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QUALITY OF GOVERNMENT

## **Comparing Media Systems in Europe: Identifying Comparable Country-level Dimensions of Media Systems**

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### **QoG WORKING PAPER SERIES 2010:2**

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March 2010

ISSN 1653-8919

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## PART I: STARTING POINTS

### 1. Europe and its Media

#### 1.1 Introduction

A traditional idea where countries marked with high level of democracy also has high levels of media freedom, and that country with low level of democracy has oppressed and cowed media is both excessive and very simplistic. But it is nevertheless the image that formed the basis for our understanding of the relationship between media and political systems. The media is attributed to positive or negative characteristics and functions depending on whether the country they operate in has a high or low level of democracy. This picture is confirmed when we study some media, but it is considerably more complex when we study other media.

How we relate to media and the relationship between media and political institutions is based on what role the media should play in society and how the media should respond to the governing and the governed in the society (Asp 2006:245). These normative theories of media then work as reference points in assessing various countries' media, and provide opportunities to systematize the relationship between media and political institutions (see, e.g. Siebert et al 1956; Mughan and Gunther 2000; Bertrand 2003; Hallin and Mancini 2004).

The relationship between media systems and political systems has great importance for our understanding of the media and the role they play in a society, but there are other aspects of countries' media systems that also are important to compare systematically. If, how and under what circumstances can independent, competitive and pluralistic media increase the quality of government institutions? In order to enable comparative analysis of the media system mechanisms that produces quality of government (QoG). A first step is to compile comparable characteristics of the European media landscape and to examine what indicators of different media systems that is comparable. This paper focuses on the media systems and establishes a set of mechanisms of the independent variable necessary to enable more powerful tests and systematic elaborations of the relationship between media and QoG in the future.

#### 1.2 Research Questions and the Focus of the Study

The aim of this paper, with its point of departure in Hallin and Mancinis already classic book *Comparing Media Systems* (2004), is to study European media systems based on population structure and media consumption, in order to answer the question about whether the patterns of Hallin and Mancinis ideal models can be observed also when studying media systems from a user perspective. On the basis of systemized and

comparable statistics, another aim is to examine the differences between media systems and the factors underlying these differences.

A first step is to identify and systematically compare *how* and in what way media systems in Europe are similar or different from a user perspective. In the next step it is then possible to look for explanations to *why* some media have greater scope and impact in some parts of Europe and not in others. This paper should be seen as a first step in this process; as a contribution to Hallin and Mancini's previous studies and as an attempt to answer the question of how. The answer to this question results in the next step forward, i.e. to the possibilities to look for an answer the question of *why*, (something that is not implemented in the context of this paper). To achieve the purpose of the paper, my intention is to answer the following questions:

- Is Hallin and Mancini's ideal models valid when the European media systems are compared on the basis of structure, access and consumption?
- In what respects confirms or weakens the user perspective Hallin and Mancini's ideal models?

The paper, just like Hallin and Mancini, puts the primary focus on countries' media system, but from other dimensions. Hallin and Mancini are studying how media markets have developed over time (with emphasis on mass-distributed daily newspapers, the relationship between media and the political power, journalistic professionalism and the political influence over the media system). This paper covers roughly the same number of countries that eventually formed part of Hallin and Mancini's study from 2008, but put emphasis on the daily press, television, and the Internet. Furthermore, media systems are studied from a user perspective, meaning that factors like structure, access and consumption are under focus. In this way, this study adds another important dimension to Hallin and Mancini's ideal models.

### **1.3 Outline**

This paper consists of three sections and the disposition is as follows: section one provides a brief overview of the research on how we look at media systems and the relationship between media systems and political systems. Then I go on to discuss the material this paper is based on, and how the methodological approach was done to implement this study. In section two, the paper's findings are presented, and the section concludes with a reconnection to Hallin and Mancini's ideal models. The paper's third section consists of two appendixes; the first appendix is an overview of the countries included in the survey. Appendix two is a detailed presentation of the statistics that the paper's findings are based on. The idea behind this arrangement is that the reader should be able to use the paper's various parts for his or her specific purpose. Some may wish to read the full paper; others just want to use specific parts.

## **2. Earlier Research on the Relationship between Media, Media Systems and Political Systems**

### **2.1 Four Media Ideologies**

The view of the media as an influential actor in political life is based on differences in the perception of the media and its functions in different countries. As already mentioned, there have also been several attempts to systematize the relationship between mass media, media systems and political systems. Traditionally, the common way to divide the concept of mass media is in four different media, or information ideologies. These ideologies are originated in the Hutchins Commission attempt to classify the relationship in the 1940s, which came to identify four different categories: (1) The Authoritarian Ideology, where the policy-makers control the press, radio and television, and where there is active suppression of inappropriate expression of opinions and unpleasant news. There is therefore censorship of the media in which only those who are in solidarity with the current system may be heard; (2) The Libertarian Theory, where citizens are presumed to be active and interested in creating public opinion. Mass media is seen as a key means of advancing ideas and anything that can prevent free formation of opinion must be countered. The media must be completely free from political decision-makers and act as a fourth estate alongside the government and parliament; (3) The Social Responsibility Ideology, which emerged as a criticism of the libertarian ideology in that it in fact also has been considered as the same as freedom from responsibility and moral obligations - freedom has become a freedom for the owners of mass media and certain political elites - but not for the majority of consumers. Proponents of the social responsibility ideology therefore believe that ideology should be revised and supplemented with different requirements designed by the media themselves, empowerment of journalists or certain governmental obligations; and finally (4) The Soviet Communist Theory, where the media and especially the press, played a significant role. Newspapers must be in the party establishment and function as an instrument in the construction of the new communist society. Press freedom in this approach is not synonymous with freedom for the owners, but contributes to the liberation through enlightenment (Hadenius, Weibull and Wadbring 2008:23f).

In 1956 Fred S. Siebert, Theodore Peterson and Wilbur Schramm made a classification of the different normative conceptions of what role the media should play in a society. In the book *Four Theories of the Press* (1956) they confirm in principle, the Hutchin Commission classification, and the outcome was four normative theories based on two fundamental conceptions of what role the mass media should play in society: one democratic – The Libertarian and The Social Responsibility Model, and one non-democratic – The Authoritarian and The Soviet Communist Model. Both the Hutchin Commission and the mass media ideologies designed by Siebert, Peterson and Schramm are ideal types that point at some basic media political divides. They appear, therefore, rarely in only one form in a country, but to different degrees in different media. It should also be added that the categorization is more than fifty years old and that the development

of new information and communication technology has opened up new technologies and, thus new media ideologies (see, e.g., Castells 2000).

## **2.2 Hallin and Mancini's Four Media Models**

The efforts to classify the different countries' media systems do not stop at *Four Theories of the Press*. Half a century later, namely 2004, Daniel C. Hallin and Paolo Mancini conducted a comprehensive comparative study that explore the role a country's political and economic system play for the media system quality. Hallin and Mancini's study is based on the Siebert, Peterson and Schramm ideal models, but the authors argue for that you can not understand media and media systems without being familiar with the specific nation characteristics, the party political system, the relationship between economic and political interests and, the development of civil society. Siebert, Peterson and Schramm took the media as something which has always influenced and changed in relation to society which they regard as their point of departure. Instead, Hallin and Mancini argue that the media institutions both reflect the society they operate in and on their own, affect social structures. The mass media has gone from being a tool to be an actor influencing and changing the society they operate in (Hallin and Mancini 2004:8).

Through their study in 2004, Hallin and Mancini identify and distinguishes three fundamental ideal models for the relationship between media systems and political systems: (1) The Mediterranean/Polarized Pluralist Media Model, which is characterized by countries that have democratized relatively late, a strong government intervention in the economy and an elite-oriented press with relatively small editions. The public service companies tend to follow national governments and parliamentary systems, such as if the leadership and political orientation changes after parliamentary elections similar changes is implemented in the public service companies. Journalism is less professional and the links between political actors and journalists are strong, while the legal system is relatively weak. Examples of countries that are placed in The Polarized Pluralist Model are Greece, Portugal and Spain; (2) The Northern European/Democratic Corporatist Media Model is characterized by countries with a long democratic tradition. Politics is characterized by consensus and a strong state with a well-grounded legal system. The publishing sector is an important part in the Democratic Corporatist Model. There is competition in the market for print media, but despite this the market is regulated through various political and cultural activities such as press subsidies. Other features are non-commercial public service and a high degree of autonomy for the broadcasters. The journalism is professional and self-regulating with common ethical standards for radio, television and newspapers. Examples of countries that are placed in this model are Sweden, Norway, Denmark, Austria and Germany; (3) The North Atlantic/Liberal Media Model is instead characterized by countries with a long tradition of democracy, strong and widespread press freedom and strong individualism. Newspaper circulation is relatively high, although lower than for the countries of the Democratic Corporatist model. Politically, most of the countries have a majority system. Generally, the media are not strongly linked to the government and political parties, but are instead governed by commercial interests and the journalistic professionalism is

relatively strong. Countries that are placed in The Liberal Model is for example United Kingdom, USA, Canada and Ireland.

In 2008 Hallin and Mancini, together with a number of researchers, conducts a study based on the three ideal models identified in 2004, but now complemented by a fourth ideal model: (4) The Eastern European/Post-Communist Media Model, to include the Eastern European countries that were excluded from the study 2004. The reason that these were not included in the analysis in 2004 was that they differed from other European countries regarding the relationship between newspaper distribution and socio-economic factors, which in turn was a consequence of the rapid changes occurring in the countries since the collapse of the Eastern bloc.

The countries in the fourth ideal model have, strictly speaking, not much else in common concerning history, culture, religion and level of development than just the history of communism and the communist system. Just as the countries in The Polarized Pluralist Media Model, the post-communist countries are characterized by late democratization and incomplete, or for some countries, very complex modernization, combined with strong state control, widespread clientelism, and state paternalism. The newspapers and newspaper media underwent major changes from 1989 onwards. When the state monopoly on the newspaper market disappeared, this meant, for example, that a flood of new newspapers emerged and the number of regional and local newspapers increased markedly. Broadcast media is struggling to keep their independence and to demonstrate political independence, but still work as political actors who actively strive to promote the ruling power.

The starting point for both analysis by Hallin and Mancini is four dimensions that the authors also use for defining the concept of *media systems*, and in which they find it fruitful to compare different countries' media systems. The first dimension is how different countries' media markets have evolved over time, with an emphasis on a strong or weak development of the country's mass distributed daily newspapers. The second dimension of their study is political parallelism, i.e. the link between the country's media system and the political power, and how the media systems reflect the political power and the country's political system. The third dimension examines the development of a journalistic profession and the scope of journalistic professionalism. Finally, Hallin and Mancini study the prevalence and manifestations of political power, the influence and impact of political power on the media system (c.f. Blumler and Gurevitch 1995).

This paper is based on the Hallin and Mancini's four ideal models, but with main focus on the countries' media systems from a user perspective. Although this means that the paper has its origin in the focus that Hallin and Mancini put on the relationship between media, media systems and political and economic systems, the operational indicators are different from these implemented by Hallin and Mancini.

The focus and main point of this paper is therefore that it adds new dimensions to the body of knowledge provided by Hallin and Mancini. Dimensions like media structure, the inhabitant's possibilities to get access to the media, and how the usage and consumption

of media is manifested in practice are three very important factors that play a major role in the understanding of countries' media systems. Hallin and Mancini's study exemplifies that it is possible to classify the different countries' media systems in different ideal models and that the differences and similarities in the dimensions follows, albeit with a few exceptions, consistent patterns.

Are the same patterns observable also when countries are compared on the basis of structure, access and consumption, or will the ideal models split up when we supplement with other dimensions in our comparisons? Whatever the outcome will be, this leads us further towards important knowledge when it comes to describing and understanding the relationship between media, media systems and political systems.

### **3. Material**

The material used in this paper is based on secondary data mainly collected from four separate sources. Data and statistics on the European newspapers are collected from the *World Association of Newspapers* and their compilations of cross-country statistics in the *World Press Trends 2007*. The statistics includes dimensions such as the total number of newspapers, where newspapers referred to papers published at least 4 days per week, average circulation, and share of national and regional newspapers, total daily reach, and share of total advertising expenditures. Data on television is collected from *IP International Marketing Committee, Key Fact Television* from 2007 and includes dimensions such as number of households with television, viewing time, reach, and the share of total advertising expenditures. Data on the Internet and broadband usage is collected from the *Eurostat* web-based statistical database and includes dimensions such as share of individuals who regularly use the Internet, share of households with access to broadband and share of total advertising expenditures. Finally, this paper also includes data on ethnic, religious and linguistic fictionalizations, literacy, freedom of the press and the political, legal and economic impact on media content, political systems, number of years of consecutive state and degree of democracy from *the Quality of Government Institute*. In addition to these four main sources, data on countries' demography and economics is collected from the World Bank, which includes GDP and GDP per capita, and the country's area.

The selection of countries to be included in the study has first and foremost been based on the availability of reliable data. The ambition is that selection of cases should correspond and include the same countries that were part of Hallin and Mancini's study 2008, but at the same time to take a holistic approach and include all media systems and a complete range of European countries, to create an overview of the media systems throughout Europe as a whole.<sup>1</sup> Europe consists of no less than 51 countries and it turns

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<sup>1</sup> The study conducted in 2004 included 18 countries: Austria, Belgium, Canada, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Switzerland, Spain, Sweden and USA.

The study conducted in 2008 included 32 countries: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Iceland, Italy, Latvia,

out pretty quickly that the availability of comparable data varies between different countries (see appendix I). It is relatively easy to find reliable media data for the member countries of the EU, the OECD and countries in both the West and Southern Europe. The lack of comparable and reliable data becomes, however rather obvious when the focus is either expanded or moved to countries in Eastern Europe. It is still, in year 2008, incredibly difficult to find reliable media data for countries such as Russia, Georgia and Ukraine.

The lack of comparable data limits the opportunities to draw some general conclusions about the dimensions of the media system, but it also means that the number of countries, after all, varies depending on the dimension that under study (from a minimum of 31 countries to a maximum of 45 countries). Hence, there are some problems when it comes to cover all European countries - some countries are simply not included in the analysis. The intention is to extend the study to also include those countries that are not member of either the EU or the OECD. In light of the collected data you can however conclude that it is precisely these countries that all too often lack reliable and comparable data.

Thus, this paper mainly focuses on the analysis of national dimensions of media systems and includes 45 of Europe's 51 countries. The countries included are the following:

**Table 1** *Countries included in the study*

Albania	ALB	Georgia	GEO	Nether-	NLD
Andorra	AND	Germany	DEU	lands	
Armenia	ARM	Greece	GRC	Norway	NOR
Austria	AUT	Hungary	HUN	Poland	POL
Azerbaijan	AZE	Iceland	ISL	Portugal	PRT
Belarus	BLR	Ireland	IRL	Romania	ROU
Belgium	BEL	Italy	ITA	Russia	RUS
Bosnia and Herzegovina	BIH	Kazakhstan	KAZ	San Marino	SMR
Bulgaria	BGR	Latvia	LVA	Serbia	SRB
Croatia	KRO	Liechtenstein	LIE	Slovakia	SVK
Cyprus	CYP	Lithuania	LTU	Slovenia	SVN
Czech Republic	CZE	Luxembourg	LUX	Spain	ESP
Denmark	DNK	Macedonia	MKD	Sweden	SWE
Estonia	EST	Malta	MLT	Switzerland	CHE
Finland	FIN	Moldova	MDA	Turkey	TUR
France	FRA	Monaco	MCO	Ukraine	UKR
		Montenegro	MRO	United Kingdom	GBR

**Note:** Monaco, San Marino, Kazakhstan and Montenegro have been excluded from the study due to lack of reliable data. It should also be noted that the Vatican is included in the statistics for Italy and Kosovo included in the statistics of Serbia for all the data from the World Press Trends 2007 (for which specific data available for the respective countries, see appendix I).

Lithuania, Luxembourg, Malta, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey and United Kingdom.

It is of course possible to discuss what different operationalizations actually measure, and how comparable the operationalizations are between different countries. Problems of this nature are probably more common for data on new media technologies in general, and the Internet and broadband in specific. For example, a majority of citizens in one country with no access to the Internet or a computer at home should not necessarily be the same as they in fact have no access to a computer or the Internet at all. It could rather mean that information from the Internet is retrieved by visiting Internet cafés, libraries, school or workplaces. Despite this, access to a computer and the Internet at home is likely to lead to a more frequent exposure to a wider range of information, both in terms of news and entertainment. What seems to be an observable fact does not always relate the same way, or concerns the same thing in all contexts. It is therefore important to use various operational indicators of what is being investigated, and thus capture different dimensions of the same phenomenon. As far as more specific dimensions and definitions, such as what people are considered adults, or whether the definition of the indicator used is the same for all countries studied, are the requirement of awareness, and to examine specific dimensions. One approach is simply not to use questionable and dubious indicators and definitions for measuring a phenomenon, and that when in use, account for exceptions and differences, as mentioned earlier.

In this paper, method and design for implementation of comparisons - 'most equal' and 'most different' design the groups with similar characteristics can be the basis for a typology that in turn can be used to systematize a phenomenon (Esaiasson et al 2003, 110ff). It could for example be the case of differences between independent and state-controlled media structures or between commercial and public service television. In this case, it is a question of examining newspapers, television and the Internet, and based on relatively simple measure, to compare the differences and similarities in media systems, the inhabitants' accessibility to different media and how the consumption of media in practice is manifested. Based on these specific and relatively simple characteristics it is then feasible to in detail explain and compare countries' media systems and to provide knowledge about the relationship between countries' media systems and political systems.

## PART II: RESULTS

Before the results are presented and analyzed, I would very briefly like to explain how this paper's findings, technically speaking, have been developed.

Fundamentally, all results are presented using fields with two dimensions in which the factors studied are presented in pairs based on a simple coordinate system. The values presented for the countries (and each country's positioning at each axis) are based on the dimensions of each specific variable. The value of the specific factor is reduced (subtracted) with the average for all countries. As a consequence, the countries then can be ranked relative to one another from the highest to the lowest value. Since the limits of what is high or low is not expressed, the countries are positioned only on the basis of how they are related. The point with this approach is that factors or variables can be compared in pairs, and that countries can be studied from two dimensions at a time. Each figure is also supplemented with a  $R^2$  value showing the percentage of explained variance for the dimensions studied, the proportion of the variation in y which can be explained by variations in x. Apart from this very simple data processing, the country-specific measurements are presented continuously in the text as well, which is entirely based on secondary data gathered from each source, which is compiled in tabular form in Appendix II.

To clarify the approach, here's an example: Let's say we want to compare Sweden, Estonia and Albania on the basis of 'Newspaper Circulation' (y) in relation to 'Urban Population' (x). Sweden has a newspaper circulation per 1,000 adults at 466.2, Estonia 241.7 and Albania 24.1. The average of the countries is 244. Each country's newspaper circulation is then subtracted with the mean (Sweden:  $466.2 - 244 = 222.2$ ; Estonia:  $241.7 - 244 = -2.3$ , and Albania:  $24.1 - 244 = -219.9$ ). The same procedure is done for the countries' share of urban population: Sweden has an urbanization rate of 84 percent, 71 percent in Estonia and Albania to 35 per cent. The average share of urbanization is 63.3. Each country's urbanization rate is subtracted with the mean (Sweden:  $84 - 63.3 = 20.7$ ; Estonia:  $71 - 63.3 = 7.7$ ; and Albania:  $35 - 63.3 = -28.3$ ). In this way, each country got a value equal the newspaper circulation (x) and a value for the share of urban population (y). These values can then be used to study and compare how countries are positioned in relation to each other. In addition to this, the  $R^2$  value .45 indicates that 45 percent of the variation in the newspaper circulation (y) can be explained by variations in the share of urban population (x). Let us now turn to the results of this study.

### **4. Media Structures in Europe**

#### **4.1 Ownership**

The differences in newspaper ownership are very clear. Few countries in Eastern Europe with a varying proportion of state-owned newspapers and the remaining European countries where state ownership not includes any newspapers at all (see Table A10 on page 57-58). *State* ownership is the term used for the proportion of the sum of the five

largest companies that can be traced to the government. The values indicate the proportion of companies controlled by the state and have been derived from data and definition in Djankov, McLiesh, Nenova, and Shleifers *Who Owns the Media* (2003).

Among Eastern European countries, Belarus was in 2003, at the top with state ownership of nearly all Belarusian newspapers. Nowadays, however, newspaper market has also opened up for private actors, but nevertheless the state-owned newspapers still account for as much as 85 percent of the Belarusian newspaper edition. An evidence is that the state shut down a number of independent newspapers as late as in the Belarusian presidential elections in March 2006. After Belarus there is a gap to the next country, Croatia where state ownership of newspapers is at 29 percent. Compared to Belarus, Croatia has developed in the opposite direction and the Croatian constitution guarantees freedom of expression and press freedom. In Armenia, every third newspaper is owned by the state. In Russia and Ukraine, the state owns almost a fifth of the daily newspapers, followed by Moldova (12 percent), Azerbaijan (10 percent), and finally Georgia with a state ownership at 6 percent.

Regarding television and state ownership of television channels, the public service model contributes to a significant impact on the figures on state television ownership broadly across Europe (see Table A10 on page 49-50 and Table A6a and A6b on page 41-42). In Belarus, Croatia and Russia, the state owns practically all television. Again, Croatia is an example of a country with an extensive state ownership. The leading Croatian television is part of the state-owned *Hrvatska Radio-Televizija (HRT)*, but there is also a television market that is open to private actors. After Croatia, we find Switzerland and Denmark, where state ownership is four fifths of the market. In Turkey, state ownership is almost non-existent and this applies also to Greece, where state ownership is one tenth of the total market. Interesting to note is the figures for Ukraine and Hungary (14 and 20 percent) are among the lowest in all of Europe.

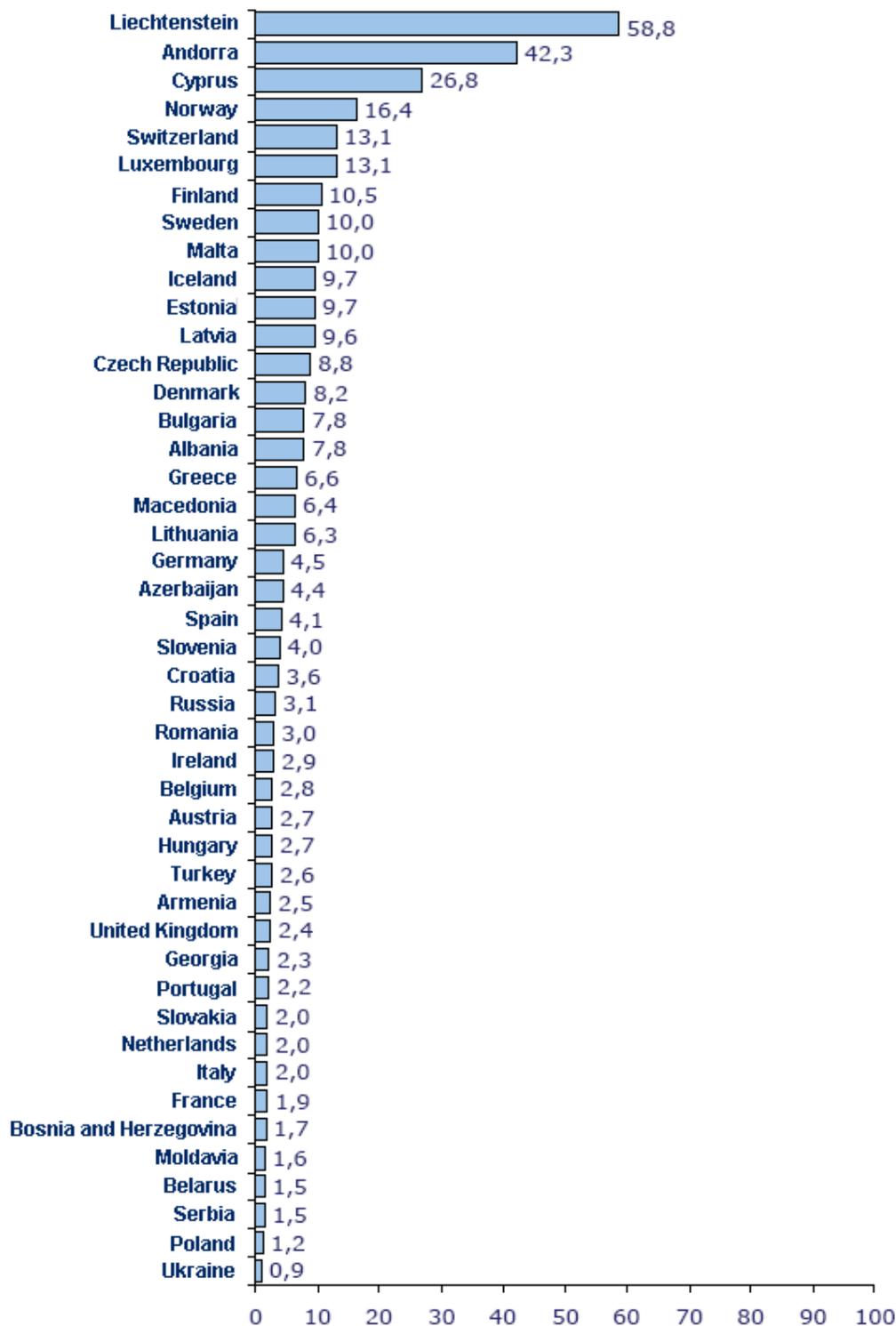
Regarding the daily press, a brief summary of the ownership structure of European countries shows that there is a clear difference between a few Eastern European countries with heavily state-controlled newspapers and other European countries where newspapers are more independent from the state. At the same time, we can see that some of the countries with a relatively high proportion of state-owned newspapers, but a trend towards increased democratization, strive towards a freer and more independent newspaper market. Regarding television and state-ownership of television companies and television channels, the public-service model contributes to a proportion of state ownership which is much broader than what is the case for the newspapers. If we put aside an almost total state control of television in Belarus, the share of state-owned television differs not so much between Belarus, Croatia, Switzerland and Denmark, but there are large differences between countries if we look at what the public service model means for the independence of the media vis-à-vis those in power.

## 4.2 The Newspaper Market

In 2006 there were around 2900 newspapers with a combined circulation of approximately 126 million copies in the European newspaper market. Compared with statistics from 2002, both the number of newspapers and the total circulation, has increased by almost 12 percentage points (see Table A1 on page 35). In Western Europe, the number of newspapers has been fairly stable in recent years. In Eastern Europe, on the other hand, there have been great changes in the newspaper market. Russia recorded a sharp rise from 436 titles in 2002 to over 552 in 2006, while Ukraine reported a decline from 76 titles in 2003 to 41 in 2006. The size of the newspaper market in part reflects the size of the countries. The largest newspaper market in Europe is the German market. In Germany, over 21 million copies is distributed per release day, making it significantly larger than the second largest market, Britain, with around 18 million copies per release. Germany and Britain also publish the two largest newspapers in Europe in terms of circulation: *Bild* (3.7 million) and *The Sun* (3.1 million). Large countries, but with relatively small newspaper markets, are Italy (about 10.3 million) and France (about 9.3 million). The Eastern European countries are also reporting relatively low circulation numbers. Poland has the largest newspaper circulation with about 5.7 million copies, an increase of almost 2 million copies since 2002. The Swedish newspaper market, with a circulation of about 4.7 million copies, is together with the Netherlands, the eighth largest in Europe.

If we specifically study the countries newspaper market, it is the total number of newspapers in relation to its population, which tells us most in terms of newspaper size and scope. A large country has virtually by definition, a major newspaper market and tells us relatively little about the scope of the daily press, while this type of measure also reflects how local the newspapers are in different countries - many newspapers indicates a high proportion of local/regional newspapers and few newspapers indicates a high proportion of national newspapers. The total number of newspapers here refers to the total number of newspapers with a release of at least four times a week (for more information about the distribution between newspapers and free newspapers, see Figure A1 on page 36). In Figure 1, the countries are ranked by the total number of newspapers per one million inhabitants for each country in 2006.

**Figure 1** Number of Newspapers per 1 million inhabitants



**Note:** Both Liechtenstein and Andorra has a population of less than one hundred thousand and the measure will therefore be misleading for these two cases.

**Source:** World Press Trends 2007.

The countries at the top have a small number of newspapers distributed on a relatively small population. Liechtenstein and Andorra have two and three newspapers on a total population of approximately 34,000 inhabitants in Liechtenstein, and approximately 71,000 inhabitants Andorra. Cyprus has 21 newspapers and a population of approximately 784,000 inhabitants (see Table A1 on page 35 and Table A3 on page 38). The newspapers are distributed roughly equally between Greek and Turkish Cypriot newspapers. Seven of the eight major Greek newspapers are Greek-speaking, and one is English: *Phileleftheros* is the largest paper with a circulation of about 250,000 copies, and it is accompanied by *Politis*. On the Turkish Cypriot side are *Sabah* and *Hurriyet* from the Turkish mainland the largest with a newspaper circulation of around 13,000 copies while the most popular Turkish Cypriot newspaper *Kibris* never reach over a circulation of 10,000 copies per day.

Norway is the country in the north with the greatest number of newspapers in relation to its population, and the figure on newspaper reading is one of the highest throughout the world (about 600 newspapers per 1,000 adults). All Norwegian citizens in virtually all segments, both geographically and socially, are regular newspaper readers. The Norwegian newspaper market is dominated mainly by two national newspapers, *Verdens Gang (VG)* with a circulation of about 334,000 newspapers and *Dagbladet* of about 162,000 newspapers. The interesting thing about these two newspapers is that they are purchased as single copies.

Among the countries with a low number of newspapers in relation to its population, Ukraine is the country with the lowest number of newspapers followed by Poland. The Polish newspaper market is dominated by foreign and mainly German owners but has one large domestic actor (Agora SA). *Gazeta Wyborcza*, which started in 1989 and is owned by Agora SA, was the first independent newspaper after the communism. *Gazeta Wyborcza* was the biggest Polish newspaper for nearly a decade; around 1999, *Fakt* took over the top position.

In Belarus, 15 newspapers are distributed on a population of approximately 9.8 million inhabitants, according to the *Belarusian Association of Journalists*, there are approximately 30 privately-owned political newspapers in the Belarusian newspaper market. The opportunities now available for private actors to operate on the Belarusian newspaper market do not mean that private newspapers are run on under the same conditions as the state-owned newspapers. Half of all privately owned newspapers are completely excluded from the established distribution networks while the Belarusian State finances the distribution of state-owned newspapers.

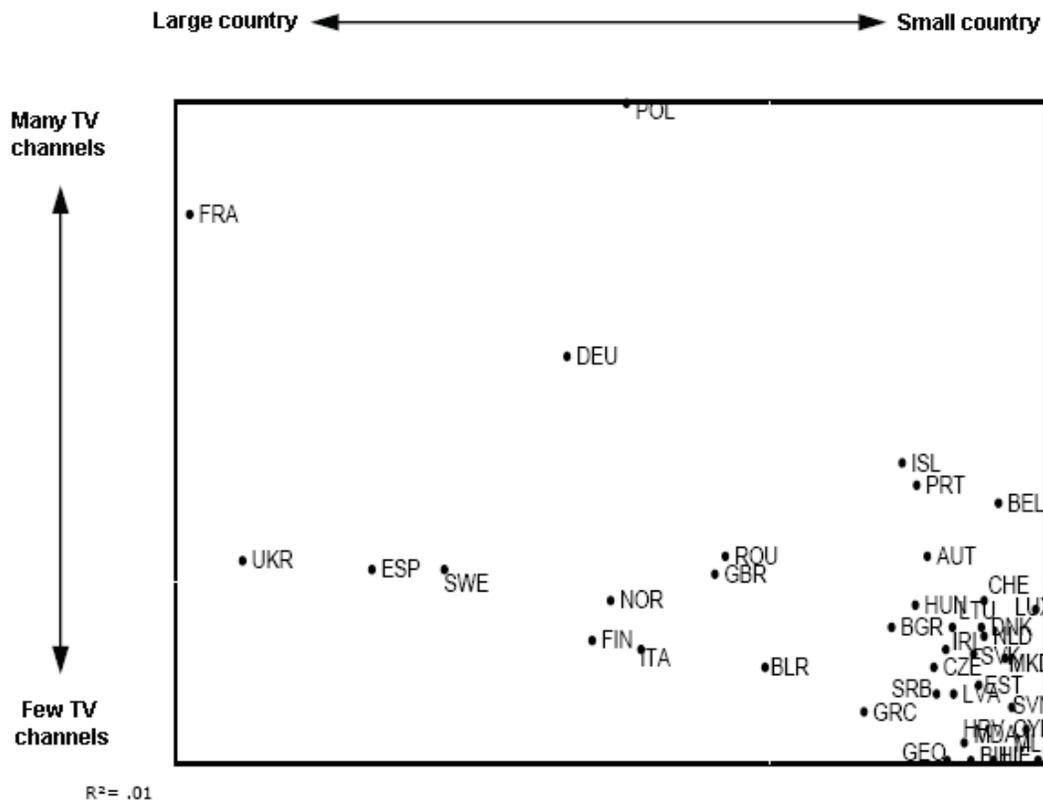
### **4.3 The Television Market**

It is clear that the European television market differs between European countries when compared on the basis of the total number of channels (see Table A6A and A6b on page 41-42). Total number of channels refers to all television channels that exist in the television markets, and therefore also covers a wide range of foreign operators. IP

International Key Facts sort the channels into four categories: *Domestic Public Channels*; *Domestic Private Channels*; *Pan European and Other Foreign Channels* and finally *Premium Pay TV Channels*. This is also the classification used in this paper.

The television market, which by far has the largest total number of channels, is the Polish (148 channels), followed by France (123 channels). With 91 channels, Germany comes as number three, and Iceland is number four with 67 channels. Croatia has a minimum number of channels, four channels; slightly more has Cyprus with seven channels. If we look to all countries, the number of television channels the figures varies between approximately 20 to 40. This must also be taken into account when looking at Figure 2, where the relationship between the total number of channels and size is out mapped.

**Figure 2 Country size (km<sup>2</sup>) and Number of Channels**



**Note:** The following countries are not included in the figure due lack of data: Albania, Andorra, Armenia, Azerbaijan and Russia. For identification of the country alpha codes see Table 1 on page 8. R<sup>2</sup> shows that 1 percent of the variation in the number of channels can be explained by variations in their size.

**Source:** IP International Key Facts 2007 and CIA World Factbook 2007th

Based on the dimensions of size and the number of channels, the countries with the smallest area also tend to have a smaller number of television channels. Since Russia is not included in the figure, the two largest countries are France and Ukraine. The differences between these two countries also show that differences in the number of channels depend on other factors than just the specific country's size in terms of square

miles. The state television monopoly in France ceased in the late 1980s, and since then the number of channels has increased, especially in terms of local and topic-specific channels. In 1980 there were three television channels in France, while today, in addition to the seven terrestrial channels, there are hundreds. It is also worth noting that the public-service channels, despite the increased choice of channels, still have the largest share of the French audience (total of 89 per cent).

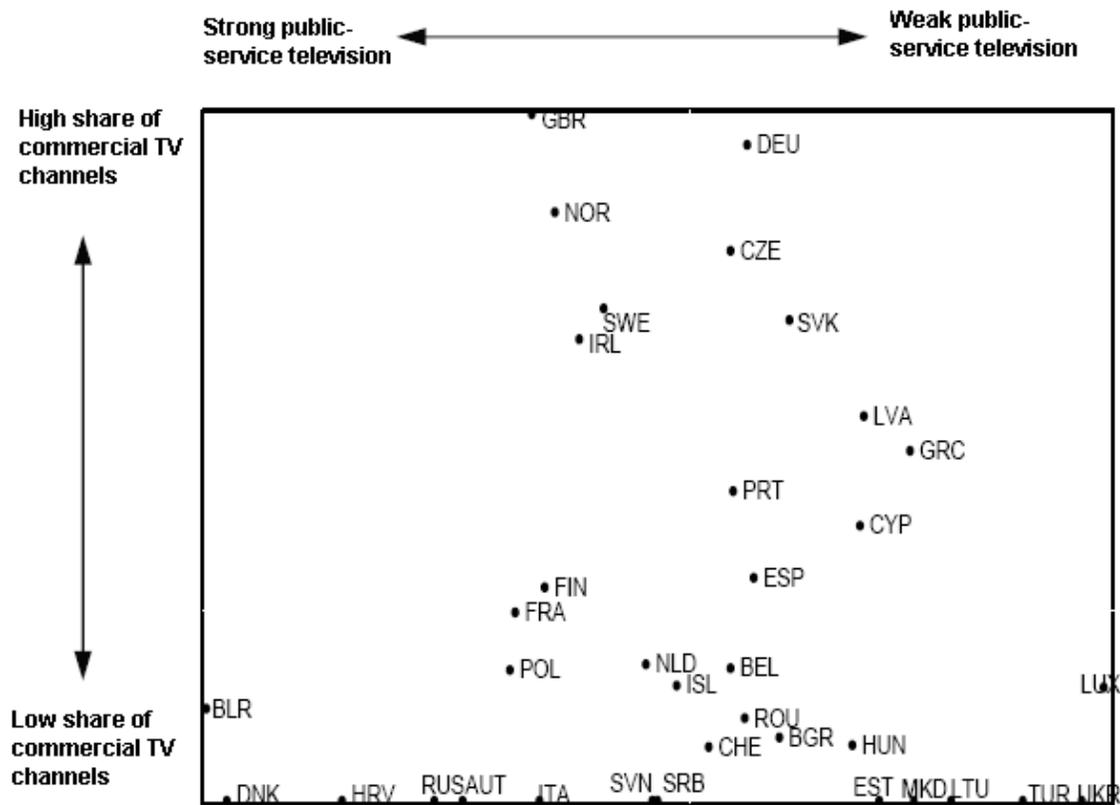
If we divide the total number of channels in the categories Domestic Public Channels, Domestic Private Channels, Pan European and Other Foreign Channels, and Premium Pay TV Channels, the countries that are placed in the top in the category of Domestic Public Channels, Spain (with 22 channels) followed by Germany and Poland (with 17 channels) each. Lowest numbers of Domestic Public Channels have the countries of Estonia, Luxembourg, Ukraine and Iceland, with one channel each.

Concerning the share of Pan European and Other Foreign Channels, Iceland is at the top (84 percent of the total number of channels), followed by Luxembourg (79 percent of the total number of channels). In contrast, Croatia, Czech Republic, Greece, Serbia, Slovenia, Turkey and Hungary have the lowest proportion of foreign channels.

For the private television market and the proportion of Domestic Private Channels, Hungary is in the top with 89 percent of the total number of channels. France holds second place with 78 percent, and as number three we find Turkey, with 74 percent. Turkey is an interesting example of how the range of channels increased alongside a state monopoly. The first Turkish radio and television broadcaster *TRT* was started by the Turkish state in the mid-1960s and held the broadcasting monopoly in almost two decades. Then, when the first private television channel *STAR 1* started broadcasting via satellite from Germany in 1990, this contributed to a significant increase in private channels, which in turn meant that the Turkish state broadcasting monopoly dismantled in mid-1990s.

The example of Turkey shows an interesting dimension of the relationship between the relationship between the share for public-service and state-owned television channels in relation to the share of commercial channels. A country with relatively weak public service can be expected to offset this with a relatively high number of commercial TV channels and vice versa. Based on Figure 3, this is most evident among the countries where public-service is strong and the share of commercial television channels is relatively low.

**Figure 3 Public-service and Commercial Television Channels Audience Shares (percent)**



$R^2 = .33$

**Note:** The following countries are not included in the figure due lack of data: Albania, Andorra, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Liechtenstein, Malta and Moldova.  $R^2$  shows that 33 percent of the variation in the proportion of Commercial TV channels can be explained by variations in the strength of Public Service television.

**Source:** IP International Key Facts 2007

Based on the public-service dimension, Denmark (70 percent) and Ukraine (0 percent) are opposed to each other in the same way as Britain (36 percent) and Italy (0 percent) are on the basis of the proportion of commercial television channels. Denmark has a low share of commercial channels and a strong public-service tradition. The lack of access to frequencies in the terrestrial network strongly contributed to the privileged position of two public service broadcasters, *DR* and *TV2*. Since 2009, however, the digitalization of the Danish TV network has changed the situation considerably.

Italy, like Denmark, has a low share of commercial television channels, whereas the share and the strength of public-service television, on the contrary, is significantly weaker. In Italy, the Italian television audience is in the situation to choose between eight free national and approximately 800 local television channels. At the same time the broadcasters *RAI* and *Mediaset* control about 85 percent of the Italian television market, a fact something that also has implications for the audience share of the public-service

channels. Interacting cases are Ukraine and Turkey, with a weak public-service television but relatively few commercial television channels.

Of the countries where statistics are available, the state-owned television channels have an audience share of 71 percent in Belarus, compared with, for example, Russia where the state or publicly owned television channels and television companies together represent 54 percent of the audience share. The largest Russian national channel is public service channel *ORT*, which reaches 98 percent of the Russian people (approximately 140 million viewers). The television channel *Russia* is the second largest with an audience reach of 98.5 percent (and approximately 50 million viewers). The weakest position of the public-service channels is found in Luxembourg and Ukraine (1.3 and 3.0 percent respectively).

To summarize, the European television market is a far more complex media market than the European newspaper market in the sense that countries' range of channels tend to overlap and reach beyond country borders more widely than for example the case of the European newspapers. This contributes to difficulties when, for example, defining a specific country's choice of channels.

As mentioned initially, the public-service model is very important for how the country-specific range of channels looks like. Apart from the Polish, French and German television channels, the countries of Europe remains relatively divided in amount of television channels, which include structural factors such as the possibility of establishment, broadcasting, access to broadcast frequencies and with digitalization play an important and decisive role in the number of channels included in national television range.

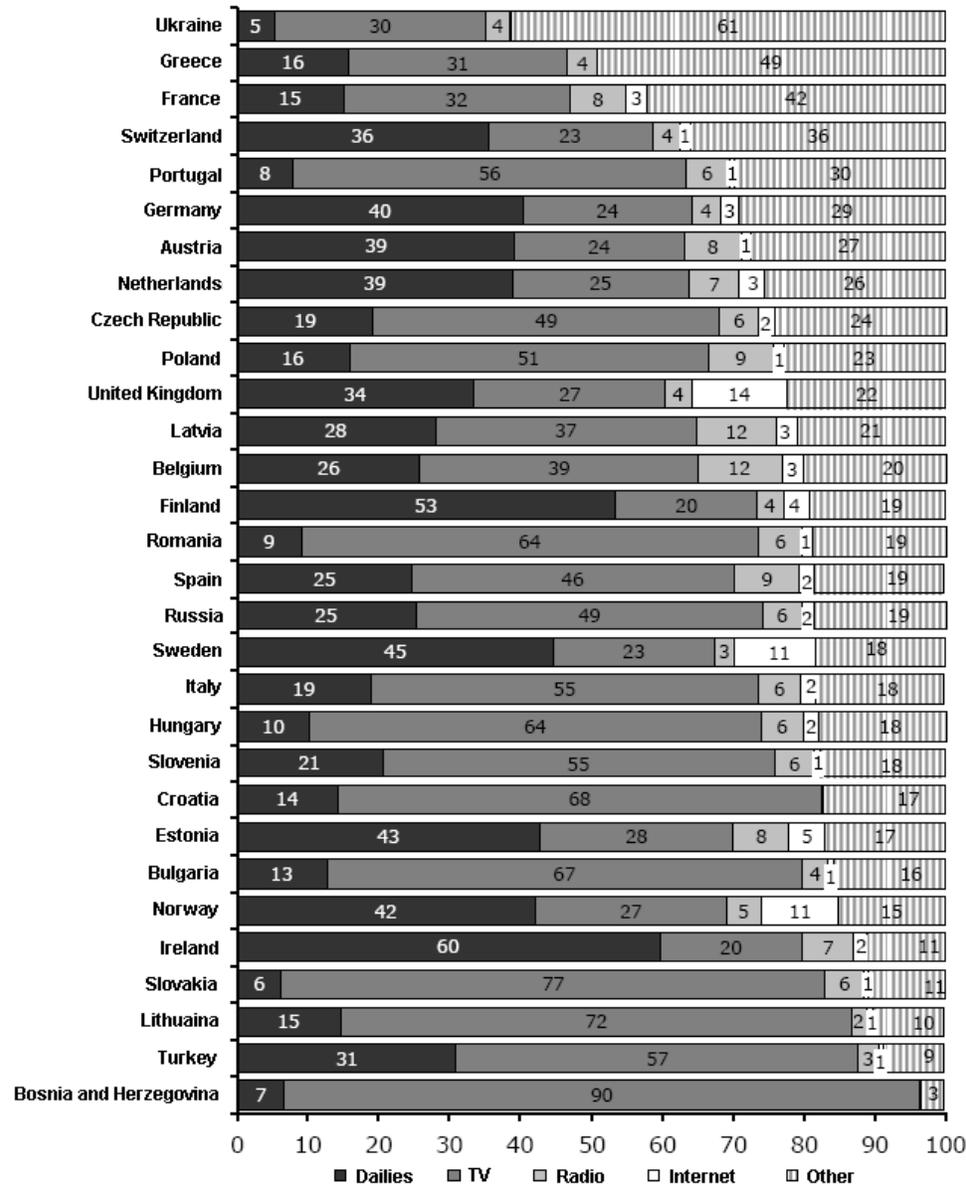
#### **4.4 The Advertising Market**

When we want to measure and compare the effectiveness of specific media, the advertising market is probably the indicator that best measures the strength of specific media in a country. It is likely, for example, to expect that media that have a large share of the advertising market also reach out to a large audience, and vice versa. Figure 4 shows the specific media's share of total advertising market in each country. The category 'Other' consists of advertising shares in magazine, cinema and outdoor advertising.

If we start by looking at the countries where advertising in newspapers represent the largest proportion of the total advertising market, Ireland is in the very top (see Table A9a on page 45). The advertising in newspapers represents 60 percent of the Irish advertising market. Also in Finland are newspapers strong in the advertising market (53 percent). If we then look at the countries where the press has a small percentage of the total advertising market, the newspapers advertising share is lowest in Ukraine (5 percent), closely followed by Slovakia (6 percent), Bosnia and Herzegovina (7 percent), Portugal (8 percent) as well as Romania and Hungary (9 and 10 per cent).

In Bosnia and Herzegovina, it is instead the advertising on television that dominates, and it has risen from 65 percent in 2002 to 90 percent of the total advertising market in 2006. This can be compared with Ukraine, where the advertising share of television has fallen by 23 percentage points over the same period (see Table A9b on page 46). Countries where the share of television advertising is lowest is Finland, Ireland and Denmark (20 percent each), Sweden and Switzerland (23 percent) and Germany and Austria (24 percent).

**Figure 4 Advertising Market Shares of different Media (percent)**



**Note:** Data for Denmark does not add up to one hundred percent and have therefore been excluded from the figure. 'Other' consists of advertising shares in magazine, cinema and outdoor advertising and has been merged into a single category.

**Source:** World Press Trends 2007.

For advertising on the Internet, United Kingdom is at the top (14 percent of the total advertising market), followed by Sweden and Norway (11 percent) (see Table A9d on page 48). This means that United Kingdom and Norway caught up with Sweden since 2002.

Ukraine is the only country where the development of Internet advertising in the advertising market, albeit very marginally, has declined since 2002 (-0.5 percent).

Another phenomenon that is interesting to note is that the 'Other' category represents as much as half of the total advertising market in both Ukraine and Greece (61 and 49 percent), and that all media but outdoor advertising had a negative development on the Ukrainian advertising market, if we compare with the statistics from 2002.

To summarize the comparisons we have made, we see trends where the shares of advertising on the Internet is highest among the Western European countries, while the share of television advertising is the largest among the Eastern European and some individual countries of Southern Europe.

## **5. Media Consumption**

In the previous section we compared the media structure in different European countries. We also compared the strength of different media and came to the conclusion that the press is strongest in the North and the Western European countries, while television has the greatest impact in former communist countries, and in some individual countries of Southern Europe. However, the strength of different media is also based on the extent to which the audience actually takes part of it - the public's consumption (exposure), the media consumption in different countries is studied in this section, starting with the consumption of newspapers.

### **5.1 Newspapers**

One of the biggest differences between countries' media systems is linked to the development of mass-distributed newspapers. In some countries, the daily press was established and developed in the late 1800s, in others it was not. Hallin and Mancini show that these historical differences are reflected by large current differences in newspaper circulation. To compare media consumption, I have chosen to compare the figures on each country's average newspapers circulation per 1,000 adults.

For European countries, the differences in the newspaper circulation are relatively large. In Figure 5, there is, albeit with some exceptions, a fairly clear dividing line between Northern, Southern European and former communist countries in the Eastern Europe. At the top we find Liechtenstein, Norway, Finland and Sweden and in the bottom, we find Georgia, Armenia, Serbia and Albania. If we compare the figures in Figure 5 with those

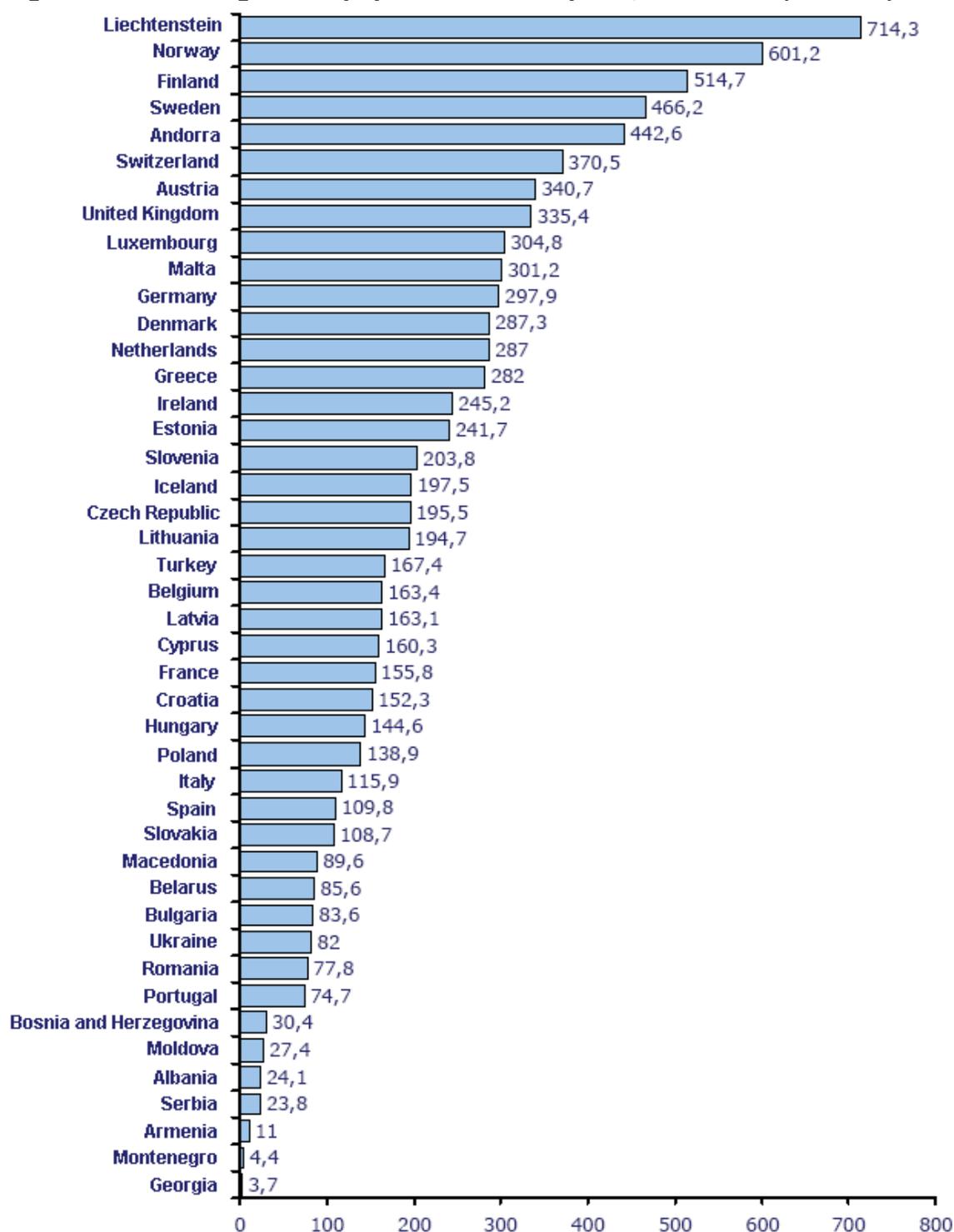
of earlier years, we can see that the average newspaper circulation is relatively stable (see Table A1 on page 35).

Spain has had the most positive development of the newspaper circulation since 2002 with an increase of approximately 373 newspapers or approximately 3.7 million copies. Other countries that also had a positive trend are Ukraine (about 351 newspapers), Poland (about 187 newspapers), Turkey (about 180 newspapers) and Russia (about 114 newspapers). Among the countries that had a negative development for the newspaper circulation, Germany has experienced the biggest decline (about -201 newspapers or approximately 2 million copies) and United Kingdom is marked with the second largest reduction (about -74 newspapers). The general trend of newspaper circulation since 2002 and for Europe as a whole is that the development of the Western European countries is negative, while the circulation in Southern and Eastern Europe is increasing, which can be traced to the establishment of free newspapers.

The conditions for a newspaper expansion have differed greatly between different countries, and this has meant that the newspaper market has developed differently in different parts of Europe. One country that had a relatively widespread daily press early was, for example United Kingdom. In other countries, such as the Scandinavian, the expansion came later but was nevertheless very strong. In Southern Europe, the newspapers never reached mass-distribution, except in certain limited regions, partly because of lower degrees of urbanization.

Something that is important to emphasize is that the differences here outlined also tell us something about the perception of newspapers, the relationship with the audience and the newspaper's role in the social and political communication process in different countries. In Southern Europe for example, newspapers are addressed and read primarily by a small clearly defined well-educated, urbanized and politically active elite. In the Nordic countries, on the contrary, newspapers are intended for a wide audience, not necessarily interested or involved in the political life. There are also obvious historical differences. Newspapers in the former communist countries have been subsidized and supported by political actors and do not have a history of being for-profit companies, while the Northern European countries have a strong tradition of newspapers as businesses run for profit.

**Figure 5 Average Newspaper Circulation per 1,000 Adults (number)**

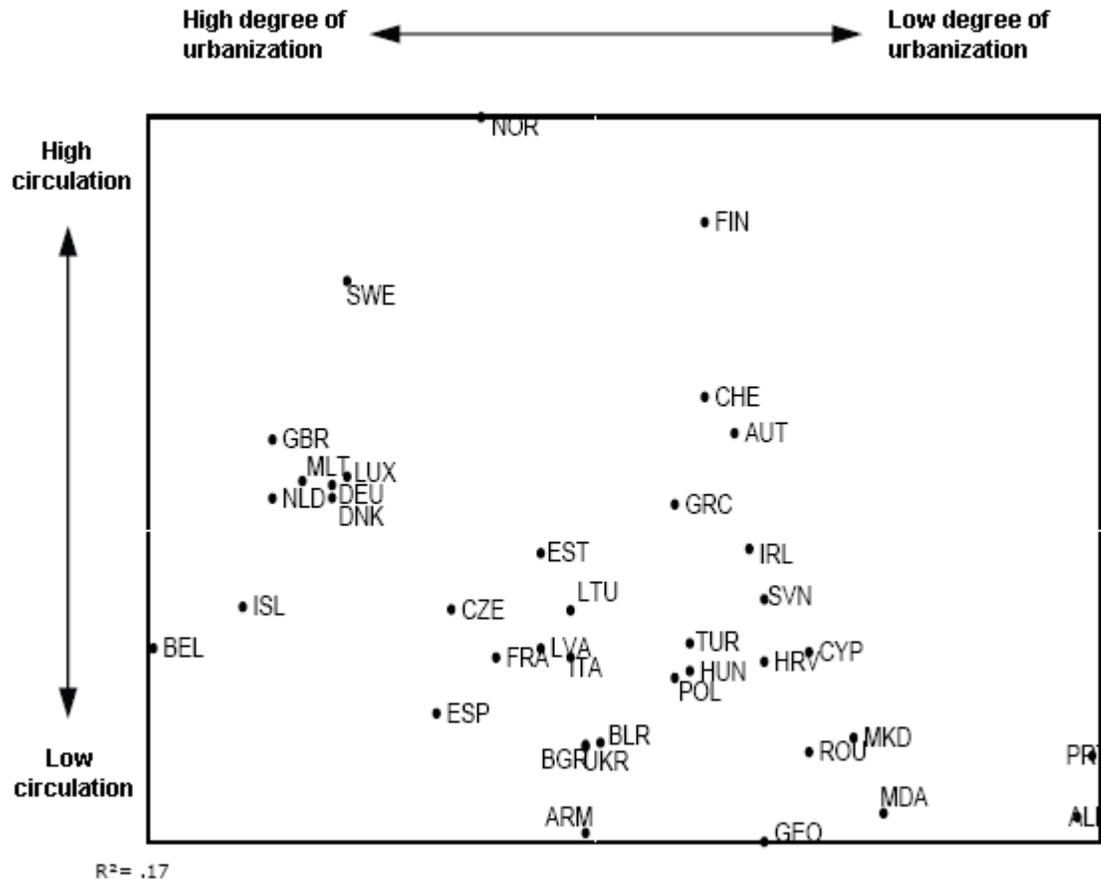


**Note:** The definition of adulthood is, for most countries is 15 years of age, 14 years for Spain, 16 years for Croatia, Georgia, Lithuania and Macedonia, and 18 years for Greece, Italy and Portugal.

**Source:** World Press Trends 2007.

If we compare countries based on the average newspaper circulation per 1,000 adults and degree of urbanization, there are differences in the circulation that can be linked back to how the newspaper market has developed, but no clear and general pattern can be identified based on the urbanization dimension (see Table A3 on page 38).

**Figure 6 Newspapers Circulation and Urban Population (percent)**



**Note:** The following countries are not included in the figure due lack of data: Andorra, Azerbaijan, Bosnia and Herzegovina, Liechtenstein, Serbia and Slovakia.  $R^2$  shows that 17 percent of the variation in the daily newspapers circulation can be explained by variations in the degree of urbanization.

**Source:** World Press Trends 2007 and The Quality of Government Institute 2007.

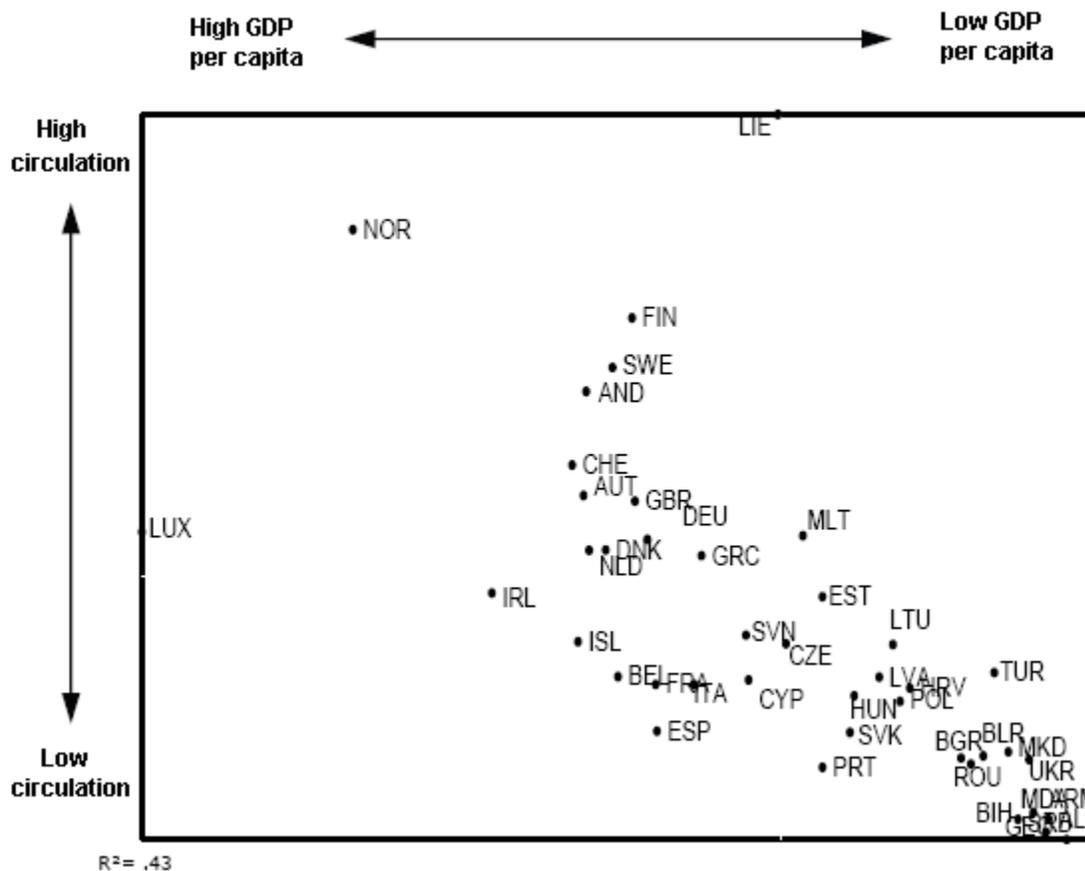
Belgium has the highest degree of urbanization but is relatively low in terms of average circulation (163.4 copies per 1,000 adults). The same goes for Iceland, with an urbanization rate of 91 percent and an average of 197.5 copies per 1,000 adults. Portugal and Albania have the lowest degrees of urbanization, where about two-thirds of the total population lives in rural areas.

The next thing to do is to ask whether the newspaper markets consist of national or regional/local newspapers. The Belgian newspaper market is well balanced with the share of local newspapers roughly as big as that of national newspapers. On the Icelandic

market, on the other hand, there are only a few large national newspapers, while for example the Swedish and the British newspaper markets consist of a few large national and numerous regional/local newspapers (see Table A5 on page 40).

Another factor affecting the public's consumption and average newspaper circulation is the national economy. The measure used here is GDP per capita by purchasing power parity (PPP) and shows the total value of a country's total consumption of products and services, the value of gross investment and the value of exports minus imports divided by the country's total population. PPP also takes more factors into account than the exchange rate, such as inflation and cost of living (see Table A9a on page 45). One can, for example, imagine that the newspaper circulation is higher in a country with high GDP per capita and lower in a country with low per capita GDP. On the other hand, factors like population, the total number of newspapers and whether the newspaper market consists of many small or a few major actors plays a key determinant of how large the newspaper circulation eventually becomes.

**Figure 7 Newspapers Circulation and GDP per capita (PPP)**



**Note:** The following countries are not included in the figure due lack of data: Azerbaijan and Russia.  $R^2$  shows that 43 percent of the variation in the daily press circulation can be explained by variations in GDP per capita.

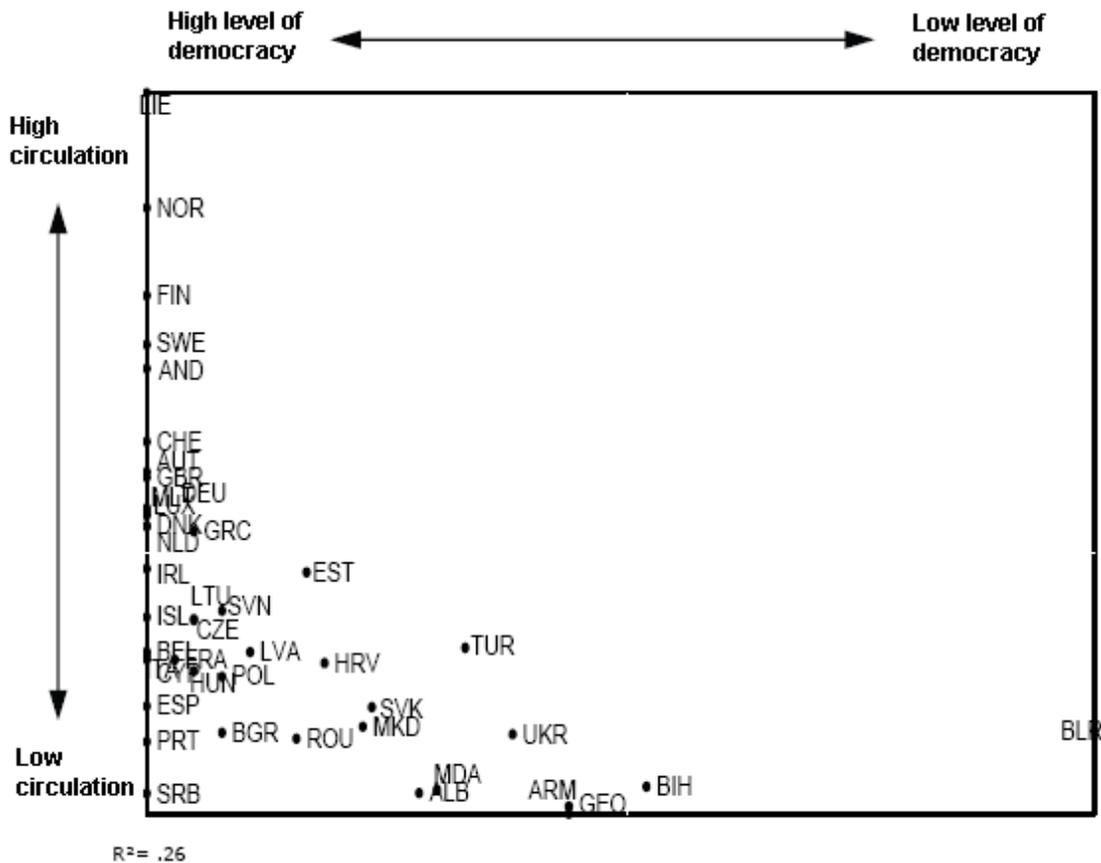
**Source:** World Press Trends 2007, World Development Indicators 2007.

In Figure 7 we can see that the relationship between newspaper circulation and GDP per capita vary. Luxembourg for example, has a relatively small average newspaper circulation in relation to its economy, partly because of a very small population (approximately 34,000 inhabitants) and partly because of a newspaper market that consists of only a few actors. Norway is marked by economic prosperity and a “high” newspaper circulation. The Norwegian newspaper market consists of 77 newspapers (8 national and 69 regional/local) and the figures are roughly the same for neighboring countries such as Sweden and Finland. In 2008, the Swedish newspaper market consisted of 91 daily newspapers distributed on four national, 81 regional/local, and six free newspapers. The Finnish newspaper market consisted in the same year of 55 newspapers distributed among nine national, 44 regional/local and two free newspapers. If we look at the countries that differ from this pattern, we can see that, for example Ireland, with a high GDP per capita has a relatively low newspaper circulation and a newspaper market that consists of twelve newspapers (distributed in eight national, one regional/local and three free newspapers). Also Iceland has had a high GDP per capita, and despite this a relatively low number of newspapers (3 pieces).

Another factor affecting the number of actors in the newspaper market is the degree of democracy and opportunity to establish on the countries newspaper markets. The measure used comes from Freedom House and is an index based on the freedom of opinion and assembly, as well as opportunities to participate in the political process (vote, compete in elections, to join political parties and organizations). The scale ranges from 0-10 where 0 is least democratic and 10 most democratic.

What is perhaps most clearly in Figure 8 is that the variation in the degree of democracy, as expected, is relatively low among European countries, but at the same time, there are some variations. Andorra, Austria, Belgium, Cyprus, Denmark, Finland, Germany, Iceland, Ireland, Italy, Liechtenstein, Luxembourg, Malta, Netherlands, Norway, Portugal, Switzerland, Slovenia, Spain, and Sweden has value 10.0 on the democracy scale, and are considered well-established democracies. But Europe also includes countries like Belarus and Azerbaijan, who is placed far down on the democracy scale (1.58 and 2.0), with a relatively large gap to the third lowest country Bosnia and Herzegovina with a democracy level of 5.56. The established democracies cover the whole range from small to large newspapers circulation; as we have seen previously, in many cases, the circulation degree depends on other factors than the degree of democracy. At the same time, we can see that there are some less established democracies, regardless of size, etc., that stand out in having high newspapers circulation, which nonetheless suggest that the country's democracy level has relevance in some specific cases.

**Figure 8 Newspapers Circulation and Level of Democracy**



**Note:** The measure used comes from Freedom House and is an index that shows the freedom of opinion and assembly, as well as opportunities to participate in the political process (vote, compete in elections, to join political parties and organizations), the scale ranges from 0-10 where 0 is least democratic and 10 most democratic. The following countries are not included in the figure due lack of data: Azerbaijan and Russia. R<sup>2</sup> shows that 26 percent of the variation in the daily newspapers circulation can be explained by variations in the degree of democracy.

**Source:** World Press Trends 2007 and the Freedom House/Imputed Polity 2004.

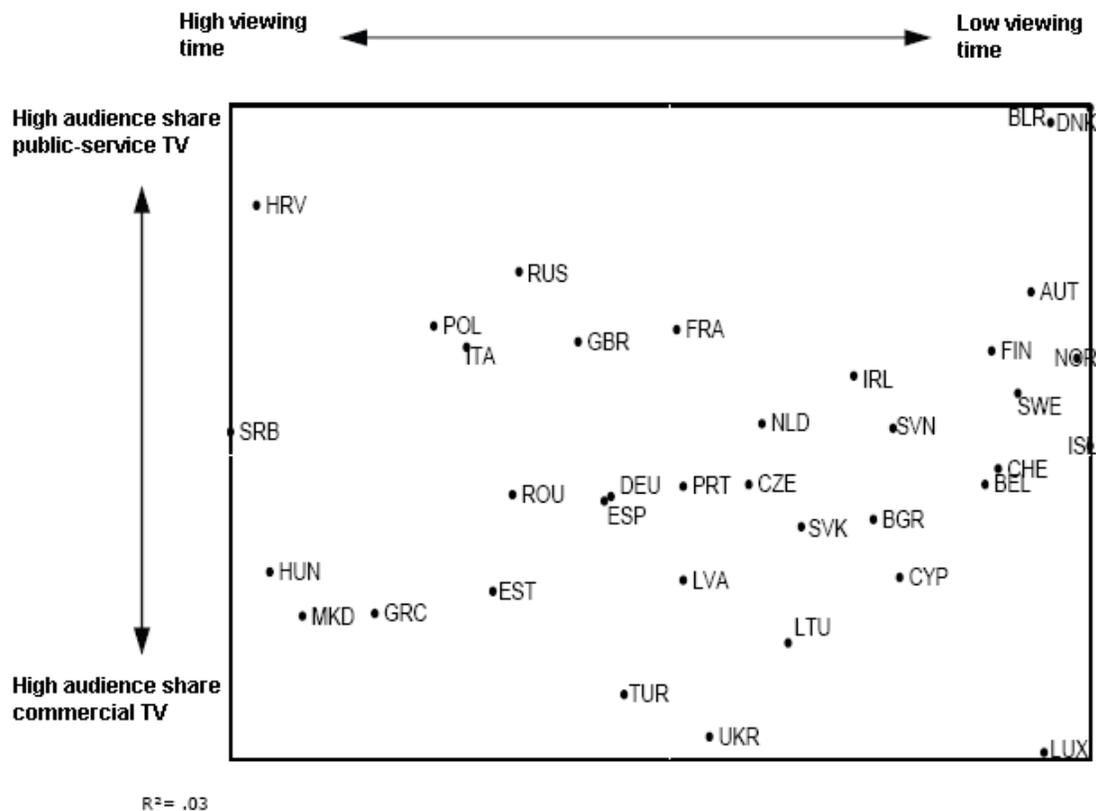
## 5.2 Television

In the case of television we can see that the consumption of television has spread widely over all the European countries (see Table A6A and A6b on page 41-42). In Cyprus, all households are counted as “TV households” with access to at least one television set. In Slovenia, the share of TV households is at 99.6 percent, and for Portugal and Spain it is at 99.5 percent. Slovakia has the lowest percentage of TV households with 84.8 percent of all households, followed by Germany (86.6 percent), Greece (90.2 percent), Ukraine (90.7 percent) and Finland (91.4 percent).

If we then compare the time individuals spend in front of their television sets, Serbia is located at the top with a viewing time at 285 minutes per day, while the people in Belarus and Iceland, which has the lowest consumption in terms of minutes per day; just spend 154 minutes in front of the television per day.

How are countries positioned relative to one another if we compare the average viewing time per individual per day in relation to the audience share for public-service television? In Figure 9 we can see that the two countries, that are highest in audience shares for the public-service or state/publicly owned television also are the countries that have relatively short individual viewing time (in minutes) per day. Belarus and Denmark have the highest audience shares for public-service and state/publicly owned television but relatively low viewing time, something that also applies for the neighboring Nordic countries.

**Figure 9** *Viewing Time per Individual mon-sun (minutes) and Audience Shares for Public Service and Commercial Television (percent)*



**Note:** Data for audience shares are from 2004. The following countries are not included in the figure due lack of data: Albania, Andorra, Armenia, Azerbaijan, Bosnia and Herzegovina, Georgia, Liechtenstein, Malta and Moldova.  $R^2$  shows that 3 percent of the variation in viewing time can be explained by variations in audience share for public service television.

**Source:** IP International Key Facts 2007.

Finland, Norway, Sweden and Iceland, together with Switzerland, Belgium and Luxembourg have relatively low viewing time per individual. If we instead look at countries with high levels of individual viewing per day, we see with the exception of Croatia and Serbia, that they also have high audience shares for the commercial television. In Hungary, the average Hungarian spends 279 minutes watching television per day, 274 minutes in Macedonia, and Greece 263 minutes per individual and day.

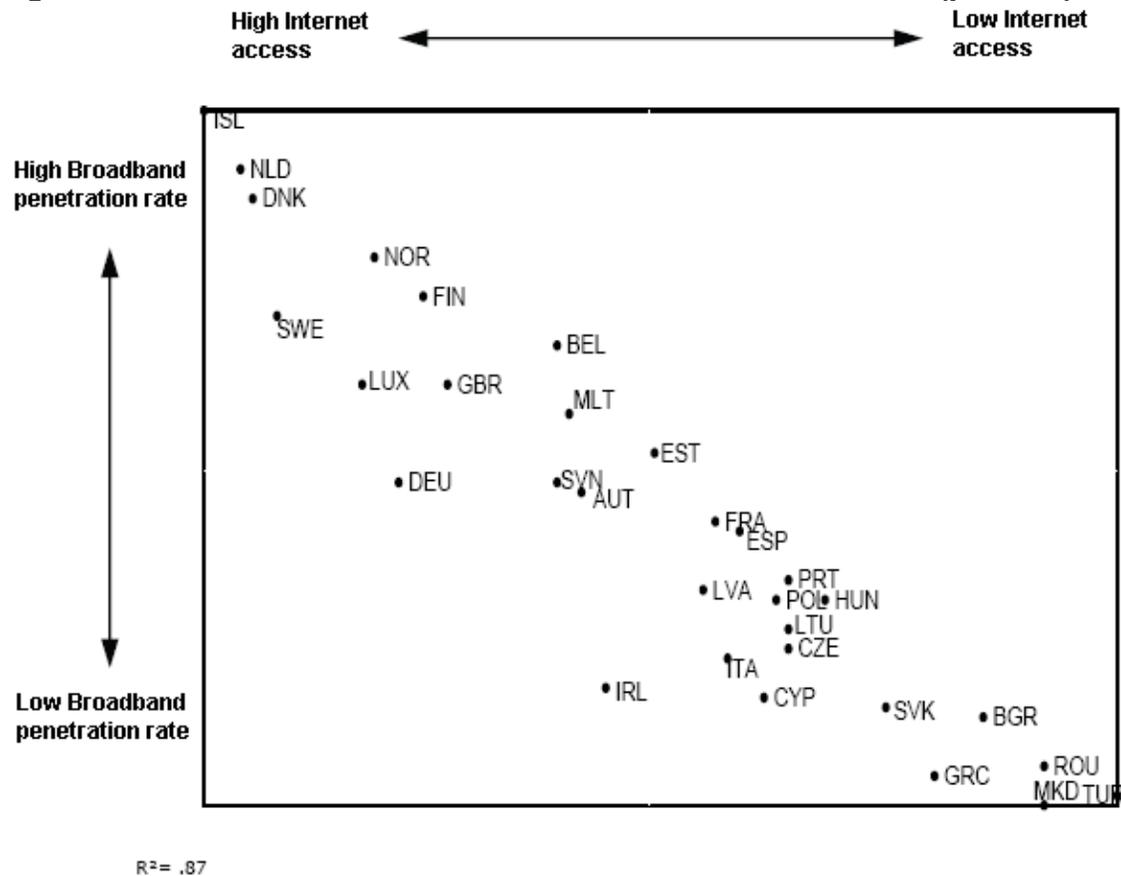
### 5.3 Internet

In addition to traditional media, I have also chosen to complete the picture of the European media systems with new media, in this case the Internet and the development of and access to broadband. Internet use and, broadband access tell us something about to what extent different information is available for the audience, but also on the development and interaction between traditional media and new technologies, as well as the diversity and range - the access the European citizens, in practice, have to various and alternative information and news sources.

We have previously discussed what the different dimensions actually measure and that the fact that the majority of the citizens of a country have no access to the Internet at home not necessarily means that they have no access to the Internet at all. At the same time, the access to a computer and the Internet at home means that the exposure becomes more frequent and that the media supply is increased, both in terms of news and information. It is also much more difficult for authoritarian and totalitarian states to control and manage the information that citizens receive, whereas it requires some technological conditions for the citizens to be able to take advantage of the increased flow of information offered via the Internet.

Figure 10 shows very clearly, and perhaps not very surprisingly, that access to the Internet and the broadband penetration rate are closely interrelated. Among the countries where a large proportion of the population has access to the Internet, the proportion of households with access to broadband is also relatively high. In Iceland, approximately 91 percent of households have access to a computer of some kind. 83 percent of the Icelandic people have access to Internet, and 72 percent of Icelandic households have broadband access (see Table A7 on page 43). It is also Iceland that has the highest percentage of the population who regularly use the Internet. The Netherlands ranks second in terms of access to the Internet and broadband penetration rate, but is lower in terms of access to computers than, for example, Sweden and Denmark (the Netherlands 72 percent, Denmark 84 percent). This is also the case with regard to the share of individuals who regularly use the Internet (the Netherlands 76 percent, Sweden 78 per cent).

**Figure 10 Internet Access and Broadband Penetration Rate (percent)**



**Note:** The share of households with access to Internet is based on all citizens between 16-74 year of age and the share of households with access to broadband include households with at least one person aged 16-74 years. The following countries are not included in the figure due lack of data: Albania, Andorra, Armenia, Azerbaijan, Belarus, Bosnia and Herzegovina, Croatia, Georgia, Liechtenstein, Moldova, Russia, Serbia, Switzerland and Ukraine.  $R^2$  shows that 87 percent of the variation in access to broadband could be explained by variations in access to Internet.

**Source:** Eurostat 2007.

Norway is a country where access to a computer is higher than, for example, Sweden and Denmark (85 percent), but where Internet access is lower (69 percent in Norway and 77 percent in Sweden). Sweden is high, both in terms of access to computers, Internet access and regular Internet usage in comparison with its Nordic neighbors, but lower with regard to access to broadband (51 percent). Nevertheless it should be noted that there are only six European countries where over half of the households have Internet access via broadband, and only 14 countries where over half of the households have Internet access at all, the majority of countries are marked by figures that are significantly lower.

If we look at countries with low Internet and broadband access, it would have been really exciting if there were reliable data for countries such as Azerbaijan, Belarus, Bosnia and Herzegovina, Georgia, Croatia, Moldova, Russia, Serbia and Ukraine, to see if they end up high or low in relation/when compared with the other countries. Instead, we can note that Turkey is the lowest of all countries, in terms of access to the Internet, and the second lowest with regard to the share of households with broadband access (in

Macedonia, one percent of all households have access to broadband). In Turkey, about 23 percent of the households have access to a computer of some kind. Eight percent of the Turkish population has access to the Internet, two percent of the Turkish households have access to broadband and 12 percent of the population uses the Internet regularly.

If we instead take a look at other forms of access to Internet it is still Turkey together with Bulgaria that are marked by lowest figures of access. Germany and Ireland where about 35 percent of Internet use is via telephone modem/ISDN are in the top, followed by Sweden and Luxembourg (25 percent each).

There are large differences between the European countries, both in terms of access to the Internet in general and more specifically with regard to broadband. It is likely that these differences are, due to factors such as urbanization, infrastructure and whether economic development is positive or negative. Perhaps it is somewhat surprisingly, France and Germany have not progressed very far in access to the Internet and broadband.

## **6. Media Systems in Europe**

Based on the four ideal models that Hallin and Mancini identified on the relationship between media systems and political systems, the comparisons between the European countries based on dimensions of structure, access and consumption, show that the patterns Hallin and Mancini argue as typical for the four ideal models, albeit with some exceptions, are actually confirmed. This is most clearly reflected when we compare countries based on media structure and newspapers markets, but it is also noticeable when we study and compare patterns of use and consumption. Although we can see that there are relatively large variations between countries in the ideal models and the factors studied, even if these tend to be smaller. The differences that can be identified with regard to newspaper reading derive from historical differences. But at the same time, we can see a clear tendency for those countries that did not develop mass-distributed newspapers in the late 1800's to catch up with those that did, and this regardless of whether the levels of literacy, political and economic development are the same as for countries with large newspapers circulation.

Background and history, for example in the development of newspapers and television, can not change, but it is clear that its meaning evolve to become less and less important. This lack of importance is due both to increasing internationalization of ownership and ownership structures, and the fact that democracy is becoming more established and widespread.

Another reason for the differences between European countries media systems is decreasing, and further, that the variation between countries in the different ideal models are becoming less clear is that democracy is becoming more established and widespread among the European countries in general, if as yet in varying degree and scale. If we for example look at the countries within each ideal model one can see by far the largest variation between countries within the The Post-Communist Media Model. Although,

there are examples of former communist countries, that have passed the South European countries, and in some cases even their Western European neighbors. This is most clearly defined over time and primarily among former Communist countries and countries in the Polarized Pluralist Media Model.

If we compare the former communist countries and the countries belonging to the Polarized Pluralist Media Model, we can see examples of several countries that quite easily could change places. Italy and France, for example, has significantly lower number of newspapers per 1 million inhabitants than Albania, Azerbaijan, Russia, Armenia and Georgia. Another example is the share of Internet advertising of the total advertising market, in which Greece and Ukraine follow approximately the same trend. Another example is when we compare the two ideal models based on the average newspaper circulation per 1,000 adults, where both Russia and Ukraine reach higher than, for example Portugal.

I am not arguing that my examples above provide evidence that countries consistently could switch between the ideal models presented by Hallin and Mancini, but rather that the limits and criteria for which countries are placed into each ideal model in some respects is diffuse. Due to an active striving towards a single European media system still formed, the overall variations within Europe is altogether likely to decrease – and this is holds true if comparisons are made between as well as within the ideal models.

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## Appendix I - Countries and the Access to Data

ccodealp	ccode	Country	Dailies	TV	Internet
ALB	8	Albania	x	no data	no data
AND	20	Andorra	x	no data	no data
ARM	51	Armenia	x	no data	no data
AZE	31	Azerbaijan	x	no data	no data
AUT	40	Austria	x	x	x
BLR	112	Belarus	x	x	no data
BEL	56	Belgium	x	x	x
BIH	70	Bosnia and Herzegovina	x	no data	x
BGR	100	Bulgaria	x	x	x
HRV	191	Croatia	x	x	no data
CZE	203	Czech Republic	x	x	x
CYP	196	Cyprus	x	x	x
DNK	208	Denmark	x	x	x
EST	233	Estonia	x	x	x
FIN	246	Finland	x	x	x
FRA	250	France	x	x	x
GEO	268	Georgia	x	no data	no data
DEU	276	Germany	x	x	x
GRC	300	Greece	x	x	x
HUN	348	Hungary	x	x	x
IRL	372	Ireland	x	x	x
ISL	352	Iceland	x	x	x
ITA	380	Italy <sup>1</sup>	x	x	x
KAZ	891	Kazakistan	few data	no data	no data
LVA	428	Latvia	x	x	x
LIE	438	Liechtenstein	x	no data	no data
LTU	440	Lithuania	x	x	x
LUX	442	Luxembourg	x	x	x
MKD	807	Macedonia	x	x	x
MLT	470	Malta	x	x	x
MDA	498	Moldavia	x	no data	no data
MCO	492	Monaco	few data	no data	no data
MRO	891	Montenegro	few data	no data	no data
NLD	528	Netherlands	x	x	x
NOR	578	Norway	x	x	x
POL	616	Poland	x	x	x
PRT	620	Portugal	x	x	x
ROU	642	Romania	x	x	x
RUS	643	Russia	x	x	no data
SMR	674	San Marino	few data	no data	no data
CHE	756	Switzerland	x	x	no data
SRB	891	Serbia <sup>2</sup>	x	x	no data
SVK	703	Slovakia	x	x	x
SVN	705	Slovenia	x	x	x
ESP	724	Spain	x	x	x
SWE	752	Sweden	x	x	x
TUR	792	Turkey	x	x	x
UKR	804	Ukraine	x	x	no data
GBR	826	United Kingdom	x	x	x

**Note:** <sup>1</sup> The Vatican is included in the statistics for Italy and <sup>2</sup> Kosovo is counted as part of Serbia for all the data from the World Press Trends, otherwise they are not included in the analysis.

Appendix II – Tables and Figures

**Table A1 Total Number of Newspapers and Total Newspaper Circulation in 2002 and 2006, and Number of Newspapers per one million Inhabitants in 2006**

Country	Number of Papers			Circulation (thousands)			Number of papers per 1 million inhabitants en miljon invånare 2006
	2002	2006	Diff	2002	2006	Diff	
Albania	18	28	+10	76*	65	-11	7,8
Andorra	2	3	+1	30	32	+2	42,3
Armenia	12	8	-4	27	28	+1	2,5
Azerbaijan	22	35*	+13	131	131	0	4,4
Belgium	29	29	0	1651	1650	-1	2,8
Bosnia and Herzegovina	7*	7	0	90*	100	+10	1,7
Bulgaria	59	60	+1	853	558**	-295	7,8
Cyprus	18	21	+3	90	100	+10	26,8
Denmark	33	42	+9	1806	3381	+1575	8,2
Estonia	12	13	+1	255	334	+79	9,7
Finland	56	55	-1	2442	2424	-18	10,5
France	88	93	+5	9087	9302	+215	1,9
Georgia	10	10	0	24	24	0	2,3
Greece	39	42	+3	1380	1491	+111	6,6
Ireland	6	12	+6	591	965	+374	2,9
Iceland	3	3	0	162	250	+88	9,7
Italy	96	101	+5	7836	10319	+2483	2,0
Croatia	12	16	+4	597	747	+150	3,6
Latvia	24	22	-2	387	424	+37	9,6
Liechtenstein	2	2	0	18	20	+2	58,8
Lithuania	354**	325	-29	-	636	-	93,3
Luxembourg	6	6	0	118	114	-4	13,1
Macedonia	7	13	+6	130	200	+70	6,4
Malta	4	4	0	80	100	+20	10,0
Moldavia	4	7	+3	60	98	+38	1,6
Netherlands	38	32	-6	5062	4769	-293	2,0
Norway	81	77	-4	2524	2270	-254	16,4
Poland	47	47	0	3869	5743	+1874	1,2
Portugal	14	18	+4	551	947	+396	2,2
Romania	24	64	+40	-	1576	-	3,0
Russia	436	552	+116	-	1135	-	3,1
Switzerland	102	98	-4	3364	3510	+146	13,1
Serbia	13**	11	-2	-	150	-	1,5
Slovakia	19	11	-8	512	465	-47	2,0
Slovenia	6	8	+2	344	350	+6	4,0
Spain	136	178	+42	5340	9072	+3732	4,1
United Kingdom	107	116	+9	19186	18444	-742	2,4
Sweden	93	91	-2	4251	4721	+470	10,0
Czech Republic	74	90	+16	1890	2799	+909	8,8
Turkey	55	81	+26	3306	5143	+1837	2,6
Germany	374	374	0	23267	21254	-2013	4,5
Ukraine	76*	41	-35	-	3511	+3511	0,9
Hungary	30	31	+1	1917	1775	-142	2,7
Belarus	14	15	+1	1328	1335	+7	1,5
Austria	17	22	+5	2287	3014	+727	2,7
<i>Total</i>	<i>2595</i>	<i>2923</i>	<i>+235</i>	<i>106919</i>	<i>125531</i>	<i>+18612</i>	<i>12,6</i>

Note: \* Data are from 2003 \*\* Data are from 2005.

Source: World Press Trends 2007.

**Figure A1** *Distribution between Paid-for and Free Newspapers (percent)*



Source: Free Daily Newspapers (FDN), Newsletter No. 39, October 2008.

**Table A2 Newspaper Circulation per 1,000 adults and Newspaper Reach by Sex and in Total for each Country, 2006 (percent)**

Country	Newspaper circulation per 1000 inhab.	Men	Women	Men/ Women	Total
Albania	24,1	-	-	-	-
Andorra	442,6	-	-	-	-
Armenia	11,0	-	-	-	14,0
Azerbaijan	-	-	-	-	-
Belgium	163,4	56,1	47,5	1,18	51,7
Bosnia and Herzegovina	30,4	-	-	-	-
Bulgaria	83,6	42,0	36,0	1,17	39,0
Cyprus	160,3	-	-	-	-
Denmark	287,3	84,3	80,8	1,04	82,5
Estonia	241,7	65,3	69,9	0,93	68,5
Finland	514,7	83,0	80,0	1,04	82,0
France	155,8	47,9	39,5	1,21	43,5
Georgia	3,7	-	-	-	-
Greece	282,0	15,9	10,2	1,56	3,0
Ireland	245,2	57,2	50,3	1,14	53,7
Iceland	197,5	-	-	-	96,0
Italy	155,9	53,2	31,2	1,71	41,8
Croatia	152,3	54,0*	46,0*	1,17	86,0
Latvia	163,1	65,9	63,7	1,03	64,7
Liechtenstein	714,3	-	-	-	-
Lithuania	194,7	56,5	55,8	1,01	56,1
Luxembourg	304,8	68,5	64,9	1,06	66,7
Macedonia	89,6	14,0	10,0	1,4	24,0
Malta	301,2	-	-	-	-
Moldavia	27,4	-	-	-	-
Netherlands	287,0	73,9	71,1	1,04	72,5
Norway	601,2	83,0	84,0	0,99	83,0
Poland	138,9	69,4	61,0	1,14	65,7
Portugal	74,7	89,1	76,1	1,17	82,3
Romania	77,8	-	-	-	50,8
Russia	-	58,4	43,8	1,33	10,7
Switzerland	370,5	80,5	74,6	1,08	77,5
Serbia	23,8	41,7	29,1	1,43	35,3
Slovakia	108,7	65,0	45,0	1,44	60,0
Slovenia	203,8	54,6	48,6	1,12	51,6
Spain	109,8	50,9	33,1	1,54	41,8
United Kingdom	335,4	35,5	30,9	1,15	33,2
Sweden	466,2	84,0	84,0	1,00	84,0
Czech Republic	195,5	52,9	47,0	1,13	49,9
Turkey	167,4	44,7	21,8	2,05	33,3
Germany	297,9	75,7	71,9	1,05	73,7
Ukraine	82,0	31,7	28,7	1,10	30,1
Hungary	144,6	54,0	46,0	1,17	50,0
Belarus	85,6	-	-	-	-
Austria	340,7	74,7	70,9	1,05	72,7

**Note:** \* Data is from 2005.

**Source:** World Press Trends 2007.

**Table A3** *Population, Area, Urbanized Population, GDP, Number of Inhabitants per km<sup>2</sup> and Adults per km<sup>2</sup>, 2006*

Country	Population	Area (km <sup>2</sup> )	Urbanized population (%)	GDP (billion USD)	Number of Inhabitants per km <sup>2</sup>	Adults per km <sup>2</sup> (%)
Albania	3582	28748	35	11,20	125	75
Andorra	71	468	-		152	86
Armenia	3219	29800	68	9,27	108	80
Azerbaijan	7962	86600	53	31,07	92	74
Belgium	10511	30528	97	442,80	344	83
Bosnia and Herzegovina	4026	51129	-	14,20	79	81
Bulgaria	7719	110910	68	39,07	70	86
Cyprus	784	9250	53	20,51	85	79
Denmark	5128	43094	85	310,70	119	80
Estonia	1344	45226	71	21,20	30	83
Finland	5236	338145	60	244,90	15	87
France	49322	643427	74	2515,00	77	-
Georgia	4368	69700	56	9,55	63	79
Greece	6354	131940	62	356,30	48	92
Ireland	4114	70280	57	253,30	59	78
Iceland	308	103000	91	19,52	3	67
Italy	50769	301230	69	2068,00	169	95
Croatia	4437	56542	56	50,96	78	83
Latvia	2295	64589	71	27,00	36	83
Liechtenstein	34	160	-	36,33	213	82
Lithuania	3484	65200	69	28,57	53	79
Luxembourg	459	2586	84	47,65	177	82
Macedonia	2023	25333	50	7,44	80	78
Malta	400	316	87	6,45	1266	83
Moldavia	4467	33843	48	4,02	132	80
Netherlands	16334	41526	89	754,90	393	82
Norway	4682	323802	75	369,30	14	86
Poland	38161	312685	62	413,30	122	84
Portugal	8311	92391	34	219,50	90	96
Romania	21314	237500	53	158,50	90	83
Russia	140702	17075200	74	1286,00	8	-
Switzerland	7507	41290	60	413,90	182	84
Serbia	7435	77474	-	41,44	96	85
Slovakia	5378	48845	-	71,57	110	80
Slovenia	2001	20273	56	44,57	99	86
Spain	43345	504782	78	1415,00	86	86
United Kingdom	47875	244820	89	2756,00	196	-
Sweden	9113	449964	84	431,60	20	85
Czech Republic	10252	78866	77	168,10	130	85
Turkey	30719	780580	61	482,00	39	-
Germany	82438	357021	85	3259,00	231	86
Ukraine	48221	603700	68	131,20	80	84
Hungary	11697	93030	61	136,40	126	86
Belarus	9800	207600	67	38,72	47	83
Austria	8233	83870	58	366,70	98	84

**Note:** The definition of adulthood is, for most countries is 15 years of age, 14 years for Spain, 16 years for Croatia, Georgia, Lithuania and Macedonia, and 18 years for Greece, Italy and Portugal. \* Data are from 2007.

**Source:** World Press Trends 2007, The Quality of Government Institute, 2007, CIA World Factbook 2007.

**Table A4 Ethnic, Linguistic and Religious Fractionalization, and Literacy Rate, 2001**

Country	Ethnic Fractionalization	Linguistic Fractionalization	Religious Fractionalization	Literacy (%)
Albania	0,22	0,04	0,47	85
Andorra	0,71	0,68	0,23	-
Armenia	0,13	0,13	0,46	93
Azerbaijan	0,20	0,21	0,49	93
Belgium	0,56	0,54	0,21	99
Bosnia and Herzegovina	0,63	0,68	0,69	-
Bulgaria	0,40	0,30	0,60	93
Cyprus	0,09	0,40	0,40	87
Denmark	0,08	0,10	0,23	99
Estonia	0,51	0,49	0,50	96
Finland	0,13	0,14	0,25	99
France	0,10	0,12	0,40	99
Georgia	0,49	0,47	0,65	93
Greece	0,16	0,03	0,15	93
Ireland	0,12	0,03	0,15	99
Iceland	0,08	0,08	0,19	99
Italy	0,11	0,11	0,30	97
Croatia	0,37	0,08	0,44	93
Latvia	0,59	0,58	0,56	96
Liechtenstein	0,57	0,22	0,33	-
Lithuania	0,32	0,32	0,41	96
Luxembourg	0,53	0,64	0,09	99
Macedonia	0,50	0,50	0,59	90
Malta	0,04	0,09	0,12	87
Moldavia	0,55	0,55	0,56	95
Netherlands	0,11	0,51	0,72	99
Norway	0,06	0,07	0,20	99
Poland	0,12	0,05	0,17	96
Portugal	0,05	0,02	0,14	85
Romania	0,31	0,17	0,24	95
Russia	0,25	0,25	0,44	94
Switzerland	0,53	0,54	0,61	99
Serbia	0,57	-	-	-
Slovakia	0,25	0,26	0,57	-
Slovenia	0,22	0,22	0,29	93
Spain	0,42	0,41	0,45	97
United Kingdom	0,12	0,05	0,69	99
Sweden	0,06	0,20	0,23	99
Czech Republic	0,32	0,32	0,66	97
Turkey	0,32	0,22	0,00	81
Germany	0,17	0,16	0,66	99
Ukraine	0,47	0,47	0,62	95
Hungary	0,15	0,03	0,52	97
Belarus	0,32	0,47	0,61	95
Austria	0,11	0,15	0,41	99

**Note:** All data are from 2001. The variables show the probability that two randomly selected individuals from the same country belong to the same ethnic, linguistic or religious group. The higher the value the greater fractionalization.  
**Source:** World Press Trends 2007, The Quality of Government Institute 2007.

**Table A5 Newspaper Circulation, and Subscribed Edition share and National Newspapers share, 2002 and 2006 (percent)**

Country	Average circulation (1,000 copies)		Changes in circulat. since	Subscribed editions (%)		National newspapers (%)	
	2002	2006		2002	2006	2002	2006
Albania	76*	65	-11	100	100	-	-
Andorra	30**	32	+2	83	84	-	-
Armenia	27	28	+1	100	100	50,0	100
Azerbaijan	131***	-	-	-	-	-	-
Belgium	1651	1650	-1	89	86	41,4	34,5
Bosnia and Herzegovina	90	100	+10	100	100	-	-
Bulgaria	853	558	-295	100	100	47,5	43,3
Cyprus	90	100	+10	100	100	-	-
Denmark	1806	3381	+1575	79	38	27,3	21,4
Estonia	255	334	+79	100	83	50,0	46,2
Finland	2442	2424	-18	93	92	14,3	16,4
France	9087	9302	+215	90	83	27,3	25,8
Georgia	24	24	0	100	100	-	-
Greece	1380	1491	+111	94	84	97,4	92,9
Ireland	591	965	+374	100	83	100	66,7
Iceland	162	250	+88	47	19	66,7	33,3
Italy	7836	10319	+2483	74	54	21,9	19,8
Croatia	597	747	+150	100	75	58,3	50,0
Latvia	387	424	+37	100	76	66,7	59,1
Liechtenstein	18	20	+2	100	100	100	100
Lithuania	-	636	+636	-	84	-	3,4
Luxembourg	118	114	-4	100	100	100	100
Macedonia	130	200	+70	100	70	-	76,9
Malta	80	100	+20	100	100	100	100
Moldavia	60	98	+38	100	100	75,0	85,7
Netherlands	5062	4769	-293	85	80	23,7	31,3
Norway	2524	2270	-254	100	100	9,9	10,4
Poland	3869	5743	+1874	92	78	25,5	25,5
Portugal	551	947	+369	100	66	64,3	55,6
Romania	-	1576	+1576	-	88	41,7	28,1
Russia	-	1135	+1135	-	-	4,1	4,5
Switzerland	3364	3510	+146	77	67	0,0	0,0
Serbia	-	150	-	-	100	-	72,7
Slovakia	512	465	-47	100	100	52,6	72,7
Slovenia	344	350	+6	100	100	83,3	87,5
Spain	5340	9072	+3732	78	45	-	-
United Kingdom	19186	18444	-742	96	87	9,4	8,6
Sweden	4251	4721	+470	86	75	4,3	4,4
Czech Republic	1890	2799	+909	89	61	9,5	11,1
Turkey	3306	5143	+1837	100	100	60,0	65,4
Germany	23267	21254	-2013	100	99	2,7	2,7
Ukraine	-	3511	+3511	-	94	-	31,7
Hungary	1917	1775	-142	83	82	30,0	35,5
Belarus	1328	1335	+7	98	98	78,6	73,3
Austria	2287	3014	+727	93	78	47,1	36,4

Note: \* Data is from 2003. \*\* Data is from 2004. \*\*\* Data is from 2001.

Source: World Press Trends 2007.

**Table A6a Total Number of Households, Share of Television Households, Number of Television Channels, Share of Privately Owned Channels, 2006**

Country	Number of households (thousands)	TV households (%)	Number of TV channels	State/public owned channels (%)	Private owned channels (%)
Belgium	4667	96,2	58	10,3	39,7
Bulgaria	2710	96,2	30	10,0	50,0
Cyprus	261	100	7	28,6	42,9
Denmark	2517	96,5	30	10,0	46,7
Estonia	582	97,9	17	5,9	29,4
Finland	2430	91,4	27	18,5	37,0
France	25689	97,4	123	8,1	78,0
Greece	3780	90,2	11	27,3	54,5
Ireland	1484	97,8	25	12,0	48,0
Iceland	118	98,3	67	1,5	9,0
Italy n	22876	99,0	25	32,0	48,0
Croatia	1477	94,8	4	50,0	50,0
Latvia	838	97,9	15	13,3	46,7
Litauen	1357	98,5	30	6,7	26,7
Luxemburg	181	98,9	34	2,9	11,8
Makedonien	507	93,3	23	17,4	21,7
Malta	130	99,2	-	-	-
Netherlands	7146	97,9	28	10,7	42,9
Norway	2036	98,7	36	5,6	33,3
Poland	14011	95,5	148	11,5	47,3
Portugal	3506	99,5	62	9,7	37,1
Romania	7320	94,1	46	8,7	47,8
Russia	52889	94,5	21	28,6	52,4
Switzerland	3337	93,0	36	16,7	66,7
Serbia	2550	94,3	15	40,0	60,0
Slovakia	1900	84,8	24	8,3	20,8
Slovenia	685	99,6	12	33,3	66,7
Spain	15734	99,5	43	51,2	37,2
United Kingdom	25799	97,6	42	31,0	21,4
Sweden	4211	98,5	43	11,6	37,2
Czech Republic	3828	96,6	21	19,0	52,4
Turkey	17000	93,5	19	26,3	73,7
Germany	39178	86,6	91	18,7	35,2
Ukraine	18201	90,7	45	2,2	44,4
Hungary	4002	97,4	35	8,6	88,6
Belarus	3736	95,6	21	23,8	28,6
Austria	3475	96,7	46	8,7	26,1

Source: IP International Key Facts 2007.

**Table A6b Share of Foreign and Premium-pay Channels, Number of Channels that reach at least 70% of the population, Audience shares of State-owned/Public-owned Channels and Viewing Time per Individual, 2006**

Country	Pan European/ foreign channels (%)	Premium pay channels (%)	Number of channels reaching 70% of the popul.	Public shares State/public owned channels	Viewing time per individual mon-sun (minutes)
Belgium	43,1	6,9	30	30,4	170
Bulgaria	36,7	3,3	3	26,6	187
Cyprus	14,3	14,3	6	20,3	183
Denmark	43,3	0,0	4	69,7	160
Estonia	64,7	0,0	3	18,8	245
Finland	33,3	11,1	4	44,9	169
France	4,1	9,8	7	47,2	217
Greece	0,0	18,2	9	16,4	263
Ireland	16,0	24,0	6	42,2	190
Iceland	83,6	6,0	4	34,6	154
Italy n	20,0	0,0	9	45,3	249
Croatia	0,0	0,0	4	60,7	281
Latvia	20,0	20,0	4	20	216
Litauen	66,7	0,0	4	13,2	200
Luxemburg	79,4	5,9	40	1,3	161
Makedonien	60,9	0,0	8	16,1	274
Malta	-	-	-	-	-
Netherlands	39,3	7,1	26	37	204
Norway	30,6	30,6	4	44,1	156
Poland	34,5	6,8	6	47,6	254
Portugal	37,1	16,1	4	30,2	216
Romania	39,1	4,3	5	29,3	242
Russia	19,0	0,0	9	53,5	241
Switzerland	13,9	2,8	41	32,1	168
Serbia	0,0	0,0	6	36,1	285
Slovakia	45,8	25,0	4	25,8	198
Slovenia	0,0	0,0	5	36,5	184
Spain	0,0	11,6	5	28,6	228
United Kingdom	11,9	35,7	5	45,9	232
Sweden	25,6	25,6	3	40,3	165
Czech Republic	0,0	28,6	4	30,4	206
Turkey	0,0	0,0	15	7,6	225
Germany	12,1	34,1	30	29,1	227
Ukraine	53,3	0,0	10	3	212
Hungary	0,0	2,9	3	20,9	279
Belarus	42,9	4,8	4	71,3	154
Austria	65,2	0,0	24	51,3	163

Source: IP International Key Facts 2007.

**Table A7 Total Number of Households, Share of Households with access to Computers, the Internet in total, through Broadband, through Dial-up/ISDN and Share of individuals who regularly use the Internet, 2006 (percent)**

Country	Number of Households	Households with access to computers (%)	Access to Internet (%)	Access to Internet via broadband (%)	Access to Internet via dial-up/ISDN (%)	Individuals regularly using the Internet (%)
Albania	-	-	-	-	-	-
Andorra	-	-	-	-	-	-
Armenia	-	-	-	-	-	-
Azerbaijan	-	-	-	-	-	-
Belgium	4667	60	54	48	6	58
Bosnia and Herzegovina	-	-	-	-	-	-
Bulgaria	2710	21	19	10	4	22
Cyprus	261	-	37	12	24	29
Denmark	2517	84	79	63	14	78
Estonia	582	44	46	37	9	56
Finland	2430	71	65	53	8	71
France	25689	55	41	30	10	39
Georgia	-	-	-	-	-	-
Greece	3780	-	23	4	19	23
Ireland	1484	53	50	13	35	44
Iceland	118	91	83	72	10	84
Italy	22876	46	40	16	21	31
Croatia	1477	39	-	-	-	-
Latvia	838	-	42	23	6	46
Liechtenstein	-	-	-	-	-	-
Lithuania	1357	37	35	19	5	38
Luxembourg	181	77	70	44	25	65
Macedonia	507	25	14	1	11	21
Malta	130	58*	53	41	13	36
Moldavia	-	-	-	-	-	-
Netherlands	7146	72*	80	66	13	76
Norway	2036	85	69	57	11	77
Poland	14011	38	36	22	9	34
Portugal	3506	53	35	24	10	31
Romania	7320	20	14	5	9	18
Russia	52889	-	-	-	-	-
Switzerland	3337	76	-	-	-	-
Serbia	2550	34	-	-	-	-
Slovakia	1900	50	27	11	12	43
Slovenia	685	65	54	34	22	47
Spain	15734	46	39	29	10	39
United Kingdom	25799	72	63	44	18	57
Sweden	4211	72	77	51	25	80
Czech Republic	3828	41	35	17	12	36
Turkey	17000	23	8	2	4	12
Germany	39178	67	67	34	36	59
Ukraine	18201	26	-	-	-	-
Hungary	4002	37	32	22	7	42
Belarus	3736	-	-	-	-	-
Austria	3475	61	52	33	19	55

**Note:** Share of households with access to the Internet, covering all inhabitants between 16-74 years. Share of households with access to broadband include households with at least one person in 16-74 years. The definition of regular use of the Internet is for all people between 16-74 years and who used the Internet at least once a week in the last three months.

\* Data for 2004.

**Source:** World Press Trends 2007, Eurostat 2007.

**Table A8 Newspaper Reach, Television Reach, and Internet access and Broadband access, 2006 (percent)**

Country	Newspapers	TV	Access to Internet	Access to Broadband
Albania	-	-	-	-
Andorra	-	-	-	-
Armenia	14	-	-	-
Azerbaijan	-	-	-	-
Belgium	52	71	54	48
Bosnia and Herzegovina	-	-	-	-
Bulgaria	39	80	19	10
Cyprus	-	67	37	12
Denmark	83	71	79	63
Estonia	69	77	46	37
Finland	82	76	65	53
France	44	83	41	30
Georgia	-	-	-	-
Greece	3	80	23	4
Ireland	54	67	50	13
Iceland	96	88	83	72
Italy	42	84	40	16
Croatia	86	80	-	-
Latvia	65	73	42	23
Liechtenstein	-	-	-	-
Lithuania	56	72	35	19
Luxembourg	67	78	70	44
Macedonia	24	97	14	1
Malta	-	-	53	41
Moldavia	-	-	-	-
Netherlands	73	82	80	66
Norway	83	69	69	57
Poland	66	75	36	22
Portugal	82	82	35	24
Romania	51	76	14	5
Russia	11	76	-	-
Switzerland	78	71	-	-
Serbia	35	73	-	-
Slovakia	60	71	27	11
Slovenia	52	65	54	34
Spain	42	79	39	29
United Kingdom	33	77	63	44
Sweden	84	74	77	51
Czech Republic	50	-	35	17
Turkey	33	70	8	2
Germany	74	75	67	34
Ukraine	30	81	-	-
Hungary	50	80	32	22
Belarus	-	-	-	-
Austria	73	67	52	33

**Note:** The newspapers and television reach is based on the total number of adults (see comment to table X). The share of households with Internet access is based on all inhabitants between 16-74 years and the share of households with access to broadband include households with at least one person at 16-74 years of age.

**Source:** World Press Trends 2007, IP International Key Facts 2007, Eurostat 2007.

**Table A9a Newspapers share of the Advertising Market and its Development during 2002 and 2006 (percent)**

Country	GDP per capita	Newspapers	Newspapers 2002	diff
Belgium	36500	25,9	19,9	+6,0
Bosnia and Herzegovina	6600	6,7	6,0	+0,7
Bulgaria	11800	12,8	17,5	-4,7
Danmark	37400	36,3	44,7	-8,4
Estonia	21800	42,6	45,2	-2,6
Finland	35500	53,4	55,1	-1,7
France	33800	15,0	16,6	-1,6
Greece	30500	15,6	11,4	+4,2
Ireland	45600	59,6	60,7	-1,1
Iceland	39400	-	58,2	-
Italy	31000	19,0	21,1	-2,1
Croatia	15500	14,3	13,3	+1,0
Latvia	17700	27,9	34,8	-6,9
Lithuania	16700	14,7	16,1	-1,4
Luxembourg	80800	-	62,3	-
Netherlands	38600	39,0	43,5	-4,5
Norway	55600	42,1	44,3	-2,2
Poland	16200	15,8	10,7	+5,1
Portugal	21800	7,8	8,6	-0,8
Romania	11100	9,2	15,9	-6,7
Russia	14600	25,2	22,4	+2,8
Switzerland	39800	35,5	48,6	-13,1
Slovakia	19800	6,3	8,5	-2,2
Slovenia	27300	20,6	15,1	+5,5
Spain	33700	24,6	28,2	-3,6
United Kingdom	35300	33,5	39,8	-6,3
Sweden	36900	44,6	48,9	-4,3
Czech Republic	24400	19,1	20,0	-0,9
Turkey	9400	31,0	33,5	-2,5
Germany	34400	40,3	41,7	-1,4
Ukraine	6900	5,3	12,5	-7,2
Hungary	19500	10,2	12,4	-2,2
Austria	39000	39,1	36,7	+2,4

**Källa:** World Press Trends 2007, World Development Indicators, World Bank 2007.

**Table A9b Television share of the Advertising Market and its Development during 2002 and 2006 (percent)**

Country	GDP per capita	TV	2002	diff
Belgium	36500	39,0	44,5	-5,5
Bosnia and Herzegovina	6600	89,5	65,0	+24,5
Bulgaria	11800	67,0	58,5	+8,5
Danmark	37400	20,3	15,6	+4,7
Estonia	21800	27,5	24,0	+3,5
Finland	35500	19,9	19,1	+0,8
France	33800	32,0	30,6	+1,4
Greece	30500	31,0	36,7	-5,7
Ireland	45600	20,2	20,0	+0,2
Iceland	39400	-	30,5	-
Italy	31000	54,5	53,4	+1,1
Croatia	15500	68,2	68,3	-0,1
Latvia	17700	36,8	33,6	+3,2
Lithuania	16700	72,0	71,4	+0,6
Luxembourg	80800	-	7,0	-
Netherlands	38600	24,8	21,5	+3,3
Norway	55600	27,0	33,3	-6,3
Poland	16200	50,8	63,6	-12,8
Portugal	21800	55,6	53,7	+1,9
Romania	11100	64,3	59,8	+4,5
Russia	14600	49,0	41,6	+7,4
Switzerland	39800	23,3	13,8	+9,5
Slovakia	19800	76,6	70,4	+6,2
Slovenia	27300	55,4	64,7	-9,3
Spain	33700	45,6	40,3	+5,3
United Kingdom	35300	27,0	30,6	-3,6
Sweden	36900	22,7	21,8	+0,9
Czech Republic	24400	49,0	47,9	+1,1
Turkey	9400	56,6	48,4	+8,2
Germany	34400	23,9	23,5	+0,4
Ukraine	6900	29,8	53,1	-23,3
Hungary	19500	63,8	63,9	-0,1
Austria	39000	24,1	24,5	-0,4

**Källa:** World Press Trends 2007, World Development Indicators, World Bank 2007.

**Table A9c Radio share of the Advertising Market and its Development during 2002 and 2006 (percent)**

Country	BNP per capita	Radio	Radio 2002	diff
Belgium	36500	12,1	10,7	+1,4
Bosnia and Herzegovina	6600	0,3	4,0	-3,7
Bulgaria	11800	3,5	-	-
Danmark	37400	1,5	2,1	-0,6
Estonia	21800	7,7	9,7	-2,0
Finland	35500	3,8	4,2	-0,4
France	33800	7,8	7,5	+0,3
Greece	30500	4,3	4,1	+0,2
Ireland	45600	7,3	6,3	+1,0
Iceland	39400	-	-	-
Italy	31000	6,2	5,1	+1,1
Croatia	15500	-	-	-
Latvia	17700	11,5	12,6	-1,1
Lithuania	16700	2,2	2,2	+0,0
Luxembourg	80800	-	13,6	-
Netherlands	38600	7,1	6,2	+0,9
Norway	55600	4,9	4,8	+0,1
Poland	16200	9,2	7,0	+2,2
Portugal	21800	6,0	6,5	-0,5
Romania	11100	6,4	4,8	+1,6
Russia	14600	5,6	5,2	+0,4
Switzerland	39800	3,8	3,4	+0,4
Slovakia	19800	5,5	6,9	-1,4
Slovenia	27300	5,5	-	-
Spain	33700	9,0	8,9	+0,1
United Kingdom	35300	3,6	4,1	-0,5
Sweden	36900	2,9	3,0	-0,1
Czech Republic	24400	5,5	5,2	+0,3
Turkey	9400	3,0	5,0	-2,0
Germany	34400	4,0	3,5	+0,5
Ukraine	6900	3,5	5,0	-1,5
Hungary	19500	6,1	4,5	+1,6
Austria	39000	8,1	7,9	+0,2

**Källa:** World Press Trends 2007, World Development Indicators, World Bank 2007.

**Table A9d Internet share of the Advertising Market and its Development during 2002 and 2006 (percent)**

Country	GDP per capita	Internet	Internet 2002	diff
Belgium	36500	3,1	0,6	+2,5
Bosnia and Herzegovina	6600	0,0	-	-
Bulgaria	11800	0,9	0,0	+0,9
Danmark	37400	5,9	3,9	+2,0
Estonia	21800	5,1	2,4	+2,7
Finland	35500	3,7	1,4	+2,3
France	33800	3,1	1,0	+2,1
Greece	30500	0,0	0,0	0,0
Ireland	45600	1,8	0,4	+1,4
Iceland	39400	-	-	-
Italy	31000	2,0	1,3	+0,7
Croatia	15500	0,2	-	-
Latvia	17700	2,8	1,2	+1,6
Lithuania	16700	0,9	0,0	+0,9
Luxembourg	80800	-	-	-
Netherlands	38600	3,4	0,9	+2,5
Norway	55600	11,0	1,9	+9,1
Poland	16200	1,4	0,3	+1,1
Portugal	21800	0,9	0,6	+0,3
Romania	11100	1,4	0,0	+1,4
Russia	14600	1,7	0,5	+1,2
Switzerland	39800	1,4	0,5	+0,9
Slovakia	19800	0,6	0,0	+0,6
Slovenia	27300	0,9	0,0	+0,9
Spain	33700	2,2	1,3	+0,9
United Kingdom	35300	13,5	1,7	+11,8
Sweden	36900	11,4	6,7	+4,7
Czech Republic	24400	2,3	0,7	+1,6
Turkey	9400	0,6	0,2	+0,4
Germany	34400	2,6	1,4	+1,2
Ukraine	6900	0,1	0,6	-0,5
Hungary	19500	1,8	0,0	+1,8
Austria	39000	1,4	0,0	+1,4

**Källa:** World Press Trends 2007, World Development Indicators, World Bank 2007.

**Table A10 Economic, Judicial and Political Influences on Media Content, and the Degree of Press Freedom, State-owned Newspapers and Television Market Shares, 2006**

Country	Economic Influence	Judicial Influence	Political Influence	Level of Press Freedom	State-owned Newspapers (%)	State-owned Television (%)
Albania	16	17	17	50	-	-
Andorra	8	1	5	14	-	-
Armenia	18	20	26	64	27	53
Azerbaijan	22	23	28	73	10	31
Belgium	5	2	4	11	0	41
Bosnia and Herzegovina	16	8	21	45	-	-
Bulgaria	12	10	12	34	0	75
Cyprus	8	5	9	22	0	23
Denmark	5	2	3	10	0	80
Estonia	6	5	5	16	0	29
Finland	4	2	3	9	0	48
France	7	5	9	21	0	43
Georgia	17	13	27	57	6	66
Greece	6	8	14	28	0	8
Ireland	5	3	7	15	0	68
Iceland	4	1	4	9	-	-
Italy	13	9	13	35	0	61
Croatia	14	10	15	39	29	97
Latvia	6	6	7	19	-	-
Liechtenstein	7	1	5	13	-	-
Lithuania	6	5	7	18	0	23
Luxembourg	7	1	3	11	-	-
Macedonia	16	13	20	49	-	-
Malta	9	2	7	18	-	-
Moldavia	20	20	25	65	12	44
Netherlands	4	1	6	11	0	57
Norway	4	3	3	10	0	47
Poland	7	6	8	21	0	57

**Note:** Economic influence examines the economic environment for the media. This includes the structure of media ownership; transparency and concentration of ownership; the costs of establishing media as well as of production and distribution; the selective withholding of advertising or subsidies by the state or other actors; the impact of corruption and bribery on content; and the extent to which the economic situation in a country impacts the development of the media. Judicial influence encompasses an examination of both the laws and regulations that could influence media content and the government's inclination to use these laws and legal institutions to restrict the media's ability to operate. Political influence evaluates the degree of political control over the content of news media. Issues examined include the editorial independence of both state-owned and privately owned media; access to information and sources; official censorship and self-censorship. Scales ranging from 0 (less judicial and economic impact) to 30 (more judicial and economic impact) and 0 (less political influence) and 40 (more political influence). The press freedom scale ranging from 0 (least press freedom) to 100 (most press freedom). Market shares measure the state-owned newspapers and television share of respective country's five largest newspapers (circulation) and the five largest TV stations (viewers). \* Data are from 2003. **Source:** Freedom House 2007 och The Quality of Government Institute 2007.

**Table A10 (continued) Economic, Judicial and Political Influences on Media Content, and the Degree of Press Freedom, State-owned Newspapers and Television Market Shares, 2006**

Country	Economic Influence	Judicial Influence	Political Influence	Level of Press Freedom	State-owned Newspapers (%)	State-owned Television (%)
Portugal	6	2	6	14	0	38
Romania	15	13	16	44	0	37
Russia	24	16	32	72	15	96
Switzerland	5	3	3	11	0	89
Serbia	11	12	17	40	-	-
Slovakia	7	5	8	20	0	35
Slovenia	7	4	9	20	0	54
Spain	5	4	12	21	0	43
United Kingdom	7	5	7	19	0	60
Sweden	4	2	4	10	0	51
Czech Republic	7	5	8	20	0	34
Turkey	11	17	20	48	0	0
Germany	5	5	6	16	0	61
Ukraine	21	13	19	53	15	14
Hungary	8	5	8	21	0	20
Belarus	28	27	33	88	100	100
Austria	5	8	8	21	0	78

**Table A11 Level of Democracy, Electoral System, Regime Type, and Consecutive Years of Democracy**

Country	Level of Democracy*	Electoral System**	Regime Type***	Electoral System****	Consecutive Years of Democracy**
Albania	7,58	Mixed	Demokrati	Mixed PR	9
Andorra	10	Mixed	-	Parallel	-
Armenia	6,25	Mixed	Limited Multiparty	Parallel	9
Azerbaijan	2,00	-	Limited Multiparty	Parallel	8
Belgium	10	Proportional	Demokrati	List PR	70
Bosnia and Herzegovina	5,56	-	Dominant Multi-Party	List PR	0
Bulgaria	9,33	Proportional	Demokrati	List PR	10
Cyprus	10	-	Demokrati	List PR	40
Denmark	10	Proportional	Demokrati	List PR	70
Estonia	8,58	Proportional	Demokrati	List PR	8
Finland	10	Proportional	Demokrati	List PR	70
France	9,75	Majoritarian	Demokrati	Two-Round	70
Georgia	6,25	-	Limited Multiparty	Parallel	5
Greece	9,58	Proportional	Demokrati	List PR	26
Ireland	10	Proportional	Demokrati	STV	70
Iceland	10	Proportional	Demokrati	List PR	55
Italy	10	Mixed	Demokrati	Mixed PR	53
Croatia	8,42	Proportional	Demokrati	List PR	8
Latvia	9,08	Proportional	Demokrati	List PR	7
Liechtenstein	10	Proportional	-	List PR	-
Lithuania	9,58	Mixed	Demokrati	Parallel	8
Luxembourg	10	Proportional	Demokrati	List PR	70
Macedonia	8,08	Mixed	Demokrati	List PR	9
Malta	10	Proportional	Demokrati	STV	25
Moldavia	7,42	Proportional	Dominant Multi-Party	List PR	9
Netherlands	10	Proportional	Demokrati	List PR	70
Norway	10	Proportional	Demokrati	List PR	70
Poland	9,33	Proportional	Demokrati	List PR	10

**Note:** Democracy measure freedom of opinion and assembly, as well as opportunities to participate in the political process (vote, compete in elections, to join political parties and organizations), the scale ranges from 0-10 where 0 is least democratic and 10 most democratic. Limited Multi-Party means that multiple parties are permitted, but the system still can not be classed as democratic; Dominant Multi-Party is a subcategory of Limited Multi-Party where the largest party's share in parliament is more than 67% and less than 100%. \* Data is from 2004. \*\* Data is from 2000. \*\*\* Data is from 2005. \*\*\*\* Data is from 2001.

**Source:** World Press Trends 2007, The Quality of Government Institute 2007.

**Table A11 (continued) Level of Democracy, Electoral System, Regime Type, and Consecutive Years of Democracy**

Country	Level of Democracy*	Electoral System**	Regime Type***	Electoral System****	Consecutive Years of Democracy**
Portugal	10	Proportional	Demokrati	List PR	24
Romania	8,67	Proportional	Demokrati	List PR	10
Russia	5,92	Mixed	Limited Multiparty	Parallel	9
Switzerland	10	Proportional	Demokrati	List PR	70
Serbia	8,00	-	Demokrati	No Provisions (N)	8
Slovakia	9,33	Proportional	Demokrati	List PR	8
Slovenia	10	Proportional	Demokrati	List PR	9
Spain	10	Proportional	Demokrati	List PR	23
United Kingdom	10	Majoritarian	Demokrati	FPTP	70
Sweden	10	Proportional	Demokrati	List PR	70
Czech Republic	9,58	Proportional	Demokrati	List PR	10
Turkey	7,17	Proportional	Limited Multiparty	List PR	16
Germany	10	Mixed	Demokrati	Mixed PR	52
Ukraine	6,75	Mixed	Limited Multiparty	Parallel	9
Hungary	9,58	Mixed	Demokrati	Mixed PR	10
Belarus	1,58	-	Limited Multiparty	Two-Round	6
Austria	10	Proportional	Demokrati	List PR	46