism has been adopted by newsrooms against online harassment or threats, apart from legal guardianship in the exercise of the journalistic profession. Also, there is widespread resistance in denouncing instances of harassment and abuse, including physical, psychological, and economic, particularly by individual women journalists. A journalist from *Sky Tg24* commented on social media attacks: "There is no support policy in this sense. [...]. If attacks happen, it is a matter that is independently managed by you with the platform". On the same point, a journalist from *la Repubblica* said: "We have full legal coverage with respect to menaces, for example, or libel lawsuits. It is normal. No other kinds of protection are provided". As far as *la Repubblica* and *L'Espresso* (Gedi Group) are concerned, many journalists, such as Federica Angeli, Salvo Palazzolo, Lirio Abate, Paolo Berizzi, and the most-known Roberto Saviano, received personal protection after being threatened by organised crime or extremist political movements. "Many police agents protect threatened colleagues", adds the journalist from

la Repubblica, “but we talk about threats other than stalking or the insult of keyboard lions”. In this regard, *la Repubblica*’s editor-in-chief speaks about the measures undertaken:

There is our solidarity with those who are victims of this type of action [...], but then there is the support of the institutions, the support of the police when it becomes necessary. The management is committed to ensuring that our most exposed journalists are always protected.

In general, informal support from colleagues as well as, in more critical cases, the stances of the editorial board and the unions, are common.

In recent years, some leading news media have adopted specific provisions to address cases of gender-based discrimination and harassment. In 2017, the public service broadcaster RAI renewed its norms against harassment in the workplace, banning any verbal or physical sexual molestation that has “the purpose or in any case the effect of violating the dignity and freedom of the person who undergoes it and of creating an intimidating, hostile, degrading, humiliating or offensive atmosphere” (RAI, 2017: 1). Likewise, the code of ethics of Mediaset and Gedi Group (owner of *la Repubblica* and *L’Espresso*), as well as the code of conduct of Comcast (Sky Italia), prohibit any form of harassment and gender discrimination to the person. In particular, these forbid “violence or sexual harassment” and any kind of discrimination “refer[ing] to personal and cultural diversity” (Gruppo Mediaset, 2019: 12), and through “the promotion and the respect of human rights” (Gedi Group, 2020: 5), also encouraging employees to denounce “without fear of retaliation” (Comcast, 2020: 11).

Alice Baroni, Claudia Padovani, Marinella Belluati, & Michele Valente

Dimension: Equality / Interest mediation (E)

(E1) Media ownership concentration national level 2 POINTS

The Italian landscape shows moderate media ownership concentration, with some market-dominant positions by large companies.

In 2018, the overall print media market of national and regional newspapers was dominated by two large groups: Gedi (*la Repubblica*, *La Stampa*, and more than a dozen regional papers) and Cairo Communication/RCS (*Corriere della Sera*, *La Gazzetta dello Sport*, and few regional papers) (Agcom, 2018e: 129). Gedi is the largest one, with a market share of 21.9 per cent on the basis of revenues (CR1), while Cairo Communication/RCS has a similar score of 19.1 per cent (CR2 40%). Although at a lower level, four other groups have some

relevance in the print media market. Monrif (*Il Resto del Carlino*, *La Nazione*, *Il Giornino*, *Il Telegrafo*) and Caltagirone (*Il Messaggero*, *Leggo*, *Il Gazzettino*, *Il Mattino*, *Corriere Adriatico*, *Quotidiano di Puglia*) score around 7 per cent, while *Il Sole 24 Ore* (*Il Sole 24 Ore*) and Gruppo Amodei (*Corriere dello Sport*, *Tuttosport*) are around 5 per cent. Overall, the concentration ratio is moderate (CR3 higher than 0.40).

In terms of radio and television, Italy has two broadcast television platforms – terrestrial and satellite – while cable television has had no success in Italy compared with other countries. The market is dominated by free channels, with pay channels steadily growing but marginal in terms of audience in the last two decades. Since 1984, the Italian television industry was marked by a duopoly, with more than 95 per cent of advertising revenues and more than 85 per cent of the national audience share held by the public broadcaster RAI and private Fininvest (later Mediaset) owned by Silvio Berlusconi (Padovani, 2004: 42). A major change occurred in 2004 with respect to media market concentration when the adoption of the so-called Gasparri law redefined the ownership restriction for the television sector. This law has been largely contested since it has strengthened the previous RAI-Mediaset duopoly. It abolished cross-ownership restrictions between television and press and also created a legal basis for future privatisation of RAI (Komorek, 2013).

In 2017, the Italian broadcast television market was worth EUR 9.354 million, basically in line with previous years (see Mediobanca Research Department, 2019). Considering the main sources of income (advertising, licence fees, subscriptions, etc.), a clear picture emerges: the public broadcaster, RAI, and the two private outlets, Mediaset and Sky Italy, earn a similar level of revenue, around EUR 2,500–2,800 million. Together, these operators control 95 per cent of the Italian television market, leaving only marginal shares of revenue for other broadcasters, such as Discovery Italy and La7. As noted by Mazzoleni and Splendore (2011: 8), the television market is still characterised by the traditional RAI–Mediaset duopoly, and “the entry of Sky Italia into the market via satellite broadcasting has arguably enlarged the duopoly to a ‘triopoly’”. However, while RAI, Mediaset, Discovery Italy, and La7 operate in the digital terrestrial television market, Sky Italy is mainly satellite pay-TV. This implies that these broadcasters have different audiences and consequently different relevance in the Italian public debate. In terms of audience market share, the traditional duopoly RAI–Mediaset persist, since these two broadcasters together account for more than 65 per cent, and no third competitor exists. In 2017, hence, the CR3 index was higher than 0.7, signalling weak competition and a concentrated industry (Agcom, 2018e: 118).

The radio market is less concentrated. The CR3 index was 0.59 in 2018, which means a moderate level of concentration (Agcom, 2019: 52). However, a handful of players control over 80 per cent of the radio market. In this case

too, RAI and Fininvest are the two biggest players, although with much lower shares than in the television market. Considering that other relevant broadcasters (such as Gedi, RDS, and Gruppo 24ore) are highly connected with print media publishers, regardless of the moderate CR3 index, the radio market appears colonised by players who have core interests in other media markets.

No clear figures about market shares are available for online platforms and news. In 2017, established media, especially print media (e.g., *la Repubblica*, *Corriere della Sera*, *Il Messaggero*, etc.) but also television news (such as *TgCom24*) and news agencies (e.g., Ansa) were the most appreciated by Internet users, but in top positions we also find some news outlets operating exclusively on the web, such as Citynews, Nanopress, and Fanpage (Agcom, 2018b).

Giuliano Bobba

(E2) Media ownership concentration regional (local) level 2 POINTS

The Italian national and local news media landscape is not easy to analyse, as it is hard to disentangle the local from the national dimension. The overall level of concentration is moderate.

National and regional (local) media markets are strictly intertwined. In particular, with regards to news media, it is quite hard to disentangle local and national levels. Many papers, for example, have local readership, but they also cover national news.

Several national editorial groups (such as Monrif, Gedi, or Caltagirone) in print media also play an important role at the local level. These are mainly groups that publish national newspapers as well as regional newspapers. In three regions, Tuscany, Piedmont, and Emilia-Romagna, the main source of local information for citizens is the daily newspaper. However, in all these cases, the newspaper identified as the main source of local information belongs to a national publisher, and the newspaper contains both national and local news. These are Monrif in Emilia-Romagna (*Il Resto del Carlino*) and Toscana (*La Nazione*) and Gedi in Piedmont (*La Stampa*) (Agcom, 2018a: 30). Local and regional television consists of approximately 400 companies, which focus primarily on the wealthier metropolitan markets, such as Piemonte, Lombardia, and Lazio.

With regards to television news, however, the third channel of the public broadcaster RAI is virtually in a monopoly position. Notwithstanding some regional or local television outlets that broadcast news in each region, the regional RAI newscast is in an undisputed position of strength thanks to the availability of resources and in terms of audience. In recent research carried out by Agcom (2018a), RAI emerged as the leading media outlet for local informa-

tion in 14 of 21 regions. Although the public service company offers regional information content in specific and delimited time windows (after lunchtime and before prime time), the regional RAI newscast represents a primary reference point for most Italian citizens (Agcom, 2018a).

With regards to radio broadcasting, 2018 data show that at the local level, there are almost a thousand broadcasters (publishers) and almost 1,300 radio brands (radio). Unfortunately, figures about local news radio are not available, but we know the audience is highly fragmented, and therefore the weight of individual publishers is quite marginal.

Agcom (2018d) has evaluated the relevance of (national and local) media groups in each region, by estimating the Total News Audience Index, namely the percentage of the population reached for information purposes in a given region by any editorial title held by the companies in all information media (newspapers, television, and radio channels). Findings show that the regional market is composite, mainly driven by the regional RAI newscast that scores the higher level of audience (38%), even though national media groups (such as Gedi, 16%, and Monrif, 5%) play a relevant role at the regional level also.

Giuliano Bobba

(E3) Diversity of news formats

2 POINTS

The diversity of news formats in Italy is quite rich. A high degree of abundance characterises different media sectors, with positive results for democracy.

The information menu of Italians is quite rich and diverse. Accertamenti Diffusione Stampa, a company that certifies the circulation data of the print content published in Italy, provides data on 62 daily newspapers, 41 weeklies, 51 monthlies, and 2 free presses active throughout Italy. Among the top fifteen for print and digital circulation, six are national, five operate at a regional or local level, three are sports media, and one focused on economic content (PrimaOnline, 2020a).

RAI has three mainstream national television newscasts, one on a local level (with offices in each region), two all-news channels (one devoted to sports), and three mainstream national radio newscasts. Additionally, in the 2019–2020 season, a total of 28 in-depth information programmes and magazines and two journalistic inquiry programmes were broadcast on the three RAI channels.

The private sector has several programmes:

- Mediaset has three mainstream national television newscasts and one all-news channel, a total of four in-depth news programmes on its three networks in the 2019/2020 season;

- La7 has one mainstream national television newscast and nine in-depth news programmes in the 2019–2020 season;
- and Sky has two all-news national television newscasts, one devoted to sports and 20 private radio stations broadcast newscasts.

As far as consumption is concerned, Censis-Ucsi (2018) reports a gap between television and radio on the one side – which seems to compensate for the decline in traditional users with an increase in online and mobile users – and newspapers on the other. In the latter case, in the face of a constant decline in sales in the print sector, the online sector sees growth in general information portals. A very broad and rapidly evolving context marks online information. Among the first 15 online information brands indexed by Audiweb (PrimaOnline, 2020b), nine are online versions of traditional newspapers and magazines (including *la Repubblica* and *Corriere della Sera*, but also *Il Fatto Quotidiano*, which features a radical division between offline and online newsroom), four are native online information sites and apps (including *Fanpage*), and two are online versions of all-news television channels (one by Mediaset, the other by Sky). Agcom (2018c) states:

Italians access online information mainly through so-called algorithmic sources (especially social networks and search engines), consulted by 54.5 percent of the population, while there is less use of editorial sources (websites and applications of traditional and native digital publishers). Moreover, 19.4 percent of the population indicates an algorithmic source as the most important within their information diet. The importance accorded to search engines and social networks stands out as the third and fourth most important source of information for information, considering all media (classic and online).

Christian Ruggiero

(E4) Minority/Alternative media

3 POINTS

Minority and alternative media play an important role in the Italian news media market, particularly for linguistic minority groups, to whom the Italian Constitution guarantees provision of relevant news access by both public and private initiatives. The plurality of non-commercial and civic information initiatives, often connected to the so-called third sector, is also meaningful.

The recognition of minority languages within the Italian territory is safeguarded by the 1948 Italian Constitution, provisions of the autonomous regions, as well as international commitments. As it is stated in article 6 of the Constitution:

“The Republic safeguards linguistic minorities by means of specific measures” (Piergigli, 2016). Thus, the public broadcaster RAI provides information in languages other than Italian in regions with special or ordinary status as the home of minority communities. Furthermore, there are initiatives such as *Daily Muslim*, an Italian online newspaper for Muslims in Italy; *Romit.tv*, an Italian television channel dedicated to the Romanian community; *Obiectiv*, an Italian-Roma bilingual newspaper printed fortnightly in Turin; *Agi.it*, a news agency dedicated to news articles and in-depth reports on contemporary China; *Cinitalia*, an Italian-Chinese magazine to promote both cultures; and *Albanianews.it*, an online newspaper in Italian language, reporting on Albanian issues, just to cite a few.

In the Valle d’Aosta/Vallée d’Aoste, RAI has been producing radio programmes such as *Voix de la Vallée* since 1968, and television news and local programmes in Italian and French, in addition to the transmission of French and Swiss channels, *France2* and *Suisse Romande* (RAI Aosta, 2020). Moreover, *Ràdio Valàde* offers radio transmission in Franco-Provençal to promote the language and culture of the Aosta, Savoy, and Swiss regions. The initiative is funded by the Presidency of the Council of Ministers, according to law 482/99 (Norms for the Protection of Linguistics and Historical Minorities). In Trentino-Alto Adige, in the South-Tirol area, there are cultural, educational, entertainment, and news programmes in Italian, German, and Ladino. The radio news *Tagesschau*, founded in 1966, was broadcasted initially in German, but expanded its coverage to embrace radio and television programmes in German and Ladino. In 1998, the television news *TRAIL* started to broadcast its coverage in the three official languages of the region, Italian, German, and Ladino (RAI Alto Adige, 2020). In addition, *TV Ladina* on YouTube prides itself for being a digital platform of the people, produced with and for the people of the Fassa Valley (Comun General de Fascia). The print newspaper *Dolomiten*, founded in 1926, is the oldest daily in Trentino-Alto Adige, dedicated to the promotion of the cultural identities of the peoples of South-Tirol in German and Ladino languages. Another example is the *Neue Südtiroler Tageszeitung*, founded in 1996, with editions from Tuesday to Saturday. On Sundays, the newspaper circulates the Saturday edition with a special dossier.

In Friuli Venezia Giulia, the regional studio of RAI broadcasts radio and television programmes in Italian and Slovene to promote the coexistence of both languages and cultures (RAI Friuli, 2020). The *Primorski dnevnik*, founded in 1945, is the only newspaper dedicated to the Slovene minority in the region, with editions from Tuesday to Sunday. The three newspapers *Primorski dnevnik*, *Dolomiten*, and *Neue Südtiroler Tageszeitung* are the Italian representatives of the European Association of Daily Newspapers in Minority and Regional Languages, which includes 27 dailies from 13 different European countries.

Looking beyond minority languages, the Italian association Articolo 21 (Farina, 2016) mapped a wide range of civic initiatives, providing a long list of available websites and resources, categorised according to their main focus: general news, economy, and alternative consumption habits, environment, geopolitics, and Global South, social issues, counter-information, crime, and criminal organisations, participative journalism. In this context, some news sources can be categorised as alternative media.

Alice Baroni, Marinella Belluati, & Claudia Padovani

(E5) Affordable public and private news media 2 POINTS

In Italy, the price represents an entrance barrier for few households in terms of access to information. Although almost all of the Italian population accesses the media, and over 80 per cent of citizens access information every day, lower education and economic levels can lead to the exclusion or marginalisation of certain segments of the population from the news consumption.

In 2017, it was estimated that the average Italian household net income was EUR 31,393 a year, or EUR 2,616 per month. In 2018, according to the National Institute of Statistics (ISTAT), 20.3 per cent of people residing in Italy were at risk of poverty, that is to say, they had an equivalent net income in the year preceding the survey of less than EUR 10,106 (EUR 842 per month). When the price for the news media is financially affordable for all households, including the disadvantaged ones, then it is more likely that democracy will be promoted (for geographic accessibility, see Indicator F1 – Geographic distribution of news media availability). Table 2 compares the cost of access to the selected leading newspapers (price of the annual subscription and copy price for paper and online) to public and private television and selected online media.

Access to television news (*Tg1*, *Tg5*, *TgLa7*, and *Sky News*) is normally free of charge in Italy, though there is a cost related to accessing television news through the annual television licence fee [*canone*]. This is a tax on the possession of a device through which it is possible to watch television, even though its profits finance only public television. *Sky News* belongs to the private network Sky Italia, a satellite-television platform, and offers a wide range of paid services. While other channels offered by Sky are paid, the channel dedicated to the news is freely accessible to everyone.

To determine the accessibility of online news, we calculated the average cost of a broadband Internet connection for a year, in 2019. While, generally, newspapers' websites (*la Repubblica*, *Il Fatto Quotidiano*) and online magazines (such as *Fanpage*) are free, the website of one leading news media outlet (*Corriere della Sera*) offers ten free articles per month, and then it is necessary

to buy a subscription (for more information on Italy’s digital audience, see Indicator F1 – Geographic distribution of news media availability).

Table 2 Cost of access to leading media (EUR)

	Annual subscription	Copy price	Online (website)
Corriere della Sera	465 (full subscription, paper and online) 200 (digital edition only)	1.50	10 free articles per month, then EUR 10 a month for full access
la Repubblica	40 (full subscription, paper) 200 (digital edition only)	1.50	Free
Il Fatto Quotidiano	305 (full subscription, paper and online)	1.80	Free
Broadband Internet connection	400		
TV tax	90		

Overall, we argue that for a segment of the population (the lower-income household groups), these costs to access information can be high. According to Agcom (2018c), although almost all of the Italian population accesses the media, and over 80 per cent access information every day, lower education and economic levels can lead to the exclusion or marginalisation of certain segments of the population from the consumption of news (see also Indicator F2 – Patterns of news media use).

Cecilia Biancalana

(E6) Content monitoring instruments 3 POINTS

Monitoring instruments for media content in the Italian landscape are numerous and diversified. In this scenario, the presence of Agcom, which works to protect pluralism also through a series of monitoring activities, should be highlighted.

The media monitoring landscape in Italy is diverse, with many institutions, authorities, and research institutes involved. First of all, the work of the independent Agcom can be indicated as a best practice in the European landscape. The Authority has launched several monitoring activities for the protection of pluralism, often in partnership with universities (see Indicators E3 – Diversity of news formats & F3 – Diversity of news sources).

Another important body is the Osservatorio di Pavia, an independent research institute specialised in media analysis, which carries out monitoring projects on

media and democracy, media pluralism, freedom of expression, media governance, and human rights, with a particular focus on public service broadcasting. In the words of the editor-in-chief of *Tg1* (see Indicator C2 – Independence of the news media from powerholders), this constitutes a significant pressure point for the public news service. The Osservatorio di Pavia also monitors the degree of pluralism in local television broadcasting and collaborates with Associazione Carta di Roma [Charter of Rome Association] (an association for journalism deontology in migration, see Indicators E7 – Code of ethics at the national level & E8 – Level of self-regulation) to prepare an annual report on racism and migrant representation in the media.

To fight hate, intolerance, and violence on the web, the Ufficio Nazionale Antidiscriminazioni Razziali [National Office against Racial Discrimination] operates especially with a focus on young people.

Oxygen for Information, a not-for-profit association with the support of FNSI, regularly publishes reports on cases of intimidation of journalists by authoritative powers as well as organised crime (see Indicator C9–Watchdog function and financial resources).

Finally, monitoring activities also concern the economic and professional dimension of journalism. Since 1990, the Federazione Italiana Editori Giornali [Italian Newspaper and Publishers' Association] has analysed the quality of employment and economic benefits. The Federazione also monitors the professional training of workers in the media sector. A more recent development is the establishment of PA Social, an Italian public communicators association that through the Osservatorio Nazionale sulla Comunicazione Digitale [National Observatory on Digital Communication] (web, social networks, chat, artificial intelligence) fosters innovation in the field of public authorities' communication.

Little has been done in response to the Beijing Platform for Action's calls for the adoption of adequate legal instruments, policy provisions, and self-regulatory mechanisms to support and protect women working in the media and to promote gender-responsive media content, but many observatories working on gendered representation operate within Italian universities (see Indicator F9 – Gender equality in media content).

Marinella Belluati

(E7) Code of ethics at the national level

2 POINTS

In Italy, the journalistic profession and deontology are characterised by a relevant number of codes pertaining to different aspects, and establishing principles and norms, but these are seldom known or explicitly considered guidelines in newsroom practice.

At the national level, journalistic deontology refers first to the constitutional provisions (art. 21 of the Italian Constitution) and to rights and duties codi-

fied in the professional law 69/1963. These sources of law have been enriched over the years with regard of specific areas through the adoption of charters and other tools, for instance the Carta di Treviso [Charter of Treviso] on the protection of minors (FNSI et al., 1990), the Carta di Roma [Charter of Rome] on the rights of migrants (ODG & FNSI, 2008), and the Manifesto di Venezia [Venice Manifesto] on respectful reporting about gender-based violence (FNSI et al., 2017) (see Table 3 for all the codes approved by the Order of Journalists).

A first attempt to harmonise the various deontological documents was made in 1993, with the Carta dei Doveri del Giornalista [Charter of the Journalist's Duties] (ODG & FNSI, 1993). The Charter has since been absorbed in the Testo Unico dei Doveri del Giornalista [Consolidated Text of the Journalist's Duties], approved in 2016. Both the charters dedicated to journalistic coverage of sensitive issues and the periodical production of consolidated texts on the journalist's duties represent updates of the national code of ethics. In some cases, the promoters of a specific document are associations which are also active in monitoring their application. This is the case with the Associazione Carta di Roma which brings together different subjects, from media companies, civil society, and academia in collaboration with the Osservatorio di Pavia, to monitor migration issues in television news. Furthermore, the promoters periodically produce guidelines to improve the Charter's application (Meli, 2012; Meli & Chichi, 2015; Barretta et al., 2018)

The Order of Journalists performs, the functions related to the discipline of its members on a regional basis, providing different types of disciplinary sanctions (warning, censorship, suspension from the practice of the profession, removal from the Register of Journalists; see ODG, n.d.-b, for the ethical precepts of the Order).

Table 3 Codes of ethics and deontological charters approved by the order of journalists

Charters and Codes	Notes
Carta Informazione e Pubblicità (1988) Charter on Information and Advertising	Establishes that advertising messages must always be distinguishable from journalistic texts. The journalist is prohibited from advertising unless it is free of charge and as part of initiatives that are not speculative in nature.
Carta di Treviso (1991) Charter of Treviso	Compels journalists to engage in ethically correct rules and behaviour towards minors.
Carta dei Doveri del Giornalista (1993) Charter of Journalist's Duties	A complete statute of professional ethics recalls respect for the person, non-discrimination, correction of errors and rectification, and presumption of innocence. The Charter also defines the concept of incompatibility between journalistic work and interests or assignments that conflict with the rigorous and exclusive search for the truth.

~ ITALY ~
A HIGHLY REGULATED SYSTEM IN SEARCH OF EQUALITY

Carta di Perugia (1995) Charter of Perugia	Charter prescribing how to deal with health and disease communication topics.
Carta Informazione e Sondaggi (1995) Charter on Information and Polls	Rule of conduct for the correctness of the information on the surveys both for those who carry them out (demographic institutes) and for those who disclose or disseminate them in any form (journalists or clients).
Testo Unico sulla Privacy e Codice Deontologico Relativo al Trattamento dei Dati Personali nell'Esercizio dell'Attività Giornalistica (2003) Single Text on Privacy and Code on Personal Data Treatment	Provides that the processing of personal data for journalistic purposes "is carried out with respect for fundamental rights and freedoms and dignity of the person concerned, with particular reference to confidentiality, personal identity, and the right to protection of personal data".
Carta dei Doveri dei Giornalisti degli Uffici Stampa Pubblici (2002) Charter of Journalists' Duties in Public Press Offices	Helps the journalist who works in public press offices in the delicate task of fostering dialogue between body and user by observing the deontological rules established by the law establishing the Order.
Codice di Autoregolamentazione TV e Minori (2002) Code of Self-Regulation TV and Minors	The Code takes into consideration the minor in his or her capacity as a user of the television message and addresses the need to protect minors.
Carta dei Doveri dell'Informazione Economica (2007) Charter of Duties on Economic News	Sets out the criteria that must govern information on the economic sector to which journalists must adhere.
Codice di Autoregolamentazione delle Trasmissioni di Commento degli Avvenimenti Sportivi (2008) Code of Self-Regulation for Sports Media Reporting	With this Code, all the protagonists of sports information say "no" to violence in stadiums, aware of the contribution that mass media, from traditional to new media, can make in condemning violence related to sports events, especially football events.
Carta di Roma (2008) Charter of Rome	Invites journalists to adopt legally appropriate terms avoiding the use of improper terms when dealing with stories about migration and migrants. It also invites reporters to avoid the dissemination of inaccurate, sketchy, or distorted information and to maintain a homogeneous and consistent yardstick to avoid feeding any racist attitudes.
Decalogo del Giornalismo Sportivo (2009) Decalogue of Sport Journalism	Helps to certify the rights and duties of the category in the confrontation that journalists have daily with sports clubs and organisations and with the authorities.

Christian Ruggiero

(E8) Level of self-regulation

2 POINTS

Though the Italian legislation does not explicitly require the adoption of self-regulatory mechanisms, several leading media newsrooms adopt internal codes of ethics.

The Italian legislation does not explicitly require self-regulatory measures, but many newsrooms have adopted an internal code of ethics. For example, the daily newspaper *la Repubblica* has adopted a code of ethics that journalists are expected to respect in order to “carry out their profession correctly and in full transparency”. In this document, the values of accuracy, completeness, honesty, independence, impartiality, transparency, ethical use of social media, responsibility, respect, quality, and verification are mentioned as the foundations of the readers’ pact. In line with the backwardness on the issues of respect for gender equality (cited in Indicator E7), the code used by *la Repubblica* is comprehensive and well structured, but no single mention is made to gender (in)equality issues on fair representation, voice and plurality of sources, or the use of gender inclusive language.

In the case of media companies not exclusively dedicated to news, such as RAI, Mediaset, and La7, reference is made to the company’s codes of ethics, which normally refers to the obligation to guarantee the rigorous respect of professional ethics by journalists. The production of a code of ethics by media companies is regulated by legislative decree 231/2001, which regulates the administrative liability of legal persons, companies, and associations (Republic of Italy, 2001).

The importance of a company’s code of ethics emerges clearly in the interviews with the editors-in-chief. A *Tg1* interviewee stated that, on the one hand, national codes of ethics “are relevant because they are very useful, and should be an incessant guide in professional activity, but honestly they are little known. I don’t even know how many of my colleagues have ever read the codes of ethics”. On the other hand:

There is a corporate code of ethics that is very important, a charter of rights and duties written very well [...] It is delivered to the employee, and is the subject of courses that we do in e-learning. However, there are two approaches. The first one reads: the law says you have to know these things, and I put you in a position to know them. The second one makes these elements professionally grounded. We are still behind on this, but it is not the responsibility of the company as much as it is the responsibility of the category.

So, the possibility of concretely applying the rules to one’s professional life, not by chance, is called into question with reference to the company’s code of ethics, which is closer to journalists and therefore more pressing than the national one.

System-wide proposals have been made, in particular by trade unions. For example, the introduction of a charter of values was discussed in the 2019 Stati

Generali dell'Editoria [General States of Publishing]. This charter aims to protect the autonomy of the editorial staff and the transparency of the relationship with readers. In order to do this, it commits the editor, each individual journalist, and the owners to strict compliance with the codes of ethics for the protection of the reader established by the Order of Journalists, such as the Charter of the Journalist's Duties (1993) and the Charter of Treviso for the protection of minors (1990).

However, doubts remain about the knowledge of Codes and Charters of Ethics at a more than general level. In the words of the editor-in-chief of the *Tg5*:

We have an obligation of professional updating, and part of that are credits of a deontological nature. [On the knowledge of codes of ethics and charters] I would have doubts: in short, their contents are known, but if you go and ask if in the Treviso Charter as far as minors are concerned, the prohibition only concerns interviews or images, a newsroom member probably would not know how to answer.

Christian Ruggiero

(E9) Participation

2 POINTS

Italian leading news media do not seem to be truly open and accessible to the public, since readers and audiences are rarely involved in the information production process. An increased awareness of the importance of using social media among information professionals goes together with limited management of the relational elements of digital platforms.

Collaboration between professionals and the public could ensure more transparent journalism and social media, in particular, are becoming an optimal tool to include readers in editorial processes (Sorrentino, 2016).

Starting from traditional forms of participation, print newspapers guarantee small visibility to readers' requests. This is in the form of readers' letters to the editor-in-chief or the newsroom (selected and published in the comments section of the newspapers), receiving daily answers from journalists (*Il Fatto Quotidiano*), or a prominent figure (*la Repubblica*, *Corriere della Sera*). In addition, this form of interaction between readers and editorial staff of print newspapers is sometimes further strengthened through the organisation of live events during the year, such as the "Repubblica delle idee" or the "Festa de *Il Fatto Quotidiano* alla Versiliana". As the *la Repubblica*'s managing editor states:

We have had for years live events such as the "Repubblica delle idee", moments in which we physically meet the community of our readers; therefore this is very important because it gives us the opportunity to understand the reader's "pulse" and enthusiasm and the extent to which *la Repubblica* is considered

a cultural reference point [...]. During the festival, the website's editorial staff works in real-time and people can see how it works while visiting the festival.

The co-editor in chief of *Il Fatto Quotidiano* emphasised the importance of these gathering moments:

There is an association composed of the members of *Il Fatto*, who are subscribers and *Il Fatto* followers, [...] we can use this expression: loyal supporters, readers, fans of *Il Fatto*. This association meets every year at the "Festa della Versiliana". They have the right to participate and, whenever they want, they can come to the newspaper headquarters and take part in the editorial meetings, even with family members.

Regarding the online news outlets, only a few channels allow readership to get in touch with the editorial offices, to request information or report a source or news item. For instance, online news forums are not provided, and the possibility to comment on articles published on the websites of the news organisations is provided only by three of the selected media after logging-in, thus implying the use of an ad hoc account (*Corriere della Sera*, *la Repubblica*, *Il Fatto Quotidiano*), and in two cases via Facebook login (*Fanpage* and *Tg3*). The other news organisations (*Tg1*, *TgLa7*, and *SkyTg24*) do not provide any space for comments under articles or videos that appear on their websites.

Other tools to interact with the editorial staff are in place. *Corriere della Sera* and *Fanpage* offer a detailed contact page that includes a form to be filled; while *la Repubblica* and *Il Fatto Quotidiano* provide the editorial staff's e-mail address (although not clearly visible on their homepage).

Television news media (*Tg1*, *Tg5*, *TgLa7*, *SkyTg24*) provide an e-mail address for the newsroom, but this is very hard to find on the web page. A test on the public's interaction with the editorial staff was carried out in the context of the MDM project in order to verify their reactivity. An email was sent to each of the selected news media, explaining the objective of the cross-national study. No response was received within four months. Overall, it appears that the leading news media are de facto limiting the possibility for the audience to reply or give feedback.

Concerning the use of social media, the largest community of users on Facebook is that of *Fanpage* (8.2 million users), followed by *la Repubblica* (3.5), *Corriere della Sera* (2.6), and *Il Fatto Quotidiano* (2.3). The daily degree of participation of community readers is high, both in terms of comments and reactions. However, the performance of television channels is quite different. *Tg5* is not active on Facebook or Twitter, while the use of Twitter and Facebook by the others channels (*Tg1*, *Tg3*, and *TgLa7*) is limited to publishing the content created for and broadcasted in their news editions. Only *SkyTg24* regularly updates its social media channels, integrating Facebook Messenger to broadcast breaking news.

In other words, Italian leading news media rarely use social media as a tool to strengthen audience participation and, in fact, the interviewed journalists talk about a “broadcast mentality” in this regard. The managing editor of *la Repubblica* says:

We control reactions and feedback, but we do not engage in interaction and dialogue because this would require enormous resources that we do not have [...]. We have a moderation team that works 24 hours a day, which however is an external service to the editorial staff. When in doubt, they contact the editorial staff to approve content.

The latter point is restated by the co-editor in chief of *Il Fatto Quotidiano*: “There are moderators who do this. There was a time when commenting was very free. Actually, even somewhat questionable things came out. It is now more selective”. According to the *Tg1* managing editor, the professionals themselves should play an authoritative role in moderating the online debate: “My idea is that we as journalists should be officially present on social networks like influencers, with a function that cannot be improvised, but it has to be recognised”. Overall, it seems that journalists are conscious about the importance of dialogue with citizens but, at the same time, they are aware that this possibility is curbed due to limited available resources. Moreover, they also seem to be aware of the risks of uncontrolled proliferation of hate speech, misinformation, and harassment.

SkyTg24 constitutes a positive exception in disseminating user-generated content, and its managing editor claims:

There are specific rules. When there are news events or events that are in any case relevant, we make a so-called “call to action”. There isn’t immediately the opportunity to go to the place where there was a flood or an earthquake [...], in those cases, we call on our audience to participate and to send us contributions.

In any case, this experience remains an exception, as there is no evidence of publication of user-generated content in print newspapers or their websites.

Rossella Rega & Michele Valente

(E10) Rules and practices on internal pluralism

2 POINTS

Pluralism of viewpoints is regularly controlled by the Communications Guarantee Authority (Agcom). Private television broadcasters respect the *par condicio* during election periods, while the public service is obliged to allocate air time proportionally to all the political forces in Parliament.

Concerning the space given to political forces, meaningful differences emerge between the public service news (RAI) and private television news. Newsroom

member of *TgLa7* explains: “We do not have the problem that RAI has: that of balance; we are not subject to the constant control of the supervisory commission, we do not have problems to weigh the space given to political sources on a daily basis”. The only formal rules followed by private television stations are those established during the election campaign period. “There are no routines, nor internal rules. The only rules are those of Agcom in times of *par condicio*”, declares the newsroom member of *SkyTg24*. The situation is different for public television. *Tg1*, for instance, is obliged by contract of service to allocate air-time proportionally to all the forces in Parliament. “Let’s pay attention to the right proportion that reflects the composition of the parliamentary groups. We also pay attention to the smaller parties, giving them the so-called right to stand. There is no routine, there is attention”, said the newsroom member. The editor-in-chief underlines that we are talking of a system that is also controlled through external bodies: “If you derail from the straight line you try to rebalance; we have a system of important pressure with the Osservatorio di Pavia that provides us with the parameters to evaluate the coverage of politics by the public service”.

As far as the selection of external guests is concerned, according to a *SkyTg24* newsroom member, these are “selected on the basis of their newsworthiness and how influential they are”. This practice is confirmed by a *TgLa7* editor: “They are selected on the basis of their competence and relevance to the theme”. Often, however, the experts involved are journalists, in which case it becomes important to which political area they belong. As stated by newsroom member of *TgLa7*:

There is a somewhat pathological aspect that does not concern us so much, but what happens in the world of information: the journalists *pro quota*. Maybe the politician does not send them, who in some cases, however, prefers some or recommends some journalists as interviewers, but they are selected because they are right or left. It is the television logic that also produces ratings.

A similar position to the editor of *Tg1*:

In the particular case of politics, in choosing newspaper editors or columnists, sometimes we are guided by their belonging to a certain political area, so as to include all perspectives. There are no written routines, but there is commitment to plurality of voices. External opinions mostly arise from the direction, it is the direction that gives input to listen to external opinions.

Mauro Bomba

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers”

2 POINTS

Professional as well as scientific debates on watchdog journalism and its practices are quite rare in the Italian media landscape, yet some meaningful initiatives fuel discussions and expose problematic situations.

There is no tradition of controlling the (media) controllers in Italy. This is due to a self-referential model of journalism, or “polarised pluralist” model of the relationship between media and politics, typical of the Mediterranean region (Hallin & Mancini, 2004).

The main association fostering debate on watchdog journalism in Italy is Articolo 21 [Article 21] (the name refers to the Constitutional article dedicated to freedom of expression), whose president Paolo Borrometi is a young Italian journalist threatened by the organised crime association also known as mafia. Another relevant entity is the journalistic association Oxygen for Information, which launched an Observatory on intimidations, threats, abuses, undue pressures on journalists, or violations of the right of information.

Columns in important daily newspapers, such as Giovanni Valentini’s in *Il Fatto Quotidiano* and Vincenzo Vita’s in *il manifesto*, foster media debate on journalism. Only one Italian journal is specifically dedicated to journalism studies: *Problemi dell’informazione* [Information Problems], edited by Il Mulino. Recently, Newsguard, an American company focusing on trust in news, has started activity in Italy, evaluating the most important online news outlets according to international criteria, and releasing some special issues on disinformation during the Covid-19 pandemic.

Table 4 *Debate on journalism in Italy: Main initiatives*

Initiatives	Notes
Articolo 21 [Article 21]	“Articolo 21, liberi di ...” is an association founded on 27 February 2002 that brings together exponents from the world of communication, culture, and entertainment. Several journalists, jurists, and economists who aim to promote the freedom of expression principle (object of Article 21 of the Italian Constitution, hence the name) are active members of the association. Hundreds of campaigns have been promoted by the association since 2002 through its website www.articolo21.org . Over the years, there were many episodes of censorship, intimidation, mobbing, denial of the rights to freedom of expression suffered by journalists, directors, authors, writers, denounced by Article 21 in Italy and abroad. The association promotes the Paolo Giuntella Journalism Prize, too.
Ossigeno per l'Informazione [Oxygen – Observatory on Journalistic Information and Obscured News]	Established in 2008 under the patronage of the FNSI and the Order of Journalists to document, analyse, and make public the growing intimidation and threats against Italian journalists investigating sensitive areas such as organised crime. It regularly publishes reports and news data to increase public awareness of the serious phenomenon of the restriction of freedom of information and circulation of news. It is a consultant to the Organisation for Security and Co-operation in Europe and the parliamentary anti-mafia commission.
Problemi dell'informazione [Information Problems]	Problemi dell'informazione was the first Italian magazine dealing with journalism and communication, offering itself as a place for processing and stimulating an interdisciplinary debate. It was founded in 1976 by Paolo Murialdi and directed by Angelo Agostini until 2013. The actual director is Professor Carlo Sorrentino (University of Florence). Since 2014, it has introduced a peer-review process for the essays hosted, which range from theoretical reflection and rereading of classical authors and texts to empirical research studies of particular interest and originality. In the other sections, interventions with a more popular focus are organised, such as reviews and critical notes, interviews, and debates with scholars and journalism and communication practitioners.

Francesco Marrazzo

(C2) Independence of the news media from powerholders 1 POINT

Independence of news media is a critical aspect in the Italian context, where journalism evolves from longstanding relations with political and economic powers.

Hallin and Mancini (2004) consider Italy as an example of a “polarised pluralist” model. This is characterised by a high level of politicisation or “political parallelism”, a strong influence of the state on the media, and a low level of professional autonomy. In particular, in Italy, the ties between politics (and powerful social and interest groups) and journalism have always been tight.

The roots of the politicisation of the Italian press can be traced back to the pre-fascist period, even though it was during Mussolini’s dictatorship that the political and consensus-oriented role of journalism was reinforced. After World War II, the first newspaper licences went to anti-fascist political forces, thus enhancing a politically oriented form of journalism, which wasn’t abandoned with the rise of market-oriented media in the 1970s. Partisanship and polarisation rose again with the entrance of Silvio Berlusconi, a media entrepreneur, in politics in the early 1990s.

This is true also with respect to broadcasters. The public broadcaster RAI has always reflected the political orientation of the country, for instance that of the Christian Democrats in the 1950s and 1960s. With the erosion of the dominance of the Christian Democrats in the 1970s, parties started to divide channels, personnel, and more generally power and resources according to their weight in Parliament, a phenomenon known as *lottizzazione* [allotment]. The collapse of the Italian party system in the early 1990s did not change these foundational features of the system, in which political affiliations continue to play a role.

The importance of political affiliation in contemporary public radio and television service is reflected in statements from the interviews. According to the editor-in-chief of *Tg1*, “This company was born with a peculiar characterisation, which is to respond in some way to politics”. It is not just the board of directors’ influence on the company’s choices, but rather a composite picture of weights and counterweights.

We have a system of pressure that is also quite significant, through the monitoring by the Osservatorio di Pavia, as well as Agcom, particularly during the election period. And when there are data that don’t work, the company tells you, you must correct it.

Although the independence of the editorial office with respect to the owner is formally guaranteed (see Indicator F5 – Company rules against *internal* influence on newsroom/editorial staff), ties between journalism and political parties, as well as big businesses, have always been strong (see Indicator F6 – Company rules against *external* influence on newsroom/editorial staff). Media have been

used by commercial owners – sometimes private, and sometimes linked to the state – to wield influence in the political world. In this respect, the case of Berlusconi's Mediaset is a landmark.

The Italian State has also played an important role as the owner of media enterprises, not only broadcasters but also commercial media and print press. The country is indeed characterised by a low number of “pure publishers”, that is, entrepreneurs present only in the publishing industry. The figure of Urbano Cairo is an exception in this respect (see Table 5).

Table 5 *Leading media identified and their owners*

Leading media	Owner
Tg1	RAI (public television)
Tg5	Tg5 is the newscast hosted on the Italian television channel Canale 5, part of the Mediaset network. Mediaset is a mass media company founded by Silvio Berlusconi and still controlled by his family's holding company Fininvest.
TgLa7	TgLa7 is the newscast of the channel La7, owned by Cairo Communication. Cairo Communication S.p.A. is a media and publishing company. Urbano Cairo owns the majority of the stakes of the company. In turn, Cairo Communication owns the majority of the stakes of the media company RCS MediaGroup.
SkyNews	SkyNews is the newscast of Sky Italia. Sky Italia is an Italian satellite television platform operated by Sky, itself owned by Comcast, an American telecommunications conglomerate.
la Repubblica	Gedi Gruppo Editoriale S.p.A is an Italian media conglomerate, in turn, part of the Exor group. It is the publisher of the newspapers la Repubblica, La Stampa, Il Secolo XIX and several local newspapers, as well as three national radio stations. It also publishes some magazines, including the weekly L'Espresso. The majority of the shares are held by the Agnelli family (FIAT).
Corriere della Sera	RCS MediaGroup, see TgLa7
Il Fatto Quotidiano	Società Editrice Editoriale Il Fatto S.p.A. It is a corporation without a majority shareholder. Among the shareholders, there are some journalists from the newspaper.
Fanpage	Ciaopeople Media Group

The launch of *Il Fatto Quotidiano* in 2009 constituted an attempt to counter the parallelism between the media and power. It is owned by a corporation without a majority shareholder and, among the shareholders, there are also journalists from the newspaper. This choice was made, in the words of the founder, Antonio Padellaro, in order to create a newspaper “with a property,

not a master”. As underlined by the editor-in-chief we interviewed, “We have an anomalous corporate form. We have a female CEO who is a stockholder. We have journalists as shareholders. The shares in the hands of journalists are able to guarantee independence”. Also, thanks to this corporate and editorial strategy, over time, the newspaper focused on investigative reporting, especially in the field of politics.

Nevertheless, in most cases, powerful organisations or individuals own or control important shares of leading news media in Italy. It remains to be seen if the rise of electronic media will transform the situation in the country.

Cecilia Biancalana & Christian Ruggiero

(C3) Transparency of data on leading news media 2 POINTS

Data on leading news media are generally available but, in some cases, these are incomplete and not easily accessible to citizens.

As stated above, the ties between journalism, political parties, big corporations, and the state have always been strong in the country (see Indicator C2 – Independence of the news media from powerholders), and media have often been used by private or state-linked owners to wield influence in the political world. Information on the leading news media’s ownership and of the key business figures are available, but not easily provided by the media themselves. While informed citizens can access this information through Internet research, leading news media are not keen to publish information on their ownership and key business figures.

The Communications Guarantee Authority (Agcom) collects (through the survey *Informativa Economica di Sistema* [Economic System Information]) and publishes all this information every year; however, this data is not easily accessible for ordinary citizens.

All news media’s websites contain some link to or information about the publisher, the owner, and the newsroom. However, this type of information is not immediately visible on the media webpage. An exception in this respect is RAI, which is required to provide all this relevant information by law.

Table 6 *Leading media and transparency of data*

Leading media	Transparency of data
Tg1	As RAI is public television broadcaster, it provides all the relevant information, by law (law 220/2015).
Tg5	Tg5 is the newscast hosted on the Italian television channel Canale 5, part of the Mediaset network. Mediaset is a mass media company founded by Silvio Berlusconi and still controlled by his family's holding company Fininvest. On Mediaset's website, information is given on the structure of the company, but there is no direct link between the website of the newscast and the company's website.
TgLa7	TgLa7 is the newscast of the channel La7, owned by Cairo Communication. Cairo Communication S.p.A. is a media and publishing company. Urbano Cairo owns the majority of the stakes of the company. In turn, Cairo Communication owns the majority of the stakes of the media company RCS MediaGroup. On the website is present information on La7's board of directors, but not on the newsroom.
SkyNews	SkyNews is the newscast of Sky Italia. Sky Italia is an Italian satellite television platform operated by Sky, itself owned by Comcast, an American telecommunications conglomerate. This information is not present on the website of the newscast, but there is information on the newsroom.
la Repubblica	Gedi Gruppo Editoriale S.p.A is an Italian media conglomerate, in turn, part of the Exor group. It is the publisher of the newspapers la Repubblica, La Stampa, Il Secolo XIX, and several local newspapers, as well as three national radio stations. It also publishes some magazines, including the weekly L'Espresso. The majority of the shares are held by the Agnelli family (FIAT). A small link to the Gedi website appears on the website of the newspaper, together with information on Gedi's board of directors and on the newsroom.
Corriere della Sera	RCS MediaGroup, see TgLa7. A small link to the RCS MediaGroup's website appears on the website of the newspaper. No information is given on the newsroom.
Il Fatto Quotidiano	Società Editrice Editoriale Il Fatto S.p.A. It is a corporation without a majority shareholder. Among the shareholders, there are some journalists from the newspaper. On the website of the newspaper information is given on the newsroom, but not on the corporation.
Fanpage	Ciaopeople Media Group. On the website of the newspaper, information is given on the newsroom and there is a link to the company's website.

Cecilia Biancalana & Giuliano Bobba

(C4) Journalism professionalism

2 POINT

The requirements to access the newsrooms are selective, although the professionalisation of Italian journalists is generally not high and mostly not related to their educational background. Younger professionals are expected to have many skills and competences – editing, writing, screen, and radio – and are requested to perform many tasks, though mostly occupying precarious positions.

Hallin and Mancini (2004) highlighted how a low level of professionalism characterises the Mediterranean model. The co-existence of such a low level of professionalism with a highly selective organisational form (regarded as a “guild”) constitutes an Italian anomaly. The Order of Journalists regulates access to the profession, defining who can (and cannot) become a journalist through a highly selective process based on years of paid work into newsrooms and a final examination. This means that Italian journalists approach the professional path inside newsrooms, rather than through education.

Nevertheless, in recent years, university education has become more common and relevant for new professionals. 68 per cent of journalists have a higher education degree. This could be university degree, bachelor’s degree, master’s degree (first or second level), or PhD, mainly in the field of Political, Social, and Communication Sciences.

Today’s diversity of journalistic styles and models (long-form journalism, data journalism, journalism based on native advertising, and so forth) is fostering a more fragmented Italian journalistic culture, whereby traditional values live side by side with newer ones. This situation produces mixed results, where paths of professionalisation may be very different. For example, on one side, forms of data journalism or crowdfunding experiments are multiplying and related information made available (see Porlezza & Splendore, 2016, 2019), but on the other side, transparency does not seem to be the core issue for many journalists and newsrooms (Bentivegna & Marchetti, 2018).

According to the president of FNSI, one aspect that is evolving positively is the journalist’s capacity of self-organising and creating forms of solidarity in cases of conflict. In November 2017, a journalist was attacked with a headshot by a member of an extreme right-wing political force and a well-known family of the Ostia underworld. In January 2020, the attacker was convicted. The president of FNSI said:

The Higher Court, with an unprecedented sentence, recognised that that headshot did not only affect the individual journalist but also the right to report [...]. This will allow us, in the future, to claim in a trial “harassment to the right to report” as an aggravating circumstance.

Finally, representatives of FNSI and the Order of Journalists (Equality Committee) have highlighted how younger professionals are expected to have many

skills and competences – editing, writing, screen, and radio – and are requested to perform many tasks, though occupying precarious positions.

Christian Ruggiero & Sergio Splendore

(C5) Journalists' job security

1 POINT

Job security varies a lot between the different categories of journalists, as well as in relation to where in the country the profession is exercised. Many gaps are found in terms of payments and protection schemes.

One way to interpret the level of job security in Italy is to look at the data that the Order of Journalists provides about its members, the most important categories being *professionisti*, *praticanti*, and *pubblicisti* [professionals, practitioners, and publicists]. The first category is usually composed of journalists with permanent jobs within their newsrooms. They have legal protection, a good level of job security, and may maintain secrecy about what they do in terms of investigation. The latest data list about 28,000 professionals. *Praticanti* are journalists who are working within newsrooms to become professionals with the expectation of acquiring the same privileges enjoyed by the former. The third group is characterised by the absence of legal provision as well as short term labour contracts and inadequate payment. There are about 75,000 *pubblicisti* today compared with around 47,749 in 2000 and 1,373 in 1975. This is a clear sign of the increasing precarisation of the profession. Moreover, another divide can be found between journalists who work in the northern part of Italy and those who work in the south, as they face more uncertainty and work in a more insecure environment.

A survey conducted by the Agcom Observatory on Journalism (Agcom, 2017) revealed that journalists were found to be employed (including permanent positions and fixed terms collaborations) in 49.5 per cent of cases. There were 24.2 per cent self-employed (freelance), 11.6 per cent para-subordinate workers (so-called co.co.co.), and 5.7 per cent unemployed or unemployed and job seekers.

From the point of view of contractual forms and their actual use by information companies, the president of FNSI paints a picture of grey areas. There are no guarantees for a contract that will last for a professional's entire career. Entry into the professional world often leads to a widespread and dangerous sense of frustration.

Many of the boys and girls I see don't even know when they're coming in, and that puts them in a situation of exasperation [...]. You have to keep in mind that there is what used to be called a "reserve army" made up of people that suffer and may even be available for any adventure if you're able to talk to them.

In this dramatic situation, the above-mentioned divide between north and south persists, so that,

in recent years a series of labour policies have been adopted that have increased flexibility, [...] that in some cases have created what I call the “information riders”, that is, girls and boys who work in particular in the areas most at risk, in Campania, in Sicily, in Calabria; they work for unscrupulous publishers, paid one euro per piece.

Representatives of the Equality Committees of FNSI and the Order of Journalists highlight the fact that a gender divide is also to be considered in relation to professional job security, as a high proportion of the precarious conditions involve women professionals. This has implications and serious consequences not only for women professionals’ job insecurity, but also on their possibility to act to obtain more equal conditions in terms of salary, or to receive support when they are exposed to situations of harassment and abuse. No efforts by media outlets are reported as addressing these intersecting dynamics.

Sergio Splendore & Christian Ruggiero

(C6) Practice of access to information

2 POINTS

Recent meaningful developments have recognised the principle of freedom to access public information (law decree 97/2016) and therefore strengthened the possibility for citizens and journalists to access public information. Despite the promises of open government, access to information presents numerous shortcomings. During the Covid-19 pandemic, even the possibility to monitor public administration’s acts was reduced.

As Porlezza (2016) pointed out, the digitalisation of public information allows, on the one hand, making public information available for the citizens and, on the other, monitoring the activities of public administrations, thus giving rise to models of open government. As Meijer and colleagues (2012) argue, the phenomenon of open government goes beyond the opportunity of data availability and involves dialogue and interaction between citizens and public administrations.

With the development of open government, journalists have the opportunity to deal with new issues and problems in a deeper manner, in line with the data journalism model (Antenore & Splendore, 2017; Giorgino, 2017; Porlezza & Splendore, 2019). In this context, journalists play the essential role of monitors of public administration activities, making use of data reporting and data analysis techniques (Felle, 2015).

In Italy, the legislative decree 97/2016 has introduced the right to generalised civic access to information for any citizen in front of any public administra-

tion, and the Autorità Nazionale Anticorruzione [Anti-Corruption National Authority], in collaboration with the Garante per la Protezione dei Dati Personali [National Data Protection Authority], has released some guidelines on this issue in 2016.

Recently, a number of civic associations have complained about the complexities of the procedures that grant citizens the right to generalised civic access to information. In particular, some journalistic associations, such as Oxygen for Information, have complained that the rules on transparency of the public administration say nothing explicitly about the request for access that may come from a journalist. Given that journalists have certain prerogatives in the processing of personal data for reporting purposes enshrined in the data protection legislation, some indications on the effective exercise of the right to generalised civic access laid down by the Anti-Corruption National Authority and Italian Data Protection Authority guidelines – applicable to all activities and therefore also to journalistic ones – seem to be more stringent than those usually valid for journalists. This is the case of the prerogatives of preventing the disclosure of relevant information by other parties, regulated by these guidelines, but usually not applicable to the personal data processing in journalistic activities in the way it is regulated by the data protection law.

Furthermore, during the Covid-19 pandemic, law decree 18/2020 suspended any proceeding with Italian public administrations, including generalised civic access. According to Transparency Italy representative Laura Carrer (2020),

the citizens and journalists who inform us every day must be able to access these information, a fundamental right especially in situations such as the one we are going through – in which it is difficult to exclude a high risk hidden under the emergency. The right of access is an essential tool for monitoring the transparency and accountability of even the smallest government, regional, and local authorities in the management of events such as this one. The choices and actions of today's government are in fact fundamental for our future, and we cannot afford to let them take place without the possibility of knowing the content and responsibilities.

Francesco Marrazzo & Simone Sallusti

(C7) The watchdog and the news media's mission statement

2 POINT

Investigative journalism is one of the missions of the news media. In spite of formal recognition and specific efforts in practice, media formats and daily news agenda often put constraints on this core news media function.

There are no explicit guidelines regarding the watchdog role of journalism, neither on the level of national standards and codes, nor in the mission statements of the leading news media outlets considered. Nevertheless, some general principles can be mentioned.

The first article of the Consolidated Text of the Journalists Duties (ODG, 2021: art. 1) states:

It is an irrepressible right of journalists to freedom of information and criticism, limited by the observance of the rules of law dictated to protect the personality of others and it is their mandatory obligation to respect the substantive truth of the facts.

While not making explicit reference to the role of investigative journalism, this principle aims at protecting the journalist in carrying out investigative activities. In the leading news media outlets analysed for the MDM project, the RAI service contract makes explicit reference to the realisation of “programmes or columns of in-depth analysis, investigative reporting” (Ministry of Economic Development & RAI, 2018: art. 4) and is committed to “enhancing and promoting its tradition of investigative journalism” (Ministry of Economic Development & RAI, 2018: art. 25). However,

investigative journalism is one of the missions of the public service, the problem is that it is not always possible to guarantee this. There are programmes that revolve around investigative journalism – one example is *Report* – but it is always hard to push for more in-depth coverage. (*Tg1* editor-in-chief)

In Italian newsmaking, major space is devoted to political news, often narrated through the statements of politicians (Legnante, 2009), a condition grounded in the close relationship between media and politics, which are configured as complementary institutions (Gurevitch et al., 2009), leaving little time for investigation and watchdog functions. So, this remains confined to specific containers, such as the aforementioned *Report*.

Our newscast is very much focused on news, and less on in-depth analysis. It is also a question of resources, meaning time and finances. Newspapers have more space for in-depth analysis, and television newscasts have less... On television, other types of investigative programmes work better than the news. (*TgLa7* newsroom member)

In fact, although investigative journalism is not explicitly expressed in their mission statements, the selected online and print press media give relevance to investigative journalism and their watchdog function. “The nature of our newspaper is based on the watchdog function [...]. We come from investigative journalism and apply the same rules to political journalism”, explains the editor-in-chief of *Il Fatto Quotidiano*. However, even in the case of the print press, politics continues to occupy the centre of the agenda. “We have a pool of journalists who deal with investigations. Even if politics absorbs us daily. American-style investigative journalism is difficult and rare because of a lack of resources”, explains the newsroom member of *la Repubblica*. Worth mentioning is the magazine *L'Espresso* (same editorial group as *la Repubblica*), which focuses on investigations and in-depth analysis and is a member of the European Investigative Collaboration.

In general, investigative journalism has never had much space and market in Italy. This is also due to the high level of political parallelism, the low level of professionalisation of journalism (Hallin & Mancini, 2004), and the difficulties of importing this model of journalism from the liberal Anglo-American context (Gerli et al., 2018). The marginality of investigative journalism within the Italian information landscape is probably the reason why it is not considered a primary objective in the mission of the media outlets in our sample.

Mauro Bomba

(C8) Professional training

3 POINTS

Professional training is mostly provided by the twelve schools across the country that are recognised by the Order of Journalists, and by sustained activities of the Order itself. Media companies differ widely in terms of their investment in courses and training.

The Order of Journalists enjoys specific powers in the field of training, as defined by law 69/1963. It is possible to distinguish between training aimed at accessing the profession on one side, through journalism schools, and the provision of on-going on-the-job training on the other. There are currently twelve schools of journalism recognised by the Order (see Table 7).

The continuing professional training of journalists is an obligation provided for by law 148/2011, for all those enrolled in the register as *professionisti* and *pubblicisti* [professionals and publicists].

Few of the leading media outlets provide internal training opportunities, separate from those of the Order of Journalists. As the editor-in-chief of *Tg1* states, public radio and television seem to be the most sensitive to the question of training, both in terms of the existence of a dedicated structure and of its perceived importance:

There is a structure, RAI Academy, and then there is the Study Centre [...] but it is still too little: we could do a lot, also in collaboration with universities, to be able to strengthen a model that is unfortunately still very focused on know-how rather than on knowledge [...] There is still not enough investment in professional training. Continuous seminar cycles would be necessary.

The private news sector, instead, tends to conceive training as a form of professional updating on more technical issues. In this regard, the editor-in-chief of *SkyTg24* declares:

[Training] takes place not on a journalistic level but on a company level [...] certainly on privacy, on data management, on forms of hacking or computer piracy there are courses [...] which in my opinion should be more frequent and better organised. I understand that in a medium-large company it is complex, but there is a need for it.

Few degrees in communication and journalism across the country include courses focused on gender, diversity, and inequality issues, or adopt a gender and intersectional lens in the training of communication professionals (see Indicator F8 – Rules and practices on internal gender equality). The same goes for schools that are recognised by the Order. Where such courses exist, they are not integral part of the curriculum, they are mostly optional, and sustainability of the teaching offer depends on teachers' and trainers' personal interest. Interesting developments have characterised the trainings offered by the Order in response to law 148/2011. Courses on diversity and gender inequality issues have multiplied, as reported by members of the Equality Committee of FNSI and Order of Journalists; and the FNSI Equality Commission is debating how to propose the *Manifesto di Venezia* [Venice Manifesto] in the recognised schools. At the same time, no specific training, aimed, for instance, at supporting women's access to managerial and leadership positions, seems to be organised by media outlets.

Table 7 Journalism schools

School	City
Two-year master's degree in Journalism of the University of Bari	Bari
Two-year first level master in Journalism of the Alma Mater Studiorum University of Bononia	Bononia
Two-year master's degree in Press, Radio and Multimedia Journalism of the Catholic University of the Sacred Heart	Milan
Two-year master's degree in Journalism of the Free University of Languages and Communication IULM	Milan
Two-year master's degree in Journalism of the University of Milan/IFG (School of Journalism "Walter Tobagi")	Milan
Two-year master's degree in Journalism from the "Suor Orsola Benincasa" University	Naples
Italian Centre for Advanced Studies for Training and Upgrading in Radio and Television Journalism	Perugia
Two-year master's degree in Journalism of the Free University SS. Assunta (LUMSA)	Rome
Higher School of Journalism "Massimo Baldini" of LUISS Guido Carli University	Rome
First-level master's degree "School of Journalism Post Graduate" of the University of Salerno	Fisciano
Master in Journalism "Giorgio Bocca" of the University of Turin	Turin
Institute for Training in Journalism	Urbino

Comments: List of schools authorised by the National Council of the Order of Journalists and currently in agreement on the basis of the Framework of guidelines for the authorisation, regulation, and control of schools for training in journalism approved by the National Council on 27 September 2018.

Source: ODG, n.d.-a

Christian Ruggiero

(C9) Watchdog function and financial resources 2 POINTS

Investigative journalism is acknowledged and valued, also by professionals. However, the limited availability of financial and organisational resources constrains this function to being a niche component of editorial routines. Transnational partnerships (like Lena and European Investigative Collaboration) and civic initiatives partly compensate for the limited support by media companies for investigative practices.

Despite the critical situation of the Italian news media in terms of newsrooms' resource availability and the lack of a professional tradition (Gerli et al., 2018; Štětka & Örnebring, 2013), the journalists interviewed recognise the importance of investigative journalism. As the managing editor of *la Repubblica* states:

Investigative journalism is the so-called non-fungible journalism, which allows us to make a difference towards the most demanding readers who come to look for something they may not find elsewhere. This is important to safeguard the role of information and the media in keeping attention on certain issues high, but it also becomes a strategic asset when the business model changes.

In this regard, a journalist of the *Il Fatto Quotidiano* underlines that investigative journalism is the core of the news organisation's mission itself:

For each event, we never just address the problem of reporting what is happening. We also try to dig into the nature of the facts, doing things that, in general, other newspapers do not dare out of “complacency” towards power [...]. Our goal is to combine the history of the facts with meticulous search and to discover what is behind facts, also from the economic point of view.

Nevertheless, the financial resources and dedicated professional teams within the editorial offices are very limited among the selected leading media outlets (*Il Fatto Quotidiano*, *la Repubblica*, *Sky Tg24*). According to the managing editor of *la Repubblica*,

We try to create a structure within the editorial staff that is dedicated to this type of journalism, with colleagues who are outside of the daily production and dedicate themselves to this activity. I would not say “Spotlight team like”, however, the idea is to have some colleagues who can work outside the everyday rhythms in order to do more in-depth work, with adequate time available.

Hence, investigative journalism imposes changes in the newsrooms' organisation and professionals' routines, impacting both the budget resources and time management. As the managing editor of *Sky Tg24* explains,

On some stories, there is an investment of time and money, which is generally established in advance. Therefore, we try to think of this also as an investment in terms of intellectual and monetary assets. Obviously, it's not an unlimited budget, but there is enough to decide what to do [...]. First of all, there is work on the dossiers. Once the attention is focused on that fact, one or several colleagues are commissioned to start working on it, putting together documents and data. This does not necessarily mean that we will then come to an investigation, but it is the beginning of something. This may take some weeks or sometimes even months. In that sense we have annual deadlines, three or four, in which we have spaces for in-depth inquiry, plus those that are potentially added on the wave of topical issues.

In general, according to the professionals interviewed, investigations remain only a privileged and expensive niche within the newsrooms' daily work, and no specific rules have been codified to conduct them.

The public service broadcaster encourages investigative journalism in its mission, but the editorial format and the hierarchical organisation of the news-rooms restrict this (*Tg1*). As *Tg1* managing editor claims,

Investigative journalism is not sufficiently represented in the offer of news programmes. This is for a number of reasons, because the bureaucratic-productive routines have been strongly focused on the logic of the news bulletin rather than on the news as a “television newspaper”. This is a big limitation because it is still too difficult to push in depth analysis even within the daily dimension of the TV news.

Transnational partnerships for investigative journalism should be mentioned here. *Il Fatto Quotidiano* has established a collaboration with the French investigative journal *Mediapart*, publishing their content weekly, and *la Repubblica* is one of the eight media partners of the Leading European Newspaper Alliance organisation (Lena), established to improve journalism in Europe by sharing common investigations. Another positive example of international partnership is the European Investigative Collaboration established in 2016 to jointly promote investigative journalism with a focus on European topics to understand how power structures affect European communities. *L'Espresso* participates for Italy, alongside prestigious news media such as *Der Spiegel* (Germany), *Le Soir* (Belgium), *Mediapart* (France), *El Mundo* (Spain), *Falter* (Austria), *Politiken* (Denmark), and *Newsweek Serbia* (Serbia).

Rossella Rega

Conclusions

The analysis and interviews conducted in the context of the MDM 2021 project provide a picture of the situation of Italian journalism with a focus on some of its leading news media. The analyses partly confirm findings from previous studies, but they also point to some recent developments, while providing insights into less investigated areas. The MDM framework has proven to be a productive tool to develop new knowledge and better the understanding of the Italian news media environment, thanks to the adoption of a holistic perspective.

Few indicators from the MDM framework have received a fully positive grade (Indicators E4 – Minority/Alternative media, E6 – Content monitoring instruments, & C8 – Professional training), and no indicator has received zero points. Most of the investigated aspects signal medium-positive trends in the profession and the sector, but there are also a number of problematic areas across the three core dimensions of freedom, equality, and control.

Freedom / Information appears as the most critical dimension. The majority of low grades are found in this set of indicators, where most indicators score 1, apart from structural aspects like geographic distribution (Indicator F1),

patterns of media use (Indicator F2), and formal normative elements, such as internal rules (Indicators F4 & F5), and gender equality in media content (Indicator F9), all of which score 2. Problems related to the limited diversity of news sources (Indicator F3) and persisting external influence on news-making (Indicator F6) seem to be related to the historical legacy and nature of a media system that, as indicated by Hallin and Mancini (2004), can be described as a typical pluralist polarised model, whereby the relation between politics, parties, vested interests, and the media still characterise news-making operations. On the other side, newer issues such as misinformation (Indicator F10) and journalists' protection against harassment, particularly online (Indicator F11) seem not to have produced adequate and systematic responses either at the national level or at the level of individual media outlets. It must be said, however, that one element allowing us to imagine positive developments in this regard is the presence of fact-checking initiatives solidly integrated within European networks operating in this field. Gender inequalities emerge as a persistent issue, more in relation to media structure (Indicator F8) than in media content (Indicator F9), but also transversely across other indicators, where a focus on the gendered implication of issues has been highlighted (for instance, in relation to Indicators F11 – Protection of journalists against (online) harassment, C5 – Journalists' job security, & C8 – Professional training).

On the contrary, the *Equality / Interest Mediation* dimension emerges as the one in which Italy gains its higher scores. In some cases, this is through good practices, as in the case the number and quality of monitoring agencies; but we also recognise that issues of (audiovisual) concentration that strongly characterised the country in the past decades have been at least partly addressed (Indicators E1 & E2); whereas the diversity of news formats (Indicator E3) and affordable news (Indicator E5) appear as consolidated features of the system (all graded 2). As anticipated, minority and alternative media (Indicator E4) and content monitoring instruments (Indicator E6) are the indicators where the most positive developments can be found. Besides acknowledging the role of a public broadcaster RAI – which, according to law, is expected to ground its operations in principles of inclusion, diversity, and pluralism – this finding should be explained by the role of both institutional and civic, or third sector, initiatives. The independent authority Agcom plays a crucial role in supporting the democratic function of media and journalism, while a number of observatories exist and monitoring activities are conducted by a plurality of actors, including civic organisations and academia. One aspect worth mentioning is the tension between, on the one side, a widely formalised set of principles, norms, and rules through the adoption of ethical codes that cover a variety of issue areas (from reporting about migrants, to respect for children, to the use of correct language when making news about gender-based violence) and, on the other, limited awareness, reference, and use of those very instruments,

alongside the absence of actual and effective sanctions in cases of violation of the codes' provisions. Finally, practices of public engagement and participation (Indicator E9) and internal pluralism (Indicator E10) seem to be evolving, but no clear model is emerging, nor innovative frameworks.

Finally, the *Control / Watchdog* dimension shows a mixed picture. Though professional training (Indicator C8) has been formalised and is well structured, mostly thanks to the role played by the Order of Journalists, other aspects appear to be more problematic. This is particularly the case for the indicator regarding the independence from the powerholders (Indicator C2), and journalists' job security (Indicator C5) in a context of widespread precarious working conditions, late entry, if at all, into the formalised profession, and the disproportional impact of precarity on women professionals. Nevertheless, the strategic relevance of the media's watchdog function and the importance of investigative journalism (as articulated through Indicators C3 – Transparency of data on leading news media, C4 – Journalism professionalism, C6 – Practice of access to information, C7 – The watchdog and the news media's mission statement, & C9 – Watchdog function and financial resources) emerge from the interviews as highly valued by editors and journalists, though seldom supported by formal mission statements or by adequate resources by media organisations.

There is a mixed picture overall, indicating elements of "path dependency" in the news media system, which parallel global trends such as financial difficulties, crisis in public trust, profound transformation of business, and practice models due to digitalisation and platformisation of news-making. At the same time, it is to be highlighted that where the most pressing problematic situations emerge – for instance in the case of threatened journalists, where Italy features the worst case in Europe – the responses by institutional actors (Agcom) and professional unions (FNSI), but also by civil society organisations (Ossigeno, Articolo 21, and others), are strong, indicating a mature professional ethos as well as societal understanding of the centrality of freedom of expression and the press.

The resulting picture is a reflection of the contemporary reality of journalism in the country, with its contrasting features and trends. It is also the result of the coming together of expert knowledge through which a team of 14 researchers, each with specific expertise, has managed to critically explore all the dimensions of the MDM framework. The team enjoyed taking part in the MDM project and appreciates its follow-ups as an opportunity to master our understanding of specific areas and contemporary challenges to the media and journalistic profession, thanks to a comparative approach across the world's regions.

Claudia Padovani

Notes

1. RAI [Italian radio and television] is a licenced agency whose board of directors consists of seven members, four of whom are appointed by the Chamber and Senate of the Italian Parliament, two by the government, and one by the employees' assembly.
2. Founded by tycoon Silvio Berlusconi and still 44 per cent controlled by the holding company of the Berlusconi family.
3. The Gender Equality Index is a tool to measure the progress of gender equality in the EU, developed by Eige. It gives more visibility to areas that need improvement and ultimately supports policy makers in designing more effective gender equality measures. It reveals both progress and setbacks by focusing on six core areas or "domains" (work, money, knowledge, time, power, and health) and two additional domains (violence against women, intersecting inequalities); and includes 31 indicators from 28 European countries) (See <https://eige.europa.eu/gender-equality-index/2019/IT>).
4. All data and analysis concerning the pandemic was carried out in 2020.
5. Following this resolution, within the Media Services WP, Agcom is periodically sharing on its website data about the time dedicated by radio and television to the topic of Covid-19 in the news and current affairs programs and specific television audience data.
6. According to several scholars, in particular economists, local newspapers are very important for the public opinion in the election periods (Drago et al., 2014), because they can prevent the polarisation of the voting behavior (Darr et al., 2018). According to some political scientists, declining local political news coverage is reducing citizen engagement (Hayes & Lawless, 2018).
7. Even if, from September 2015 to September 2019, the audience of the evening news programme *Tg1* (on air from 20:00 to 20:30 on RAI1) has decreased from 25.1 to 22 per cent of share, while the audience of evening news programme *Tg5* (on air from 20:00 to 20:30 on Canale5) has increased from 17.4 to 18.2 per cent of share.
8. In particular, 36.6 per cent worked for daily print media, 5.6 per cent for weekly newspapers, 7.3 per cent for magazines, 17.7 per cent for private or public television, 14.9 per cent for private or public radio, 6.1 per cent for news agencies, 6.6 per cent for online newsrooms of traditional media, and 5.3 per cent for stand-alone online news sites.
9. At the time of writing, the latest data available from the GMMP are from the 2015 edition. The 2020–2021 national, regional, and global reports will be launched in June 2021 (available at www.whomakesthenews.org).

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SOUTH KOREA

Relatively healthy, still trying hard to adapt to digitalisation

Eun-mee Kim & Jae-woo Lee

Introduction

South Korea is a relatively small country with a land size of 100,033 square kilometres and a population of 52 million. Despite its history of colonisation, war, and authoritarian regimes, South Korea has emerged as a liberal democracy and is well-known as one of the leading countries in developing and adopting communication technologies. Politically, South Korea is now considered a “full democracy”, moving from the classification of “flawed democracy” in 2020, according to The Economist Intelligence Unit’s (2020) Democracy Index 2020.

Freedom in the World 2021: status “free” (Score: 83/100 (Freedom House, 2021).

Liberal Democracy Index 2020: South Korea is placed in the Top 10% bracket – rank 17 of measured countries and with a score of 0.78, considerably up from rank 37 in 2016 (Varieties of Democracy Institute, 2017, 2021).

Freedom of Expression Index 2018: rank 13 of measured countries, considerably up from 65 in 2016 (Varieties of Democracy Institute, 2017, 2019).

2020 World Press Freedom Index: rank 42 of 180 countries (Reporters Without Borders, 2020).

While these numbers show how far the country has come, South Korea has its fair share of challenges and struggles when it comes to freedom of the press and democratic media practices.

News media in South Korea is saddled with a history of partnership and complicity with political power under authoritarian rule. Some of the legacy media companies that emerged in such a setting are still very much influential and thrive as cultural producers in South Korea. Although less so today than in the past, journalists consider politics as one of the top five factors that interfere

with the freedom of the press. Specifically for the two broadcasters Korean Broadcasting System (KBS) and Munhwa Broadcasting Corporation (MBC), the President and the ruling party have absolute control over the hiring of the company president and the chairman of the board. The public broadcaster in South Korea is always heavily criticised for aligning itself with whichever party is in control of the presidential office. Adding to this, the plethora of journalists turned congressmembers and public officers has given rise to internal criticism that journalists, without any external pressure, are voluntarily becoming more sensitive to political power. Especially in the recent polarised political environment, public cynicism stands out as a serious problem, as newspapers and journalists are often conflated with either the conservative or the liberal camp, regardless of the quality of journalism. Active watchdog functions run the risk of being dismissed or discounted as protecting one's own camp from the opposing camp.

On the surface, the focus of power seems to have shifted from the government (authoritative, military regimes) to advertisers and corporate sponsors and, to some extent, it has. The law restricts *chaebols*, or large powerful groups of companies involved in various kinds of business, often referred as conglomerates, which are distinctive in South Korea. For the newspaper market, this means that family-run conglomerates in newspaper ownership are restricted and prevented from owning more than half of the shares of any newspaper. But as the legacy of the development economy era, mainly through 1970s and 1980s, remains, *chaebols* still wield significant power in the South Korean economic structure. The sheer amount of advertising contracts from these companies gives them substantial market power, and critical reporting on these *chaebols* is still very much limited by such structural restraint.

As of 2018, there are 221 daily print newspapers printed by 192 newspaper companies in South Korea. 30 are national general dailies, but just 11 of these national general dailies account for 97.8 per cent of the revenues made by the national general daily newspapers. There are 65 other daily newspapers including 14 economic dailies, 8 sports dailies, and 5 dailies printed in foreign languages. 38 are categorised as other special daily newspapers. 124 regional general dailies and 2 free dailies are also in print. There are also 1,292 companies printing 1,376 weekly newspapers including 54 national general weeklies and 548 regional general weeklies. Of these, a total of 34 newspapers (including the 11 major national general dailies) are required to regularly file financial reports with the Korean Financial Supervisory Commission and publish them online.

In terms of newspaper circulation, *the Chosun Ilbo* tops the list at 1,308,395 copies, followed by *JoongAng Ilbo* (978,279), and *Dong-A Ilbo* (965,286). *Maeil Business Newspaper* is ranked fourth (707,749), with *Hankyoreh* (214,832) and *Kyunghyang Shinmun* (190,745) placed seventh and tenth on the list, respectively. The largest regional daily newspaper is *Busan Ilbo* (144,073),

which caters to readers in Busan, the second-largest city in South Korea. Regardless of the scale, revenue and profits have kept falling fast.

The number of broadcast channels that carry newscasts, television, and radio combined is 42, with 8 public broadcasting channels, 15 commercial channels, 10 religious or other special channels, 6 general cable television channels, and 3 terrestrial digital multimedia broadcasting channels. As for the radio news media, there are four public radio stations, two commercial, two regional, eight religious, and two specialised news stations. Early drive-time news shows offering straight news and commentaries are fairly influential.

Policy changes in the early 2000s triggered transformation across the media landscape in South Korea. Strict media regulations restricting conglomerates, newspapers, and foreign capital from entering the broadcasting industry were lifted in 2000 with the Broadcasting Act, and the free channel registration system introduced in 2001 allowed media companies to enter the industry as programme providers. This led to a significant rise in the number of television and radio channels as well as channel providers.

In the past few years, news consumption through mobile devices has become prominent in South Korea. In recent years, there has been a striking rise in news consumption on social media and YouTube. The trend of decreasing subscription to print newspapers continues, but more people are accessing news through Internet portals on their smartphones.

Like in many other parts of the globe, fake news receives much attention in South Korea. Legislative moves toward regulating fake news and incorporating media literacy into the national educational curriculum are being taken to fight unreliable and deceptive information.

Different laws and agencies regulate different forms of media. The Act on the Promotion of Newspapers (the Newspaper Act) is regulated by the Ministry of Culture, Sports, and Tourism, which governs newspapers, including online newspapers. Broadcast communications are governed by the Broadcasting Act and the Internet Multimedia Broadcast Services Act. The latter governs businesses delivering broadcasts through Internet protocols, and both are regulated by the Korean Communications Commission and the Ministry of Science and ICT (MSIT). Although there are no laws that specifically govern OTT or online media, the Telecommunications Business Act (TBA) regulates services provided through telecommunications technology.

In 2018 and 2019, there were noteworthy governmental and institutional efforts to regulate Internet portal services like *Naver* and *Daum*. The portal news services are unique in that when a reader clicks on an article, they are presented with the article on the portal site via an “in-link”, rather than being directed to the article on the news media’s website via an “out-link”. The current law classifies portals as value-added telecommunications business operators. Portals have been excluded from the competition assessment review in the past as it

is difficult to define their markets, since they provide a wide range of services including Internet search, advertising, shopping, news, and video streaming. In 2018, an opinion-rigging scandal occurred where the view counts and likes for certain news articles on *Naver* were purposely manipulated with a computer program by a blogger. 17 legislations related to the online portals were then introduced in Congress, which included regulations on the “in-link” system being used to provide news articles to portal users and comments sections on portals. *Naver*, through internal decision, withdrew from news editing on its news section and removed the news list on the mobile front page in 2019. Later in 2019, taking a move interpreted as a gesture to bring the online portals into the boundaries of government regulation, the Fair Trade Commission launched an investigation into *Naver*’s abuse of its market dominance, for deliberately placing items from its own shopping, real estate, and video platforms at the top of its search results. There is an ongoing debate regarding whether these news mediation services which provide gateways to the news by presenting news, in a specific format and order, should be considered as news media, even though they do not produce news themselves.

Covid-19

In early 2020, due to the Covid-19 pandemic, all public attention was on news media reporting the numbers of cases and deaths every hour or so. Ratings and clicks on the pandemic news sky-rocketed, but at the same time, they were criticised on two aspects. The first was instilling too much fear backed by only flimsy scientific evidence. However, the urgency and uniqueness of Covid-19 required news media to continue reporting even if with uncertainty. The second point of criticism was privacy infringements, with details of movements of those with confirmed cases being revealed to the public. Whether this fear contributed to South Korea’s success in terms of dealing with this pandemic is yet to be assessed, but it certainly contributed to voluntary lock-downs and social distancing, with South Korea never officially experiencing total lock-down.

Policy-makers, such as the Korea Communications Commission, are reported to have initiatives in collaboration with Internet portals to join forces to combat fake news, especially related to Covid-19, but no concrete moves have been reported yet. They make effort to enforce the deletion of personal information of the confirmed patients and the places they visited after 14 days.

Leading news media sample

Leading news media in South Korea can be grouped into three categories. One is the terrestrial broadcasting networks, one of which was originally established

as a national broadcast service and has since held the status of the public broadcasting service. Two commercial broadcasters are also in operation. The second category is a group called “top”, consisting of six national newspapers: *the Chosun Ilbo*, *JoongAng Ilbo*, *Dong-A Ilbo*, *Hankyoreh*, *Kyunghyang Shinmun*, and *Hankook-Ilbo*. *Chosun*, *JoongAng*, and *Dong-A* are typically categorised as conservative news media, while *Hankyoreh* and *Kyunghyang* are liberal. Despite some controversy, *Hankook-Ilbo* takes a centrist political stance. The third and the newest group to join the news industry is several cable networks, which were specially licensed to carry news. The six cable networks, JoongAng Tongyang Broadcasting Company (JTBC), TV Chosun, Channel A, Maeil Broadcasting Network, Yonhap News TV, and Yonhap Television News (YTN), are bi-media, in that they also issue print newspapers. It is worth noting that the broadcast programmes of these bi-media are sometimes considered to have a more conservative tone than their print counterpart. Conservative media outlets might appear to be greater in number, but the two conservative presidencies and impeachment of former President Park by the citizen’s revolution (“Candlelight Revolution”) have made the political climate more hostile to conservatives in general. As a result, conservative media outlets are often discounted as a single power group and criticised by citizens in the liberal camp.

Indicators

Dimension: Freedom / Information (F)

(F1) Geographic distribution of news media availability 3 POINTS

Traditional news media content is available nationwide. Backed by strong digital infrastructure, multiplatform delivery via online portals, YouTube podcasts, and news websites ensures widespread news media availability.

Regarding print media, most national dailies are available either in a single issue or by subscription around the country. Subscription is more common than newsstand purchases, and newspaper distribution centres handle 93.9 per cent of newspaper deliveries, while 5.3 per cent of the deliveries are made by the postal service (Korea Press Foundation, 2019c). Delivery by mail is usually offered for areas where distribution centres are unable to deliver due to transportation or cost issues, at an extra or no cost for the subscriber depending on the newspaper. While national general daily newspapers are still readily available in most parts of the country, recent changes in news media usage have added to the pressure on print news media. As a result of continued decreases in newspaper subscriptions and readership, the average time of newspaper use has

become 4.2 minutes, and the household subscription rate hit an all-time low of 6.4 per cent (Korea Press Foundation, 2019b). The net income of the print news media continues to decrease (Korea Press Foundation, 2019d), leading to cut-backs in the number of local distribution centres. However, all major national daily newspapers are also available online on the official newspaper websites or portals like *Naver* and *Daum*, and access to news content is fairly easy. The free newspapers are distributed at major subway stations, bus terminals, and community or district offices.

The television landscape in South Korea consists of terrestrial, general cable, satellite channels, and cable channels, and television news is available on four public television channels, eleven commercial channels, and six general cable channels. KBS, MBC, and Educational Broadcasting System operate the four public television channels and are available nationwide. KBS is the national public broadcasting company of South Korea and operates two generalist television channels, KBS 1TV and KBS 2TV. The former presents news programmes, current affairs, culture programmes, and sports programmes, while the latter is more geared toward educational programmes, television dramas, and variety shows. *KBS News 9* has been the prime-time news programme on KBS 1TV since 1964. Its rival news programme, *MBC Newsdesk*, is aired by MBC, a generalist public broadcasting company funded by a public organisation that is often considered a commercial broadcaster, since it operates on advertising. Finally, the Educational Broadcasting System runs a single public television channel specialising in educational programmes.

As the biggest commercial broadcaster, Seoul Broadcasting System (SBS) offers a wide variety of programmes, ranging from newscasts and investigative programmes to television dramas on its channel, and offers *SBS 8 News* as its prime-time news programme. KBS, MBC, and SBS long dominated the television industry as the three major rival national terrestrial television networks. In 2019, news programmes took up 29.2 per cent and 8.4 per cent of the airtime on KBS 1TV and KBS 2TV, respectively, while MBC designated 18.6 per cent of its airtime to news programmes. All three broadcasters have local broadcast stations around the country addressing the audience outside the metropolitan area of Seoul, Incheon, and Gyeonggi-do. KBS and MBC each have more than 18 regional broadcast stations and SBS partners with nine local commercial channels to serve audiences in different regions.

JTBC, TV Chosun, Channel A, Maeil Broadcasting Network, Yonhap News TV, and YTN launched as general cable channels in the wake of a major media law revision in 2009, and since then have gained the upper hand on the three major terrestrial channels. JTBC, TV Chosun, Channel A, and MBN are generalist channels, and Yonhap News TV and YTN are 24-hour news channels. These channels are available on cable, Internet protocol television (IPTV), or satellite service subscriptions. Television news channels from other countries

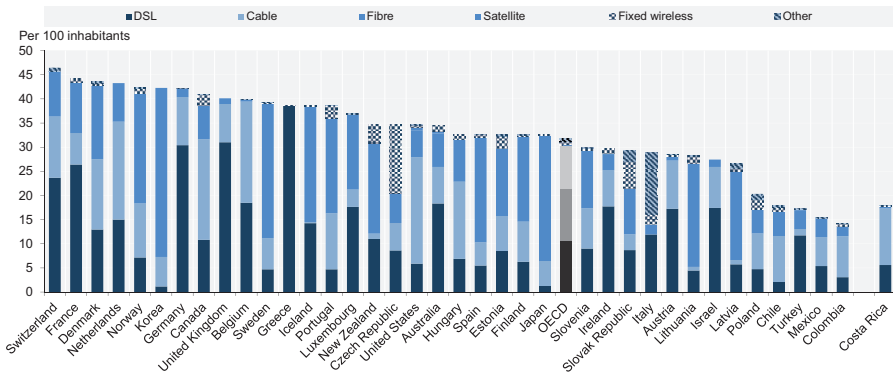
like CNN, BBC World, Al Jazeera, CCTV4, and CNBC, are also available in select subscription plans.

Infrastructure plays an important role in ensuring access to news broadcasts, and South Korea, like many other countries, has shifted to digital television. In December 2012, terrestrial analogue television services were terminated as a part of the 14-year-long national project for the “digital turn” planned by government agencies in 1999. With this transition, either a digital television or a converter for an analogue television became required to receive any television channel. Cable channels are still available on analogue television, but the gradual rise in digital television ownership shows that the transition is more or less complete. In 2018, 96.5 per cent of households were estimated to have one or more television, and 90.3 per cent were estimated to have at least one digital television, with only 9.4 per cent of households owning an analogue television. In 2018, 93.2 per cent of households were estimated to be customers of subscription services.

The radio landscape in South Korea consists of 18 radio stations, of which KBS operates three, and MBC and SBS operates a station each. Except for YTN News FM, which specialises in news broadcasts, and Traffic Broadcasting System, which offers a news bulletin every other hour, only KBS 1Radio and MBC FM carry news bulletins around the clock. Other channels offer two to three news bulletins throughout the day. Radio signals are transmitted to analogue radios, but KBS, MBC, SBS, YTN, and Traffic Broadcasting System radio stations are also all available online or on smartphone applications.

In terms of online access and news, South Korea is known to be one of the best-connected countries in the world. In 2018, the Internet penetration rate was 95.9 per cent (OECD, 2018a), and the household Internet access rate was 99.5 per cent. South Korea has consistently ranked at the top in Internet connections in the past few years and had the greatest percentage of fibre connections in total fixed broadband in 2018, boasting one of the fastest Internet speeds in the world (see Figure 1). In terms of the urban and rural digital divide, broadband is unavailable in some rural areas, and mobile Internet use is lower in county-level cities (74.5%) than in metropolitan cities (89.9%). Despite these limitations, government-initiated policies and programmes for digital infrastructure have promoted nationwide adoption of broadband Internet, and South Korea has the second-most connected rural areas among the OECD members.

Figure 1 OECD fixed broadband subscriptions by technology, June 2019 (per 100 inhabitants)



Source: OECD, 2018a

The number of online newspapers and news services has grown exponentially since 2005, when the Act on the Promotion of Newspapers was revised to include online news providers. In 2018, 2,900 companies were publishing 3,573 online newspapers, 966 of which were based offline and 2,571 were based online.

Online portal services are widely influential in South Korea, and they are the most popular news source after television. *Naver* and Kakao's *Daum* are the two most-used portals, dominating online traffic. They provide a wide array of content and services like a search engine, e-mail, blog, and social media, as well as news articles from many different media outlets in their news sections. As influential as these Internet portals are, their status in the news media industry is still very much undefined. Though making news more accessible online by distributing news from a wide range of partnered news media, these portals were recently criticised for discriminating against regional newspapers by eliminating them from their partnered news media list after an update of the news search algorithm.

The digital turn has further added to the variety of platforms that not only help access information and news, but also invite audience participation. Not only do the major television news channels operate their own YouTube channels, where television reports and live news can be streamed at any time, but individual and business channels create and upload commentaries, interviews, and videos on a wide range of topics. Podcasts are another medium that provide new ways of consuming news, by allowing listeners to stream regular radio or television programmes on-demand and subscribe to or run their own channels.

The Broadcasting Law (Chapter V, Article 69) stipulates that any broadcasting business provide Korean sign language, closed-caption subtitles, screen commentaries, and so forth, to assist people with disabilities in viewing broadcasts.

By law, the Korea Communications Commission subsidises broadcasters with the expenses incurred in providing these services, or supplies receivers purchased by the Broad Communications Development Fund for people with disabilities.

Standards and procedures for selecting operators of public access channels or “public-interest channels”, as defined by law, are prescribed by a Presidential Decree, and the operators are chosen from the cable television broadcasting and satellite broadcasting businesses every other year. In 2019, there were a total of eleven public access channels in three different categories: social welfare, science and culture, and education and local channels.

(F2) Patterns of news media use (consumption of news) 2 POINTS

The changing media use patterns reflect the digital turn in the media industry of South Korea. With 92.3 per cent of the adult population getting news from either television or the Internet, interesting patterns emerge between different age groups. Legacy media are in greater use among the older population, while Internet-based media are a major news source for younger people.

In South Korea, television has traditionally been the most influential form of media. Television remains popular with a penetration rate of 90 per cent for the adult population, but the digital shift has changed the way people watch television and television programmes. Television programmes are no longer reserved for televisions but are also accessible online via personal computers (PCs), smartphones, and other mobile devices. This has resulted in television programmes reaching a greater portion of the adult population (91.6%) than television did. Television news programmes reach 82.8 per cent of the population. 75.6 per cent of the adult population watch television news programmes more than two days a week, with 47 per cent watching television news every day. Despite a continued decreasing trend in use, television remains the most-used medium, with an average weekly viewing time of 143.2 minutes and television news viewing time of 48.4 minutes. News usage share by media sector (categorised by the type of devices used) also shows that television is still the most popular news media among the news audience, with a usage share of 45.3 per cent in comparison with that of newspaper and Internet, which have a share of 9.2 per cent and 40.4 per cent, respectively. However, a closer look into the television news usage share shows that terrestrial television channels, once the dominant news outlet in the country, now have the news usage share of 17.8 per cent, with general cable channels and specialised news channels’ share together reaching 27.5 per cent (Public Opinion Concentration Survey Committee, 2018).

In contrast to its glory days in the 1990s when the print newspaper was the second-most used medium and its penetration rate reached 87.8 per cent, print

newspapers are read by a mere 12.3 per cent of the population today, exclusively for news. The subscription, readership, and reading time of print newspapers have consistently decreased since 2011. The Media Consumer Research reported that the print newspaper subscription rate fell to the level of 6.4 per cent and the time spent reading print newspapers to 4.2 minutes in 2019. In terms of newspaper circulation, *the Chosun Ilbo* tops the list at 1,308,395 copies, followed by *JungAng Ilbo* (978,279) and *Dong-A Ilbo* (965,286). *Maeil Business Newspaper* is ranked fourth (707,749), with *Haynkyoreh* (214,832) and *Kyungbyang Shinmun* (190,745) placed at seventh and tenth on the list, respectively. The paid circulation data from Korea Audit Bureau of Certification show that these six national print dailies are among the ten most-circulated newspapers in South Korea. *Chosun Ilbo*, *JungAng Ilbo*, *Dong-A Ilbo*, *Hankyoreh*, and *Maeil Business Newspaper* are the top brands in terms of weekly usage percentages (Newman et al., 2019). While *Chosun Ilbo* is the most-read print daily newspaper, it ranks at the bottom in terms of brand trust. *Hankyoreh* and *Kyungbyang* are the most and second-most trusted print dailies by those who have heard of the titles. While trust in the news in South Korea is consistently low, print news is even less trusted, and all the print newspapers discussed above place at the bottom in the brand trust ranking when compared with television news media. Other periodicals declined in their reach by 25.9 percentage points since 1996, and 1.3 per cent of people still get news from them.

Most striking in recent years has been the rise of Internet-based media as the news media of choice, especially on mobile devices. As of 2019, the reach of Internet-based media is 86.7 per cent, with 80 per cent of the adult population using Internet-based media to access news. Preference for mobile devices over PCs became even starker, with only 21.1 per cent of the population using a PC to access the news and 79.6 per cent using mobile devices. 37.2 per cent of adults get news on their mobile devices and 3.3 per cent on their PC every day. Altogether, 79.6 per cent of adults consume news online at least once a week on their mobile devices. On average, people spent 21.5 minutes and 4.8 minutes reading or watching the news on their mobile devices and PC, respectively.

Looking at the platform through which people get news on the Internet, 73.6 per cent gets news from an Internet portal like *Naver* or Kakao's *Daum*. The Internet portals provide a wide range of services and reach 81.8 per cent of the population on either PC or mobile devices, and have become one of the most influential media in the country. Another interesting change has been the rise of online video platforms like YouTube, Naver TV, and Afreeca TV as popular online news media channels. The use of these platforms for news rose from 6.7 per cent in 2018 to 12 per cent in 2019. All major broadcasting companies run a channel on at least one of the video platforms, and JTBC, YTN, and MBC topped the list as the news outlets that reached the greatest number of people on these video platforms.

It is important to note the status of Internet portals as news media, because while Internet portals do not produce their own news articles or programmes and act only as go-betweens, they are still believed to be some of the most important news media by South Koreans. The three largest portal sites, *Naver*, Kakao's *Daum*, and *Nate*, have 55.4 per cent, 22.4 per cent, and 7.4 per cent share, respectively, in online news article consumption. The concentration ratio (CR3) reaches 85.2 per cent, and the Herfindahl-Hirschman Index in online news article consumption is 3,638 (Public Opinion Concentration Survey Committee, 2018). Internet portals distribute articles and stream content uploaded by the programme providers, but 64.2 per cent of the adult population saw it as a news medium, with the vast majority of those in their 20s believing it to be so (76.8%). *Naver*, the most-used Internet portal in South Korea, ranked second in the most influential media company after KBS in the *Survey of Media Audiences' Perception* and was the fourth most-trusted media company after KBS, JTBC, and MBC, despite not being a news outlet that produces original content (Korea Press Foundation, 2019a). News on the Internet portal also scored 3.19 out of 5 in reliability, which is comparable to the reliability score of print news media (3.21).

Despite an overall increase in digital media use, polarised patterns in news media use habits across different age groups are becoming more prominent. Most of the news audience in their 20s get news predominantly from the Internet (77.7%), but 89.5 per cent of those older than 60 get news from the television, and only 4.6 per cent of this group use the Internet for news. Use of television for news is significantly lower in the younger groups, with only 10.1 per cent of those in their 20s and 25.4 per cent in their 30s watching television news.

The digital turn is even more visible in teens' news consumption patterns. 66.2 per cent of teens access news on the Internet, 52.8 per cent get their news from television, and only 7.8 per cent use print media. In terms of the platforms of choice for news consumption, social media has the greatest reach (41.4%), with online video platforms (39.8%) and messenger services (35.1%) following closely. This shows a significant change in news consumption habits, considering the reach of social media (10.8%) and messenger services (13%) among adults.

(F3) Diversity of news sources

2 POINTS

The national news agency plays a dominant role, and the number of foreign correspondents is falling. Despite the existence of many different news sources that journalists rely on, certain gender and minority groups are under-represented and sources tend to be selected based on the political position of the given news outlet.

While there are a total of 24 news agencies in operation, few news agencies play dominant roles as news providers, while Yonhap News Agency (YNA) plays a

key role as the national news agency. As mandated by law, YNA (2018) provides news, pictures, and other data, domestically and overseas, to the state and other public institutions and research organisations. YNA serves the purposes of “protect[ing] information sovereignty, narrow[ing] the information divide and satisfy[ing] citizens’ right to know” (Ministry of Culture, Sports, and Tourism, 2017: art. 10, 1–2). YNA is funded by the Korea News Agency Commission, which was founded to govern the news agency. The seven board members of Korea News Agency Commission are appointed by the President, with three of them nominated by the National Assembly Speaker and one each by the Korean Association of Newspapers and the Korean Broadcasters Association. Korea News Agency Commission owns 30.77 per cent of the agency, with the rest of the shares distributed among public broadcasting companies and other national dailies. YNA has been criticised at different points in its history for holding pro-government views, and given the ownership structure of YNA, concerns have been raised about the internal pressure on fair reporting standards.

YNA doesn’t just supply domestic news media with news content, but also directly services the news audience, which has given rise to some complaints about it taking readership shares from non-government funded news media. While YNA services almost 200 newspapers, broadcasters, and online news media – including all the major media conglomerates – it also operates its own website and has partnered with major Internet portals to be displayed as a news outlet alongside its partners. Newsis and News1 also supply news to major media groups and Internet portals as two of the major commercial news agencies, but both are controlled by the same media group. As for the overseas network, they are partnered with Associated Press in the US and Xinhua News Agency in China and supply domestic news media with foreign news content. YNA has partnerships with many major news agencies – Associated Press, Reuters, and Agence France-Presse, to name some – with a total of 88 partner news agencies. In 2019, YNA had 34 reporters in 23 major cities in 18 countries, which was a significant drop from 47 correspondents in 36 major cities in 27 countries in 2014 (Korea Press Foundation, 2019d). YNA’s downward trend in the number of overseas correspondents is in line with an overall industry cutback on overseas networks, as digital platforms like YouTube, social media, and news media websites have made it easier and much faster to access information from around the world.

Outside of the partnership with news agencies, newspapers and broadcasters do not have any active content syndication in South Korea. Most of the major print national dailies and national broadcasters have their own correspondents in the US, Japan, and China, but few news outlets have correspondents in other parts of the world, with a couple in Europe and even fewer in Southeast Asia and Africa. Without the means to conduct first-hand original reporting, these news outlets must rely on major news sources abroad for international news, at

the risk of also absorbing political and cultural biases. This explains the criticisms of Korean news media for lacking international news and perspectives.

The *Korean Journalists Survey 2019* showed that journalists are most reliant on field investigation and direct interviews with the source, but that they also use several different sources including professional reports, press releases, tips from general public, and reports from other news media (Korea Press Foundation, 2019c). When asked to rate how much they rely on each news source on a five-point Likert scale, the journalists gave press releases an average score of 3.45, ranking it in third place in news sources they rely on the most, after field investigation and expert reports and data. Coverage from a different news outlet ranked fifth place at 3.06, after tips from the general public (3.16). A comparison of different media outlets showed that journalists from news broadcasters were most reliant on field investigation (4.14), followed by journalists from print newspapers (4.05) and those from news agencies (4.03). On the other hand, journalists from news agencies relied on press releases (3.64) more than journalists from any other news outlets did. When asked to evaluate the reporting conditions, easy access to news sources and informants and informant cooperation were rated the highest (3.29 and 3.19, respectively), and access to expert reports and data was rated the third (3.01). Access to information upon request, however, was low overall (2.87), indicating possible challenges in the research stage of reporting.

The *2018 Media Diversity Survey* showed the lack of representation in news media in terms of diversity in news-making (Wook-jae et al., 2018). The survey offered a look into diversity in the six major television channels. None of the channels represented a sexual minority in their news programmes; the majority of news informants were men (74.4%), while only 25.6 per cent were women. 55.7 per cent of the news informants were between ages 50 and 69, and considering that only 27.7 per cent of the population is in this age group in the 2018 resident registration survey, the survey suggests that privileged groups in the traditional patriarchal society are over-represented. The news sourcing patterns also reflect a substantial reliance on elite sources: 34.7 per cent of informants on television news were from management-level positions, although they account for only 0.8 per cent of the population in reality, and 29.7 per cent of the informants were experts in their fields, while they represent only 12.6 per cent of the population.

Gender diversity is still lacking in many ways; however, it is worth noting that there is clearly increasing awareness in terms of gender-sensitive expressions in news reports. Some newspapers make extra efforts to balance the gender ratios of opinion-column writers who are recruited from outside.

In terms of active investigative journalism, South Korea is at a turning-point. Younger reporters feel the need to drastically increase investigative journalism to differentiate themselves as a quality news outlet, but senior reporters and

desks are a bit hesitant, partly due to cost concerns and uncertainty related to successful reporting.

(F4) Internal rules for practice of newsroom democracy 2 POINTS

Although leading news media are politically polarised, journalists can reasonably voice their views on the selection and framing of the news. Affirmative policies regarding female journalists are not yet set as a part of general newsroom culture.

Newsroom democracy ensures journalistic freedom and fosters fair and balanced reporting by opening up the discussion of news selection and coverage. There's been an increasing awareness of the importance of internal freedom in the news industry, as advertising and investments have come to have an increasing influence on news coverage in addition to influence due to ownership structure. While the newspaper law (Chapter 1, Article 5) indicates that a general daily newspaper may run its newsroom council, it requires neither newsroom council nor editorial guidelines. Some major news media have newsroom councils, often under the labour union, and most have editorial guidelines of their own. Demands for, as well as pushes against, making amendments on the current newspaper law to require editorial guidelines and newsroom councils isn't something new. The 2009 amendment of the media-related laws that legalised cross-ownership of newspapers and broadcasters eliminated articles on promoting newsroom councils and editorial guidelines.

Most recently, in 2019, the National Union of Mediaworkers demanded the amendment of the newspaper law to make the newsroom council mandatory and to require the inclusion of news staff representatives in the council, but no bill has been introduced to the congress yet. The broadcasting law, on the other hand, includes fairly detailed instructions on how to ensure freedom of the press and internal democracy. The broadcasters must assign broadcast programming managers and present their names at least once daily during the broadcasting hours while guaranteeing freedom in programming for them. The law states that the freedom and independence of broadcast news programming shall be guaranteed. The broadcast news companies should institute a covenant on news programming, in consultation with the employees in charge of news, and make a public announcement. Interviews show that the discussions in the newsroom regarding which news to report and kill or which framing the story should take are overall freely conducted. Although the final say goes to the senior desk staff, the opinion of the individual reporter is almost always heard.

When asked about the direct and indirect factors that interfere with the freedom of the press, the editorial executive officers were ranked the second-most influential following the advertisers, more influential than the company

owners, whose influence was almost nil. The responses to questions about freedom at different stages of reporting showed that journalists feel they have the greatest freedom in the writing process. Journalists' freedom in each of the three stages of reporting, selection of the story, article writing, and the final decision to publish the reporting, was scored out of five points and garnered 3.84, 3.95, and 3.71, respectively. There were some differences among the media types, with journalists from Internet media enjoying the greatest freedom, while broadcast journalists had the least freedom in the overall reporting process. The differences seem to stem from the difference in tradition and scale of operation.

Awareness of gender diversity in the newsroom is definitely on the rise, but there has been no instance of explicit internal rules to support and promote female journalists' careers and their access to managerial positions.

(F5) Company rules against *internal* influence on
newsroom/editorial staff

2 POINTS

Independence from advertisers is held as a principle, and many reporters do not encounter daily pressures. But higher-ranking journalists do feel pressure and have to sometimes arrange something for advertisers, via the advertising and sales department.

Independence from owners and management is strongly supported. However, in practice, newsroom operation is not free from linkages with the advertising and sales department. This link with advertising and sales seems to be done at the level of senior desk staff, while reporters claim that the advertising and sales department's operation is separate from the newsroom.

With subscriptions dipping and the share of advertising revenue declining, some say it is a matter of survival, not a matter of growth and profitability. It seems that important stories do not get killed by advertising concerns, but some stories do get carried due to the public relations demands of certain parties and corporations. In the case of critical stories, advertising pressure cannot completely kill the news but can influence the size or tone of the story. Interviewees said that that front-page news is protected from such influence.

Divisions covering industry and business often initiate a story and ask specific sponsors to buy the story by paying a special sponsorship. Major newspapers have several awards set up (e.g., the best investment banker of the year, creative business of the year) and indirectly ask for sponsorship to those selected. They may say this is totally separate from editorial decisions, but it is highly likely that the opposite is true.

(F6) Company rules against *external* influence on newsroom/editorial staff

1 POINT

Partly due to the structure of the economy, in which a few conglomerates dominate the demand for advertising space, and partly due to declining paid subscription for the news, leading news media depend more on advertising revenue. They also must be creative in devising other indirect advertising products such as advertorials, branded content, and so on.

Growth in revenue from online content licensing stands out across the entire newspaper industry. Revenue from sources other than online content declined in comparison with the previous years, but advertisement remains a major source of income for many news media. Print newspapers, through years of declining readership and subscription, have diversified their income stream to make up for the losses in sales. In 2018, the newspaper industry relied the most on advertisement as a source of income, with advertisements accounting for 60.1 per cent of the total revenue of print newspapers KRW 1,990 billion. This was an increase from 59.6 per cent of the total print dailies' revenue coming from advertisement in 2017. Only 11.8 per cent of the total revenue in the print newspaper industry was from sales (KRW 390 billion) in 2018, and income from online content licensing accounted for 8.2 per cent of the income (KRW 272 billion). Other additional businesses accounted for 19.9 per cent of the total revenue in the daily print newspaper industry in 2018.

Advertisement is also the biggest source of revenue in the online newspaper industry, accounting for 61.5 per cent of the total industry revenue at KRW 301 billion in 2018, showing a slight decline in advertisement's share in the total online newspaper revenue, from 62 per cent in 2017. Online newspapers are available free of charge, which means there is no sales revenue. 32.4 per cent of revenue comes from other business activities, and only about 8.4 per cent of the industry revenue comes from online content licensing.

The revenue structure in the broadcasting industry seems more balanced, with advertising revenue on the decline over the past five years, from 48.7 per cent in 2013, but the income breakdown suggests that broadcasters may still be vulnerable to significant external pressure. In 2018, 34.1 per cent of industry revenue came from advertisement and 10 per cent from sponsorship earnings. Income from reception fees accounts for 12.6 per cent and programme sales account for 16.7 per cent. Key income sources vary based on the broadcaster's ownership structure. As the public broadcaster, KBS operates under an annual budget; for financing, the chief executive officer sets an annual budget, which is then approved by the board of directors and submitted to the Korea Broadcasting Commission. The budget is exempt from prior congressional approval for the sake of independence and impartiality, but the finalised account must

be approved in congress after the end of every tax year. KBS is also the only broadcaster that charges a monthly reception fee to fund itself. In 2018, KBS earned 46 per cent of its income from the reception fees, 23.2 per cent from advertisement, 12.9 per cent from programme sales, and 5.6 per cent from sponsorship. MBC and SBS, however, relied on advertisements the most (40.1% and 41.1%, respectively), followed by programme sales.

A 2015 report from the liberal Democratic Party's Institute of Democracy (Kim & Lee, 2015) pointed out the dominance of conglomerates in the media advertising market, suggesting that concentration of market power with a few advertisers may compromise the freedom and independence of the press. The study's focus was the biggest four conglomerates in South Korea: Samsung, Hyundai Automobile, SK, and LG. The results showed that all three of the major terrestrial broadcasters have the highest proportion of Samsung advertisements. Hyundai Automobile is dominant in the four major general cable channels except for JTBC, where Samsung is the biggest advertising client. For newspapers, Samsung advertisements were dominant in *Chosun Ilbo*, *Joon-gAng Ilbo*, *Dong-A Ilbo*, *Maeil Economy Daily*, and *Hankook Economy Daily* between 2010 and 2014. *Hankyoreh*, *Kyungbyang Shinmun*, and *Hankook Ilbo* did not consistently rely on a single advertiser, unlike *Maeil Economy Daily*, which relied mostly on Samsung for its advertising revenue.

The Newspaper Code of Ethics, adopted by the Korean Association of Newspapers, Korea News Editors' Association, and Journalists Association of Korea, specifies independence from social and economic powers as one of the fundamental responsibilities of journalists (Korea Press Ethics Commission, 2009). However, responses from the *Korean Journalists Survey 2019* reflect the pressure journalists work under in companies with different revenue and ownership structures. Overall, advertisers (68.4%) were most frequently selected as one of the three biggest factors restricting freedom of the press, followed by executive editorial officers (52.7%). But the journalists from the three major broadcasters (KBS, MBC, and SBS) selected the executive editorial officers as the biggest obstacle to freedom of the press (57%), followed by government and political influence (54.2%), with advertisers fifth on the list (29.6%) (Korea Press Foundation, 2019c). This reflects the influence of government and government-affiliated commissions in legacy television news media, especially in the form of subsidies and government advertisement contracts. On the other hand, respondents from the economic dailies (90%), national general dailies (77.1%), and online newspapers (74.6%) felt the pressure from the advertisers to be the greatest.

(F7) Procedures on news selection and news processing 2 POINTS

Rules and routines, albeit informal, do exist and there are abundant debates in newsrooms.

There do not exist any formal rulebooks, and instead, informal rules dominate. Items are selected by reporters every week, which then have to go through editorial meetings with senior desk staff, but selections made by reporters are rarely overturned.

Reporting on topics being debated on social media is currently a hot topic. Some outlets have developed informal rules on how to report on social media topics, especially regarding politicians and public figures.

(F8) Rules and practices on internal gender equality 2 POINTS

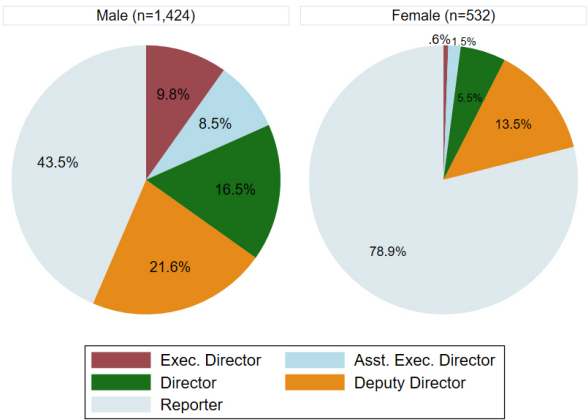
Inequalities still remain. An unequal cultural milieu and poor daycare support are partly to blame for the remaining inequalities, especially in relation to the promotion of female journalists.

Gender equality and women's rights in the workplace have been often overlooked issues in South Korea. Gender inequality and glass ceilings are not unique to the media industry, and the *2018 Global Gender Gap Report* from the World Economic Forum (WEF) ranked South Korea 115th out of 149 countries in gender equality (World Economic Forum, 2018). Out of the four factors measured by the WEF index, economic participation and political empowerment stand out as areas of weakness in comparison with educational attainment and health and survival. Placed 92nd for political empowerment and 124th for economic participation and opportunity, South Korea has fewer female lawmakers or high-level public officials and a wider wage gap than other countries, which is also reflected in the media industry. Such a social milieu is closely linked to the opportunity windows for female reporters to be assigned to major positions, which is inevitably linked to career advancement. This becomes not a matter of competence, but an issue of lacking social networks crucial for sourcing stories.

According to the *Korean Journalists Survey 2017*, 71.6 per cent of the journalists in the news industry were male (21,940) and 28.4 per cent were female (8,707) in 2016 (Korea Press Foundation, 2017). Since then, female journalists have grown in number, reaching 31.5 per cent (9,872) in 2018, but the gender gap persists. Gender gaps are even more evident in high-ranking positions. 78.9 per cent of female respondents and 43.5 per cent of male respondents are rank-and-file reporters, and 92.5 per cent of female respondents hold positions that are deputy-level or below. This far exceeds the 65.2 per cent of the male

respondents who hold positions at or below deputy level. However, the ratio reverses in higher rank positions: 34.8 per cent of male respondents hold positions above the director level, while only 7.5 per cent of the female respondents do (see Figure 2).

Figure 2 Positions held by gender



Source: Korea Press Foundation, 2019c: 53

Although published almost a decade ago, the *Global Report on the Status of Women in the News Media* (International Women’s Media Foundation, 2011) offers insights into South Korean women’s work environment in the media industry that are still very much relevant today. South Korean women are, as in many other areas, pursuing journalism more actively than before, and the report depicts an increasingly open work environment for women. The study reports fairly equal full-time employment with benefits for both sexes, where there is little to no gender difference in lower-range salaries. Many news media have more female reporters at the entry-level. In 2018, the salary gap is as present as ever, with some exceptions in rare cases where women hold high-rank positions. The global report’s findings are also consistent with the more current *Korean Journalists Survey 2019*, in that more men hold higher-rank positions than women (see Table 1). In 2018, there are still virtually no women in top-level management, suggesting that women have little say in what gets reported and on what terms (Korea Press Foundation, 2018).

Table 1 Gender ratio by position

	Executive director	Assistant executive director	Director	Deputy director	Reporter
Ratio of female journalists	3 (2.1%)	8 (6.2%)	29 (11.0%)	72 (18.9%)	420 (40.4%)
Ratio of male journalists	140 (97.9%)	121 (93.8%)	235 (89.0%)	308 (81.1%)	620 (59.6%)
Total (n = 1,956)	143	129	264	380	1,040

Source: Korea Press Foundation, 2019c

According to the 2018 article from the Journalist Association of Korea, some print newspapers do not have any female directors in their newsrooms, despite a substantial number of female journalists (Kim, 2018). Among the major newspapers, *Kyunghyang* and *Hankyoreh* have the highest overall ratio of female reporters. Out of the 259 journalists working for *Kyunghyang*, 85 (32.8%) are women, and 5 out of 25 deputy director-level positions and above are held by women. 93 out of *Hankyoreh*'s 275 reporters are women, which makes up more than a third of their entire workforce. 14 out of 60 executive officials above the deputy director-level positions are women. *JoongAng Ilbo* is the only national daily with a female editor-in-chief.

While there is much room for improvement in gender equality and representation in the newspaper industry, the broadcasting industry has even thicker glass ceilings that have kept women from reaching the executive director positions in all of the three major terrestrial broadcasters. KBS has only two female directors, a mere 9.5 per cent of the 21 management-level employees, which means that fewer women get to participate in the decision-making process in news production meetings. MBC and SBS are not very different in their gender makeup, despite a slight increase in the number of women in deputy director- and director-level positions in recent years.

The marital status of respondents from the *Korean Journalists Survey 2019* is also reflective of the working environment of women in the news industry (Korea Press Foundation, 2019c). In 2018, 71.3 per cent of male journalists were married, but only 31.4 per cent of the female journalists were, and the number of female journalists drops even further (21.2%) when asked if they have children (Korea Press Foundation, 2018). Such a pattern can be explained by the social pressure put on women to leave their job for marriage and family. The difference in the average age of male (42.6 years) and female (33.4 years) respondents is reflective of women's relatively recent entry into economic participation.

The Child Care Act (Article 14) dictates that any business with at least 300 full-time female workers or at least 500 full-time workers establish, joint-

operate, or contract a workplace childcare centre. Given that approximately 400 to 500 employees work part- or full-time for each of the major national dailies, childcare is not always guaranteed. Larger broadcasters like the major terrestrial broadcasters do provide childcare to meet this mandatory requirement.

The nationwide #metoo movement in 2018 sparked changes in the news media, giving rise to specialised departments like a gender equality centre, committee for gender equality, and gender desk in media companies to promote gender sensitivity and identify and resolve gender-related issues internally. KBS first adopted gender equality rules in 2019, expanding its previous guidelines for sexual harassment at the workplace to include measures for equal treatment of both sexes as well as disciplinary measures for sexual misconduct. SBS and MBC, along with other major news media, revised their disciplinary code for sexual harassment and assault to better accommodate victims and impose stricter discipline on their perpetrators. These efforts, albeit overdue, are expected to foster gender-sensitive work environments and systematically improve women's working conditions, while also changing stereotypical and discriminatory coverage of women in media.

In the news industry, the Korea Woman Journalists Association has advocated for the rights of women in the media industry and promoted gender equality since 1978 through research, training, publication, networking, and study-abroad opportunities for female journalists. Organisations like the Korea Women's Associations United and other government agencies dedicated to promoting women's rights also offer commentaries and research on gender equality in news coverage and media content.

(F9) Gender equality in media content

1 POINT

Leading news media are only just beginning to be more inclusive in content construction in factors such as source distribution and selection of columnists. The current lack of diversity can be attributed partly to the overall social state, as South Korea has immense gaps in gender equality in the professional sphere and social status.

The news industry in South Korea has come a long way in the past few decades in terms of gender inclusivity in the workforce. Guidelines on providing balanced, fair coverage regardless of gender, age, or ethnicity are also widely accepted and are included in the various codes of ethics adopted by different news media.

The Korea Press Ethics Commission is a self-regulatory organisation established by the Korea Press Association, Korea News Editors' Association, and Journalists Association of Korea in 1961. It has put forth Newspaper Ethics Guidelines that ban discriminatory and stereotypical depiction of any regional,

socioeconomic, gender, or religious minority. The Internet Newspaper Code of Ethics is another self-regulatory code overseen by the Internet Newspaper Committee (2019) that outlines guidelines for fair coverage. The Journalists Association of Korea also guards against discrimination and stereotyping in news coverage in its Rules on Human Rights Reporting.

(F10) Misinformation and digital platforms
(alias social media)

2 POINTS

There are special rules and checks for reporting something from social media or the Internet, especially when quoting someone based on social media posts.

The annual report on journalists' reporting and working conditions showed that many news media have fact-checking systems in place. In 2019, only 4.3 per cent answered that there is absolutely no rule against misinformation in place, while 73.3 per cent answered that at least some systematic measure is being taken. More than half of these respondents answered that an adequate or excellent fact-checking system is in place (37.3%).

The interviewees said that in practice, they rarely use online-only material for reporting, and even if they do, they double-check with official sources. Classes are held on this in the Korea Press Foundation, and reporters are encouraged to participate, with management often excusing reporters who want this education from their daily duties. Data scientists and programmers are beginning to enter newsroom as special staff.

(F11) Protection of journalists against (online) harassment 2 POINTS

Cyberstalking is a huge problem in South Korea. Most firms protect their employees and try to prevent traumatic experiences, especially for less-experienced journalists.

Cyberstalking has emerged as a big problem in South Korea. Violent comments – sometimes with personal threats – are prevalent in the polarised political environment. Journalists' work e-mails are disclosed on the articles they author, and some receive e-mails with profanities for no evident reason. No specific law is in place to protect journalists from these comments or e-mails. Libel laws apply to online comments, and they are currently the only legal protection journalists have.

Interviews show that firms provide therapy and other medical costs. However, what is more dangerous in terms of harassment is not harassment itself, but self-censorship due to repeated incidents.

Dimension: Equality / Interest Mediation (E)

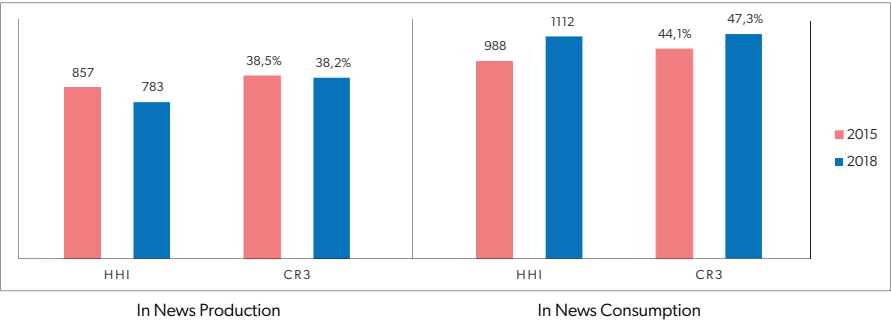
(E1) Media ownership concentration national level 2 POINTS

A higher concentration ratio (CR3) is observed when the news media market share is calculated based on news consumption (47.3%) rather than production (38.2%).

Some level of plurality of ownership is observed at a national level. Some believe that the government is rather heavy-handed with subsidies and regulations affecting management, and the government-owned news outlet is still fairly influential. Still, the news industry has a free market. Ownership and major shareholders are disclosed in annual business reports, which are available online on the public data analysis and retrieval terminal. However, some of the less visible familial and business ties may not always be apparent for someone unfamiliar with the economic geography of South Korea.

The concentration ratio differs based on how the news media market share is calculated. When news producers are considered, the CR3 is 38.2 per cent in 2018, a slight decrease from 38.5 per cent in 2015. When news consumption is used to calculate the concentration ratio, CR3 reaches 47.3 per cent, a jump from 44.1 per cent in 2015 (see Figure 3).

Figure 3 Concentration ratio by category



Source: Public Opinion Concentration Survey Committee, 2018

(E2) Media ownership concentration regional (local) level 1 POINT

The ownership concentration at the regional level largely matches the national level, although there may be some regional preferences for specific news outlets.

The relatively small size of the country means that news media is centralised. News outlets available around the country are fairly uniform. All leading news media have their main offices located in the metropolitan area in or near Seoul, and local newspapers have far smaller market shares even within local communities. As much as keeping track of regional market shares of local newspapers is helpful to understand varying levels of plurality of media ownership in each region, the centralised news media structure renders such distinctions quite meaningless.

(E3) Diversity of news formats 2 POINTS

The popularity of smartphones to access news while on the move has contributed to the emergence of “card news” as a convenient, visualised news format. New and innovative formats of news presentation have started to take off, especially geared towards younger audiences who are used to the fast-paced and eclectic news available on social media platforms.

A wide range of media is used to access news. The shift to news consumption on mobile devices has also affected the way news is organised and presented. While the more traditional news formats of straight news, features, and editorials in newspapers are still published, “card news” – or news presented in a series of “cards” – are also popular in South Korea. Card news presents information a piece at a time so that the reader can digest the news as they flip through cards on mobile devices.

From the news-making side, journalists from print and online newspapers, as well as those from news agencies, write straight news the most, writing up to 10.6 articles a week. Feature reports amount to 2.1 articles a week, with editorials or commentary amounting to a mere 0.4 articles. An average of 9.7 online articles were written per week per journalist.

In news broadcasts, it is typical for an evening news programme to cover numerous news items in a straight format rather than provide an in-depth report or commentary. Each news programme includes two to three in-depth issues reported by different reporters. In rare occasions of live coverage or feature reporting, the news announcer engages with the reporters to present information in greater detail. Other news programmes, like investigative pieces, dedicate extended time to track and report a single issue.

(E4) Minority/Alternative media

0 POINTS

Minority and alternative media are extremely scarce, and news media specialising in investigative journalism are still very small in comparison with legacy media. However, the rise of Internet news has given these news outlets greater reach.

Major news media companies still serve as the dominant source of news, but the rise in Internet news media companies has encouraged the growth of a few alternate media outlets.

An example of alternate news media is the Korea Center for Investigative Journalism (also known as *Newstapa* in Korean), established in 2012 with funding from the Union of Media Workers as an online independent news media outlet specialising in investigative journalism. *Ohmy News* is another alternate online media outlet, where much of the news stories are sourced by the public and written by citizen reporters.

Still, there's a general dearth of news media companies that represent minority groups in South Korea. *The Women's News* is the only news outlet that focuses on gender issues and women's rights. Since the first issue of a weekly periodical in 1988, *The Women's News* now offers both a print newspaper and an online news website. *BeMinor* and *Ablenews* are alternative news outlets whose missions are to advocate for the rights of people with disabilities and to promote social inclusion. As Internet news outlets, these two are relatively new.

(E5) Affordable public and private news media

3 POINTS

Accessing news is relatively easy in South Korea, with news articles and television news programmes provided free of charge online most of the time. Various forms of news are accessible as long as one has a personal computer or a smartphone. Channel reception fees, cable, and smartphone plans are generally affordable.

The wide availability of both ethernet and wireless Internet offers easy access to online news at little or no cost. Online news articles are free of charge on both Internet portals and newspaper websites, and most television news programmes are also streamed free of charge on broadcaster websites and YouTube. Since much of online news content is consumed on mobile devices, phone bill expenses are an important factor to consider. 67 per cent of people spend between KRW 30,000–60,000 on average on their smartphone plans.

Monthly subscriptions for print general dailies cost about KRW 20,000 and are tax-deductible. The monthly reception fee for KBS television channels amounts to KRW 2,500, which can, should one choose to, be waived. Cable, satellite, and IPTV subscriptions vary across different package plans from different telecommunication companies, but range from about KRW 12,000–40,000

and are offered as package plans with mobile plans for smartphone use, often offered at a lower cost. These expenses should be contextualised against the average monthly income of KRW 2,970,000 in 2018.

(E6) Content monitoring instruments

1 POINT

Public and civic monitoring bodies provide content monitoring regularly and offer easy public access to decisions and statistics online.

Content of the media outlets is regularly monitored by the public monitoring bodies. The Korea Press Ethics Commission permanently monitors news content and deliberates on violations of the Newspaper Code of Ethics, issuing notices, private warnings, and public warnings for print and online articles and advertisements. The deliberations and decisions statistics are available to the public on their website. Likewise, the Korea Communications Standards Commission monitors broadcast content regularly, while also monitoring language used in broadcast programmes. Deliberations are made quarterly, and summary reports are posted online. The commission issues sanctions while also providing administrative guidance.

As for monitoring by non-profit organisations, Citizens' Coalition for Democratic Media provides content monitoring not only for newspaper and broadcast programmes, but also for YouTube. It also runs citizens' communications standards commissions and organises the Reporting of this Month award to incentivise responsible and fair news reporting. Despite these content monitoring instruments, however, the balance between male and female subjects in news content is relatively overlooked in comparison with other non-news media content.

(E7) Code of ethics at the national level

2 POINTS

Codes of ethics exist both at the national and the firm levels. Newsroom practice does not always match what is laid out on paper.

The Journalists Association of Korea has its code of ethics recognised at the national level. The items stipulated are freedom and independence of the press, fair and balanced reporting, journalists' integrity, fair and transparent information gathering, fair use of information, protection of privacy, protection of the source, prohibition of discriminatory or instigative reporting, and restriction of advertising and sales.

The Press Arbitration Commission serves as the press complaints commission that mediates between the party injured by news reporting and the news media

at no cost. It helps the aggrieved party to recover any damage by requesting correction of the original news report, a statement in reply to the report, a follow-up report, and compensation for the injury. Although these instruments are in place for ethical journalistic practices, they are not always observed, and oftentimes overlooked in practice.

(E8) Level of self-regulation

2 POINTS

Each news media outlet has its own mission statement, and most have codes of ethics or conduct. Readers' rights instruments and ombudspersons are present in many of the leading news media outlets but are not found very widely and often serve as customer service of sorts.

Most newspaper firms do have their own codes, guidebook, and internal committees. Per Broadcast Law, all television news providers must have a viewer committee to advise on content and programming. YTN, for one, runs an ombudsperson programme titled *YTN Citizens' Desk*, and Yonhap News TV also runs and broadcasts a weekly ombudsperson programme.

In 2019, 671 news media outlets (26.0%) had a readers' rights instrument out of the 2,584 surveyed, and 216 (40.1%) of print new media outlets had an ombudsperson (Korea Press Foundation, 2019d). The ombudsperson model in South Korea is very much informed by the American model, where newspapers commission an external expert to hold the ombudsperson position, but sometimes have a former journalist serve in the position and publish columns. Despite such practices, the ombudsperson programme is not very popular because individuals consisting of internal figures in the position often operate like customer service or are limited in their capacity to reflect reader criticisms in news media practice.

(E9) Participation

3 POINTS

Citizen participation is convenient and active. News outlets offer various online channels through which the public can comment, share user-generated content, and engage in public discussions.

One of the many advantages that South Koreans enjoy today is easy access to news and opinions online. Every major news outlet operates its own website, while also partnering with online portals like *Naver* and *Daum* to have them pool news articles to populate their news sections. Portals usually use the "in-link" method – which embeds the news outlet's article into the portal's template rather than redirecting the user via an external link to the news outlet's web page

– and operate their own comments section for these in-linked articles. Given that these platforms attract users with a wide range of political opinions and from different walks of life, the most heated online discussions occur on the comments sections of these online platforms. Comments for individual articles are open to the public on news outlets' websites, and readers' letters, online forums on general topics, and public online comments on news items are all available online. All leading news media also run story tip-off web pages and hotlines. Journalists' e-mail addresses are disclosed on the articles for reader feedback.

Most news outlets collect user-generated content via audience submission or on social media platforms like Twitter or YouTube. At least one piece of audience-generated content is covered on television news, either as a subject of extensive reporting or as a form of audience commentary. News channels like YTN distribute applications and operate tip-off numbers, where first-hand video recordings can be sent to the hotline.

(E10) Rules and practices on internal pluralism

2 POINTS

Codes of ethics and guidelines mandate the inclusion of different relevant viewpoints, and some level of internal pluralism is observed in the newsroom. However, there is no methodical system in place to ensure the reflection of various voices.

The code of ethics and practice guidelines laid out by the Korea Press Ethics Commission and those adopted by the leading news media outlets explicitly state journalists' responsibility to reflect the opposing voice when presenting an article that is critical of an individual or organisation, and to maintain impartiality in reporting. The guidelines also guarantee readers' right of reply and right to demand correction to ensure balanced and fair reporting that embraces different voices.

In terms of actual practice of internal plurality, interviewees suggested that different views are often debated in the newsroom. However, the degree of plurality can be very arbitrary, especially in this polarised news media environment. In theory, they seek plurality, but in reality, they have to rely on available sources.

Dimension: Control / Watchdog (C)

(C1) Supervising the watchdog “control of the controllers”

3 POINTS

There exists ample media outlets and people who scrutinise journalists’ behaviour, although the majority of the time it is one-note criticism by the other side of the political spectrum. But the general audience has exposure to both sides, which has the negative side-effect of increasing cynicism.

The press serves the crucial role of watching over political and economic powers to defend democracy. In South Korea, the news media’s ties with authoritarian regimes in the past, its function as a pseudo-government agency, and the size and influence of media over public opinion have given it the nickname “the fourth body of government”. Although the ties – both overt and subtle – between the press and the government have become weaker since, there is still a need for watchdogs of the press.

On an official level, public commissions and agencies watch over news media. The Korea Communications Commission, Korea Press Ethics Commission, Internet Newspaper Committee, and Press Arbitration Commission are the major institutions that watch for violation of human rights in news, regulations, and other media laws, keeping the press under both the direct and indirect influence of the government.

Non-profit organisations acting as media watchdogs, independent and self-governing entities that regularly monitor and evaluate news media, are also prominent players in the media in South Korea. However, some non-profit organisations take partisan positions, which further aggravates polarisation and promotes distrust in news media. Most of the media watchdogs in South Korea emerged out of citizen movements, whether it be consumer activism, monitoring, or media reform movements (Chung, 2017). The Citizens’ Coalition for Democratic Media is an independent organisation founded in 1984. It was conceived by journalists and reporters fired from the press during the authoritarian regime, persecuted by both the administration and the news media owners (Citizens’ Coalition for Democratic Media, n.d.). Citizens’ Coalition for Democratic Media sets the agenda for media reform and independent press while also monitoring the press and offering policy suggestions. The Korea Press Consumerism Organisation is a non-governmental organisation famous for its boycott campaign against the three major conservative newspapers: *the Chosun Ilbo*, *JoongAng Ilbo*, and *Dong-A Ilbo*. While Korea Press Consumerism Organisation focuses on consumer activism for media reform, grassroots organisations like Cultural Action and WomenLink monitor issue commentaries and engage in public access movements or host public discussions as watchdog

organisations. WomenLink focuses on gender issues and women's rights in media content. These organisations also form different coalitions, like the People's Coalition for Media Reform, to join forces for specific issues of interest.

The National Union of Media Workers also plays a role in watching the media. Founded in 2000 as an industry union serving the legacy of the Korean Federation of Press Unions, the union serves media workers by advocating for fair pay and better working conditions. A part of its mission is also to support media reform by promoting self-regulation among journalists and advocating for independent editorial and programming. The National Union of Media Workers has 14,512 members and 72 chapters around the country. Since its first publication as the union newspaper in 1989, the Media Union Newspaper provides articles and commentary on ownership structures, media policies, and media reform.

Media Today is a periodical which specialises in reporting on media coverage. Originally published by journalists and editors as a weekly periodical on news coverage, *Media Today* now also offers an online news site updated daily with articles and commentaries on the South Korean press in addition to its weekly print publication. Legacy news outlets also air feature television documentaries and report coverage on journalistic practices and various issues in the news media industry, albeit infrequently.

While there are plenty of personal blogs that offer analyses and personal insights into the state of South Korean press, no single blog stands out as either the most influential voice in the blogosphere or as an expert media watchdog blog.

(C2) Independence of the news media from powerholders 1 POINT

Although it may look like a free press on the surface, leading South Korean news media are not completely free from the influence of government and conglomerates.

News media's close relationship with politics and business in South Korea puts the press under the heavy influence of external powerholders. Although there is no explicit statement of support for a specific political party, most of the major news media are known to be either right- or left-wing, and on the rare occasion also centrist.

While some news outlets' ownership structures are more diverse than others, most of the major newspapers and broadcasters are predominantly owned by one or two private owners, media conglomerates, or non-media companies. In 2015, a total of 16 news outlets' largest shareholders were corporations. KBS is owned by the government of South Korea, but others, like *the Chosun Ilbo* or *JoongAng Ilbo*, are predominantly owned by a single owner or owners

from the same family. The personal ties between some of the media owners and non-media *chaebol* owners are considered especially troubling, because these affiliations are not readily noticed, yet can critically impair the independence of the press. Integration of ownership and management has also been a controversial issue in many of the news media companies and a point of struggle between the media union and management.

Journalists in South Korea are also exposed to various forms of external pressure. Although the code of conduct from the Journalists Association of Korea (2014) lists protection of the source as one of the journalists' responsibilities, without a shield law to protect the journalists who refuse to disclose their source, journalists are often asked to cooperate with the police in a criminal investigation and identify their sources. The absence of a shield law and other relevant articles means that journalists may, unless actively harbouring a fugitive or assisting in a felon's escape, legally refuse to disclose the personal information of the sources. Still, the law obligates journalists to testify should they be summoned to court and leaves them vulnerable to external pressure to disclose their source, since journalists' refusal to testify is not protected by law.

(C3) Transparency of data on leading news media 3 POINTS

Most of the information is available in accessible formats.

Information about the leading news media is easy to access and readily available online. Leading news media publish the ownership and contact information in their impressum for print, broadcast, and online media.

Ownership structures, key business figures, and management performance reports are published in the annual business report of the major news media and reported to the Financial Supervisory Service. The report is mandatory, based on the size of the media outlet, and thus required of most leading news media. The report is also available online via Korea Press Foundation as well as the public Data Analysis and Retrieval System, and a summary of key figures for each leading news media – if available through the Financial Supervisory Service – is presented in the annual Korea Press report by the Korea Press Foundation. Quarterly business reports are also publicly accessible and include a summary of finances, capital changes, auditor's report, and shareholder information.

(C4) Journalism professionalism

2 POINTS

The infrastructure, such as professional organisation, solidarity, opportunities for training, values of investigative journalism, and so forth, is in place. Whether these are fully utilised in the intended way is another question.

With the newspaper business declining, the professional ethos of journalists seems to be strong in South Korea. One needs strong conviction to keep with the profession, especially when the financial reward is not as strong as before and social esteem for the profession is not as strong either. Reporters' communicative efficacy in the newsroom is solid, and when editorial or journalistic rights are infringed upon by external or internal factors, they often show solidarity across firms as a professional group. Union activities are also strong.

Organisations such as the Korea Press Foundation provides a fair amount of quality education and professional forums for journalists to network and learn new skills, such as data science and visualisation. The foundation is also active in publishing professional texts or reports. Prominent reports from global organisations such as Reuters Institute are often quickly translated into Korean.

Though cynicism towards the news media is prevalent in South Korea, public debate on journalism is ample. Although being controversial in its political stance, public broadcaster KBS has regular hour-long programmes on journalism critiques.

(C5) Journalists' job security

2 POINTS

Longer term contracts are still the norm. But new hires under the same terms are declining.

While the constitution ensures the freedom of the press, no specific legal provisions are in place for internal democracy, or for the protection of individual journalists when in conflict with the management. While the general level of job satisfaction improved in comparison with the 2017 survey, the average job satisfaction score in 2019 was still 2.85 out of 5. Job stability was third on the list of work environment factors respondents were satisfied with, with the score of 2.91 (out of 5), following work autonomy and promotion opportunities. 32.6 per cent of respondents were generally dissatisfied by the work stability, while only 28.5 per cent were generally satisfied. 84.6 per cent of journalists in the news industry worked full-time, and 15.4 per cent worked under contract in 2018. In comparison with the previous year, this is a 0.3 per cent decrease in the number of full-time journalists and a 17.5 per cent decrease in the number of contracted journalists. While full-time employment is predominant and sug-

gests relative job stability, we can expect some gap between the statistical data and reality based on the history of unexplained firings.

There is no formal action taken to support women and promote gender equality in hiring non-permanent positions. However, in recent years, many news media have adopted gender equality rules and guidelines for sexual harassment at the workplace and refurbished rules for equal treatment of both sexes as well as disciplinary measures for sexual misconduct.

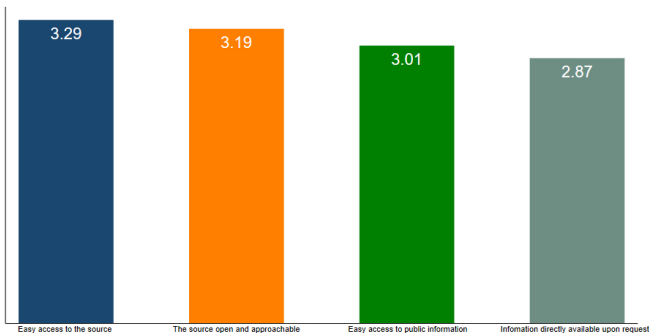
(C6) Practice of access to information3 POINTS

Public information is fully open upon request.

There is an information access law which requires all public information to be made available when requested. Moreover, the *Korean Journalists Survey 2019* shows that journalists enjoy a fairly high level of freedom in the reporting process in South Korea. In the 5-point scale to rate the reporting environment, easy access to information was rated 3.01, and provision of information upon request was rated 2.87 (see Figure 4).

Although legal provisions do not guarantee rights to request and access information, the scope of available information has drastically increased and may explain the relative satisfaction with the reporting environment. The ease of access via online databases and government data portals may also explain the ease of access to information.

Figure 4 Journalists' evaluation of the reporting environment



Source: Reprinted from the *Korean Journalists Survey 2019* (Korea Press Foundation, 2019c)

(C7) The watchdog and the news media's mission statement

2 POINTS

Mission statements exist, but a lack of resources prevents the prioritisation of such missions over routine news production.

Some major news media have mission statements containing the watchdog role, and it is fair to say that even for others, there is a widespread understanding of this role. But there is a constant lack of time to invest in investigative journalism.

There is a generational gap between millennials and their superiors. Younger journalists have stronger motivation and preference for conducting investigative journalism. A focus group interview in 2019 showed that younger journalists have a stronger demand for basic training on investigative journalism and advanced skills, partly due to the decline of the apprenticeship system in the newsroom and lack of opportunities for novice journalists to learn from their veteran colleagues. More experienced journalists, however, find the younger generation to be more resistant to their advice and consultation, suggesting that the generational gap may affect the quality of news reporting in the long run.

(C8) Professional training

3 POINTS

High-quality training opportunities are available within South Korea and even abroad. It is not easy for reporters to carve out time for such education, but managers do make efforts to provide opportunities to whoever wants them.

Continuous and ample training opportunities are provided by the Korea Press Foundation and those who seek to participate in trainings are usually given the chance to do so. The *Korean Journalists Survey 2019* showed that the opportunity to develop expertise was the fourth most satisfactory factor in the journalists' job, with an average score of 2.85 (out of five). 26.9 per cent of the respondents were satisfied by these opportunities, a jump from 18.5 per cent in 2017 (Korea Press Foundation, 2017, 2019c).

There's a consensus that the professional training programmes journalists participated in were generally useful. When asked to score the usefulness of the training programmes they completed, the journalists rated study abroad or graduate programmes abroad to be the most useful at 4.50, and rated Korea press foundation training at 4.17. Internal training offered at the workplace were rated as the least useful among different types of training programmes (3.60) but still proved to be fairly useful. There's a general demand for training in digital journalism and Big Data analysis, which suggests that the training programmes currently offered have scope to improve.

(C9) Watchdog function and financial resources

1 POINT

There is a consensus that increasing investigative journalism is the way forward, but this has not been realised in practice. Some media have only now started to have a separate division to deal with investigations.

Some leading news media explicitly stipulate financial support for investigative journalism in their codes of ethics, but most do not. The need to increase investigative journalism is certainly accepted, but there is still a long way to go to actually making investments. Overall industry cutback on overseas networks has also decreased the number of already scarce foreign correspondents. Interviewees said that foreign correspondents are shrinking and are no longer very active.

Independent online news services, such as *Newstapa*, are gaining a reputation as investigative reporting-focused services. *Newstapa* runs on donations and subscriptions and does not accept any sponsorship of funds from the government or corporations to ensure its autonomy.

Conclusions

A polarised political environment, created through the impeachment of the former President by citizens' revolution and the current regime, which again is criticised for not being inclusive of all the political voices within the society, is the biggest threat to healthy working journalism in South Korea. Leading news media outlets are divided among the large political parties and select and frame news according to their alignment. Thus, the media is not a watchdog but a political player.

There exists good public infrastructure that acknowledges the role of journalism for healthy democracy through bodies such as the National Journalists Association and the Korea Press Foundation which conduct research and training for journalists. Leading news media outlets are eager to learn digital tools such as data science and visualisation. However, declining revenue has curbed such aspirations and desires to venture into investigative journalism. With leading news media still under the influence of external powers, young journalists exert more effort in defying the legacy to build up a new model of journalism.

South Korea is a country of advanced telecommunication infrastructure, industry, and culture. News start-ups are rising and experiments are taking place which have started to affect how journalism is conducted by leading firms. In conclusion, the current state of journalism is not so satisfactory, but the future is not that gloomy either.

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Solid performance, but democratic deficits remain

Conclusions

Josef Trappel & Tales Tomaz

A concluding assessment of the indicators used to measure the performance of leading news media within and for mature democracies allows for a brief comparative analysis of the participating countries. In 2011, ten countries participated in the Media for Democracy Monitor (MDM) project (Trappel et al., 2011); nine of them were again part of the sample in 2021. Therefore, a longitudinal analysis is possible for exactly half of the current sample, whereas nine countries participated for the first time in 2021. The sample is limited to countries with a stable democratic tradition, and the MDM is designed to evaluate the contribution of leading news media in a political environment where media freedom is guaranteed and prevails. By excluding countries with a less profound democratic tradition, or in the process of democratisation, the focus of the study rests on the performance of media organisations and media companies, rather than on the legal and political affordances.

Why, then, is Hong Kong part of the sample? Invitations to participate in the MDM 2021 were issued in 2019. At that time, the protest movement in Hong Kong had started, but elections still prevailed as a core instrument of political participation and decision-making. Furthermore, press freedom was largely respected by the authorities, and the research team from Hong Kong confirmed unfettered working conditions of journalists. By the time of writing and publishing this book, however, conditions have dramatically changed, and the press has lost much of its free and independent status. The empirical research on the leading news media in Hong Kong took place before and partly during the dismantling of journalistic freedoms. Therefore, the Hong Kong analysis documents the status quo ante.

Nordic countries perform best in 2021

This monitoring project does not culminate in a country ranking. The translation of the collected data – both from interviews and secondary sources – into numbers and scores should not lead to a horse race competition on which country scores highest. Therefore, we do not publish a country ranking. Nonetheless, the scores attached to each indicator allow for clustering the countries. Four countries constitute the cluster with the highest conformity to democratic norms and values encapsulated within each indicator. Denmark, Sweden, Finland, and the UK reached around 80 per cent of all available scores of the MDM. The second-best cluster includes Canada, Finland, Germany, and the Netherlands (some 70%). The largest group of countries – Austria, Belgium (Flanders), Iceland, Italy, Portugal, South Korea, and Switzerland – reached some 60 per cent of possible scores. At the low end of the scale, Australia, Chile, Greece, and Hong Kong cluster around 50 per cent of all scores, or even below. These results largely correspond to the findings of the MDM 2011, when Sweden performed best.

Digitalisation well managed

In a more general perspective, the 2021 set of data provides for a positive message: leading news media are serving democracies rather well. While this overall finding might not be surprising, it does not necessarily reflect the expectations of the research teams. The decade from 2011 to 2020 has delivered massive digitalisation of communication at large, and of mass media in particular. Given the many shades of media crises (Curran, 2019; Trappel et al., 2015) occurring in parallel with the emergence of digital platforms as global giants (Birkinbine et al., 2016), the performance of leading mass media could have well eroded. This has not been the case. Taken together, the country analyses delivered similar results for all three dimensions. For *the Freedom / Information (F)* dimension, 69 per cent of all scores were reached by the (then) ten countries in 2011, and 65 per cent ten years later (by 18 countries). Similarly, the overall scores did not significantly change for the other two dimensions over time. Therefore, the first general finding of MDM 2021 is that the leading news media managed to cope with the digital challenge and found ways to maintain their performative strengths despite economic, political, and technical challenges.

Freedom and information: Wide reach, poor gender equality

A closer look at the three dimensions and the country-specific performance unveils both strengths and weaknesses. The first positive message from the *Freedom / Information (F)* dimension is the continuous interest of citizens in

news, which follows from adequate and successful presentation of the news by leading media. Second, the availability of news media is very high in almost all countries. Only the huge countries Australia and Canada, as well as Italy, do not see the news media distributed evenly throughout their territories. Third, the awareness of the negative effects of harassment against journalists on democracy is high in most countries, particularly in the top clusters of the sample. Deficits in this respect have been recorded in Australia, Chile, and Hong Kong.

The most pronounced weakness and deficit among all indicators of the 2021 MDM edition concerns gender equality in media content (Indicator F9). Not a single country reports full respect for gender parity and awareness, and two countries even reported that gender equality, as well as fundamental rules on gender equality in reporting, are not respected at all. This result demonstrates once again the fundamental disrespect when it comes to fair and equal gender representation in the leading news media. It is a clear and unambiguous call for newsrooms to reconsider their internal practices.

Similarly, but less pronounced, internal gender equality within newsrooms constitutes a problem for democratic norms and values. On average, only 59 per cent of all scores have been reached, with only Sweden as a role model for other countries. Again, the bottom tier of the sample performs particularly poorly.

Some noticeable progress has been made with regard to internal rules for harnessing democratic practices in newsrooms. For the nine countries participating in both years, score fulfilment increased significantly, indicating some growth of democratic culture within larger media organisations.

Equality and interest mediation: Diverse, affordable, but concentrated

Within the *Equality / Interest Mediation (E)* dimension, the structural indicator for affordable public and private news media (E5) performs particularly well. The democratic requirement of easy access to news and information is met by almost all countries (with the exception of Portugal). Another positive result of the MDM 2021 concerns the diversity of news formats. Evidently, leading news media provide citizens with an abundance of news formats, thereby fostering information plurality and equality.

However, diversity is critically challenged by the high level of media concentration, both at the national and the regional and local level. At the national level, not a single country reports concentration levels below 0.40 (CR), and in about one-third of the countries, competition appears weak, with few media conglomerates controlling the news media markets. Digitalisation has also not delivered significantly to balancing media ownership concentration at the regional and local level. Taken together, the 18 countries reach only 56 per cent

of all possible scores, with Canada and Portugal scoring best, and almost half of the other countries scoring poorly. Also, in the long-term perspective (for nine countries), ownership concentration remains a major problem for democracy.

Regarding content monitoring instruments (Indicator E6), making transparent biases in the news, the 18 countries perform very diversely. While in some countries (Canada, Germany, and Italy), media content is regularly monitored, in other countries, such monitoring does not exist at all (South Korea) or is underdeveloped. Interestingly, most of the tier-one countries are found among the latter group of countries.

Compared with 2011, significant progress has been made with regard to the respect for a national code of journalistic ethics, possibilities for citizens to participate in the news process, and rules and practices on internal pluralism. These advancements can at least partly be explained by new technical opportunities, such as digital chats and forums, as well as digitally-enabled virtual spaces for exchange, including the use of digital platforms by leading news media.

Control and watchdog: High watchdog esteem, but journalistic jobs insecure

The indicator on journalists' self-perception as watchdogs (C7) is among the top-3 highest-scoring indicators of the entire monitor. It appears that journalists identify themselves highly with their mission as investigative reporters and that this democratically crucially important norm is well established within the mission statements of newsrooms. Throughout the decade under scrutiny, the watchdog role of journalists has strongly increased its importance, reaching even 85 per cent of the possible scores in the nine countries participating in both years, compared with 67 per cent in 2011. Less pronounced, but still above average, are scores for available resources for watchdog journalism, which have also grown in leading news media. Along with this self-understanding as investigative reporters, journalism professionalism is considered well developed. This indicator (C4) reflects almost perfectly the country cluster, with tier-one countries scoring the maximum and the lowest tier performing poorly.

By contrast, however, and of great concern, journalists' job security is at stake throughout the sample. Less than 50 per cent of scores have been reached. Not surprising, not a single country reports a high degree of professional security for journalists, and half of them observe frequent changes of employment and only occasional long-term contracts. Such precarious labour conditions constitute a major threat to the democratic performance of leading news media, as job security is considered a prerequisite for holding the powerful to account. Subsequently, scores for the indicator concerning the independence of the news media from powerholders (C2) are relatively low as well.

Methodical reflection on the instrument

The MDM is designed to be an inclusive qualitative research instrument, striving to integrate all relevant sources. Its purpose is first and foremost to enable learning from one country to another and from one media outlet to the next. Furthermore, the monitor compares countries, and some of them also over time. It is meant to inform the debate among academics, politicians, journalists, and the interested public at large. To this end, country information is collected and evaluated by qualified and experienced teams of academic scholars with no restriction on where information is gathered. Best data sources differ from country to country, and the expert teams know best where to find them. In addition, interviews have been conducted with representatives of the leading news media under scrutiny and other relevant actors in the field, mostly journalism unions. All information has been collected according to the 30 indicators, grouped in three theoretically reasoned and justified dimensions.

This approach has the advantage of inclusivity. The best available information is included in the report and helps in drawing an accurate picture of the country. While some information can be validated by interviews, and vice-versa, research economics did not allow for more reliable methods, such as participatory observation in newsrooms or content analysis.

Another challenge are scores. Although the instrument delivered plausible results for all three dimensions, and also across the decade, there remains a substantial element of personal and subjective assessment. The research teams met and discussed indicator after indicator to arrive at a joint and shared view, but each team member has its own view reflected in the scores. For this reason, we insist that the instrument is qualitative, and any attempt to classify countries in a ranking should bear this in mind.

Overview of all indicators and all countries

Below, the results for each indicator are presented, along with the motivation given for the score. All indicators are displayed afterwards in one large table to facilitate comparative learning (see Table 1). An accessible Excel version of Table 1 is available to download as a supplementary file. In the indicator descriptions, international country codes (top level domains) are designated to each country:

- AT = Austria
- AU = Australia
- BE = Belgium (Flanders)
- CA = Canada
- CH = Switzerland
- CL = Chile
- DE = Germany
- DK = Denmark
- FI = Finland
- GR = Greece
- HK = Hong Kong
- IS = Iceland
- IT = Italy
- KR = South Korea
- NL = the Netherlands
- PT = Portugal
- SE = Sweden
- UK = the United Kingdom

Dimension: Freedom / Information (F)

Indicator F1 *Geographic distribution of news media availability*

Country	Motivation for score	points 2011	points 2021
AT	A wide and stable variety of news media is available to Austrian citizens. There is a small regional bias between rural areas and the Vienna region. The distribution of news media remains variable concerning media types.	3	3
AU	Due to Australia's geography and population distribution, regional areas are less well-served than the metropolitan centres, where all media are available. Regional newspapers have significantly contracted, and this accelerated with Covid-19.	2	2
BE	All types of media are distributed and available throughout the whole of Flanders, with a broad variety of news offered by diverse media companies.	–	3
CA	Because of Canada's immense landmass and population distribution, large northern and rural parts of Canada's regional areas are not well served by the news media when compared with the country's large urban areas where considerable news media is available in both digital and analogue forms.	–	2
CH	News media are widely available in all language regions of Switzerland with no major restrictions, despite strong horizontal press concentration since 2000.	3	3
CL	There is a large variety of media, complemented by access to it for the citizens in the country. Nationwide media coexists with regional media.	–	3
DE	There is a multiplicity of news sources widely available all over the country.	3	3
DK	A wide variety of news media are broadly available all over Denmark.	–	3

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FI	Despite significant changes in the delivery of news, the mainstream news media is accessible throughout the country without any major regional divides.	3	3
GR	In the Greek media market, news media are widely available all over the country, with supply often superseding existing demand. It is a media landscape characterised by high level of public access. Newspapers are mostly located in Athens, being national in scope; however, some regions still prefer, either as a first or a secondary choice, the local press. There are also both regional and local radio stations, with the most influential radio stations located in Athens and in Thessaloniki. Television is available through terrestrial, satellite, or digital (broadband) transmission. Most of the media content, albeit not in its entirety, is offered free of charge.	–	3
HK	Hong Kongers are kept informed by a wide variety of news media. High levels of public access and the efficient use of technology to gather and distribute news and information characterise the news media.	–	3
IS	The mainstream news media are accessible throughout the country and there are no major regional differences. The number of news media available to Icelandic citizens is somewhat limited though, due to the smallness of the population and hence its media market.	–	3
IT	A wide and stable variety of news media is available to Italian citizens. Some parts of the country are not served by local or regional news media. The distribution of news media varies along different media and news outlet types.	–	2
KR	Traditional news media are available nationwide. Backed by strong digital infrastructure, multiplatform delivery via online portal, YouTube podcasts and news outlet websites ensures widespread news media availability.	–	3
NL	A wide variety of news and information media is still available to all Dutch citizens, although several news outlets were shut down. Regional and local news coverage varies from region to region.	3	3
PT	Relevant news media are generally available to all citizens.	3	3
SE	The media landscape has become more crowded and competitive.	3	3
UK	News media are widely available throughout the four nations of the United Kingdom in broadcast, print, and online form. While the local newspaper industry is under pressure, there are few areas where dedicated local coverage is not available to citizens.	3	3

Indicator F2 *Patterns of news media use (consumption of news)*

Country	Motivation for score	points 2011	points 2021
AT	Newspapers and public service television remain the prime sources of information concerning political issues. Among the younger population, the digital Internet platforms increase their news relevance. Overall, the interest in news is high, but gaps are widening between soft and hard news followers.	2	2
AU	The Australian citizen is well supplied with news from different sources. However, the print media sector, already highly concentrated, is also in structural decline.	3	2
BE	In general, interest in news is high, with a notable decline in interest among the younger generations. Although news consumption via traditional media is still popular, shifts to online media are on the rise.	–	2
CA	Despite challenges in smaller markets, Canadians have access to a wealth of news sources.	–	3
CH	The Swiss population still uses traditional media such as the press, television, and radio to inform about news, but the Internet and social media have become the main source of information, especially for young people.	3	2
CL	The protests that erupted in Chile emphasised the amassing tendency for a frequent consumption of news, but it is tainted with distrust, especially for online and television news and with a small readership of printed newspapers, leaving radio as the most credible medium.	–	2
DE	The German citizen is well supplied with news from different sources.	2	3
DK	Public service television and online newspapers remain the prime sources of news and information in Denmark. Some age gaps in media use exist, particularly with regard to Danes under 25, who continue to consume news, but prefer to receive their news through social media.	–	3
FI	Consumption of traditional media and supply of news content are slowly declining, but in cross-national comparison, the mainstream news media still reach a very high proportion of the population in Finland. News is more highly valued in times of crisis.	2	3
GR	A considerable majority of the population is reached by news media, with some gaps between the young and old. Although there is an abundance of choices, media consumption in Greece remains low compared with the rest of Europe, and uneven within the population. Greek media mostly reach the elites, while significant minority segments of the population experience deep inequalities of representation and access to the media.	–	2

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HK	90 per cent of the Hong Kong population consume news every day, with online and television being the main news media. Demographic factors contributed to different news consumption patterns.	–	3
IS	Online news and television news are the prime sources of news for Icelanders. Interest in news is high, irrespective of gender and in all age groups. There is a considerable age difference in platforms used, and among the 18–24-year-old age group, social media is a very popular source of news.	–	3
IT	Almost the entire Italian population accesses the media for information, and over 80 per cent of Italian citizens access information regularly. Only 5 per cent of Italians are not informed at all. Older people tend to consume only one news-media type, while younger people are more prone to searching for information from different sources or media.	–	2
KR	The changing media use patterns reflect the digital turn in the media industry of South Korea. With 92.3% of the adult population getting news from either television or Internet portal, interesting patterns emerge between different age groups. Legacy media are in greater use among older population, while Internet-based media are major news source for the younger population.	–	2
NL	On average, eight out of ten Dutch nationals turn to the news on a daily basis, varying from seven out of ten in the younger age group (18–34 years) to nine out of ten in the oldest age group (55+). The average daily reach figures – not only for print media but also for television and radio – have declined in the last decade. The public broadcaster is seen as an important news source both online and offline.	3	2
PT	Consumption of news is less than that of entertainment or fiction, especially given the overwhelming presence of television. Accessing news through social media is an increasing trend.	2	2
SE	News consumption has lessened and become more fragmented.	3	2
UK	News consumption remains high, with varied and diverging patterns of media use among different age groups. Decline in consumption of print journalism in the past decade has been significant, though the growth of online audiences offsets this to a degree.	3	2

Indicator F3 *Diversity of news sources*

Country	Motivation for score	points 2011	points 2021
AT	Editors-in-chief and journalists emphasised the predominant role of journalistic research over news agency and public relations material. National and international collaboration is increasing.	2	3
AU	The Australian newspaper industry (print and online) is highly concentrated, impacting the availability of diverse news voices.	2	1
BE	In the news-making process, news agencies are mostly used by the leading news media as a secondary or tertiary source. Internal content syndication is common practice.	–	2
CA	Canada's English-speaking audiences have a wide — national and international — array of news sources. French-speaking Canadians have less. All Canadian news organisations have scaled back their foreign correspondents. Moreover, critics charge — and many of the journalists interviewed for this study concede — that Canada's news media tends to index too much of its coverage to elite (non-diverse) sources.	–	2
CH	The diversity of news sources has become smaller because of media concentration, especially since 2000.	3	2
CL	Daily journalism includes mostly official sources, with nuances varying between each publication outlet. Television is the one medium that introduces more diversity with citizen sources. The daily agenda, work rhythm, and the part and counterpart logic, sees influence in their lack of deep reflection on source selection.	–	2
DE	The variety of sources in news production is restricted in the sense that non-elite discourse and diversity of the social and cultural heterogeneity of society are reflected less. Some news agencies dominate the market. Investigation is mostly conducted in special units and is limited to large flagship media outlets.	2	2
DK	Diversity of news sources is relatively high but limited by reliance on a single national news agency and a decreasing number of foreign correspondents.	–	2
FI	The role of syndicated content from the national news agency is diminishing, while the influence of public relations material and recycled content from other media outlets is increasing.	2	2

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GR	There is a limited variety of formats across media, and few formats are available. Research, as well as findings from interviews conducted with journalists and editors-in-chief on the issue of sources used by leading news media in Greece revealed a uniform use of sources, albeit with some room for further investigation by the journalists. Moreover, the findings revealed differences among media outlets on how dependent they are on source material and the level of investigation they engage in.	–	1
HK	The respondents stressed that they performed independent research on publicity materials and did not rely on news agencies over local news sources. However, there were serious issues relating to political censorship, especially through the selection or omission of sources, among some media organisations.	–	2
IS	Editors-in-chief and journalists emphasised the predominant role of journalistic research over news agency and public relations material. National and international collaboration is increasing.	–	2
IT	Within the Italian news media system, approximately seven out of ten news stories are based on just one source. Government sources enjoy considerable importance, and personal contacts are one of the most-used sources. News agencies and press releases are also referred to. No systematic data is available concerning the use of press releases.	–	1
KR	The national news agency plays a dominant role, and the number of foreign correspondents is on the fall. Despite a number of different news sources that journalists rely on, certain gender and minority groups are under-represented and sources tend to be selected on the basis of the congruence of the political position of the given news media.	–	2
NL	Editors-in-chief and journalists emphasised the crucial importance of checking news sources, especially in the case of social media. Exchange of information, be it international, national, or regional, is increasing. Much like the public broadcaster, reflection of societal reality in news was part of the mission of all news media organisations.	3	3
PT	There is little diversity of news sources, with a high dependency on a single national agency. Some investigative journalism is present, but not on a large scale.	1	1
SE	There is an increased understanding of the importance of diversity of news sources, but elite dominance persists.	2	2
UK	News agencies are widely used by UK journalists, and there has been consistent evidence of the infiltration of public relations material into journalism, but journalists and editors have a high degree of autonomy in the pursuit of stories and sources.	2	2

Indicator F4 *Internal rules for practice of newsroom democracy*

Country	Motivation for score	points 2011	points 2021
AT	Newsroom democracy is established by editorial statutes, which are common in Austrian newsrooms. But journalists have limited influence on decisions about hiring the editor-in-chief.	1	1
AU	There are no written rules for newsroom democracy in the Australian media.	1	1
BE	Discussions between editors(-in-chief) and journalists take place on a daily basis. The majority of journalists affirm that they are heard in these discussions. Management elects new editors-in-chief, with journalists having no say in these decisions. Meanwhile, a lack of guidelines or legislations to support and promote advancement of female journalists and journalists of minority groups continue to remain.	–	1
CA	While there are no written rules for newsroom democracy in Canada's media system, journalists do have input and freedom.	–	2
CH	The newsroom practices, especially of Swiss leading newspapers, are not guided by clear and explicit democratic structures. And journalists have only limited influence regarding the selection of the editor-in-chief.	1	2
CL	Media structure in Chile is hierarchical. Journalists can participate in the discussion of content and may advance in their careers, but the editors and directors have the power to make decisions.	–	1
DE	Newsroom democracy is established by editorial statutes, which are common in German newsrooms. But journalists have limited influence on hiring decisions for editors-in-chief.	1	1
DK	Newsroom democracy in Denmark is well established. However, it is informal and carried out more in the professional culture rather than written down in formal, internal rules.	–	2
FI	Finnish journalists seem to have a relatively high level of autonomy in their daily work, but any formal structures or practices supporting internal democracy are not common.	2	2
GR	Journalists are heard and participate in decision-making, but do not have the power to make decisions. In Greek newsrooms, internal democratic practices are applied in rudimentary ways, with journalists merely having the opportunity to be heard, at best, and at worst, being deprived of any engagement with the decision-making processes. The appointment of editors-in-chief and other managerial positions are decisions left to the discretion of a media organisation's managers and owners. Moreover, Greek journalists' voices have no tangible impact on how news topics are ultimately framed.	–	1

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

HK	Democratic practices in newsrooms varied between different media organisations. Generally speaking, newsroom journalists did not have a say in appointing the editor-in-chief or other positions. However, some newsroom journalists had a greater role in portraying and framing political issues than others.	–	1
IS	Journalists have much say concerning how issues are framed. They seldom have any influence on decisions about hiring the editor-in-chief.	–	2
IT	National and internal rules are in place to guarantee equality, impartiality, objectivity, and internal democratic practices in the newsroom. By law, all news media with at least ten journalists are expected to have a newsroom council (and a trustee for smaller companies). The publisher of a news organisation appoints editors-in-chief who then nominate managing editors.	–	2
KR	Although leading news media are politically polarised, journalists can reasonably voice their views on the selection and framing of the news. Affirmative policies regarding female journalists are not yet set as a part of general newsroom culture.	–	2
NL	Newsroom democracy is provided for by editorial statutes, which are common in Dutch newsrooms. Journalists are represented via a newsroom council that influences decisions such as hiring an editor-in-chief or news chief. Most new media platforms draw up an editorial statute.	2	3
PT	Several laws and mechanisms for journalists' democratic participation exist, but they are not always followed in practice.	2	2
SE	Journalists have influence on editorial matters.	2	2
UK	Newsrooms in the UK continue, on average, to be hierarchical, with editorial coordination concentrated among senior roles at the expense of ordinary journalists. The appointments of editors-in-chief rarely involve journalists.	1	1

Indicator F5 *Company rules against internal influence on newsroom/editorial staff*

Country	Motivation for score	points 2011	points 2021
AT	The separation of newsrooms from management is formally practised by all media organisations in this media sample and can be interpreted as common in the Austrian media system.	2	3
AU	Media proprietors have long been dominant figures, also in newsroom decisions.	1	1
BE	The majority of Flemish journalists report a high degree of editorial independence. However, the interviewees mentioned an ambivalent relationship between journalism and marketing sometimes. The line between journalistic content and branded content seems to be blurring.	–	2
CA	The influence of media proprietors is more subtle than direct in newsroom decisions.	–	2
CH	The media representatives of the leading Swiss newspapers attach great importance to separating business-entrepreneurial decisions and journalistic work processes. In practice, this hardly ever succeeds, as business decisions have a major impact on the daily work of the editorial staff and editorial cultures.	2	2
CL	Internal pressures exist between management boards and editors-in-chief and directors, but these do not directly reach journalists, who confirm the exercise of freedom in their work. The 2019 protests implied an exceptional internal pressure within different forms of media.	–	2
DE	Newsroom journalists enjoy independence on editorial decisions. The management, sales department, and newsrooms are separated most of the time. Although there was one severe case of political influence in public service media, this was resolved by a constitutional court proceeding.	2	2
DK	The degree of independence of Danish newsrooms is high; editorial decisions remain in the domain of the editorial staff, but there is increasing collaboration between editorial and commercial departments.	–	2
FI	The autonomy and independence of the newsroom remains a central value in Finnish journalistic culture.	2	2
GR	Management and sales department meet newsroom staff regularly. In Greek media organisations, although newsrooms, management, and sales department are separated, internal manipulation is still exerted through unspoken pressures that lead to self-censorship by journalists. It implies a subconscious adoption of the editorial stance preferred by the ownership. Pressures from the advertising department are far less considerable, with most journalists being unaware of the main advertising sponsors in most cases.	–	1

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

HK	The separation of newsrooms from management is not practiced by any of the media organisations sampled, and there is a diversity of relationships between media owners and the newsroom. In Hong Kong, generally speaking, newsrooms are totally separated from the advertising department.	–	2
IS	Main news media all have established rules to guard their newsrooms from internal influences. Journalists mostly enjoy editorial independence.	–	3
IT	Management units, sales departments, and newsrooms are formally separated, and the National Journalistic Employment Contract states that the powers of the editor-in-chief “are determined by agreements stipulated between the publisher and the editor-in-chief”, who is responsible for elaborating the editorial line with a degree of autonomy. There are nevertheless (rare) situations where pressure is exercised by owners or sponsors.	–	2
KR	Independence from advertisers is held as a principle, and many reporters do not encounter daily pressures. But higher-ranking journalists do feel pressure and have to sometimes arrange something for advertisers, via the advertising and sales department.	–	2
NL	Editorial bylaws endorse the chief editor’s final responsibility and protect the strict separation between editorial staff on the one hand, and management and shareholders on the other. However, concentration in the newspaper market has increased significantly over the last ten years, and editors-in-chief are getting more involved in managerial tasks.	2	2
PT	The degree of independence of the newsroom against ownership is high in leading media, but weak in small news outlets.	2	2
SE	The management and the newsroom are separate most of the time.	2	2
UK	Newsrooms and management are generally separate, though changing business practices in UK newspapers is leading to a more porous boundary between the editorial and commercial arms of media companies.	2	2

Indicator F6 *Company rules against external influence on newsroom/editorial staff*

Country	Motivation for score	points 2011	points 2021
AT	Editors-in-chief strictly denied the direct influence of external parties on newsroom work and content, although such attempts were occasionally reported. The amount of public advertising compromises editorial freedom for some leading news media.	2	1
AU	The strong position of Australian media proprietors protects the newsroom from external influence.	3	3
BE	No interference from advertisers or sponsors in their daily news reporting was mentioned by Flemish journalists. Meanwhile, knowledge of income stream of their news brands was limited. Also, it was reported that many politicians tried to influence journalists on a regular basis.	–	2
CA	There are very few external influences on newsrooms in Canada.	–	3
CH	There are at least some informal rules in media companies to deal with external advertising influences. At the same time, however, problematic forms of advertising, such as “native advertising”, have increased.	1	1
CL	Chilean media depends highly on advertising, which has led to scenarios of low revenue resulting in firing of journalists and editors. Despite this, journalists defend their autonomy from commercial interests.	–	2
DE	Leading news media in Germany receive their income from diverse sources. There is no single large advertiser.	2	2
DK	Danish newsrooms are well shielded from external commercial influence. The increasing relevance of native advertising does, however, pose a potential gateway for increasing external influence.	–	3
FI	Direct influence by external parties on newsroom decisions is still not seen as a major problem.	2	2
GR	Newsrooms depend on a few major advertisers or sponsors. Leading media companies in Greece – either for reasons of political or ideological standpoints, or due to journalistic integrity and professionalisation – have the potential to resist outside pressures. However, there have been cases where media houses have experienced boycott or pressures because of their reporting. Most journalists are unaware of the main sources of advertising income with the very small Greek advertising market having shrunk during and after the economic crisis, leading to dependence on fewer advertising sponsors.	–	1

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

HK	The external influence on newsrooms varies among news media organisations. Some respondents reported no direct influence of external parties on their newsroom work and content, although advertising boycotts due to political concerns have affected revenues.	–	1
IS	All main news media outlets have rules thwarting the direct influence of external parties on newsrooms and media content. Editors and journalists alike strictly deny such influence. No advertisers can be said to have dominance in leading news media. Leading Icelandic news media houses separate newsrooms from their advertising departments. All declare explicitly in their formal editorial rules that the interests of advertisers shall never be considered in news production.	–	3
IT	The Department of Information and Publishing of the Presidency of the Italian Council supports, through direct contributions, the editorial activity of newspapers and periodicals. Politics remains the main “external” factor influencing the quality of the journalistic product. Moreover, Italian newsrooms depend on a few large advertisers or sponsors. In this respect, legal provisions are in place to guarantee editorial independence, but the boundaries between information and advertising often tend to blur.	–	1
KR	Partly due to the structure of the economy, in which a few conglomerates dominate the demand for advertising space, and partly due to declining paid subscription for the news, leading news media depend more on advertising revenue. They also must be creative in devising other indirect advertising products such as advertorials, branded content, and so on.	–	1
NL	Direct influence from external parties on newsroom work and content is strictly forbidden, although advertisers occasionally attempt to gain influence. Given their smaller markets, local, regional, and niche news media are at higher risk of external influence.	2	2
PT	Although news media generally receive revenues from a multitude of advertisers, they are increasingly permeable to advertising formats, allowing some confusion between the editorial and commercial areas.	1	1
SE	There is less external pressure as subscriptions are becoming the single most important revenue source.	3	3
UK	Broadcast news in the UK is largely insulated from commercial pressures, although political interference in public service broadcasters has grown in the past decade. Commercial news outlets have a wide range of advertising partners, though there is some evidence of editorial favourability to certain industries.	2	2

Indicator F7 Procedures on news selection and news processing

Country	Motivation for score	points 2011	points 2021
AT	Institutionalised means of criticising journalistic working habits only exist in a few newsrooms and are not regularly practised.	1	1
AU	Although no formal rules on how to select and process news exist, informal rules are followed in the news selection and processing.	1	1
BE	Every leading Flemish news media has their own procedures on news selection and news processing, with freedom to discuss strategies. Editors have the loudest voice and most times they decide if an article is ready for publication.	–	2
CA	There are very few external influences on newsrooms in Canada.	–	2
CH	News selection and news framing became more audience oriented. But there is variation according to the type of media, for example, public versus private broadcast or elite versus popular versus free press.	2	2
CL	Routine is the main element when selecting news, with relatively small space for reflection. Decisions are mainly taken in editorial meetings and the conversations between journalists and editors during the day.	–	2
DE	Internal debate on news production is practised more than once every day and is part of journalistic routines.	2	2
DK	Most news media have formal procedures for news processing. For news selection, however, the formal procedures are far less detailed.	–	3
FI	Despite radical reforms of strategy for news production and distribution, the ways of processing and selecting the news have not yet been revolutionised.	2	2
GR	Internal debate on news production is practiced more than once every day and is part of journalistic routines. Leading news media follows informal rules and procedures, consisting of meetings between the editors-in-chief, when selecting news topics. The primary factor in this selection seemed to be the political stance of the organisation. In managing news derived from social media, certain processes of verification were in place, however, nearly all media outlets lacked a fact-checking department.	–	2
HK	Only a few media organisations have formal rules or training on news selection and news processing. Most of the respondents emphasised that new journalists learn through experience and by following the newsroom practices of senior staff.	–	1

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

IS	Internal debate is mostly limited to daily news meetings and the procedures concerning news selection and news processing are usually informal and not based on formalised rules.	–	1
IT	Italian journalism does not have procedures for news selection, nor media accountability measures. There is almost an overabundance of codes of ethics, but these codes are not compulsory, nor widely respected and, when norms are violated, there are no strict sanctions. The Worlds of Journalism Study shows that Italian journalists perceive having little autonomy in deciding which topics to work on and how to frame their news.	–	1
KR	Rules and routines, albeit informal, do exist and there are abundant debates in newsrooms.	–	2
NL	In the absence of formal news or document selection rules that might outline a definition of what is and what is not news, meetings and discussions held by editorial staff can be considered as informal selection procedures.	2	2
PT	Rules and standards for news processing exist, but they are not always present in day-to-day routines. The pressure of online breaking news and the dependence on clicks by the audience, as well as the permanent presence of social media, leaves almost no room for debates.	2	1
SE	Newsroom practices are in line with formal rules.	3	3
UK	Broadcast news in the UK is governed by a series of regular procedures on news selection and processing. Newspapers also supply detailed guidelines to journalists on newsgathering and verification.	2	3

Indicator F8 *Rules and practices on internal gender equality*

Country	Motivation for score	points 2011	points 2021
AT	Employment conditions among male and female journalists are equal in terms of conditions and pay.	–	2
AU	After decades of reforms and changed policies, women remain less paid, less promoted, and harassed.	–	1
BE	Equal conditions of employment and benefits for both genders are ensured and even enshrined in regulations. However, male journalists earn more and are promoted more often than their female colleagues.	–	1
CA	Addressing gender equality in a structural way in Canada's news media remains a challenge.	–	2
CH	Gender equality has improved significantly, but there are still more male journalists working in the politics department and especially in higher positions in newspapers.	–	2
CL	There is a notorious gap in participation in higher positions, where women face greater challenges to work than men. There is also a difference in salaries between genders.	–	1
DE	Media organisations are more aware of gender inequalities than they were a decade ago. However, systematic measures to even out gender imbalances, like supporting female talent or fighting the gender pay gap, remain on the agenda. However, informal efforts to eliminate them exist and have already succeeded in some respect.	–	2
DK	Gender differences in terms of salary and positions persist, albeit to a lower degree than in other sectors and in other countries. There is relatively little emphasis on achieving gender equality through formal rules and initiatives, but in recent years, awareness has increased and large media organisations are beginning to explicitly articulate their goals on internal gender equality.	–	2
FI	Gender equality is protected by law and women have equal opportunities to proceed and develop their careers as journalists. However, the division of work tends to be very stereotypical in practice.	–	2
GR	Inequalities exist and remain. The organisations slowly move towards eliminating them. The Greek media do not acknowledge the existence of gender issues; therefore, there are no rules applied to address them. According to male journalists, all news employees enjoy the same treatment irrespective of gender. However, women journalists' accounts reflect images of income inequalities based on gender, as well as difficulties in climbing the ladder of rankings within a media organisation.	–	1

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

HK	Employment conditions, including salaries, are equal for male and female journalists.	–	2
IS	Employment conditions among male and female journalists are mostly equal in terms of conditions and pay. Women are under-represented in decision-making positions in media companies.	–	2
IT	Although the overall situation of gender equality in the country has improved over the past 15 years, the reality of journalism in Italy shows that gender inequalities are still widely present in the sector, and there is still a lack of awareness amongst professionals. Patterns of inequality persist in women's participation in news reporting, job guarantees, pay gaps, and glass ceiling barriers to career advancement.	–	1
KR	Inequalities still remain. An unequal cultural milieu and poor daycare support are partly to blame for the remaining inequalities, especially in relation to the promotion of female journalists.	–	2
NL	Employment conditions among male and female journalists are equal in terms of conditions and pay.	–	2
PT	Employment conditions are basically equal between men and women, although there is still a lower presence of female journalists in senior managing positions, which causes some gender pay gaps.	–	2
SE	There are more women in top positions and newsrooms.	–	3
UK	Despite recent improvements in the representation of women in the very top editing and managerial roles, women continue to be underrepresented in managerial roles, and a substantial gender pay gap remains.	–	2

Indicator F9 Gender equality in media content

Country	Motivation for score	points 2011	points 2021
AT	There is growing sensitivity among journalists for gender equality in media content, but no formal rules apply. Stereotypes prevail in visual gender representation.	–	1
AU	Women in sports has seen greater coverage than ever, but there is room to expand how and how much the media is covering women and their concerns.	–	1
BE	No rules or guidelines regarding the promotion of gender equality in media content apply, with only the Flemish public broadcaster imposing gender quotas. Our interviewees seemed to be aware of the underrepresentation of women in media, but none indicated the need for regulation or monitoring.	–	1
CA	Acknowledging gender inequalities in media content is not enough. Canadian news organisations must approach the problem of promoting free expression and the inclusion of diverse voices in a more meaningful and structural way.	–	1
CH	Women have received more media coverage in the last decade, but men are still more prominent, especially in the political news sections of the Swiss media.	–	1
CL	The difference in sources and roles assigned to men and women is noticeable in Chile. This issue concerns academia and several entities. Despite available guidelines, it is still not apparent in the journalistic profession.	–	0
DE	German media became increasingly sensitive to gender and diversity issues, but no formal or legal regulations are in force.	–	1
DK	Danish news media has no codified rules securing gender equality in media content, but an increased awareness of the issue exists.	–	1
FI	The leading Finnish news media organisations strive towards increased gender equality in media content online by using a tracking system. However, challenges remain, as the surrounding society is truly not equal.	–	2
GR	There are no specific rules on gender equality in reporting, and each journalist decides whether or not it is respected in reporting. In leading news media organisations, a culture of safeguarding gender equality in their content is lacking. This is reflected in the lack of rules regarding gender balance or parity in reporting, a phenomenon stemming from the lack of awareness that gender sensitivity in reporting is crucial in order to make media reflect upon the plurality of society's voices.	–	0

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

HK	Past research has found that media construction of gender stereotypes remained prevalent in Hong Kong. The respondents accepted the importance of gender equality, but they did not see it as a serious concern and were not particularly aware of gender equality when reporting news.	–	1
IS	Journalists agree that gender equality in media content is important, but no formal rules apply except at the public broadcasting service. Women are under-represented as news subjects.	–	2
IT	Italian news media are increasingly presented and produced by female journalists, yet it is still mostly men that make the news as subjects, while women continue to be marginalised in the news agenda. In comparative studies, Italy still scores below the European and global average, but some recent positive developments are worth mentioning.	–	2
KR	Leading news media are only just beginning to be more inclusive in content construction in factors such as source distribution and selection of columnists. The current lack of diversity can be attributed partly to the overall social state, as South Korea has immense gaps in gender equality in the professional sphere and social status.	–	1
NL	Although there is a growing sensitivity among journalists for gender equality in media content, media professionals overestimate the number of women in the news. No formal rules apply. The public broadcasters (at local, regional, and national level) do not follow a quota system, although they are supposed to represent women in a balanced way.	–	2
PT	There is an overwhelming dominance of male actors and protagonists in the news.	–	1
SE	The accepted principles are not always practised.	–	2
UK	There is an imbalance in the frequency of female voices as expert sources in UK news coverage, and in the portrayal of women in certain outlets, though several news organisations, particularly broadcasters, have engaged in policy reviews and have introduced new policies and procedures to address the problem.	–	2

Indicator F10 *Misinformation and digital platforms (alias social media)*

Country	Motivation for score	points 2011	points 2021
AT	Misinformation on digital platforms is of minor relevance and importance so far, and defence mechanisms are not yet developed.	–	1
AU	Misinformation is spreading aggressively on social media, and its impacts are reverberating in current crises.	–	1
BE	Concerns about misinformation are rising among Flemish journalists. It has become more prevalent on social media. Fact-checking and double-checking of information is seen as part of the job. A few Flemish organisations are specialised in fact-checking.	–	3
CA	While Canadian newsrooms are worried about disinformation and misinformation, there are few recent examples of coordinated efforts to misinform the population.	–	3
CH	Misinformation and false information have been recognised, and most editorial offices defend themselves with special internal units or collaboration with external fact-checking organisations.	–	2
CL	Having teams dedicated to fact-checking is still an emerging process within the Chilean journalistic routine. The social protests of 2019 promoted and accelerated the establishment of these practices.	–	2
DE	In most leading German news media, there exist specially trained experts to monitor misinformation. In only a few cases are algorithm-based tools used, as traditional means of fact-checking are considered more valuable.	–	2
DK	There is high awareness on the issue of misinformation on digital platforms in Denmark; the actual amount of fake news and disinformation campaigns on social media appears, however, to be comparatively low. Defence mechanisms are in place, but they mostly rely on established journalistic fact-checking, while algorithmic and data-driven solutions are only slowly being tested by few media.	–	2
FI	The leading Finnish news media rely primarily on internal processes and traditional practices of good journalism as defensive weapons against misinformation. They have also invested in improving the media literacy of their audiences.	–	2

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

GR	Regular internal meetings to discuss potential misinformation. There is no common approach applying to all the Greek media regarding the issue of misinformation. The process of careful crosschecking is the typical action of Greek journalists in order to deal with misinformation. Most media organisations do not have fact-checking departments, nor have they established official collaboration with external fact-checking organisations.	–	1
HK	There are no formal defense mechanisms or regular training for defeating fake news, although all of the respondents admitted that misinformation on digital platforms is a serious problem, particularly in times of social unrest and the Covid-19 pandemic.	–	2
IS	Misinformation on digital platforms is of minor relevance and importance so far, and defence mechanisms are not developed and not seen as a priority.	–	1
IT	Italian leading news media have not developed particular expertise and practices to identify misinformation and avoid spreading fake news. Among the newsrooms examined, the most common habit is to address the problem at the individual level. Outside news media organisations several actors and agencies are involved in projects aimed at fighting misinformation.	–	2
KR	There are special rules and checks for reporting something from social media or the Internet, especially when quoting someone based on social media posts.	–	2
NL	Misinformation is a crucial issue in Dutch newsrooms. Only a few media outlets check online comments using algorithmic tools. Sufficient training is provided.	–	2
PT	There are a number of fact-checking mechanisms in some newsrooms, as well as monitoring initiatives regarding “fake news” and disinformation. The need to deal carefully with social media is a major concern in most news media.	–	2
SE	Doubtful information is usually checked.	–	2
UK	Journalists demonstrate a high regard for the need for social media verification in their work. While print media do not publicise guidelines for social media verification, broadcast newsrooms tend to have detailed procedures in place, particularly for international coverage.	–	2

Indicator F11 Protection of journalists against (online) harassment

Country	Motivation for score	points 2011	points 2021
AT	Journalists generally rely on support and protection by their employers in case of harassment.	–	3
AU	Online harassment has become a mainstay of being a journalist online. Despite its implications for journalists, little has been done to stem the tide.	–	1
BE	Flemish journalists mention a rise of (online) harassment and intimidation, but knowledge about what to do against this and where to go to file complaints is limited.	–	2
CA	No specific laws protect Canadian journalists against online harassment. News organisations apply an ad hoc approach to helping their journalists when they become the target of online trolls.	–	2
CH	Online harassment of journalists became a problem in the last years, but Swiss journalists are protected by assistance, for example, by specialised internal (legal) centres.	–	2
CL	The protection of journalists is irregular, depending on each employer and on the context.	–	1
DE	Journalists can rely on their employers in such cases, but the news media organisations decide whether they will assist on a case-by-case basis.	–	2
DK	There is increasing awareness for the issue of online harassment, and internal policies to address the issue are in place – although not always well implemented in practice. The trade union provides an ample level of assistance and guidance.	–	3
FI	All the largest news media organisations in Finland have their own internal protocols and guidelines for protecting their journalists against external interference and harassment. Meanwhile, freelancers may get help from a special fund. Online harassment is also going to be criminalised.	–	3
GR	Journalists can rely on their employers in such cases, but cost or other reasons sometimes compromise the assistance provided by news media organisations. In case of harassment, the main type of support offered to journalists from their media organisations is legal support. However, not all journalists feel adequately protected or there are cases where they felt no level of support towards them, especially for women journalists.	–	2
HK	Journalists generally rely on the support and protection of their employers in cases of harassment. The HKJA and other news worker groups have made a joint declaration against police harassment of journalists.	–	1

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

IS	Journalists can usually rely on support and protection from their employers in case of harassment, but guidelines are often lacking.	–	2
IT	Italy features as the country in Europe where journalists' safety is most threatened by online harassment, personal assaults, and intimidation, often connected to reporting on organised crime and mafia issues. No specific protection mechanism has been adopted against online harassment or threats (apart from the legal guardianship in the exercise of the journalistic profession); no mechanisms exist to protect women professionals from on- and offline harassment.	–	1
KR	Cyberstalking is a huge problem in South Korea. Most firms protect their employees and try to prevent traumatic experiences, especially for less-experienced journalists.	–	2
NL	(Online) harassment is an increasing problem in the Netherlands. <i>Persveilig.nl</i> was launched as a contact point to address problems. In general, journalists are supported and protected by their employer's legal department.	–	3
PT	There have been no such situations in the country; it is not an issue (at least for now).	–	3
SE	In the face of increasing harassment, there is now better security for all staff.	–	3
UK	UK journalists with formal contracts enjoy a range of support mechanisms relating to abuse and harassment online. Legal protections also apply in some cases. Freelance journalists, however, report little or no access to support networks.	–	2

*Dimension: Equality / Interest mediation (E)***Indicator E1** *Media ownership concentration national level*

Country	Motivation for score	points 2011	points 2021
AT	Ownership concentration on a national level remains remarkably high, as a few big media companies divide the market among them.	1	1
AU	Australia has a high media ownership concentration on a national level for offline media, which tends to be repeated online.	1	1
BE	Belgium as a whole has a very diverse multilingual media landscape, but with only very few overlaps in brands and company ownership between, notably, the Dutch- and French-language communities and media markets.	–	2
CA	The issue of news concentration has been the subject of successive government studies for 50 years, with very little change. The digital environment has provided a wealth of viewpoints, introducing new problems.	–	2
CH	Only a few media companies dominate the print media market in the four language regions, while the public service broadcaster SRG SSR leads the electronic sector in all language regions.	2	2
CL	A highly concentrated market with media holdings.	–	1
DE	The television audience market is extremely concentrated with a strong counterweight of public service broadcasters. Print and radio markets are not very highly concentrated.	2	2
DK	The level of media ownership concentration in Denmark is relatively high and primarily the result of Denmark being a small media market (as Danish is only spoken in Denmark).	–	2
FI	The national media market is relatively concentrated, with only a handful of companies dividing the market in each sector. Since 2011, mergers and acquisitions within the industry have continued, but the overall concentration ratios have remained stable.	2	2
GR	There is a moderate concentration ratio, with some market dominance by large companies – CR3 is between 0.40 and 0.70. Despite the fact that Greece has more media outlets than the market can sustain, the level of ownership concentration is dangerously high. The main reason for this is the vulnerable media legislation, whose limitation on horizontal concentration in broadcast media and newspapers permits a specific modus operandi of the market.	–	2
HK	Hong Kong is a city; therefore, this indicator is not applicable.	–	2

SOLID PERFORMANCE, BUT DEMOCRATIC DEFICITS REMAIN
CONCLUSIONS

IS	Competition is limited in the small Icelandic media market, and four big media companies are overall dominant in all news media sectors. There is, however, no cross-ownership to speak of in the media sector.	–	1
IT	The Italian landscape shows moderate media ownership concentration, with some market-dominant positions by large companies.	–	2
KR	A higher concentration ratio (CR3) is observed when the news media market share is calculated based on news consumption (47.3%) rather than production (38.2%).	–	2
NL	Ownership concentration on a national level is remarkably high, with only five large media companies sharing the market among them.	2	1
PT	There are three or more competitors for every area. There is some concentration in a few media groups, but various relevant titles still exist outside those groups.	2	2
SE	The previously existing oligopoly situation continues to be in place.	2	2
UK	Ownership concentration in the newspaper industry has increased in recent years, and commercial radio is dominated by a small number of companies. The BBC, while publicly owned, is dominant in broadcasting overall, and broadcast news provision is almost entirely provided by the BBC, ITN, and Sky News.	2	2

Indicator E2 *Media ownership concentration regional (local) level*

Country	Motivation for score	points 2011	points 2021
AT	On a regional level, ownership concentration is remaining remarkably high. In most Austrian regions, one newspaper is dominant; the public service broadcaster still dominates the local radio market.	1	1
AU	Australia's demographic distribution and resulting economy of scale have led to a high media ownership concentration on a regional level.	0	1
BE	The Flemish media market is highly concentrated. In recent years, a wave of mergers and acquisitions led to the total number of leading media companies dropping from nine to just five.	–	1
CA	Local media continues to struggle but does not suffer from the same ownership concentration as the national news services.	–	3
CH	The strong concentration of newspapers at regional level has increased significantly. Moreover, almost all private regional radio and television stations are owned by the dominant media groups.	1	1
CL	One company dominates newspapers, but media ownership is diversified at the regional level.	–	2
DE	On a regional level, ownership concentration remains remarkably high. In most German regions, one newspaper is dominant, and the public service broadcaster still dominates the local radio market.	2	2
DK	There is a relatively high degree of media ownership concentration at the regional level in Denmark after a period of market consolidation in the last decade.	–	2
FI	Apart from newspapers, the leading news media houses in Finland are more nationally oriented. There are no significant regional or local television channels. Dominant regional newspapers generally face no direct competition in their own market area.	1	1
GR	More than two media companies address most relevant regions. Following the media market deregulation and the abolition of state monopoly on broadcasting, regional television stations entered the media field in the early 1990s without receiving official licences, as was also the case for the national television stations. Later on, indicative of the harsh crisis afflicting the media market, is the fact that more than 50 regional television stations closed down over the period of the economic recession.	–	2

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HK	The Hong Kong government has a restrictive licensing policy that results in a broadcasting oligopoly in Hong Kong. TVB has long held a virtual monopoly on the free-television market. Across all media organisations, there is no major concentration of ownership under a single giant media conglomerate. However, there is another form of ownership concentration, that of a small number of businessmen with vested interests in mainland China. They have operated across the news media with the same political and economic constraints, although the situation is currently in the process of being challenged by the rise of online and alternative media.	–	2
IS	In most Icelandic regions, there is one dominant local media outlet, and in many areas, only one outlet published. The national media is instrumental for people getting news in general.	–	1
IT	The Italian national and local news media landscape is not easy to analyse, as it is hard to disentangle the local from the national dimension. The overall level of concentration is moderate.	–	2
KR	The ownership concentration at the regional level largely matches the national level, although there may be some regional preferences for specific news outlets.	–	1
NL	The same two large players dominate both the national and regional newspaper markets. By contrast, concentration in the regional radio and television market is considerably lower.	1	1
PT	Ownership concentration at the regional level is very low, with many dozens of small newspapers belonging to different owners	3	3
SE	Regional media empires have emerged.	2	2
UK	The UK local press has become more concentrated over the past 20 years, but a significant “long tail” of smaller publishers still exists. Broadcast news, as at the national level, is dominated by the BBC and Sky News, though the local radio and hyperlocal sector has a wide variety of providers.	1	2

Indicator E3 *Diversity of news formats*

Country	Motivation for score	points 2011	points 2021
AT	Austrian news media provide for a large variety of different news formats, from headline news online to long-reads in newspapers and background features on radio and television. All different categories are covered, including local, national, and international news as well as politics, economy, current affairs, culture, and sport sections.	3	3
AU	News and information formats are under pressure.	2	2
BE	Radio, television, and newspaper news maintain a strong dominance in Flanders. Regular online news is catching up rapidly but is nearly all owned by legacy players. Online-only news media only operate in the fringes.	–	2
CA	There is great diversity of formats for Canadian news.	–	3
CH	The diversity of different media products as well as different formats of news presentation is still sufficient. But there are clear tendencies towards a stronger orientation on reader interests, with more tabloidisation of news, especially in the print media.	2	2
CL	A media landscape that achieves innovation, but it is still at an early stage as for the variety of formats and consolidation of the same.	–	2
DE	News formats are abundantly available, and citizens can choose from a very long list of news formats in all media sectors. Popular news formats offer snackable and mobile news with special apps. News formats are of high quality, and a majority trusts them.	3	3
DK	There is strong diversity in news formats in Denmark on all platforms and in both privately owned and public service media.	–	3
FI	Most major news formats are widely available in Finland, with new formats being generated online by both legacy and online-only outlets.	3	3
GR	Few formats are available, and public attention is focused on dominant news formats. Deprived of substantial investments on innovative ventures, the news media of Greece are characterised by conventional news formats. The transition to the online environment has been slow, clumsy, and in some cases, questionably user friendly.	–	1

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HK	Hong Kong has a large variety of different news formats covering different regions of focus, including local news, Chinese and Asian news, and world news, as well as all news sectors, such as politics, finance, culture, entertainment, and sports. With regard to news formats, other than traditional long-form and feature stories, many new media formats are now emerging in what is becoming a small and competitive market. These include animated news, virtual-reality news, and live-streamed news broadcasting.	–	3
IS	Icelandic news media provide for a large variety of different news formats, from headline news online to long-reads in newspapers and background features on radio and television. All different categories are covered, including local, national, and international news, as well as politics, economy, current affairs, culture, and sports sections.	–	3
IT	The diversity of news formats in Italy is quite rich. A high degree of abundance characterises different media sectors, with positive results for democracy.	–	2
KR	The popularity of smartphones to access news while on the move has contributed to the emergence of “card news” as a convenient, visualised news format. New and innovative formats of news presentation have started to take off, especially geared towards younger audiences who are used to the fast-paced and eclectic news available on social media platforms.	–	2
NL	Dutch news media range across a wide array of different news formats, from headline news online to long-form reads in newspapers and discussion programmes on radio and television.	2	3
PT	There is an increasing homogenisation of formats, leading to less diversity in the public offer.	1	1
SE	There is an abundance of news formats of different types.	3	3
UK	The UK news landscape is characterised by a wide range of news formats across all platforms.	3	3

Indicator E4 *Minority/Alternative media*

Country	Motivation for score	points 2011	points 2021
AT	The availability and institutionalisation of minority media depends on whether the minority is legally recognised. Overall, a wide range of minority media are available; however, their reach is limited.	2	2
AU	Australia offers an abundance of broadcast and print media in languages other than English.	3	3
BE	There are no news outlets directly addressing minority groups. Public broadcaster VRT does offer a portion of its online news in English, French, and German though.	–	1
CA	Efforts have been made to establish a minority and alternative media sector within the wider news system.	–	3
CH	Swiss linguistic minorities are well served by the Swiss mass media. The public broadcaster SRG SSR guarantees that all official languages and cultures are covered with information. And some alternative media exist as well. But there is still almost no special media for minorities with migrant backgrounds.	2	2
CL	There are media and initiatives for several specific communities, but usually they are born out of those same groups and tend to be niche.	–	2
DE	Large and mid-size minority groups are increasingly recognised by existing media, but, compared to the diversity of society, minority media are rather a niche-phenomenon, and only a few large and powerful minorities operate their own media.	3	2
DK	The only officially recognised minority group in Denmark, the Germans, have their own media. Other minorities are less visible and represented in the Danish media landscape.	–	2
FI	The supply of media content in Swedish and Sámi languages is extensive in relation to the size of the population in Finland, but other minority and alternative media organisations are limited.	2	2
GR	The existing media houses recognise large and mid-size minority groups and they operate their own media. Since the early 1990s, various attempts have been made to establish fair representation of minority groups in media outlets. However, governmental policies of no-recognition and counterfeit representation of ethnic groups by traditional media left a lot to be desired.	–	2

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HK	Minority ethnicities are generally under-represented and negatively portrayed in Hong Kong. The sole public service broadcaster has worked on programs for the purposes of cultural diversity and produced programs for ethnic minorities. The rise of the Internet provides an opportunity for ethnic media and for platforms on which minorities can interact.	–	1
IS	There is no minority media to speak of in Iceland. A few news media outlets have news in English or Polish to cater to the country's growing immigration populations.	–	1
IT	Minority and alternative media play an important role in the Italian news media market, particularly for linguistic minority groups, to whom the Italian Constitution guarantees provision of relevant news access by both public and private initiatives. The plurality of non-commercial and civic information initiatives, often connected to the so-called third sector, is also meaningful.	–	3
KR	Minority and alternative media are extremely scarce, and news media specialising in investigative journalism are still very small in comparison with legacy media. However, the rise of Internet news has given these news outlets greater reach.	–	0
NL	The public broadcaster aims at inclusive broadcasting. Minority groups, among them ethnic minorities, can make their voices heard. In this regard, some forms of media are doing better than others. Cultural diversity and diversity of opinion remain thorny issues.	3	2
PT	Relatively little attention is paid to minorities in the mainstream media, and they have little media of their own.	1	1
SE	Minority and alternative media reach a limited audience.	1	2
UK	The BBC devotes significant funding to minority-language news in Scotland and Wales, and the BBC Asian Network is also aimed at minority audiences. Commercial minority media covering many language groups and communities are licensed by Ofcom and several are available in print and online.	3	3

Indicator E5 Affordable public and private news media

Country	Motivation for score	points 2011	points 2021
AT	All news media have moderate sales prices compared to the average income of Austrian households. Prices for cultural expenditures have remained stable, or have even been decreasing, over the past ten years.	3	3
AU	Media are readily affordable in Australia but there is still a reluctance by some demographics to pay for news.	3	3
BE	The public broadcaster is funded directly through Flemish taxpayers' money, whereas research has shown that Belgians pay considerably more for broadband access than their neighbours.	–	2
CA	Prices vary, but Canadians can access news.	–	2
CH	Switzerland is one of the richest countries in the world, and its mass media is relatively cheap and affordable for almost everybody. But "over-information" on the Internet is a factor for certain people, who don't want to pay anymore for journalistic media products.	3	3
CL	Subscriptions to the main printed and digital newspapers are expensive for the average salary, but the rest of the media are affordable for the people	–	2
DE	All news media are quite cheap compared to the average income of a German household.	3	3
DK	Public service media are relatively affordable. Newspapers – both print and online – are relatively expensive.	–	2
FI	The prices for media services in relation to household income remain affordable.	3	3
GR	Price excludes only few households from receiving news – Prices of services are relatively low, while the majority of news content is offered free of charge. However, the cost of news media is still relatively high for an average household.	–	2
HK	Newspapers, online news outlets, and television broadcast news can be accessed at low prices in relation to the average monthly income. In fact, most media outlets' news content is freely available online, and Hong Kong has very high Internet and mobile phone penetration rates.	–	3
IS	All news media can be considered affordable for the average household in Iceland. The price of a "basic package" of the most common media outlets can be considered low when measured by average spending power.	–	3

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IT	In Italy, the price represents an entrance barrier for few households in terms of access to information. Although almost all of the Italian population accesses the media, and over 80 per cent of citizens access information every day, lower education and economic levels can lead to the exclusion or marginalisation of certain segments of the population from the news consumption.	–	2
KR	Accessing news is relatively easy in South Korea, with news articles and television news programmes provided free of charge online most of the time. Various forms of news are accessible as long as one has a personal computer or a smartphone. Channel reception fees, cable, and smartphone plans are generally affordable.	–	3
NL	News media have moderate sales prices compared to the average income of Dutch households.	3	3
PT	Prices are decreasing and much free content is available, but the cost of news media is still relatively high for an average household. In the sensitive area of telecommunications (cable television, Internet access, mobile phone), prices are increasing, while they are decreasing in most other European countries.	2	1
SE	Media spending is dominated by non-news media.	3	2
UK	News in the UK (across all platforms) is generally affordable compared to average household income. Online output by several national and most regional outlets is free to access online.	3	3

Indicator E6 *Content monitoring instruments*

Country	Motivation for score	points 2011	points 2021
AT	Publicly available institutionalised and independent media monitoring instruments are rare in Austria.	1	1
AU	Australia has a number of monitoring instruments, but largely of a self-regulatory nature.	2	2
BE	The Flemish government-owned media watchdog only assesses the media market on economical parameters, but might soon be given the questionable task of assessing the impartiality of the public broadcaster.	–	1
CA	There is no formal monitoring.	–	0
CH	Efforts to monitor the media in Switzerland on a regular basis are institutionalised in OFCOM. Supervision is carried out on a regular basis, but of the broadcasting media.	1	1
CL	There is more than one external instance, which functions in a case by case manner, but media do not self-monitor permanently for the citizenship.	–	1
DE	Continuous content monitoring is regularly provided and published by independent organisations, scholars, and media organisations.	3	3
DK	Content monitoring instruments are not widely implemented in the Danish media industry.	–	1
FI	There have been some content monitoring initiatives by the media houses themselves, universities, and public bodies. However, they are mostly irregular and non-systematic. In some regards, the data basis for systematic monitoring has eroded in recent years.	1	1
GR	Content monitoring is done irregularly and occasionally by various organisations. The NCRTV is the monitoring body for broadcasting media, a regulating entity independent from, but supervised by, the government. Thematic observatories, as well as university departments focusing on media and communication studies, also conduct relevant monitoring procedures and research projects regarding news media content.	–	1
HK	Independent media monitoring instruments and institutionalised regulation of media are rare in Hong Kong.	–	1
IS	Publicly available institutionalised and independent media monitoring instruments are rare in Iceland.	–	1
IT	Monitoring instruments for media content in the Italian landscape are numerous and diversified. In this scenario, the presence of Agcom, which works to protect pluralism also through a series of monitoring activities, should be highlighted.	3	3

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KR	Public and civic monitoring bodies provide content monitoring regularly and offer easy public access to decisions and statistics online.	–	1
NL	The Dutch Media Authority publishes the Media Monitor, an annual report that analyses ownership relations and markets, with a specific focus on pluralism in news media. The Dutch Journalism Fund strongly focuses on research and monitoring news media, including those related to local and regional news.	3	3
PT	There are different monitoring instruments and they are publicly available, but some complaints about their inaction or passivity arise now and then.	3	2
SE	Content monitoring is done occasionally.	1	1
UK	The UK has no public media monitor, though piecemeal monitoring is conducted by NGOs and academic units, some self-monitoring mechanisms are operated by broadcasters, and there are some transparency obligations on regulated media that comprise informal monitoring instruments.	2	1

Indicator E7 Code of ethics at the national level

Country	Motivation for score	points 2011	points 2021
AT	The self-governed code of ethics for print media is well respected. For audiovisual and Internet-based media no national code exists (only company rules).	1	2
AU	The journalists' code of ethics is well-known in the print industry but needs to be updated to better suit new online environments.	2	2
BE	There is no code of ethics at the national, Belgian level, but rather at the Dutch- and French-speaking levels specifically. Journalists refer to these codes frequently, and they are taught in journalism studies.	–	3
CA	While most news organisations have a code of ethics or set of journalistic standards of practice during their work, there is no national code of ethics in Canada.	–	1
CH	Although there is a code of ethics formulated by the Swiss Press Council, it has only a limited effect in the everyday life of journalists.	1	1
CL	There is more than one entity in charge of media ethics; however, they are not relevant referents for the daily exercise of journalism.	–	1
DE	A code is implemented and frequently used by all leading news media.	3	3
DK	National media have high ethical standards and procedures on a formal as well as informal level.	–	3
FI	All leading news media organisations in Finland have committed to the common code of ethics, overseen by CMM.	3	3
GR	A code exists, but not all leading news media respect it. In Greece, there are five journalism associations, which compose the Pan-Hellenic Federation of Journalists' Association, covering the whole country geographically and representing both newspapers and electronic media. There is also the Internet Publishers Association, representing the publishing companies of primary digital content. Each of them has issued their own Code of Ethics. However, they mostly share common norms on how journalism should be exercised. Despite journalists' declarations of loyalty and adherence to the journalistic Code of Ethics, research has shown that they are less sincere than it is thought. In leading news media, there are many cases where loose interpretation of the Code of Ethics proves to be a common practice among journalists, showing disrespect towards ethical standards.	–	2

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HK	There exists a self-governed code of ethics, yet not all media organisations adhere to it. Interviewees stressed that they respect the code of ethics, although its details generally escaped them.	–	2
IS	A code of ethics exists at the national level and is respected by most news media outlets.	–	2
IT	In Italy, the journalistic profession and deontology are characterised by a relevant number of codes pertaining to different aspects, and establishing principles and norms, but these are seldom known or explicitly considered guidelines in newsroom practice.	–	2
KR	Codes of ethics exist both at the national and the firm levels. Newsroom practice does not always match what is laid out on paper.	–	2
NL	Most media organisations comply with the guidelines of the Press Council and the Code of the Association of Editors-in-Chief or observe a code of conduct of their own.	2	2
PT	A national Code of Ethics exists, but not all leading media respect it.	2	2
SE	The code of ethics is implemented and frequently used.	3	3
UK	UK news media are variously covered by five separate codes of ethics that apply nationwide. Broadcast news provision is underpinned by legislation.	2	3

Indicator E8 *Level of self-regulation*

Country	Motivation for score	points 2011	points 2021
AT	Self-regulation occurs rather informally; institutionalised or codified rules and procedures are rare.	1	2
AU	While the self-regulatory system is far from perfect, a fair attempt is made to implement it.	2	2
BE	Most news media have their own editorial statutes, deontological codes, and newsroom council or ombudsperson. In case of unethical journalistic behaviour, citizens can file a complaint with the journalism councils in both regions.	–	2
CA	An established broadcasting self-regulator for private broadcasters.	–	2
CH	Although there are many measures and instruments for corporate and editorial self-organisation, they contribute little to media accountability of companies and journalists.	2	2
CL	Internal self-regulation exists associated with a culture shared by journalists and editors within a medium, with clear dogmas, but are rarely written down.	–	1
DE	Leading news media have self-regulation instruments in place but only use them occasionally.	2	2
DK	The level of self-regulation is high in Denmark and part of a professional newsroom culture.	–	3
FI	The common code of ethics overseen by CMM is the backbone for self-regulation in all leading news media organisations in Finland. Beyond these national guidelines, the existence of additional internal guidelines and self-regulation instruments varies from one organisation to another.	2	3
GR	Self-regulation instruments exist, but are not notified. There is some “oral culture” in newsrooms. In the leading news media organisations of Greece, there seems to be no standard procedures or formal internal rules reflecting a typical self-regulation system. The interviewed journalists reported the dominance of an “oral culture” in newsrooms based on self-censorship and informal self-regulation practices. In this context, media organisations enforce their ideological orientation to which journalists must conform. Conflicting narratives and controversial topics are often settled through collective consensus in the newsroom.	–	1
HK	Self-regulation occurs rather informally; institutionalised or codified rules and procedures are rare.	–	1
IS	Self-regulation occurs rather informally, with the public service media a notable exception.	–	2

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IT	Though the Italian legislation does not explicitly require the adoption of self-regulatory mechanisms, several leading media newsrooms adopt internal codes of ethics.	–	2
KR	Each news media outlet has its own mission statement, and most have codes of ethics or conduct. Readers' rights instruments and ombudspersons are present in many of the leading news media outlets but are not found very widely and often serve as customer service of sorts.	–	2
NL	The Press Council, which examines complaints about media coverage, is a self-regulatory organisation. Self-regulation can also be found in the open debate culture on fairness, balance, and impartiality in the newsrooms.	3	2
PT	Some self-regulation mechanisms exist on the level of the main news media, but their presence is less visible than in the past.	2	1
SE	Self-regulation instruments are in place.	2	3
UK	The UK print and online news media are subject to self-regulation. Broadcast regulation is managed by a statutory corporation that is not directly controlled by the state, though its guidelines are underpinned by statute.	2	2

Indicator E9 Participation

Country	Motivation for score	points 2011	points 2021
AT	Audience participation happens by posting comments online in some web-editions of newspapers and by analogue letters to the editor. Austrian newsrooms are not open to citizens' participation.	1	2
AU	Though there is an ongoing level of interaction between journalists and the public, there is no formal participation mechanism in the news process.	1	2
BE	Citizens cannot truly contribute to news reporting, and the option to comment on websites has been scaled back in favour of comments on social media.	–	1
CA	While some avenues remain open, others have closed to greater public contributions.	–	2
CH	As a consequence of social media, the leading Swiss news media created possibilities for feedback, but still hesitate to incorporate the participation of media users actively in the news process.	1	2
CL	There are limited instances for citizen participation in media and editors are critical of the quality of the discussion provided by the audiences.	–	2
DE	After a period of openness, newsrooms tend to close commentary functions again after masses of inappropriate or outright hateful user comments. Selected news items are still open for comments from the public, but under the supervision of a moderator.	2	2
DK	News media in Denmark invite participation from the public and value comments, tips, and letters to the editor.	–	2
FI	News media has generally shifted from anonymous and open commenting to moderated comments sections. Social media, too, has increased dialogue between journalists and audiences.	2	3
GR	Newsrooms always closed some space for comments online, but in online forums, not underneath news items. In Greece, the transition to online journalism does not necessarily mean a rise in the interaction between the audience and newsrooms. The trend is that online news platforms close off their comments sections under the fear of legal action. Radio seems to remain the sole medium where audience members can participate without having their voices or comments edited or filtered out.	–	1
HK	Hong Kong newsrooms are not open to participation by the general public. Audience participation in the newsroom is very limited.	–	2

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IS	Audience participation in news mostly consists of posting comments online through social media and letters to the editor.	–	2
IT	Italian leading news media do not seem to be truly open and accessible to the public, since readers and audiences are rarely involved in the information production process. An increased awareness of the importance of using social media among information professionals goes together with limited management of the relational elements of digital platforms.	–	2
KR	Citizen participation is convenient and active. News outlets offer various online channels through which the public can comment, share user-generated content, and engage in public discussions.	–	3
NL	Audience participation happens by posting comments in some online newspaper editions or via Facebook pages, and by e-mails to the editor-in-chief or the ombudsperson.	3	3
PT	People are not particularly encouraged to participate in the news process, in spite of some improvements in the online context, where the possibility for commentary is generally available.	1	2
SE	Participation is only sometimes welcome.	2	2
UK	Different news organisations in the UK offer different avenues of participation for audiences. Many comments sections have been scaled back or removed due to difficulties in moderating abuse.	2	2

Indicator E10 Rules and practices on internal pluralism

Country	Motivation for score	points 2011	points 2021
AT	Most Austrian newsrooms do not have codified rules on internal pluralism – public service television being the exception. Leading newsrooms are undertaking efforts to extend the range of voices represented by the media.	1	2
AU	There is evidence of internal diversity but little of internal pluralism.	1	1
BE	There is a lack of designated rules and guidelines applicable to presenting opinions of journalists within the same newsroom. Overt diversity in viewpoints is most notable at the fringe online-only news media.	–	1
CA	A wide variety of rules and practices exist when it comes to ensuring that news organisations include a wide variety of perspectives.	–	2
CH	Media organisations strive for pluralism. Their editorial statutes should ensure that different views are brought to bear and reported from different perspectives. However, the diversity in newsrooms leaves much to be desired.	2	2
CL	There are no rules for internal pluralism, but there are opportunities for deliberation. In any case, in a polarised scenario, the issue of inner pluralism generates tension.	–	1
DE	No internal formal rules are in place, but newsroom meetings are a regular practice to discuss and check for pluralism.	2	2
DK	The internal pluralism in Denmark is based more on practices than rules and most often discussed in relation to professional journalistic values.	–	2
FI	Internal pluralism is generally encouraged and valued, but aside from general professional guidelines and values, there are few formal rules.	2	2
GR	It is the personal responsibility of the editor-in-chief or chief producer to check for internal pluralism. Plurality is the default practice for the public service broadcaster ERT. On the other hand, commercial broadcasters are mostly tied to a specific political orientation, presenting a mono-dimensional policy in terms of internal pluralism. Thus, plurality in media is achieved through quantity of partisan perspectives, rather than through diversity of opinions inside a single medium.	–	1

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HK	Some Hong Kong newsrooms, including public service broadcasting stations, have codified rules on internal pluralism, but they do not necessarily follow the rules. A large majority of leading newsrooms are making efforts to extend the range of voices represented by the media. However, a third of respondents suggested that their companies engaged in self-censorship and did not give experts from all sides equal chances to present their case.	–	1
IS	Icelandic newsrooms do not have codified rules on internal pluralism, but journalists try to make sure that there is diversity in the range of voices represented.	–	2
IT	Pluralism of viewpoints is regularly controlled by the Communications Guarantee Authority (Agcom). Private television broadcasters respect the <i>par condicio</i> during election periods, while the public service is obliged to allocate air time proportionally to all the political forces in Parliament.	–	2
KR	Codes of ethics and guidelines mandate the inclusion of different relevant viewpoints, and some level of internal pluralism is observed in the newsroom. However, there is no methodical system in place to ensure the reflection of various voices.	–	2
NL	Most news media organisations enjoy a culture of openness with room for discussion on internal pluralism, although this is still a matter of individual interests of journalists. No formal rules are in place.	2	2
PT	Internal pluralism is fairly well promoted in the main news media, and they give voice to various groups.	3	3
SE	There are no formal rules, but a regular debate is ongoing.	2	2
UK	UK broadcast news is subject to strict rules on impartiality and the representation of views on any programming dealing with controversial or political matters. Newspapers are free to be partisan but usually provide at least some space for opposing voices or views.	2	2

*Dimension: Control / Watchdog (C)***Indicator C1** *Supervising the watchdog “control of the controllers”*

Country	Motivation for score	points 2011	points 2021
AT	Self-observation by journalists in the media and public debates about journalism have increased. But apart from some independent initiatives, no systematic media observation is done in Austria.	2	2
AU	Australia has a number of independent observers of the news media.	3	2
BE	Different independent supervisors scrutinise the Flemish (news) media, each of them monitoring a different field in journalism. Most of these “controllers of the controllers” publish their findings and elaborate reports on platforms freely accessible to the public. Self-regulation is also common on the level of media organisations and their brands, with a few media organisations even installing an independent ombudsperson.	–	2
CA	Several independent observers scrutinise Canada’s news media.	–	2
CH	There is no external “control of the controllers”; at most there is individual ethical self-control in newsrooms. The judgments of the Press Council in this regard on the basis of the Code of Ethics are generally without consequence at both the corporate and editorial levels. Media criticism and media journalism barely take place anymore.	2	1
CL	There are different instances to oversee whether the media fulfils their journalistic function.	–	2
DE	Media performance and content are publicly discussed in the media. Over the last decade, online fora and the journalistic enterprises of critical journalists have become a watchdog force to be reckoned with.	2	2
DK	Media performance is often publicly discussed in media, and media themselves are a topic for critical journalistic coverage in special magazines and sometimes very rarely in media scandals.	–	2
FI	Independent media criticism in Finland is weakly institutionalised.	1	2

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GR	Media performance is often publicly discussed in the media or online forums – some forms of journalistic coverage of the media. In Greece, the most prevalent institutionalised mechanism to control the performance and role of the news media is the NCRTV, which occasionally has been regarded as ineffective. Although media performance is often discussed in the media or in online forums, this discussion is often merely descriptive or based on the subjective perception of the criticiser, leading to unfocused or unsystematic critique lacking in depth. The most usual context where media performance is investigated and discussed comprehensively and systematically is the academic one.	–	2
HK	There are no institutionalised mechanisms for scrutinising the performance of leading news media, although universities, media bloggers, and professional journalists' bodies serve as independent observers monitoring their performance, especially in terms of self-censorship and news credibility. The performance of the media is always subject to debate.	–	1
IS	Self-observation by journalists in the media and public debates about journalism are not frequent, but sometimes occur in relation to specific issues. No systematic news media monitoring is done in Iceland.	–	1
IT	Professional as well as scientific debates on watchdog journalism and its practices are quite rare in the Italian media landscape, yet some meaningful initiatives fuel discussions and expose problematic situations.	–	2
KR	There exists ample media outlets and people who scrutinise journalists' behaviour, although the majority of the time it is one-note criticism by the other side of the political spectrum. But the general audience has exposure to both sides, which has the negative side-effect of increasing cynicism.	–	3
NL	There is no independent institution in the country that systematically monitors media performance, although the website <i>denieuwereporter.nl</i> and Media Ombudsman Foundation (MON) are inviting citizens and media professionals to think about the media's role as a watchdog.	2	2
PT	There are institutionalised mechanisms to control media performance as a watchdog, but these issues are not very present in public debates.	2	2
SE	Media performance is often discussed.	2	2
UK	Though UK news outlets have in the past been criticised for a reluctance to investigate or scrutinise their peers, several publications and broadcast channels have dedicated media beats, including indirect scrutiny through news review programmes. NGOs play a significant role in scrutinising the media industries and their regulatory structures.	2	3

Indicator C2 Independence of the news media from powerholders

Country	Motivation for score	points 2011	points 2021
AT	By law, journalists' independence is protected, but ownership structures limit this freedom in practice.	1	1
AU	Legal instruments to guarantee greater independence from power holders are relatively new. However, defamation law continues to be used as another pathway by the rich and powerful to silence critics.	2	2
BE	Flemish media organisations enjoy editorial independence, as set out in the Belgian Constitution and the media decree. Journalists declare being satisfied with the level of autonomy of their redaction. Nevertheless, politicians trying to influence the press is common practice.	–	2
CA	Legal instruments, democratic traditions, and journalistic standards and practices protect the Canadian news media's independence.	–	3
CH	For the leading media, pressure from external interest groups is part of their daily business. But regional and local media also have to cope with this challenge.	2	2
CL	The industrial view encompassing the Chilean media system has led to its property becoming mainly corporate. However, there are views about politics and society that reach the people in charge of the newsrooms.	–	2
DE	Independence from powerholders is guaranteed by law and widely respected, though there was one important case of undue influence by powerholders.	2	2
DK	No formal or ownership-related influence looms over leading news media houses, but political parallelism is a factor for newspapers.	–	3
FI	Independence of the Finnish news media from powerholders is generally strong, but it is increasingly tested.	2	2
GR	Strong formal or ownership-related influence of powerholders is exerted on leading news media. Leading news media houses in Greece are owned by powerful entrepreneurs, coming from other sectors of the economy, who use media companies as an effective instrument of serving their business interests.	–	0
HK	By law, the freedom of the press is protected, but press freedom continually deteriorates because of political pressure.	–	1
IS	Law and internal rules protect journalists' independence, but ownership structures indicate that political and economic interests still play a big role in some leading news media.	–	1

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IT	Independence of news media is a critical aspect in the Italian context, where journalism evolves from longstanding relations with political and economic powers.	–	1
KR	Although it may look like a free press on the surface, leading South Korean news media are not completely free from the influence of government and conglomerates.	–	1
NL	The Dutch news media enjoy relative independence from the powers that be. Media ownership concentration increased in the last decade, with more media titles held by a single owner.	1	1
PT	Various laws and regulations guarantee some independence, but real practice shows some difficulties.	2	2
SE	The independence of private and public news media is well protected from power holders.	3	3
UK	UK broadcasters are broadly insulated from interference, despite recent government pressure on the BBC. Commercial news organisations are owned by media companies, and there is no recent tradition of party, church, or industry-owned news organisations.	3	2

Indicator C3 *Transparency of data on leading news media*

Country	Motivation for score	points 2011	points 2021
AT	Ownership structures are transparent online, but some important information on media and advertising markets is lacking.	1	2
AU	Data on media are rarely a topic of debate.	1	1
BE	Data on leading news media is easily accessible online, with the only difficulty sometimes being unravelling the complex power structures and revenue streams.	–	2
CA	There is little discussion about media system transparency.	–	2
CH	Detailed information on the ownership structure and decision-making processes of private commercial media organisations is not available. Only listed companies must meet minimum transparency requirements.	1	1
CL	By law, every media publishes information about their ownership, but only a few give more details.	–	2
DE	Transparency data on large parts of the media system is recorded and available to the public online.	3	3
DK	Some data is published regularly, but not everything is easily accessible. Transparency requires data collection from several different sources, and it does not provide a uniform basis of comparison for all the leading news media.	–	2
FI	Relevant information about the media system is publicly available, but it is difficult to find.	2	2
GR	Information regarding ownership of leading news media is published once every year, but is available online. Leading news media's transparency of data, in terms of operational status and ownership identity, is undermined by a type of regulation that favours concealment of their funding flow and their ownership status. Therefore, citizens retain a blurred image of the media field. The release of relevant reports, available to the general public, is not compulsory, and therefore, transparency of information depends on the discretion of the media outlet.	–	2
HK	Not all news media outlets have disclosed their ownership structures, circulation information, and advertising revenues. Only the media organisations listed on the stock market have disclosed this information under the Securities and Future Ordinance.	–	2
IS	Information about media ownership is transparent online. Important data on the media market is, however, often lacking.	–	2

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IT	Data on leading news media are generally available but, in some cases, these are incomplete and not easily accessible to citizens.	–	2
KR	Most of the information is available in accessible formats.	–	3
NL	On its <i>mediamonitor.nl</i> website, the media authority describes the current media ownership relations.	3	3
PT	Information on news media exists and is easily accessible, namely after the creation of a “Transparency Portal”.	3	3
SE	Information is easily available online.	2	2
UK	Information on media companies, including accounts, ownership, and board composition, is compiled by the government and available to view online. Publicly traded companies and some broadcasters publish detailed revenue information annually, and Ofcom provides several annual market reports.	2	3

Indicator C4 *Journalism professionalism*

Country	Motivation for score	points 2011	points 2021
AT	The share of higher education among journalists is increasing, but time and resources for professional journalism, as well as job satisfaction, are on the retreat.	2	2
AU	Most journalists receive professional training.	2	2
BE	The majority of Flemish journalists acquired a degree of higher education. However, less time and resources for professional journalism are available. This contributes to a general decline in overall job satisfaction.	–	2
CA	Most Canadian journalists receive professional training.	–	2
CH	Journalists have a high level of education and professional skills, but many do not have enough direct experience, for example, of (local) politics. Journalism professionalism is being challenged as well by increased working pressure and decreased resources, for example, for investigations.	2	2
CL	Although professional education is high at the university level, the work scenario is precarious, offering little time and resources for journalists to improve their skills.	–	1
DE	German journalists have a high level of education and a pre-vailing professional ethos, and resources are still sufficient in leading news media.	1	3
DK	The journalism professionalism in Denmark is high with strong professional ethos.	–	3
FI	Strong professional ethos and a high level of unionisation characterise the news media.	3	3
GR	Limited journalistic resources do not allow for high professional ethos. The profession of journalism in Greece has been distorted by the financial crisis and the subsequent and larger crisis distressing the media industry. Interventions in editorial decisions on the part of politics and media owners are a long-lasting malpractice hindering the development of journalism in the country.	–	1
HK	Reporters generally have strong educational backgrounds and hold similar professional ethics and principles. About half of the interviewees believed that their companies allot satisfactory time and resources for investigative research.	–	2
IS	The share of higher education among journalists is increasing, but time and resources for professional journalism are on the retreat.	–	2

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IT	The requirements to access the newsrooms are selective, although the professionalisation of Italian journalists is generally not high and mostly not related to their educational background. Younger professionals are expected to have many skills and competences – editing, writing, screen, and radio – and are requested to perform many tasks, though mostly occupying precarious positions.	–	2
KR	The infrastructure, such as professional organisation, solidarity, opportunities for training, values of investigative journalism, and so forth, is in place. Whether these are fully utilised in the intended way is another question.	–	2
NL	The Dutch newsrooms have become highly professionalised over the past decades. Close examination of the work done, and being done, is a regular feature of editorial meetings. However, this mostly occurs on an ad hoc basis. Only a few news media organisations have an ombudsperson.	3	2
PT	Professional ethos is not too strong in absolute terms, considering the heterogeneity of the professional group. Professionalism is sometimes compromised by a lack of resources.	2	2
SE	There is a high degree of professionalisation.	3	3
UK	Journalism qualifications are now widely held, and training, including ethics training, is freely available and used by a majority of journalists. Some journalists report increasing newsroom pressures as exerting a detrimental effect on their quality of work.	2	2

Indicator C5 Journalists' job security

Country	Motivation for score	points 2011	points 2021
AT	Journalists stay for a long time with their employers and are formally well protected by several laws. Economic pressures affect experienced journalists.	2	2
AU	It is difficult to provide job security for journalists in this time of change.	1	1
BE	A lot of Flemish journalists worry about job security, even though professional journalists are protected by law. Due to financial pressure, journalists are more and more forced to work as freelancers, lacking protection measures. Older journalists fear being fired because of their higher wages.	–	2
CA	Job security is elusive in Canada's news media.	–	1
CH	In the wake of the general media crisis and the Covid-19 crisis in spring 2020, job security was not guaranteed, and journalists lost their jobs. Such uncertainties are greater in commercial media than in public broadcasting.	2	1
CL	Academics describe work conditions as "precarious". Wages are low. The crisis faced by this industry has enhanced this situation.	–	0
DE	Journalists' job security depends on economic situations. Once employed, journalists normally remain employed for a long time. However, fixed and long-term contracts are thinning out, and there is an increased proportion of freelancers, who then must bear the brunt of economic disruptions.	1	2
DK	Journalists' job security in Denmark is generally high compared with other countries. However, the older generations have more secure job positions and privileges than their younger counterparts.	–	2
FI	There are few specific legal provisions that apply only to journalists: but general legal provisions and labour contracts that cover the field provide journalists relatively strong occupational protection.	2	2
GR	Leading news media change their journalistic staff frequently; employment for a longer period of time is not the rule. In contradiction to the past, due to sharp decline in media revenues, the journalism profession is characterised by non-permanent or occasional contact positions, which is a shared working regime between genders. At the same time, on the juridical level, there are no special legal measures or tools protecting journalists against dismissal.	–	1
HK	Journalists tend to work for their employers briefly, and the main reason is low wages.	–	1

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IS	Economic pressures mean that many experienced journalists have been laid off. Job security is low and short-term contracts common.	–	1
IT	Job security varies a lot between the different categories of journalists, as well as in relation to where in the country the profession is exercised. Many gaps are found in terms of payments and protection schemes.	–	1
KR	Longer term contracts are still the norm. But new hires under the same terms are declining.	–	2
NL	In general, the Association of Journalists controls the basic working conditions of professional journalists in the Netherlands.	2	2
PT	There is a relatively high level of job security in the legal framework, but the economic crisis and the weakness of media outlets make job security much more fragile in practical terms.	2	1
SE	Conditions are good but there are fewer permanent positions.	2	2
UK	Journalists are more likely than not to be in stable employment, but economic pressures, particularly at the local level, have led to recent cuts and made many jobs precarious. Journalists generally enjoy contractual protections and whistleblowing channels if pressured to breach professional ethics codes.	1	2

Indicator C6 Practice of access to information

Country	Motivation for score	points 2011	points 2021
AT	Although the Constitution guarantees freedom of information, the absence of a freedom of information act impedes access to public information and exacerbates journalistic work.	2	1
AU	The law provides access to public information, but practical problems persist.	1	1
BE	According to the Belgian Constitution and media decree, every Flemish citizen can request information from committees or boards under the jurisdiction of the Flemish Government. However, Flemish journalists rarely make use of this feature, due to impracticalities and lack of usefulness of acquired information.	–	1
CA	While laws offer access to public information, problems with Canada's freedom of information laws persist. Moreover, Canadian officials and the legal system often blunts journalists' efforts to obtain information.	–	2
CH	Journalists in Switzerland generally have free access to most public information held by government and administration, but not to companies and associations. There are still restrictions and obstacles.	3	2
CL	There is a law for freedom of information, but under 50 per cent of journalists evaluate it positively. Specific knowledge is required to use it effectively.	–	2
DE	Public information is accessible by law, but not in reality. Journalists need to spend time and effort to get access.	2	2
DK	Traditionally, Danish news media have enjoyed a relatively high widespread access to public information. However, a revision of the law in 2013 led to several restrictions that, despite debate and criticism, are still in place today.	–	2
FI	There is an existing law that, in principle, provides open access to public information, but problems remain in practice.	2	2
GR	Public information is accessible by law, but not in reality. Journalists must spend time and effort to gain access. Although in theory public information is accessible by law, in actual practice this is not the case, given that the accessing public documents presents considerable problems or difficulties. These restrictions affect the quality of investigative journalism, which at times is not truly revealing, or is ad hoc or only partially revealing.	–	2

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HK	Article 27 of the Basic Law guarantees Hong Kong residents freedom of speech, the press, and publication. It is becoming more difficult for journalists to access public information. There are significant differences between promises and practices.	–	1
IS	Public information is accessible by law, but not always in reality. Journalists often must spend time and effort to get access.	–	2
IT	Recent meaningful developments have recognised the principle of freedom to access public information (law decree 97/2016) and therefore strengthened the possibility for citizens and journalists to access public information. Despite the promises of open government, access to information presents numerous shortcomings. During the Covid-19 pandemic, even the possibility to monitor public administration's acts was reduced.	–	2
KR	Public information is fully open upon request.	–	3
NL	One of the most important sources of news is government, with Dutch legislation on the public nature of government records giving citizens (and hence journalists) the right to access government data. The way in which the law functions as well as the lengthy procedures involved are strongly criticised.	1	1
PT	No legal barriers exist to accessing public information, with a law guaranteeing access to public documents, but access is sometimes difficult in practice.	2	2
SE	Old traditions still work.	3	3
UK	Detailed access to information legislation is in place in the UK and open to all citizens. There are some restrictions on availability and evidence showing that certain government departments in practice tend to withhold requested information, at least initially.	2	2

Indicator C7 The watchdog and the news media's mission statement

Country	Motivation for score	points 2011	points 2021
AT	Significant value is attributed to the watchdog function of media in Austria.	2	3
AU	Australia's media sees itself as a watchdog.	3	3
BE	Flemish journalists declare being the watchdog of democracy is of utmost importance, with media organizations welcoming and supporting investigative journalism. However resources and time invested in investigative journalism are declining.	–	2
CA	Canadian journalists see themselves as a watchdog.	–	3
CH	The mission statements or editorial statutes of the media contain hardly any reference to the role of the media as democratic "watchdogs" in the interests of civil society and are of little importance in the everyday work of media professionals.	2	2
CL	There is a certain notion about the watchdog role of journalism, but this tends to be relegated to specialised units or specific practices within daily coverage, where other roles are more dominant.	–	2
DE	Investigative and watchdog journalism is, in most cases, part of the self-conception of leading news media. Austerity measures and the economic situation of the media, however, often don't leave enough resources for journalists to exercise it.	1	2
DK	All leading news media refer to the watchdog role and work to exercise it.	–	3
FI	The significance of the watchdog role is widely recognised by Finnish media organisations.	2	3
GR	Media market investigative and watchdog journalism is part of the self-conception of leading news media, but journalists rarely have resources to exercise it. The mission statements of the leading news media organisations in Greece contain no particular or separate references to investigative journalism or watchdog performance of journalists against the abuse of power and corruption. They just incorporate the conventional rules of journalistic ethics, as defined by the JUADN, a professional association of daily newspapers and broadcasting journalists based in Athens.	–	2
HK	The mission statements of news organisations do not contain provisions for acting as watchdogs. However, Hong Kong newsrooms value the watchdog function of media.	–	2
IS	The watchdog function of media in Iceland has grown significantly in recent years, and some outlets and programmes have investigative journalism as their brand. Investigative journalism is, however, expensive, and media outlets are grappling with resource constraints.	–	2

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IT	Investigative journalism is one of the missions of the news media. In spite of formal recognition and specific efforts in practice, media formats and daily news agenda often put constraints on this core news media function.	–	2
KR	Mission statements exist, but a lack of resources prevents the prioritisation of such missions over routine news production.	–	2
NL	The media themselves decide on the extent to which they play their role as watchdog, on the basis of their distinctive characteristics.	3	3
PT	News media only indirectly refer to the watchdog function in their mission statements.	1	1
SE	Watchdog journalism exists where possible.	2	3
UK	UK broadcasters are obliged to perform certain functions fulfilling the watchdog role of journalism and devote significant resources to investigative journalism. Many newspapers specify their watchdog functions in mission statements or adhere to standards codes that emphasise the importance of the public interest in their work.	2	3

Indicator C8 Professional training

Country	Motivation for score	points 2011	points 2021
AT	Supply of further education is abundant in Austrian newsrooms, but course attendance is not.	2	2
AU	Some mid-carrier training is on offer.	1	1
BE	Additional training and education are offered by almost all media organizations. However, they are not obliged to offer this, and journalists cannot be forced to partake.	–	2
CA	Most media organisations offer some sort of training.	–	2
CH	Supply of professional training offerings in journalism is not a problem in Switzerland, but there are no specified or even obligatory strategies and concepts in most media and editorial offices. As a consequence, professional training is a discretionary matter and its attendant demand seems to be quite moderate.	2	2
CL	There is a large offer for journalists, but their work conditions do not allow them to specialise as much as they would want to.	–	2
DE	In Germany, there are sufficient opportunities for journalism training. Journalists in well-established and economically sound news media are better off than their colleagues in weaker media.	2	2
DK	Continuous “knowledge” training for journalists in news media are available and are usually funded by the employer.	–	3
FI	The importance of continuous professional training is broadly acknowledged, but journalists do not have opportunities enough to participate in it.	2	2
GR	Training opportunities are not regularly provided. However, those who wish to participate find ways and means to do so. In Greece, the need for continuous and systematic professional training on watchdog and investigative journalism or on Big Data analysis is not embedded within leading news media organisations’ culture. Therefore, there is a lack of internally institutionalised means permitting training courses or training networks. Although there are some exceptions to this prevalent trend, the issue of training is a matter of personal decision on the part of journalists disconnected from the media outlet’s policy.	–	1
HK	Most of the newsrooms in Hong Kong have not institutionalised continuing professional education. Most newsrooms neither regularly provide training nor request that their journalists take courses.	–	1
IS	There are not many higher education opportunities in Iceland for journalists, and course attendance is low.	–	1

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IT	Professional training is mostly provided by the twelve schools across the country that are recognised by the Order of Journalists, and by sustained activities of the Order itself. Media companies differ widely in terms of their investment in courses and training.	–	3
KR	High-quality training opportunities are available within South Korea and even abroad. It is not easy for reporters to carve out time for such education, but managers do make efforts to provide opportunities to whoever wants them.	–	3
NL	Training courses are offered by the Dutch Association of Journalists (NVJ) and the Association of Investigative Journalists (VVOJ). Some media (companies) have set up their own training structures. Training opportunities depend on the news medium.	1	2
PT	Journalists' training is not a high priority among leading news media, except for technical skills attached to the new convergence efforts.	1	1
SE	The idea of training is applauded, but not practised often.	2	2
UK	Professional training is generally available to UK journalists, and the majority who do undertake training are funded by their employers when doing so. Larger news organisations such as the BBC operate their own internal training schemes.	3	3

Indicator C9 Watchdog function and financial resources

Country	Motivation for score	points 2011	points 2021
AT	Austrian newsrooms are positive and try to provide resources for investigative reporting to the extent possible, but funds are strictly limited.	2	2
AU	Commitment to investigative journalism is the Australian media's way to brand themselves.	3	2
BE	Resources for investigative journalism have substantially declined. Every leading news media house has tried to do investigative journalism, but the majority do not have journalists working full-time on long-term projects.	–	1
CA	While many news organisations say they are committed to enterprising and investigative journalism, fewer resources are making it harder to produce good journalism.	–	2
CH	For a long time, leading daily media were financially successful. For some time now, there has generally been less staff available for traditional reporting, but with the creation of research desks, there are now slightly more resources available for research and investigative journalism.	1	1
CL	There are some media houses that produce investigative journalism, but they have decreased for economic reasons.	–	1
DE	Journalistic investigation is perceived as more important than a decade ago, but resources are rare. Investigative journalism tends to be outsourced to special units. The number of investigations is clearly limited by financial means and focused on those topics that guarantee high attention.	2	2
DK	Leading news media give high priority to well-funded investigative journalism	–	3
FI	While the watchdog function is seen as being crucially important, resources for investigative critical journalism are scarce.	2	2
GR	Investigative journalism happens, but it is the exception rather than the rule. In leading news media organisations in Greece, although investigative journalism is recognised as a task of great importance, lack of the financial resources since the period of recession has minimised the potential of the newsroom to perform their watchdog functions systematically.	–	1
HK	Over half of the interviewees stated that their media companies have provided specific and sufficient resources for performing investigative journalism.	–	2
IS	News media in Iceland lack resources to conduct quality in-depth reporting, and analysis on their daily reporting and investigative reporting is seriously hampered for lack of time and finance.	–	2

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IT	Investigative journalism is acknowledged and valued, also by professionals. However, the limited availability of financial and organisational resources constrains this function to being a niche component of editorial routines. Transnational partnerships (like Lena and European Investigative Collaboration) and civic initiatives partly compensate for the limited support by media companies for investigative practices.	–	2
KR	There is a consensus that increasing investigative journalism is the way forward, but this has not been realised in practice. Some media have only now started to have a separate division to deal with investigations.	–	1
NL	Dutch newsrooms provide resources for investigative reporting as much as possible – no more, no less. The Dutch Journalism Fund subsidises specific projects on a temporary basis, as well as investigative journalism.	1	2
PT	Journalistic investigation has some priority, but the number and extent of investigations are limited by financial means.	1	2
SE	There are increased differences between national and regional or local media.	2	3
UK	While broadcast newsrooms continue to have significant resources to devote to investigative journalism, economic pressures are limiting the capacity of some – but not all – commercial news organisations to engage in costly investigative or international journalism.	2	2

Table 1 Overview of scoring for all indicators and all countries

Indicators	Cross-country 2011	Cross-country 2021 (9 from MDM 2011)	Cross-country 2021 (all)	
Freedom / Information (F)				
(F1) Geographic distribution of news media availability	97%	96%	94%	
(F2) Patterns of news media use (consumption of news)	83%	74%	78%	
(F3) Diversity of news sources	67%	67%	63%	
(F4) Internal rules for practice of newsroom democracy	47%	56%	54%	
(F5) Company rules against internal influence on newsroom/editorial staff	60%	67%	67%	
(F6) Company rules against external influence on newsroom/editorial staff	63%	63%	63%	
(F7) Procedures on news selection and news processing	63%	63%	61%	
(F8) Rules and practices on internal gender equality	–	–	59%	
(F9) Gender equality in media content	–	–	41%	
(F10) Misinformation and digital platforms (alias social media)	–	–	63%	
(F11) Protection of journalists against (online) harassment	–	–	70%	
Total points (max. 33)	–	–	–	
Percentage	69%	67%	65%	
Equality / Interest Mediation (E)				
(E1) Media ownership concentration national level	57%	56%	57%	
(E2) Media ownership concentration regional (local) level	47%	52%	56%	
(E3) Diversity of news formats	77%	85%	81%	
(E4) Minority/Alternative media	73%	70%	63%	
(E5) Affordable public and private news media	97%	89%	83%	
(E6) Content monitoring instruments	63%	56%	46%	
(E7) Code of ethics at the national level	70%	78%	72%	
(E8) Level of self-regulation	67%	70%	65%	
(E9) Participation	60%	74%	69%	
(E10) Rules and practices on internal pluralism	60%	67%	59%	
Total points (max. 30)	–	–	–	
Percentage	67%	70%	65%	
Control / Watchdog (C)				
(C1) Supervising the watchdog “control of the controllers”	67%	67%	65%	
(C2) Independence of the news media from powerholders	60%	63%	57%	
(C3) Transparency of data on leading news media	67%	74%	72%	
(C4) Journalism professionalism	73%	78%	70%	
(C5) Journalists’ job security	57%	56%	48%	
(C6) Practice of access to information	63%	59%	61%	
(C7) The watchdog and the news media’s mission statement	67%	85%	80%	
(C8) Professional training	60%	63%	65%	
(C9) Watchdog function and financial resources	57%	67%	61%	
Total points (max. 27)	–	–	–	
Percentage	63%	68%	64%	
All Indicators				
Total points (max. 90)	–	–	–	
Percentage	66%	68%	65%	

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	AT	AU	BE	CA	CH	CL	DE	DK	FI	GR	HK	IS	IT	KR	NL	PT	SE	UK
	3	2	3	2	3	3	3	3	3	3	3	3	2	3	3	3	3	3
	2	2	2	3	2	2	3	3	3	2	3	3	2	2	2	2	2	2
	3	1	2	2	2	2	2	2	2	1	2	2	1	2	3	1	2	2
	1	1	1	2	2	1	1	2	2	1	1	2	2	2	3	2	2	1
	3	1	2	2	2	2	2	2	2	1	2	3	2	2	2	2	2	2
	1	3	2	3	1	2	2	3	2	1	1	3	1	1	2	1	3	2
	1	1	2	2	2	2	2	3	2	2	1	1	1	2	2	1	3	3
	2	1	1	2	2	1	2	2	2	1	2	2	1	2	2	2	3	2
	1	1	1	1	1	0	1	1	2	0	1	2	2	1	2	1	2	2
	1	1	3	3	2	2	2	2	2	1	2	1	2	2	2	2	2	2
	3	1	2	2	2	1	2	3	3	2	1	2	1	2	3	3	3	2
	21	15	21	24	21	18	22	26	25	15	19	24	17	21	26	20	27	23
	64%	45%	64%	73%	64%	55%	67%	79%	76%	45%	58%	73%	52%	64%	79%	61%	82%	70%
	1	1	2	2	2	1	2	2	2	2	2	1	2	2	1	2	2	2
	1	1	1	3	1	2	2	2	1	2	2	1	2	1	1	3	2	2
	3	2	2	3	2	2	3	3	3	1	3	3	2	2	3	1	3	3
	2	3	1	3	2	2	2	2	2	2	1	1	3	0	2	1	2	3
	3	3	2	2	3	2	3	2	3	2	3	3	2	3	3	1	2	3
	1	2	1	0	1	1	3	1	1	1	1	1	3	1	3	2	1	1
	2	2	3	1	1	1	3	3	3	2	2	2	2	2	2	2	3	3
	2	2	2	2	2	1	2	3	3	1	1	2	2	2	2	1	3	2
	2	2	1	2	2	2	2	2	3	1	2	2	2	3	3	2	2	2
	2	1	1	2	2	1	2	2	2	1	1	2	2	2	2	3	2	2
	19	19	16	20	18	15	24	22	23	15	18	18	22	18	22	18	22	23
	63%	63%	53%	67%	60%	50%	80%	73%	77%	50%	60%	60%	73%	60%	73%	60%	73%	77%
	2	2	2	2	1	2	2	2	2	2	1	1	2	3	2	2	2	3
	1	2	2	3	2	2	2	3	2	0	1	1	1	1	1	2	3	2
	2	1	2	2	1	2	3	2	2	2	2	2	2	3	3	3	2	3
	2	2	2	2	2	1	3	3	3	1	2	2	2	2	2	2	3	2
	2	1	2	1	1	0	2	2	2	1	1	1	1	2	2	1	2	2
	1	1	1	2	2	2	2	2	2	2	1	2	2	3	1	2	3	2
	3	3	2	3	2	2	2	3	3	2	2	2	2	2	3	1	3	3
	2	1	2	2	2	2	2	3	2	1	1	1	3	3	2	1	2	3
	2	2	1	2	1	1	2	3	2	1	2	2	2	1	2	2	3	2
	17	15	16	19	14	14	20	23	20	12	13	14	17	20	18	16	23	22
	63%	56%	59%	70%	52%	52%	74%	85%	74%	44%	48%	52%	63%	74%	67%	59%	85%	81%
	57	49	53	63	53	47	66	71	68	42	48	56	56	59	66	54	72	68
	63%	54%	59%	70%	59%	52%	73%	79%	76%	47%	56%	62%	62%	66%	73%	60%	80%	76%

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THE MEDIA FOR DEMOCRACY MONITOR 2021

To what extent do structures and conduct of leading news media correspond with requirements of contemporary democracies? Based on a root concept of democracy and several empirical indicators, the Media for Democracy Monitor (MDM) delivers a panorama of the news media's performance regarding freedom, equality, and control across several countries. In 2011, the MDM analysed 10 democracies. Ten years later, it covers 18 countries worldwide and pinpoints essential strengths and weaknesses during this decade of digitalisation. Around the globe, news are highly attractive to users, and the journalistic ethos of watchdogs and investigators is paramount. On the downside, journalistic job security eroded over time, and gender gaps both in content and employment patterns remain strikingly excessive in most countries.

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