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# Monitoring Media Pluralism in Europe: Testing and Implementation of the Media Pluralism Monitor 2015

Policy Report

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Centre for Media Pluralism and Media Freedom



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## Executive Summary

The Media Pluralism Monitor (MPM) is a tool for assessing the risks for media pluralism in a given country. The Monitor aims to help policymakers, researchers, and civil society to understand the threat to media pluralism in different media systems through research, analysis and the provision of country data.

The present Monitor has been developed and tested by the Centre for Media Pluralism and Media Freedom (CMPF), at the European University Institute, and has been funded by the European Union. The CMPF created the prototype of the Monitor and pilot-tested it in 2014 (MPM2014),<sup>1</sup> building on the 2009 Independent Study on Indicators for Media Pluralism in the Member States – Towards a Risk-Based Approach.<sup>2</sup> The results of this second prototype, which was tested in 2015 (MPM2015), are published in this report. During these two rounds of implementation, the CMPF has strengthened the research design of the Monitor, co-ordinated the data collection carried out by national experts, and analysed the results, i.e., it has assessed the risks for media pluralism across EU Member States.

This report presents the results and the methodology of the MPM2015 implementation, which measures risks to Media Pluralism in 19 EU countries, namely, Austria, Croatia, Cyprus, the Czech Republic, Finland, Germany, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, and Sweden. The Monitor assesses the risks for media pluralism based on a set of indicators that cover four different domains: Basic Protection, Market Plurality, Political Independence and Social Inclusiveness.

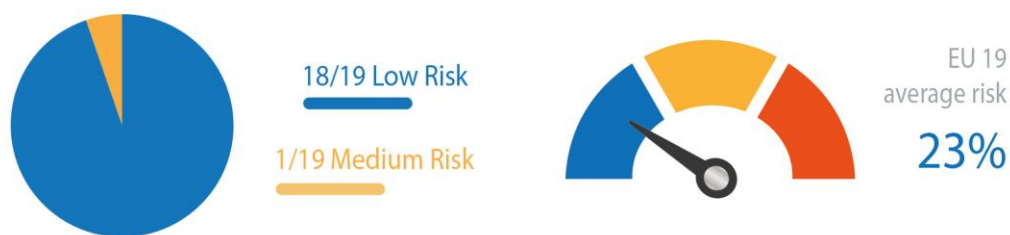
The MPM uses thresholds to determine the value of indicators according to three categories of risk – low, medium or high. The indicators cover legal, economic and socio-political questions that are assessed by national experts. This means that the MPM2015 tool evaluates the potential threats to media pluralism, taking into account both the legal framework and the effective situation (practice) of a given media landscape. It is important to stress that the existence of a risk for a specific indicator or domain does not necessarily represent an actual deficit of pluralism in a given context.

The first MPM domain, **‘Basic Protection’**, represents the regulatory backbone of the media sector in every contemporary democracy. Its indicators measure a number of potential areas of risk, including the existence and effectiveness of the implementation of regulatory safeguards for freedom of expression and the right to information; the status of journalists in each country, including their protection and ability to work; as well as the independence and effectiveness of the national regulatory bodies, namely, media authorities, competition authorities and electronic communications’ authorities.

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<sup>1</sup> <http://monitor.cmpf.eui.eu/results-2014/>

<sup>2</sup> [https://ec.europa.eu/digital-agenda/sites/digital-agenda/files/final\\_report\\_09.pdf](https://ec.europa.eu/digital-agenda/sites/digital-agenda/files/final_report_09.pdf)



**Figure i. Overview of the Risk Levels in the Area of 'Basic Protection'**

The comparative analysis of risks for 'Basic Protection' shows that all of the countries score low risk, with the exception of one (Romania). However, several countries come close to the medium risk threshold, with a risk level of 25% or more, including Austria, Croatia, Ireland, Latvia, Lithuania, Luxembourg, Poland, Slovenia and Spain. The fact that the risk is generally low in the countries that are measured is not surprising, and it is in line with the findings of other similar studies in the area, which, in general, do not find high levels of risk for basic freedoms of expression and information in the 19 EU countries that are measured by the 2015 Media Pluralism Monitor. Despite the overall low level of risk in 'Basic Protection', several countries showed medium and high levels of risk in specific indicators, so significant concerns remain for media freedom and pluralism, as measured by some of the 'Basic Protection' indicators. Specifically, key areas of risk that were detected by the Media Pluralism Monitor in 2015, in the 'Basic Protection' domain, include the protection of journalists, the criminalisation of defamation, and the lack of freedom of information laws in a number of countries. Hence, the analysis reveals that although generally at low risk, most of the countries assessed present some degree of problems in the domain of basic protection, which, in turn, endangers media freedom and media pluralism in other significant areas.

It should be noted that the indicator on the independence of media authority(ies) has been found to be problematic in the 2015 implementation of the Media Pluralism Monitor. This indicator, which aimed to combine the risks to the independence and effectiveness of media authorities, competition authorities and communication authorities, was found to produce unreliable findings. In particular, despite significant problems with regard to the independence and effectiveness of some of the authorities in many of the countries, the indicator failed to pick up on such risks and it tended to produce an overall low level of risk for all countries. This indicator will be revised in future versions of the MPM.

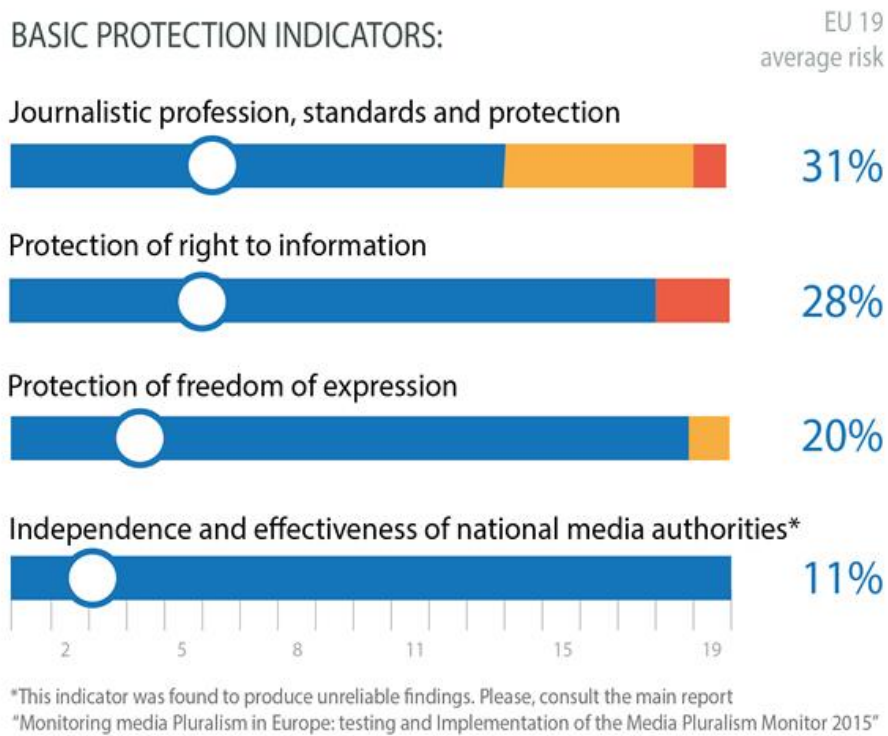


Figure ii. Overview of the Risk Levels by Indicator in the Domain of ‘Basic Protection’

‘Market Plurality’ indicators deal mostly with media ownership, an economic component that is widely considered essential in the assessment of a level of media pluralism in any given context. The MPM considers threats to media pluralism that arise from the level of transparency and from the level of the concentration of media ownership.

‘Market Plurality’ indicators show the highest levels of risks amongst all the four domains of risk that were captured by the MPM2015, with five countries scoring high risk (Luxembourg, Finland, Poland, Spain and Lithuania), nine countries scoring a medium risk (Romania, the Czech Republic, Latvia, Portugal, Ireland, Netherlands, Sweden, Germany, Austria), and five a low risk (Slovakia, Cyprus, Croatia, Slovenia, Malta).

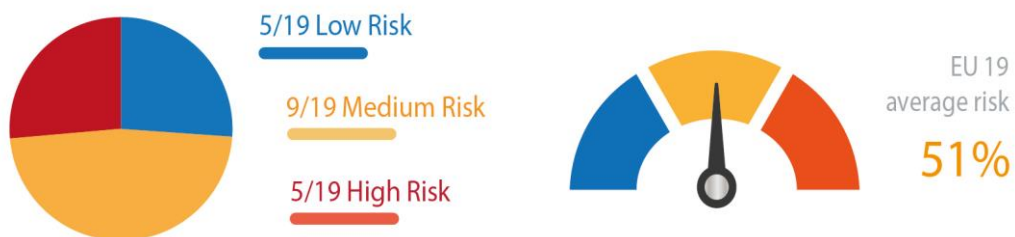


Figure iii. Overview of the Risk Levels in the Domain of ‘Market Plurality’

The results for this set of indicators confirm the trend, shown in the analysis of MPM2014, which revealed a medium/high risk in what was then called the ‘Ownership’ domain throughout

the nine countries<sup>3</sup> that were observed (CMPF 2015). The overall results of the market plurality assessment highlight that ownership-related risks are a constant element in the assessments of all the considered countries, with some remarkable exceptions. It is very interesting to note that within the 2015 analysis, the countries that score low risk in this domain are small countries which, generally, have a low GDP. This finding highlights the fact that the widespread presumption that market plurality is quite “naturally” at risk in small markets should be rethought.

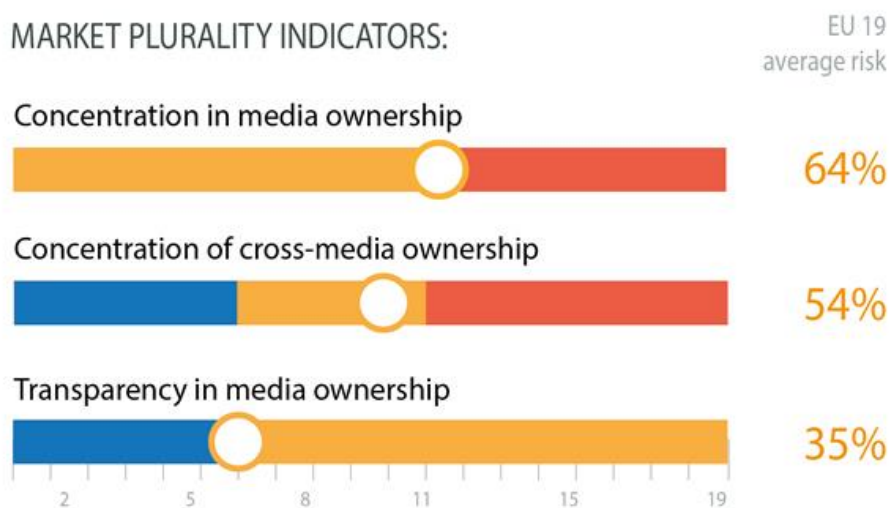


Figure iv. Overview of the Risk Levels by Indicator in the Domain of ‘Market Plurality’

The ‘**Political Independence**’ domain of risk is assessed using indicators that are associated with the politicisation of the media, public service media, commercial media outlets, media distribution networks, and news agencies.

The comparative analysis of the risks for ‘Political Independence’ reveals that most of the examined countries score a medium risk, with seven being at low risk from political influence over their media systems (Sweden, Germany, Luxembourg, Portugal, the Netherlands, Finland, and Latvia).

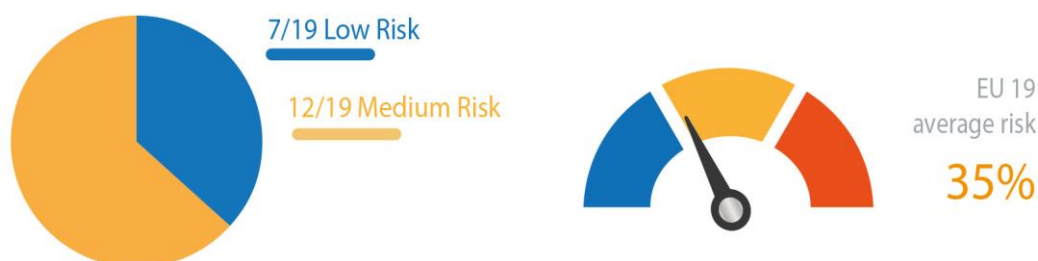


Figure v. Overview of the Risk Levels in the Domain of ‘Political Independence’

According to the MPM2015 results the strongest point in the system, that is, the least susceptible to political pressures, are related to the media distribution networks. In other words,

<sup>3</sup> The nine countries observed in 2014 were: Belgium, Bulgaria, Denmark, Estonia, France, Greece, Hungary, Italy and the UK.



the smallest risks for political independence across the EU Member States have been found in regard to the politicisation of media distribution networks. On the other hand, the two mechanisms for exerting political pressure, which seem to be most problematic in some EU Member States, are the political affiliations of commercial media and state advertising. These two indicators have the greatest number of high risk countries associated with them, i.e., seven EU member states reveal a high risk from state advertising, and four from the politicisation of control over media outlets.

However, caution is needed when interpreting this information, since these are also the two indicators in which many countries reported missing data. In some cases, the high risk actually indicates that the data needed to establish the risk is not available – and this may only be a transparency issue, which is a risk in its own right, or an actual risk that is related to the political affiliations of the commercial media and the state advertising dependencies.

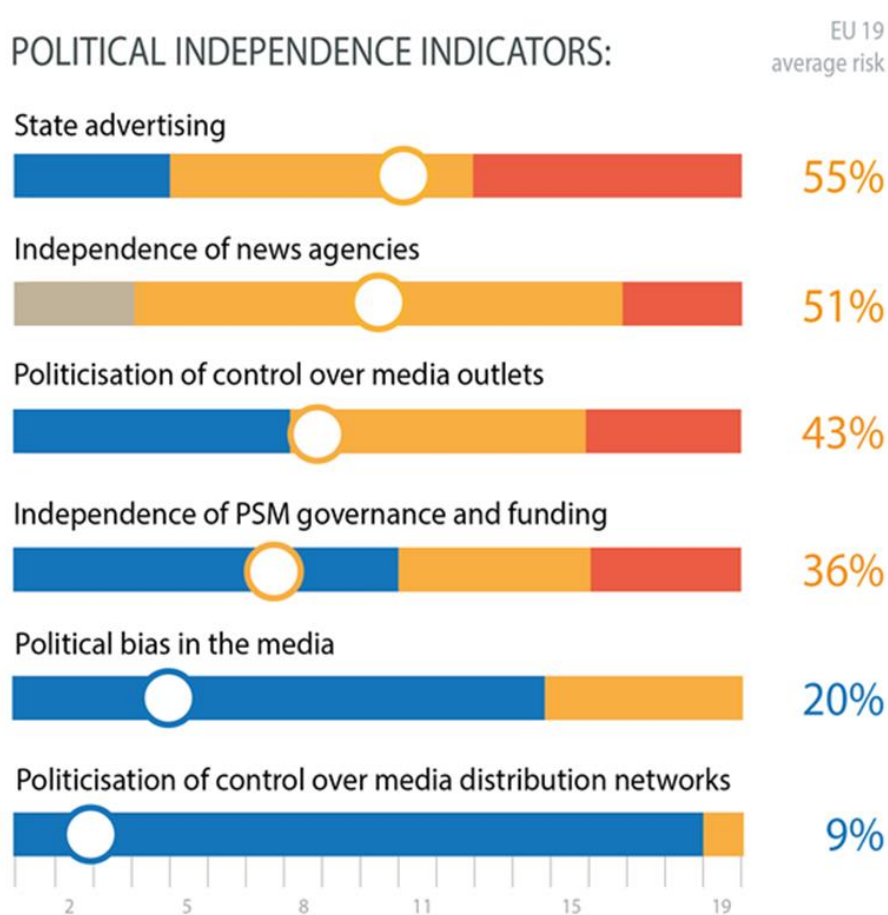
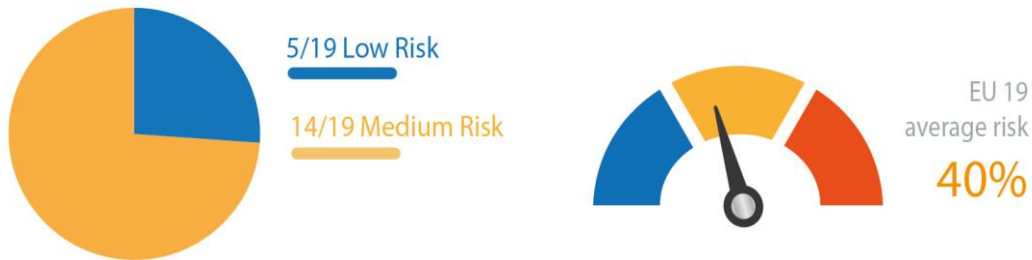


Figure vi. Overview of the Risk Levels by Indicator in the Domain of 'Political Independence'

'Social Inclusiveness' indicators focus on access to airtime and media platforms for different cultural and social groups, for local/regional communities, and for people with disabilities. They assess both the regulatory safeguards for, and the actual access to, media by various groups. The indicators also consider the extent of the centralisation of media systems; the universal access to PSM and the Internet; and the quality of the countries' media literacy policies, as well as the level of the digital media skills of the population.

The comparative analysis of risks for ‘Social Inclusiveness’ shows that no country scores a high risk for the overall domain, while most countries (14 of 19) score a medium risk, and only five score a low risk (Sweden, Germany, the Netherlands, Finland, and Austria).



**Figure vii. Overview of the Risk Levels in the Domain of ‘Social Inclusiveness’**

The indicator where the largest number of countries shows a high risk (eight of 19) is that related to media literacy. This indicator measures the availability and quality of the media literacy policy, the extent of Internet use, and the basic digital skills of the population. In particular, the implementation of the MPM2015 has revealed that most of the 19 countries analysed have no, or have an underdeveloped, media literacy policy.

The indicator where most countries show a low risk (15 of 19) is the one on access to media by people with physical challenges. In particular, the MPM analysis reveals that the majority of the countries have an effective state policy on access to media content by people with physical challenges.

Looking at the domain of ‘Social Inclusiveness’ from the perspective of the 19 Member States, the only country that scores a low risk across all the indicators is Sweden. The other countries that, on average, display a low risk across the area (Germany, the Netherlands, Finland, and Austria) all have at least one indicator that scores a medium risk.

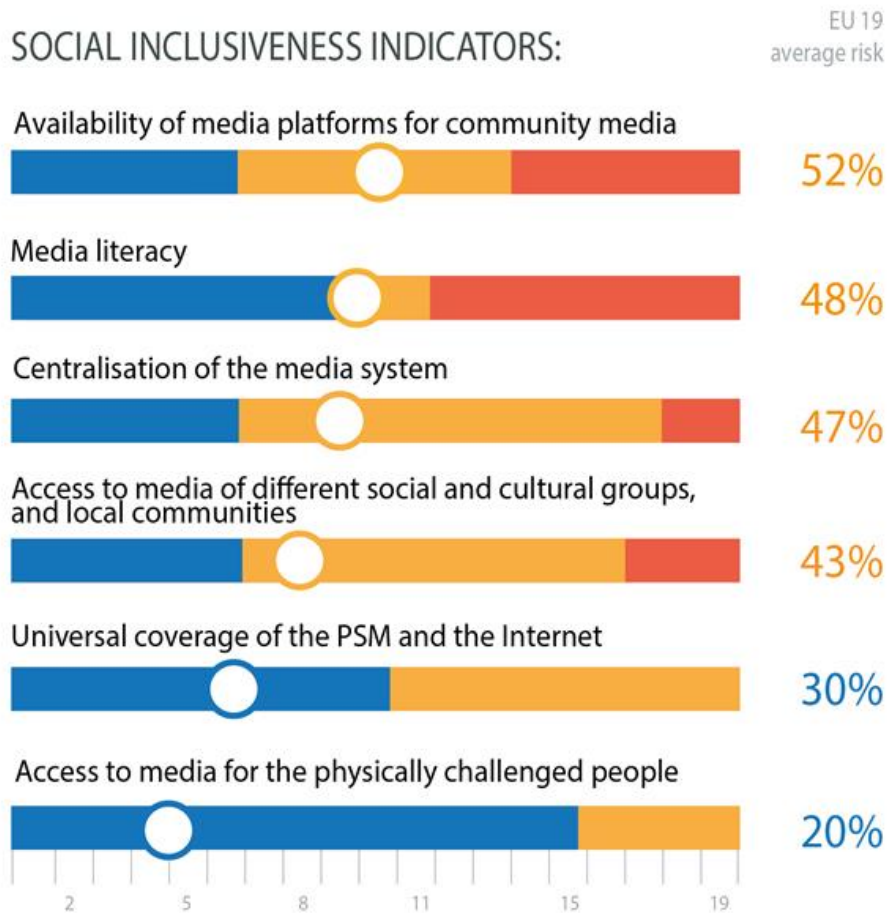


Figure viii. Overview of the Risk Levels by Indicator in the Domain of ‘Social Inclusiveness’

The results of the MPM2015 implementation, jointly analysed with the results of the MPM2014 pilot, show the extent and complexity of measuring threats to media pluralism in the EU Member States. More importantly, the findings have highlighted that **no EU country is immune from risks that are related to media freedom and pluralism.**



## Introduction

Media freedom and media pluralism are pillars of any democratic society and deserve to be safeguarded and protected for the sake of the existence of democracy itself. This is of utmost importance, particularly in the present difficult times, when freedom of expression is both enhanced and challenged by technological developments and also faces the alarming threats that arise from intolerance and fundamentalism.

At the European Union (EU) level, freedom of expression and the freedom and pluralism of the media are principles that are enshrined in the Charter of Fundamental Rights of the European Union.<sup>1</sup> The protection and promotion of pluralism and the freedom of the media are crucial ingredients in guaranteeing a democratic environment for all EU citizens, and for the legitimacy of the Union as a whole.

Given the growing importance of media freedom and media pluralism, in September, 2013, the European Union assigned to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute, a grant to update, simplify and conduct a pilot-test implementation of the Media Pluralism Monitor (MPM), which was conceived in 2009 by a consortium that was led by the University of Leuven.<sup>2</sup> The first version of the Media Pluralism Monitor (MPM) was a tool that aimed to measure risks for media pluralism in given countries. It was made up of a large number of indicators, and it proved to be difficult to implement. In 2013/2014 the CMPF did an intense and challenging simplification process, reducing the number of indicators to those affecting “news and current affairs”, and it pilot-tested a prototype version of the tool (MPM2014) on a sample of nine EU countries, namely, Belgium, Bulgaria, Denmark, Estonia, France, Greece, Hungary, Italy and the UK (CMPF 2015).

In its 2013 Conclusions on Freedom and Media Pluralism in the Digital Environment (EU Council 2013), the European Council stressed the importance of guaranteeing media freedom and pluralism through diverse initiatives. In particular, it invited the European Commission to ‘continue to support the independent monitoring tool for assessing risks to media pluralism in the EU (Media Pluralism Monitor), which is implemented by the European University Institute of Florence, and encourage its further use by Member States and all relevant stakeholders’ (ibid.).

Following the first pilot-test implementation of the Media Pluralism Monitor, the CMPF developed the second prototype of the MPM in 2015. Consequently, the CMPF has fine-tuned the first prototype (MPM2014), strengthened the project’s research design, implemented the new prototype (MPM2015), and has tested it in the remaining 19 EU Member States (Austria, Croatia, Cyprus, the Czech Republic, Finland, Germany, Ireland, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden).

The research design was based on a questionnaire that was compiled by national country teams that were made up of experts in media pluralism and media freedom, while a second group of experts, including national stakeholders and experts in the area, conducted a review of

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<sup>1</sup> Please note that the Charter applies to Member States only when they are implementing EU law.

<sup>2</sup> <https://ec.europa.eu/digital-agenda/en/media-pluralism-monitor-mpm>

the answers that required a qualitative type of measurement and/or that lacked measurable and easily verifiable data.

In order to ensure the comparability of the answers and the consistency of their quality, the CMPF centrally monitored the data collection and raised questions in cases where there were inconsistent or incomplete answers provided by the country teams. This proved to be essential in a cross-national study of this size and type.

The MPM 2015 assessed the risks for media pluralism by considering four domains of risk:

- Basic Protection
- Market Plurality
- Political Independence
- Social Inclusiveness

and by taking into account 19 indicators:

<b>Basic Protection</b>	<b>Market Plurality</b>	<b>Political Independence</b>	<b>Social Inclusiveness</b>
Protection of freedom of expression	Transparency of media ownership	Political bias in the media	Access to media for different social and cultural groups, and local communities
Protection of right to information	Concentration of media ownership	Politicisation of control over media outlets	Availability of media platforms for community media
Journalistic profession, standards and protection	Concentration of cross-media ownership	Politicisation of control over media distribution networks	Access to media for the physically challenged people
Independence of national authority(ies)		State advertising	Centralisation of the media system
		Independence of PSM governance and funding	Universal coverage of the PSM and the Internet
		Independence of news agencies	Media literacy

**Figure 1. Overview of Domains and Indicators**

The results of the implementation of the MPM 2015 should be considered to be provisional, given that they are based on a prototype, rather than on the final version of the tool. However, the results at hand do allow for the tentative mapping of the state of play in relation to the risks for media pluralism across EU Member States, and they point to the fact that no EU Member State is free from risks.

This policy report analyses the results of the 2015 implementation from a comparative perspective, and it describes in detail the methodology used for the pilot-test implementation of the MPM. The risks for media pluralism are examined, taking into account a number of indicators that address different aspects and potential threats to media pluralism in a systematic way. The inventory of indicators follows a holistic approach to media pluralism, and gives a comprehensive picture of a very complex and multifaceted phenomenon. The four domains capture the main areas of risk for media pluralism and media freedom. The 'Basic Protection' domain consists of four indicators; Market Plurality has three, while Political Independence and Social Inclusiveness each have six indicators. Each indicator is the result of an articulated construction of sub-indicators and elementary variables.





## **PART I**

### **1. Results**

This section analyses the results of the 2015 implementation from a comparative perspective. The risks for media pluralism are examined, taking into account a number of indicators that address different aspects and potential threats to media pluralism in a systematic way, being related to four comprehensive main thematic domains: Basic Protection, Market Plurality, Political Independence and Social Inclusiveness. The inventory of indicators follows a holistic approach to the phenomenon of media pluralism, and it guarantees sufficient complexity and comprehensiveness to examine what is a rather complex and multifaceted phenomenon. Each indicator is the result of an articulated construction of sub-indicators and elementary variables.

#### **1.1. Analysis of Basic Protection**

The ‘Basic Protection’ indicators represent the regulatory backbone of the media sector in every contemporary democracy, and they measure a number of potential areas of risk, including the existence and effectiveness of the implementation of regulatory safeguards for the freedom of expression and the right to information; the status of journalists in each country, including their protection and their ability to work; as well as the independence and effectiveness of national regulatory bodies, namely, media authorities, competition authorities and communications authorities.

Specifically, there are four indicators for ‘Basic Protection’:

- Protection of freedom of expression
- Protection of right to information
- Journalistic profession, standards and protection
- Independence and effectiveness of national media authorities

By measuring these aspects of media freedom and media pluralism, the domain of ‘basic protection’ gauges the risk to democratic debate in a given country. It therefore lies at the foundation of any media system and is thus an essential building block for the media pluralism monitor as a whole. Any level of risk in basic protection can be of concern to other areas of media freedom and media pluralism, as the protection of these core aspects of media protection may be indispensable to all of the other domains that are measured by the monitor. By way of example, if freedom of expression, or the right to information, are at risk in a given country, this will have severe consequences for the media system as a whole. Similarly, if journalists are unable to carry out their work without fear of intimidation or of economic instability, the quality and reliability of the entire media landscape will suffer. Finally, the independence and effectiveness of media authorities is essential, as it may influence all other areas of media protection, including market plurality, political independence and social inclusiveness.

The indicators of the basic domain present different types of risks, combining both legal and socio-economic variables. In particular, the indicators aim to capture dual types of risks in relation to specific legal standards, by measuring both the existence of legislation in a given area

and its implementation. Starting from the inclusion of a given standard in national laws, the monitor assessment often includes an evaluation of the quality of such laws, which is followed by an evaluation of their implementation and their effectiveness more broadly.

The comparative analysis of risks for Basic Protection shows that all countries score a low risk, with the exception of one (Romania). However, several countries come close to the medium risk threshold, with a risk level of 25% or more, including Austria, Croatia, Ireland, Latvia, Lithuania, Luxembourg, Poland, Slovenia and Spain, as shown in Figure 2.

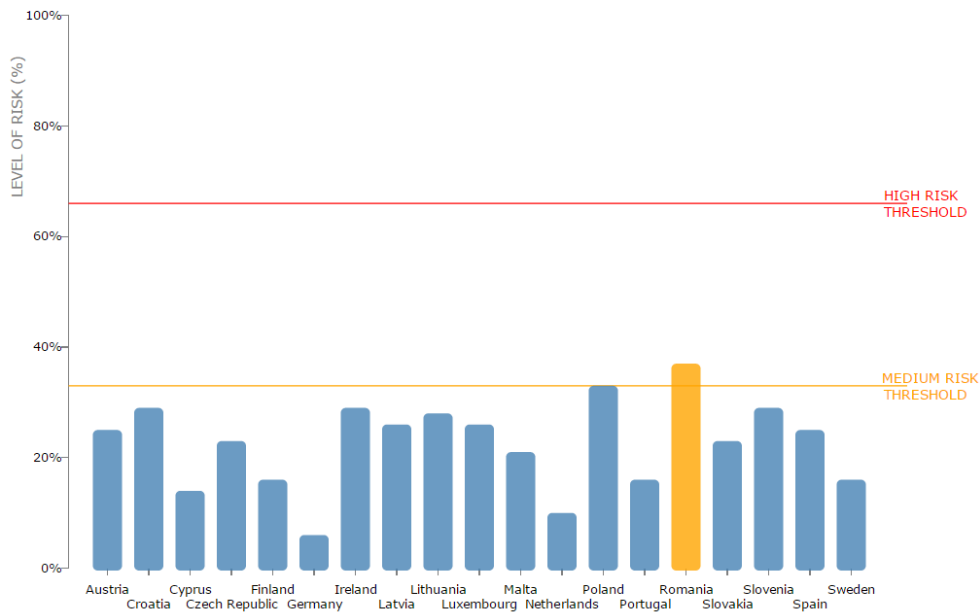
The fact that the risk is generally low in the countries measured is not surprising, and this is in line with the findings of other similar studies in the area, which generally do not find high levels of risk for the basic freedoms of expression and information in the countries measured by the 2015 Media Pluralism Monitor.<sup>1</sup> Although the overall level of risk is low in the domain of ‘Basic Protection’, concerns remain, as the indicators measure the basic safeguards for media freedom and democratic societies, any risk to Basic Protection should be considered problematic for media freedom and for pluralism more widely.

Despite the overall low level of risk in ‘Basic Protection’, concerns therefore remain for media freedom and pluralism, as measured by the ‘Basic Protection’ indicators. Several countries showed medium and high levels of risk in relation to specific indicators, as described below. Romania showed an overall level of medium risk in the ‘Basic Protection’ domain, owing mostly to the serious problems relating to the status of journalists in that country. Overall, the pilot implementation of the Media Pluralism Monitor in 2015 was found to pick up on key areas of risk in the domain of ‘Basic Protection’, including the protection of journalists, the criminalisation of defamation, and the lack of freedom of information laws in a number of countries. The picture reveals that, although generally at low risk, most of the countries assessed present some types of problems in the domain of ‘basic protection’, which, in turn, endangers media freedom and media pluralism in other significant areas.

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<sup>1</sup> See Freedom House’s 2015 Freedom of the Press Report, and Reporters without Borders, 2015 World Press Freedom Index.

## Results



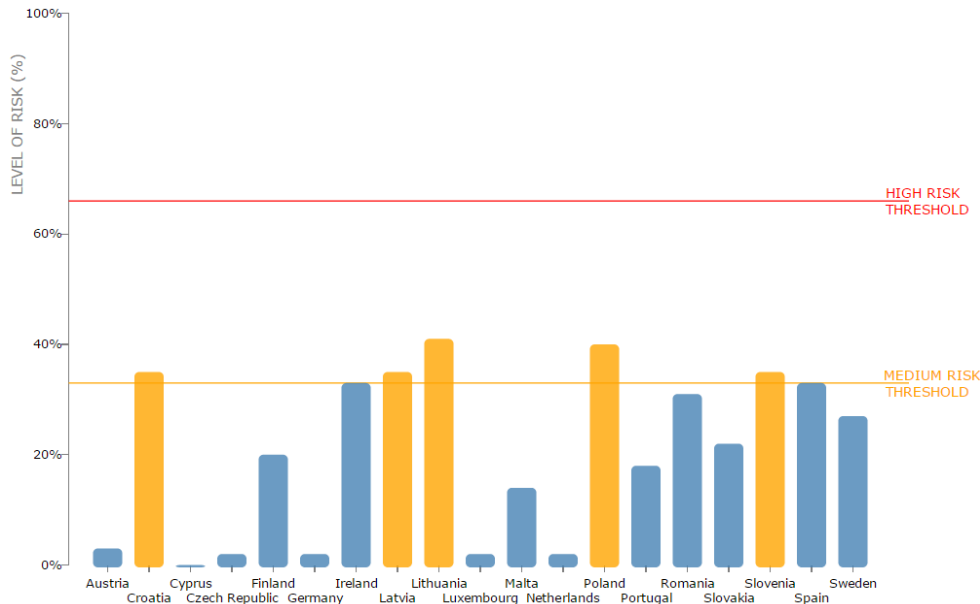
**Figure 2. Basic Protection Domain – Risks per Country<sup>2</sup>**

### *Protection of freedom of expression*

The first risk assessed in the domain of ‘basic protection’ is the protection of freedom of expression. Not only do freedom of opinion and expression “constitute essential foundations for democracy, rule of law, peace, stability, sustainable inclusive development and participation in public affairs” (EU Council 2014), they also lie at the heart of any healthy media system. The indicator on the freedom of expression aims to assess the existence and the effective implementation of regulatory safeguards for freedom of expression, as well as the ratification of the relevant international instruments. It also looks at whether restrictions upon freedom of expression are clearly and narrowly defined in law and in accordance with international and regional human rights standards, with a special focus on the area of defamation, given its centrality to the work of journalists. Finally, the indicator looks at whether there are instances of infringements of the freedom of expression in a country, both off- and online.

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<sup>2</sup> Please note that the type of visualisations of results varies, i.e., for some areas or indicators it was more adequate and effective to represent the results in maps, while in others histograms were the best solution.



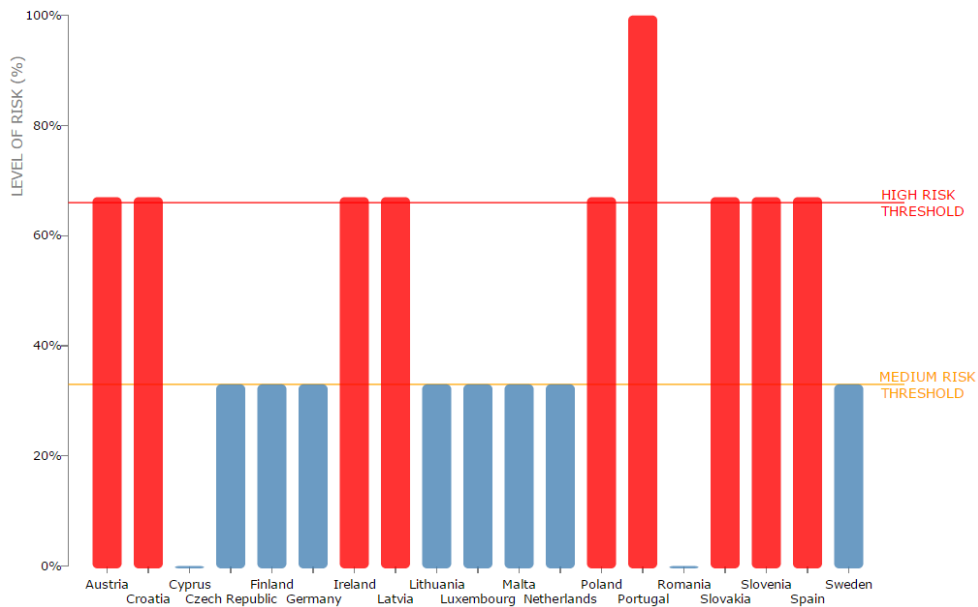
**Figure 3. Protection of Freedom of Expression Indicator – Risks per Country**

The overall results for the first indicator on the protection of freedom of expression show five countries to be at medium risk, namely, Croatia, Latvia, Lithuania, Poland and Slovenia, while two countries (Ireland and Spain) are on the border between low risk and medium risk.

Freedom of expression is protected in the constitution and/or the national laws of all 19 countries, and all of the countries assessed in the 2015 pilot-test implementation had ratified the relevant international standards, in particular, the International Covenant on Civil and Political Rights (ICCPR) and the European Convention on Human Rights (ECHR), with no significant exceptions. Problems, however, remain, with restrictions upon freedom of expression which do not always meet international and regional human rights standards. The criminalisation of defamation in most of the countries is considered to pose risks in this regard, and, at times, it is coupled with over broad defamation laws, or insufficient legal defences.

When looking specifically at the variable and sub-variables that measure the legal protection of freedom of expression *vis à vis* defamation laws, the picture that emerges from the 19 countries is far less positive (see Figure 4). Nine countries score high risk in regard to their defamation laws (Austria, Croatia, Ireland, Latvia, Poland, Portugal, Slovakia, Slovenia, and Spain), eight countries stand at the threshold of medium risk, and only two countries show a negligible risk in regard to the national legal provisions on defamation (Cyprus and Romania). In fact, Cyprus and Romania are the only two countries in which defamation had been decriminalised at the time of the implementation of the 2015 MPM, although problems remain in Romania, with back and forth decisions on re-criminalisation between Parliament, the Constitutional Court (CCR) and the High Court of Cassation and Justice (see also the narrative report on Romania attached). Overall, the criminalisation of defamation in most Member States is considered to pose risks to the freedom of expression and to media freedom more generally.

## Results



**Figure 4. Defamation Variable – Risks per Country**

Finally, a number of problems exist with regard to the legal remedies that are available in cases where there are violations of the freedom of expression, which are subject to delays or are, at times, ineffective in a number of countries. Cases of infringements of freedom of expression, either off- or online, were found to be present in several countries, including, in particular, Croatia, Ireland, Latvia, Lithuania, Poland, Romania, Slovenia, Spain and Sweden, where infringements were reported both off- and online.

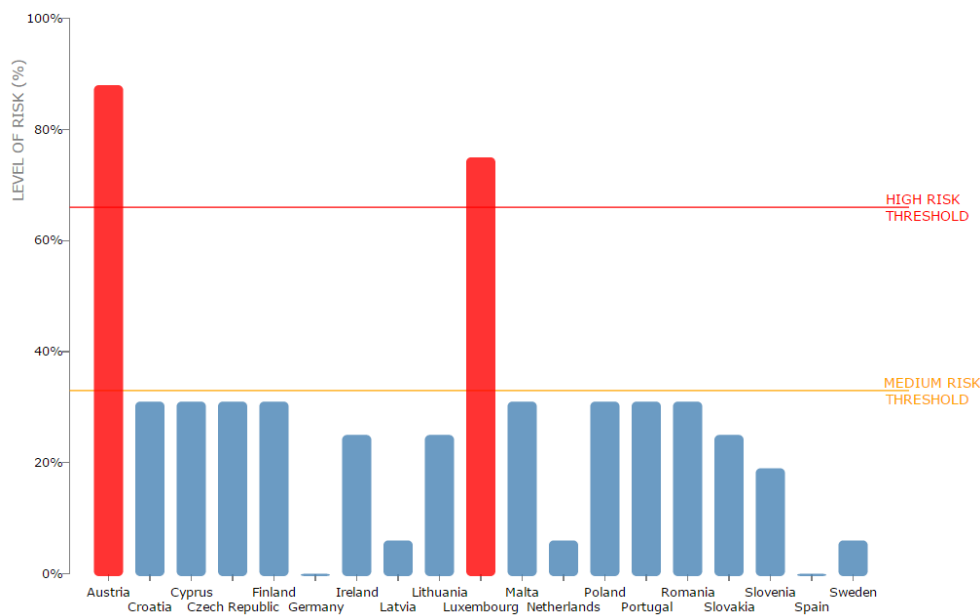
### *Protection of the right to information*

The indicator on the protection of the right to information aims to assess the existence and effective implementation of regulatory safeguards relating to the right to information. While a country may have good laws relating to the right to information, they may not be fully implemented or enforced. The indicator is specifically concerned with the right of access to information that is held by public authorities and the state, the lawfulness of its limitations, as well as the existence and effectiveness of appeal mechanisms in cases where there is denial of access to information. The indicator is based on the overarching notion, as expressed by the former UN Special Rapporteur on Freedom of Expression, Frank La Rue, that “all information in the possession of the State belongs to the public, with limited and qualified exceptions that must be justified by State authorities”.<sup>3</sup> In measuring the presence of infringements to the right to information, the indicator aims to assess one of the building blocks of media freedom and investigative journalism.

As presented in Figure 5, two countries were found to be at high risk in this indicator, namely, Luxembourg and Austria. All of the other countries were found to be at low risk, although some came very close to the medium risk threshold, including Croatia, Cyprus, the Czech Republic, Finland, Malta, Poland, Portugal and Romania.

<sup>3</sup> Report of the Special Rapporteur on the Promotion and Protection of the Right to Freedom of Opinion and Expression, UN Doc. A/68/362.

The reason for the high risk in Austria and Luxembourg originates from the legal protection regulating the right to information, or the lack thereof. In Austria, although Article 20(4) of the Federal Constitution states that there is a right to information, the obligation of the administrative authorities to maintain secrecy has precedence, and serious infringements of the right to information regularly take place in the country (see narrative report on Austria, attached). In Luxembourg, the right to information is not mentioned in the Constitution, and there is an overall lack of a fundamental and coherent right to information legislation (see narrative report on Luxembourg, attached). Given the importance of the right to information for media freedom, the lack of adequate laws regulating this area leads to a situation of high risk in both countries. Lower levels of risk remain in other countries, with a number of countries close to the medium risk threshold, mainly due to delays in appeal mechanisms or infringements relating to the freedom of information more broadly, including cases where the government withholds information, despite adequate laws being in place.



**Figure 5. Protection of Right to Information Indicator – Risks per Country**

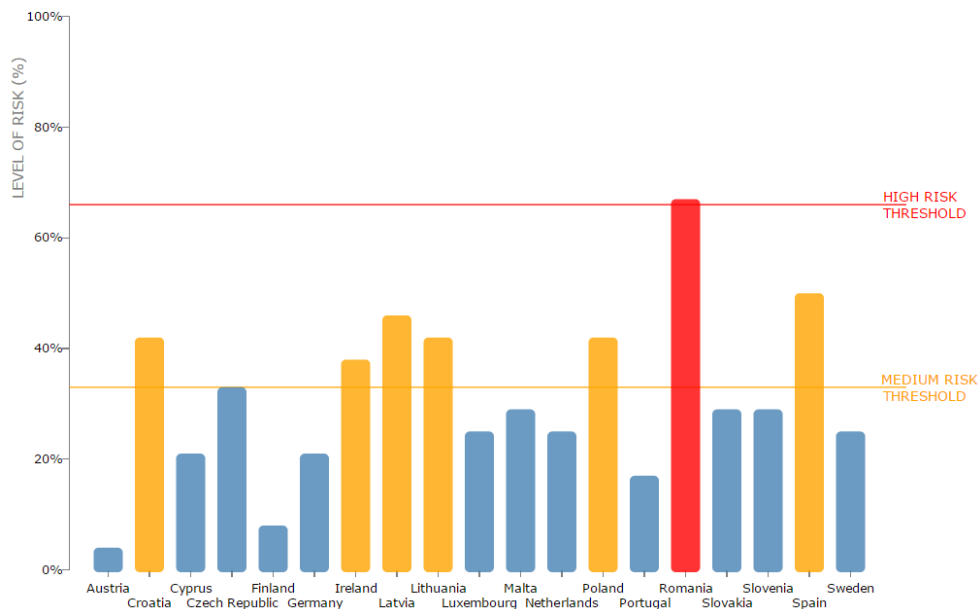
### *Journalistic profession, standards and protection*

This indicator deals with a range of different issues concerning journalists, the key players promoting media freedom and media pluralism, and often those who are most at risk. These include, in particular:

- Access to the journalistic profession
- Professional journalistic associations (whether journalists are represented, and how effective this representation is)
- Protection of journalists' safety
- Working conditions of journalists
- Editorial content (influence by commercial entities or media owners)
- Protection of journalistic sources

The overall comparative analysis of the indicator on the journalistic profession and its standards and protection across the 19 countries shows one country, Romania, to be at high risk, while six countries were found to show a medium level of risk in this key area of media freedom and pluralism, namely, Croatia, Ireland, Latvia, Lithuania, Poland, and Spain (see Figure 6). All of the remaining countries were found to be at low risk, although several came very close to the medium risk threshold, including the Czech Republic, Malta, Slovakia and Slovenia.

The problems emerging from the risks to the protection of journalists, their profession, their associations and sources, inevitably affect the media landscape more broadly, thereby endangering media freedom and pluralism.



**Figure 6. Journalistic Profession, Standards and Protection Indicator – Risks per Country**

In Romania, a set of mutually reinforcing negative factors were found to put journalism in a precarious situation, making it open to instrumentalisation and external influences, and unlikely to produce quality content that is in the public interest (see country narrative report, attached), thereby creating a situation of high risk. The findings of an overall medium risk for this indicator in Croatia, Ireland, Latvia, Lithuania, Poland and Spain, was due to a number of interrelated factors, as outlined below.

The assessment of journalists' professional associations under the 2015 MPM and, in particular, whether a broad section of journalists is represented by professional associations or other journalists' organisations, and whether they are effective in guaranteeing editorial independence and respect for professional standards, found three countries to be at high risk, i.e., the Czech Republic, Romania and Slovakia. Eight countries were also found to be at medium risk in this area, including Croatia, Ireland, Latvia, Lithuania, Luxembourg, Malta, Portugal and Spain.

With regard to threats to, or attacks on, the physical or digital safety of journalists, five countries presented a situation of high risk – Croatia, Latvia, Lithuania, Romania and Sweden –, where frequent threats and some attacks were reported. Six countries were also found to be at medium risk, namely, Germany, Ireland, the Netherlands, Poland, Slovenia and Spain. Croatia, Germany, Latvia, Romania and Sweden reported multiple threats to the physical safety of, and

attacks on, journalists in the past two years, with some threats also reported in Finland, Ireland, Lithuania, Malta, the Netherlands, Poland, Slovenia and Spain. Threats to the digital safety of journalists were reported in Cyprus, Ireland, Latvia, Lithuania, the Netherlands, Poland, Portugal, Romania and Sweden, while several country teams reported that data was not available on this issue (namely, Croatia, Slovenia and Spain).

The working conditions of journalists were reported to be particularly problematic in the Czech Republic, Ireland, Latvia, Lithuania, Poland, Romania, Slovakia and Spain, which were all found to be at high risk in this sub-indicator, while a medium level of risk was found to be present in Croatia, Malta and Slovenia.

With regard to the commercial influence on editorial policies and, in particular, on whether there are any laws or self-regulatory codes that prohibit commercial parties from influencing, or seeking to influence, editorial content, and whether there is evidence that commercial entities, or the owners of the media companies, systematically do so in practice, four countries were found to be at high risk: Luxembourg, Poland, Romania and Spain. Medium risk was found to be present in this domain in Croatia, Cyprus and Malta. In the first four countries, not only were commercial entities, or the owners of the media company, at times found to influence, or seek to influence, the editorial content of broadcasters or the press, but no laws or self-regulatory codes were in place to prohibit them from doing so. In the latter three countries, while laws or self-regulatory codes were in place, there was evidence that commercial entities, or the owner of a media company, systematically influenced, or sought to influence, the editorial content of broadcasters or the press.

Finally, with regard to the protection of journalistic sources, only one country was found to be at high risk, the Netherlands, due to the fact that this aspect is not (yet) enshrined in statutory law, although the government issued two Bills on the protection of journalistic sources in 2014. Similarly, Spain was found to be at medium risk in this domain, as there is no explicit mention of the protection of sources in the laws. However, in practice, this was reported not to constitute a serious issue.

#### *Independence and the effectiveness of national media authority(ies)*

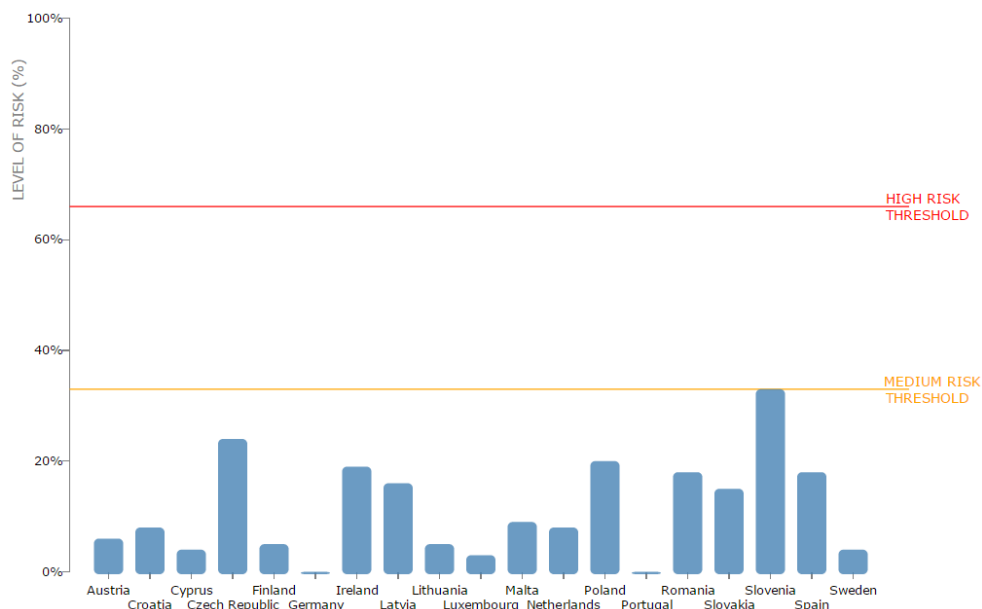
The indicator on the independence and effectiveness of national media authority(ies) aimed to measure the fundamental issues of the independence and effectiveness of national regulatory authorities with competencies in the media sector. It asks a series of questions that relate to the three authorities which may be involved in the regulation of the media sector, namely, the media authority, the competition authority, and the telecommunications authority, if present, in a given country, and if relevant in that context. The variables which aim to construct an assessment for each authority cover a number of issues: whether the appointment procedures for each authority guarantee its independence; whether the allocation of budgetary resources to the authorities protects them from coercive budgetary pressures and the possibility of performing its functions, and the type of powers and appeal mechanisms which are in place in regard to each authority. The decisional practices and transparency of each authority are also assessed through specific variables.



Unfortunately, this indicator was found to be particularly problematic in the 2015 implementation of the Media Pluralism Monitor due to its composite structure. In particular, the indicator which aimed to combine the risks to the independence and effectiveness of media authorities, competition authorities and telecommunication authorities, was considered to be disproportionately large if compared to other indicators, and it was found to produce unreliable findings.

Despite significant problems with regard to the independence and effectiveness of the authorities in many countries, the composite indicator failed to accurately capture the level of risk and produced an overall low level of risk for all countries. Combining the scores for all three types of authority into a calculated average, as well as the inclusion of a large number of variables for each authority, resulted in ‘watered down’ scores, which did not accurately reflect the level of risk in relation to the key issues of the independence and effectiveness of each authority. The large number of variables produced low levels of risk across the board, despite the fact that several country teams reported some level of risk in relation to the independence or effectiveness of at least one of the authorities involved in the regulation of the media sector in their country.

This, in turn, to some extent lowered the level of risk for all of the countries in the domain of ‘Basic Protection’. While the regulatory authorities in some countries present more problems and elements of risk than in others, it is suspected that the overall level of risk for ‘Basic Protection’ would be higher were the indicator to more accurately reflect this area of risk. The indicator will be significantly revised in the next version of the Media Pluralism Monitor, and this is likely to produce more accurate results, showing a greater variation in the level of risk.<sup>4</sup>



**Figure 7. Independence and Effectiveness of National Media Authority(ies)' Indicator – Risks per Country**

<sup>4</sup> By way of example, the MPM 2014 presented very different results, since four of nine countries presented a low risk, two a medium, and three a high risk. At the time it was thought that the structure of this indicator should be revised, as the requirements needed to obtain a low risk score were too strict. In this case, the new requirements appear to be too loose to be effective.

## 1.2. Analysis of Market Plurality

Market Plurality indicators deal mostly with media ownership, an economic component that is widely considered to be essential in the assessment of a level of media pluralism in any given context. The structure of media ownership matters, firstly in assessing the influence being exercised by a specific media owner within a single media outlet, both in terms of internal pluralism and of fairness towards the readers and audience. Moreover, the level of concentration of media ownership is important in assessing the measure of external pluralism within a given media market. The MPM considers threats to media pluralism that come from the level of transparency and from the level of concentration in media ownership. The concentration is measured within the same media market (e.g., the audiovisual) and across different media markets (cross-media concentration).

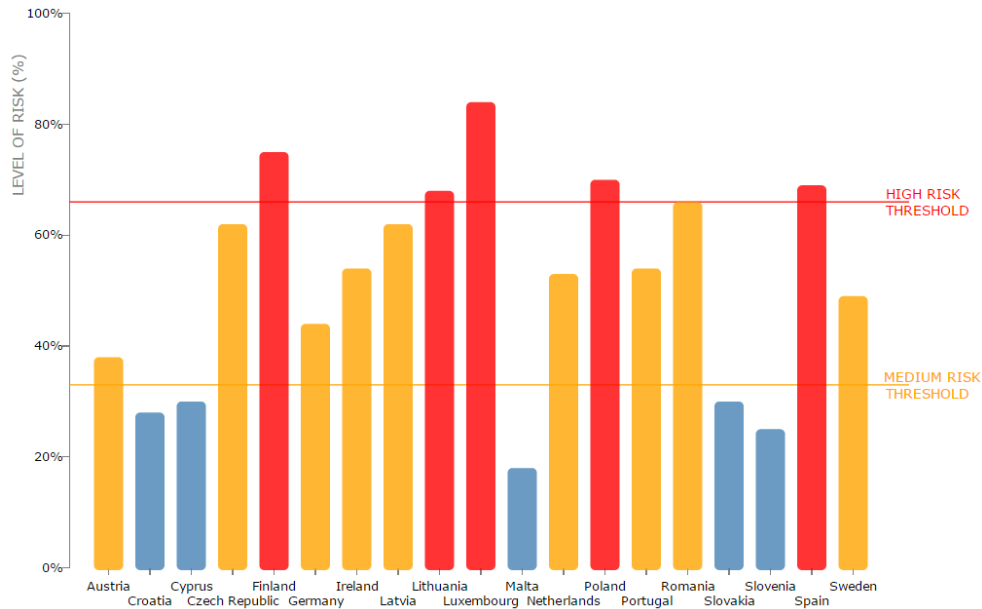
Specifically, there are three indicators on Market Plurality in the MPM2015:

- Transparency of media ownership
- Concentration of media ownership
- Concentration of cross-media ownership

Analysis of the market plurality indicators shows as the highest amongst all the four domains of risk that are perceived by the MPM: with five countries scoring high risk (Luxembourg, Finland, Poland, Spain and Lithuania), nine countries scoring medium risk (Romania, the Czech Republic, Latvia, Portugal, Ireland, the Netherlands, Sweden, Germany, Austria) and five a low risk (Slovakia, Cyprus, Croatia, Slovenia, Malta).

The results for this set of indicators confirm the trend shown in the analysis of the first pilot-test implementation of the MPM (CMPF 2015). The assessment that was carried out by the CMPF in 2014, using a partially different list of indicators, showed medium/high risk, in what was previously called the Ownership Domain, in the nine countries examined (Belgium, Bulgaria, Denmark, Estonia, France, Greece, Hungary, Italy and the UK). The comparison of the overall results of the market plurality assessment, both in MPM2014 and MPM2015, highlight that ownership-related risks are a constant element in the assessments of all of the countries considered, with some remarkable exceptions.

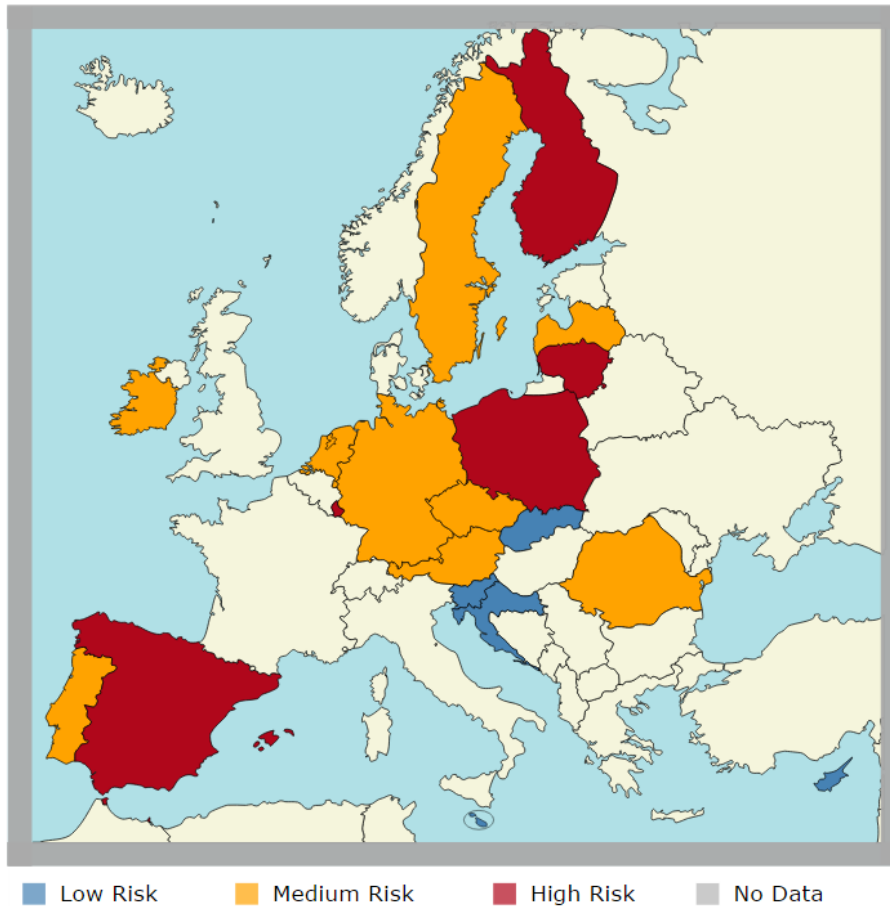
## Results



**Figure 8. Market Plurality Domain – Risks per Country**

Indeed, it is very interesting to note that, in the 2015 analysis, the countries that score a low risk in this domain are small countries which generally have a low GDP. Within the context of this research exercise, and according to the measuring methodology used, the MPM2015 results suggest that the widely held presumption that the media market of a small country tends necessarily to be especially concentrated, is not confirmed.

According to the MPM2015's results, in fact, amongst the 19 countries, those who score the lowest are precisely the small countries. The explanation of these results probably lies in the wider test that is used in the MPM2015 exercise, firstly, the fact that the implementation covers 19 countries, thus offers more country cases and more reliable trends. These results are also an effect of the fine-tuning of the MPM2015 tool that was carried out after the above-mentioned 2014 implementation. The revision of the MPM, in fact, aimed to balance the different components of the three indicators that better shape the risk domain of market plurality: a clearer balance between the legal, the economic and the socio-political variables (see the section on methodology, below) has led to results that, in general, are more tailored to the specificities of any given country. In the light of this achievement, while Slovakia, Cyprus, Croatia, Slovenia and Malta score low risk in the market plurality domain, it is remarkable that a small, high GDP country, such as Luxembourg, scores the highest in the market concentration indicators. The very high risk of two of three indicators, due to the lack of rules to control ownership concentration and the high concentration of the market, is not sufficiently balanced by the result on media ownership transparency, which, notwithstanding its medium risk, has one of the highest scores for this indicator among the 19 countries.



**Figure 9. Market Plurality Domain – Map of Risks per Country**

### *Transparency of media ownership*

The first indicator in the market plurality domain is on media ownership transparency. This indicator aims to assess the existence and effectiveness of the implementation of the transparency and disclosure provisions that relate to media ownership and/or control. Ownership transparency can be interpreted as a sort of precondition for any reliable analysis of the plurality of a given media market.

On one side, in fact, knowing who the real owners of a media outlet are gives citizens the possibility to gauge the extent of potential bias in the information that is provided by a media outlet: and, as was recently recalled by the Parliamentary Assembly of the Council of Europe, media ownership transparency “is necessary to enable members of the public to form an opinion on the value of the information, ideas and opinions disseminated by the media” (PACE; 2015). On another note, media ownership transparency is important from a regulatory perspective, as a knowledge of the owners of media outlets is a precondition for assessing the level of competition in the media market and for fair application, in the case of the specific rules on media concentration that may aim, in any given country, to limit media ownership so as to avoid dominant positions in the media market.

The MPM2015 indicator on ownership transparency aims to assess the existence and effective implementation of transparency and disclosure provisions in relation to media ownership and/or control. The analysis is twofold, as the variables within this indicator take into consideration how the media are accountable to the public and to the public authorities when it comes to the structure of their proprietorship. The variables that are taken into account under this indicator are legal and socio-political. The indicator, then, assesses whether, in a given country, there are laws that deal with media ownership transparency, and whether they succeed in disclosing the real owners of the media outlets. This set of questions proved to be successful in highlighting many of the areas of opacity in media ownership throughout Europe.

While no country scores a high risk, it is nevertheless alarming that most of the countries examined (12) score a medium risk. In most cases, the risk is raised by the poor effectiveness of laws on media ownership transparency, which do not succeed in disclosing the real owners of the media outlets. Some media owners remain unknown, even when a specific law on media transparency is in force. The law often does not envisage tracing back in order to discover how much control certain legal or natural persons effectively have on the media.

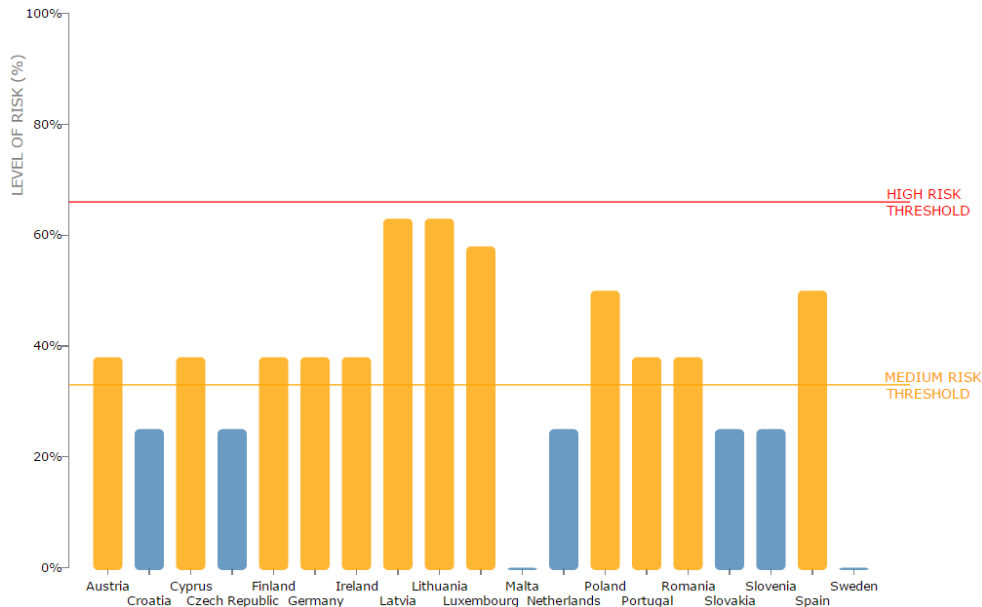
Amongst the twelve countries that score a medium risk, Latvia and Lithuania score the highest. Both in Latvia and Lithuania (63%), the mechanisms to implement the laws, when they exist, are very weak, and they are insufficient to guarantee the disclosure of just who are the real owners. The case of Luxembourg is interesting too, as the country scores a risk of 58%, due to legislation on media ownership that provides very few obligations for transparency, and no legal sanction for non-compliance with disclosure requirements. Within this framework, the law does not fully succeed in ensuring that the public can know who the owners of the media are.

There is a relevant sample of countries (7) that scores the same risk (38%) for this indicator. The results assess the same level of risk for countries like, for instance, Finland, Germany and Romania, that have media systems that are quite different. Notwithstanding this, the assessed risks must be evaluated according to the peculiar contexts of each single country, and it is indeed interesting that different systems share similar concerns and types of risks. Nonetheless, this indicator will be enhanced for the first EU-wide implementation in 2016, in order to comprise better, where possible, how, and to what extent, the opacity of media ownership affects the media landscape and the democratic debate. The analysis of a given country on the issue of media ownership transparency can also benefit from the cross analysis of other MPM2015 indicators, such as, for instance, the indicator on the politicisation of control over media outlets.

As an outcome of the MPM2015, indeed, similar results for the indicator on media transparency may suggest the need for European actions in this very sector, starting with better co-operation by the Authorities in setting standards and sharing information on media ownership. In this regard, the work that was started in 2014 by the European Regulators' Group for Audiovisual Media Services (ERGA), must be seen as being both promising and valuable.<sup>5</sup>

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<sup>5</sup> ERGA brings together the representatives of national independent regulatory bodies in the field of audiovisual services, to advise the Commission on the implementation of the EU's Audiovisual Media Services Directive (AVMSD) (see: <http://ec.europa.eu/digital-agenda/en/avmsd-audiovisual-regulators>).



**Figure 10. Transparency of Media Ownership Indicator – Risks per Country**

### *Concentration of media ownership*

The second indicator that occurs in the assessment of the risks for Market Plurality is that on the ‘concentration of media ownership’. This indicator is composed of several sub-indicators that aim to assess the threats for media pluralism that come from the structure of the media market. Risk is evaluated by taking into account the existence and effectiveness of the implementation of regulatory safeguards against a high horizontal concentration of ownership in different media markets. It does this by measuring the effective concentration of the market using the Top4 method. Furthermore, assessment is carried out by considering the existence and effectiveness of *ad hoc* regulatory safeguards against a high horizontal concentration of ownership and/or control in a specific media sector, and the existence of competition rules that take into account the specificities of the media sector when analysing mergers in a specific market. The assessment of the legal framework is linked, then, to the effective measuring of the concentration of the given market, and this allows for a better evaluation of the risk, considering both the legal standards and the effective conditions of the media market. The analysis is carried out by considering the different media markets (audiovisual, radio, newspapers, and online content providers).

Another component of the indicator is a sub-indicator on net neutrality, which is made up of two variables that aim to assess the concentration of the ISP market and the existence of regulatory safeguards on net neutrality. The separate analysis of the cluster on net neutrality shows that only a few countries have some kind of policy in this regard. This result is unsurprising, since a specific policy on the issue has only recently been developed by the EU.

The results of the MPM2015’s implementation confirm the trends that have already been highlighted by the MPM2014, and which have already been stressed by most of the studies in this sector, including the CMPF Policy Report: European Union Competencies in Respect of Media Pluralism and Media Freedom (CMPF 2013), that demonstrate that media markets have a strong tendency to concentration that can result in a reduction in the number of the players who can successfully operate in those media markets. Indeed, this is the indicator that scores the highest in the whole MPM2015. No countries scored a low risk. According to the data collection, in fact, all the markets are concentrated and show a medium to high risk for media pluralism: 8 of 19 countries scored a high risk, and 11 a medium risk.

The risks are mostly due to the lack of specific legislation on media concentration in countries that have embraced a fully competition-oriented legislation (like Luxembourg, the Baltic countries, or Nordic Countries like Finland and Sweden) together with high levels of market or audience concentration.<sup>6</sup> High levels of concentration are a constant feature in all the media markets considered. The sub-indicator on media market concentration that measures audience and readership concentration scores a high risk for all of the countries analysed.

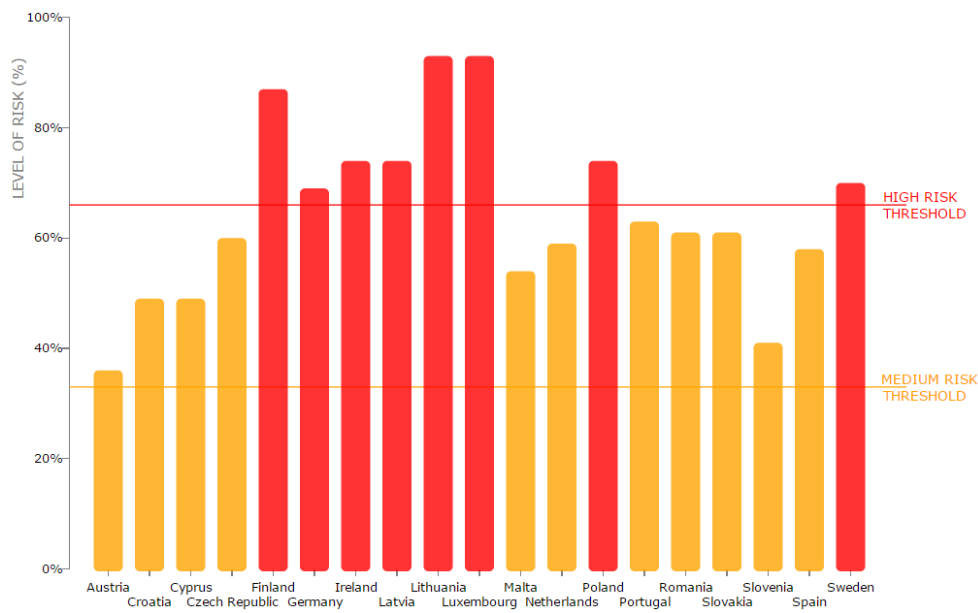


Figure 11. Concentration of Media Ownership Indicator – Risks per Country

<sup>6</sup> On the lack of data relating to media market concentration, see, below, in the section on the methodology that was used.

A topical issue is whether “the low number of contestants and the associated high level of market concentration should be regarded as having only negative implications, and whether the degree of concentration *per se* is always a meaningful indicator” (CMPF 2013). This is particularly important when the analysis of media concentration is carried out for small markets, which tend to be concentrated. The general results for the media ownership concentration area show that a balanced assessment of different variables within this indicator leads to results that are reasonable in relation to the market size of the given country. The MPM2015 duly takes into account many of the components of the risks that are associated with the structure of the media markets. In general, the results on media ownership concentration must be interpreted within the framework of the market plurality domain first, and of the other three domains of risk that compose the assessment of the MPM, as a whole. For instance, a highly concentrated market (which means low external pluralism) may be associated, and may be corrected in practice, with a good assessment of other indicators that highlight a high level of internal pluralism within the media outlets.

The indicator on media ownership concentration also takes into account the digital media component of the market. Firstly, on the one hand, the sector-specific markets are defined within the framework of media convergence. On the other, as a new feature of the MPM2015, the indicator contains specific variables on the existence of regulatory safeguards against a high horizontal concentration of ownership and/or control in the internet content providers’ sector, and on the consumption of online content. The measurability of the economic variables proved to be difficult, as it relied on data that are not easily affordable, as such data are usually collected by private companies (see Section 2.2 and 2.4 for more details).

#### *Concentration of cross-media ownership*

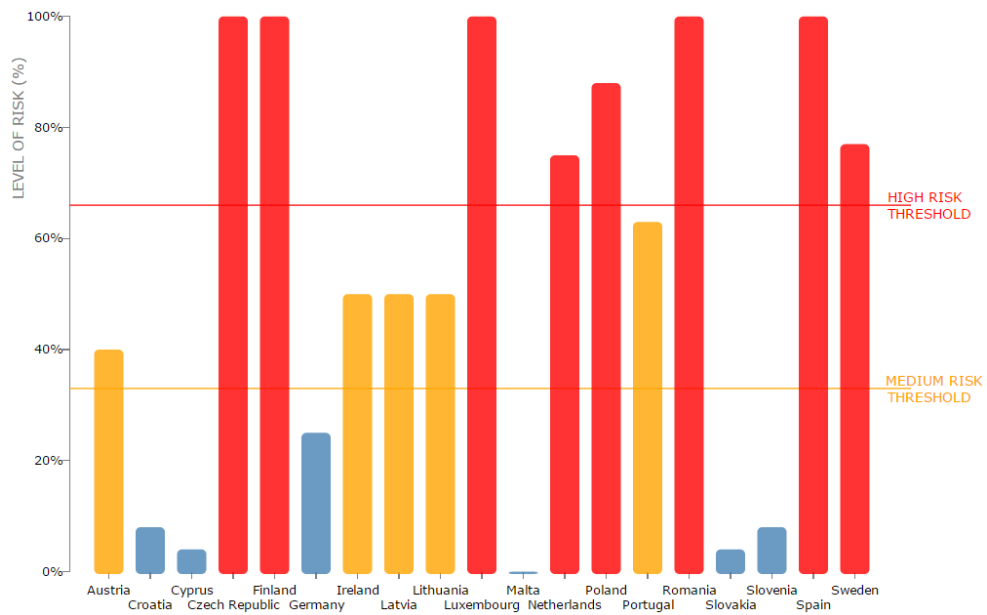
A similar scenario is described by the results of the last indicator, which concur in assessing the risks for Market Plurality: Concentration on cross-media ownership. This indicator aims to assess the risk that results from an excessive concentration within few hands of different types of media. The assessment is carried out through the evaluation of the existence of regulatory safeguards against a high degree of cross-ownership in the different media sectors, balancing this with the risks coming from the effective level of cross-ownership concentration in the market. The methodology used to define the market concentration is the Top8 method. The indicator is made up of a simple set of questions on whether specific laws that set thresholds on cross-ownership exist, and whether the specificities of the media sector (i.e., a plurality test) are taken into account by the authorities when applying competition law in cases of cross-media mergers and acquisitions.

The results show very high risks for ownership concentration for 8 of the 19 countries, either because there are no specific rules that limit cross-ownership, or because the cross-media market is highly concentrated, or when both these conditions (legal and economic) are not met.

Amongst the 8 countries that score a high risk, five reach a threshold of 100% risk, as they lack any sort of legislation covering the issue of cross-media ownership concentration, and their markets are already very highly concentrated. In some cases, the lack of specific data on cross



ownership was evaluated negatively as being a symptom of the low transparency of the information that is available on the media market.



**Figure 12. Concentration of Cross-Media Ownership Indicator – Risks per Country**

### 1.3 Analysis of Political Independence

Indicators of Political independence are designed to assess the risks for the political independence of a national media system and its media outlets. They focus on examining the existence and effectiveness of the implementation of regulatory safeguards against the biased representation of political viewpoints in the media, and also the extent of the politicisation of media outlets, media distribution networks and news agencies. Moreover, they also aim to assess the influence of the state on the functioning of the media market, through specific influence through state advertising and public service media.

Specifically, there are six indicators that are related to ‘Political Independence’:

- Political bias in the media
- Politicisation of control over media outlets
- Politicisation of control over media distribution networks
- State advertising
- Independence of PSM governance and funding
- Independence of news agencies

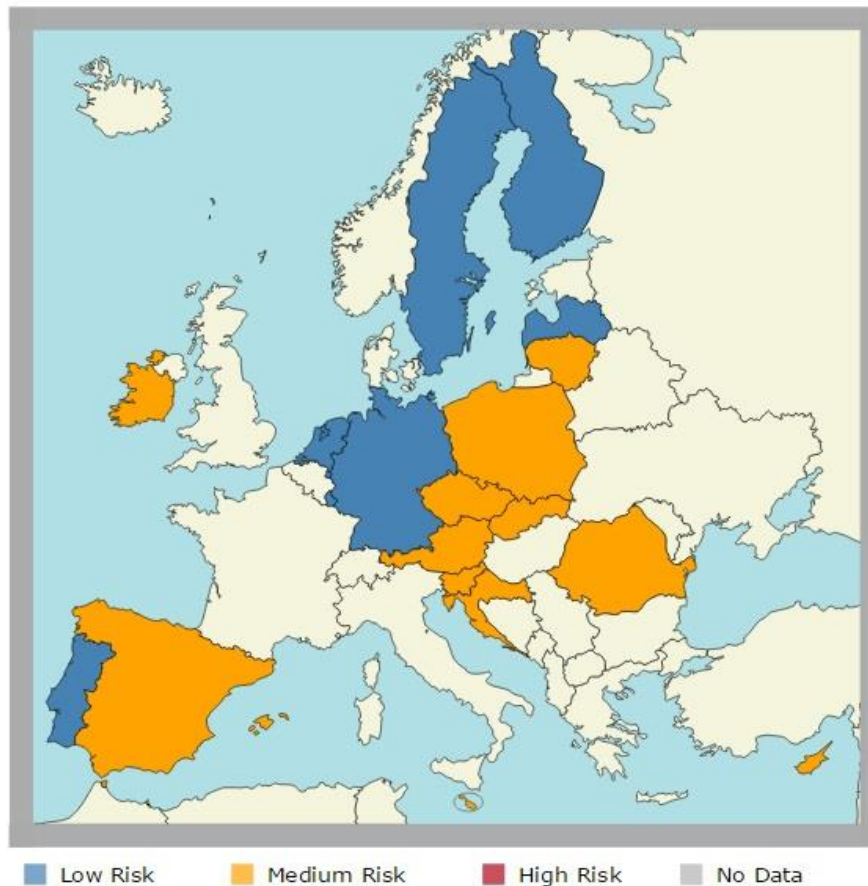
The comparative analysis of the risks for political independence reveals that most of the countries examined score a medium risk, with seven being assessed at low risk from political influences over their media systems (Sweden, Germany, Luxembourg, Portugal, the Netherlands, Finland, and Latvia).

The study revealed two particularly interesting cases, those of Latvia and Portugal. Latvia is the only country among those which have acceded to the EU since 2004 that scores a low risk for political independence. What makes Latvia different from the other European countries which have acceded to the EU since 2004 is that it scores a low risk for the two indicators in which the majority of these other countries were assessed as being at medium or high risk – the politicisation of media outlets and state advertising. With regard to the latter, the distribution of state advertising in Latvia does not appear to be a cause for concern.

The Portuguese case is also interesting, since Portugal was assessed as being at low risk from political influences, partly due to recent changes in media legislation. Portugal is at a negligible risk from the politicisation of PSM due to a new law, which has de-politicised the appointment procedures for PSM, and the fact that direct grants to the PSM were abolished in 2013 (see the Portuguese report, attached, for more details). These changes to the relationships between the state and the PSM were deemed by the Portuguese team of experts as being useful in reducing the risks from political influence over those PSM, although it remains to be seen how this new legislation will actually be implemented, and what are the trends in its application, in practice.

It is also worth noting that only one of the countries scores a low risk across all indicators of political independence (Luxembourg), and there are several countries in which all levels of risk (low, medium and/or high) have been found. Examples of such countries are the Czech Republic, Cyprus, and Ireland. This points to the fact that, even though legislation is effective in safeguarding the media system from one type of political influence, political élites may be able to

exert influence in other ways. Hence, a comprehensive enquiry into the risks from political influence, such as that in this Monitor, is needed to detect the system's weakest points.



**Figure 13. Political Independence Domain – Map of Risks per Country**

### *Political bias in the media*

The first risk for the political independence of the media is that related to the ‘political bias in the media’. This indicator consists of four sub-indicators which aim to assess the risks from the bias in the Public Service Media, the risks for PSM bias during election campaigns, the risks from commercial media bias, and those stemming from the regulation and use of political advertising. The focus of this indicator is on the risks from bias in the audiovisual media, as television remains the main source of news for citizens in the majority of Member States of the EU (Newman et al. 2015). However, it needs to be acknowledged that, in some Member States, the majority of citizens presently get their news online, rather than via television, and that younger audiences, in particular, make more use of new, rather than traditional media (ibid). Notwithstanding this, there is still a valid argument to be made for focusing on audiovisual media content and its bias, since, even in countries in which more people get news from digital sources rather than television (e.g. Spain, Italy, Denmark, Finland, Ireland), evidence points to the fact that the news sources used online are very often the websites of traditional media (mostly television and newspaper outlets).<sup>7</sup>

<sup>7</sup> Alexa.com data that related to the most visited pages per country was used to establish this result. Particularly, the Top10 visited webpages, for countries in which online news are declared as being used most often than

The analysis of risks from political bias in the media shows that most EU Member States are at low risk, while five of the 19 countries examined are at medium risk from political bias (Slovenia, Poland, Austria, Romania, and Finland).

It is worthwhile examining the results that were obtained in relation to the sub-indicators in order to highlight the similarities and differences in the ways in which countries are dealing with political bias in the media. With regard to political bias in PSM reporting, the data shows that all of the countries studied have some kind of legislation which aims to impose rules that are aimed at the fair, balanced and impartial representation of political viewpoints in news and informative programmes on PSM channels and services. However, these regulatory safeguards are not equally well implemented in all of the countries, so, in the end, four countries present a medium risk from political bias in PSM reporting, namely, Austria, Spain, Slovenia and Poland. To illustrate, although the media law prescribes that PSM reporting should be balanced and impartial in Austria, the body that is tasked to monitor this does not have sufficient sanctioning powers, and the regulatory safeguards are only partially implemented.

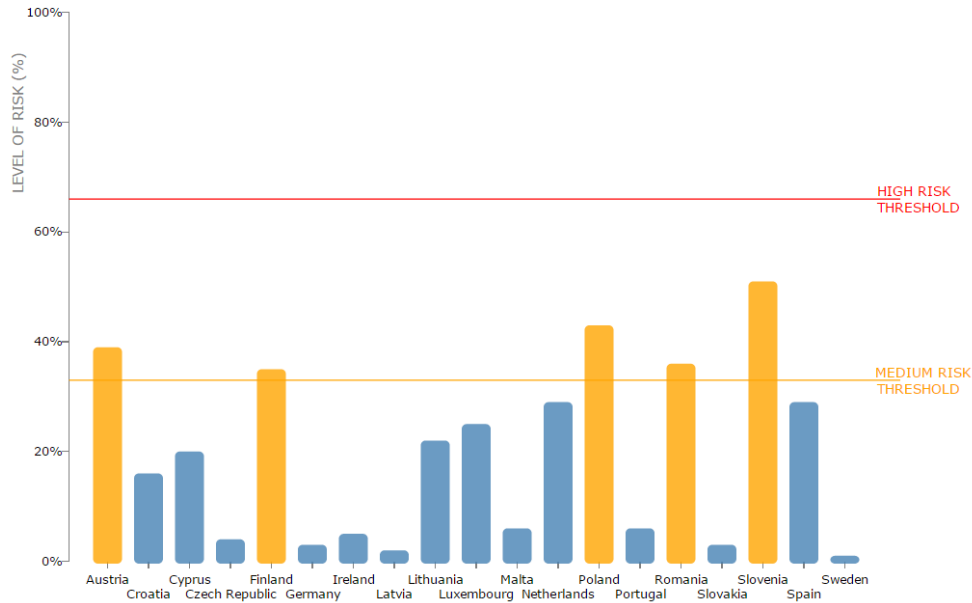
When it comes to PSM reporting during electoral campaigns, the analysis has revealed that, in all but two countries (Finland and Austria), the law imposes rules that aim to guarantee access to airtime on PSM channels and services for political actors during election campaigns. Although these provisions are not set in law in Finland, the PSB's Administrative Council sets the guidelines for electoral coverage prior to each election, taking into account the Act on Political Parties (10/1969), which asks that organisations governed by the State must treat all political parties equally and must follow uniform criteria. These, and similar safeguards, are usually well implemented in the EU Member States, but some bias in electoral reporting in the PSM has been identified in Ireland, Poland, Portugal, Slovenia and Spain. However, after taking into account the existence of the legal safeguards, their implementation, and the actual representation of bias in the content, the overall risk from political bias in PSM content during electoral campaigns has been assessed as being at medium risk in Austria and Finland (which do not have legal safeguards, but where the representation during electoral campaigns seems to be unbiased and proportional), with Slovenia scoring at the upper end of the low risk band, and all other countries scoring a low risk.

With regard to commercial media bias, Romania is the only country with a high risk from commercial media bias, meaning that political coverage on its commercial channels was evaluated as not being fair, balanced and impartial, and it is suggested that clear political bias is visible in this coverage. The majority of countries score a low risk, with six countries being at medium risk (Austria, Cyprus, Lithuania, Poland, Slovenia, and Spain), pointing to the fact that, overall, all political viewpoints are expressed within the media system.

Finally, the sub-indicator that looks at the risks from political advertising was designed to assess the extent to which political actors are allowed to, and can, use political advertisements to gain disproportionate representation in audiovisual media. The data shows that the risks from this are highest in Luxembourg and the Netherlands, which do not have any kind of regulation to ensure equality among parties in political advertising.

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television news, were examined. News aggregators (e.g., Google) and social networks (e.g., Facebook) were not considered to be news sources.



**Figure 14. Political Bias in the Media Indicator – Risks per Country**

#### *Politicisation of control over media outlets*

The second ‘Political Independence’ indicator aims to assess the risks from the politicisation of control over media outlets. This indicator is composed of two sub-indicators, one looking at the extent of the politicisation of commercial media through examining the audience shares of the politically affiliated media, and another which focuses on the self-regulation which should ensure editorial independence and empower editors to make decisions without political interference. As in the previous implementation (see CMPF 2015), data collection for this indicator has shown that, in some countries, there is insufficient information to assess the extent of politically affiliated media outlets, given that information about commercial media’s political affiliation is rarely collected. Specifically, in 11 of the 19 countries studied the data about audience/readership shares for some media markets (television, radio or print) were missing. What makes this information even more problematic is that in nine of the eleven countries<sup>8</sup> in which some data are missing, the ownership of media is not completely transparent, so the public may not be aware of who owns the media, and of whether or not this person/organisation has a political agenda.

With regard to the other sub-indicator, which aims to assess self-regulatory measures and their effectiveness in ensuring editorial independence, it is important to emphasise that in eight of the countries studied not all of the leading media outlets have self-regulatory mechanisms which can secure editorial independence (Malta, Austria, the Czech Republic, Slovenia, Ireland, Slovakia, Romania, Portugal). In Lithuania, such measures exist, but there is no body that checks compliance with them and imposes remedies in cases where there is non-compliance. In other countries, the leading commercial media have this kind of self-regulation, and it seems to be

<sup>8</sup> Data are missing and there is a transparency problem with media ownership in Croatia, Cyprus, Lithuania, the Netherlands, Poland, Romania, Slovakia, Slovenia and Spain, while there are no official data, but media ownership is, in general, transparent in Finland and Malta.

more or less effective. The lack of protection for editorial independence is particularly problematic in countries where a medium/high risk has been identified in regard to the extent of the politicisation of the media. For example, in countries such as Lithuania, Romania and Slovenia, the extent to which the media markets are politically-affiliated has been assessed as being at medium/high risk, and the leading media do not have the measures to secure editorial independence. In these situations, the system is vulnerable to political influences and there is little, if anything, that can protect the media from political interference.

Overall, four countries are assessed as being at high risk from the politicisation of media outlets, namely, Lithuania, Romania, Slovakia and Slovenia. Another seven are assessed as being at medium risk (Ireland, Portugal, Croatia, the Czech Republic, Malta, Austria, and Poland), while the rest score a low risk. Hence, all of the countries at high risk are countries which accessed the EU after 2004, with only Latvia from this group of countries being identified as at a low risk from this type of political interference.

Finally, it is worth noting that among the EU Member States, only in Malta do major political parties own their own television and radio stations, as well as owning newspapers. Their combined audience shares are less than 30%, and it is believed that the audience is well aware of the bias in these media's content. On the other end of the spectrum are countries in which the ownership of the media by political actors is completely forbidden by law. Such is the case in, for example, Portugal and Lithuania.

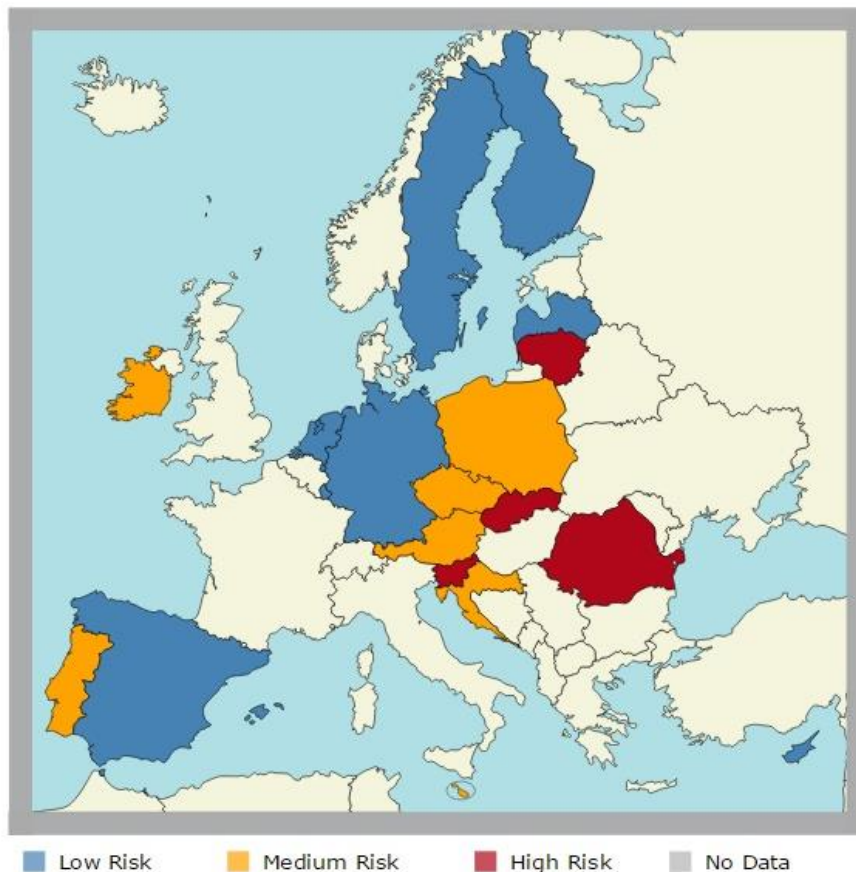
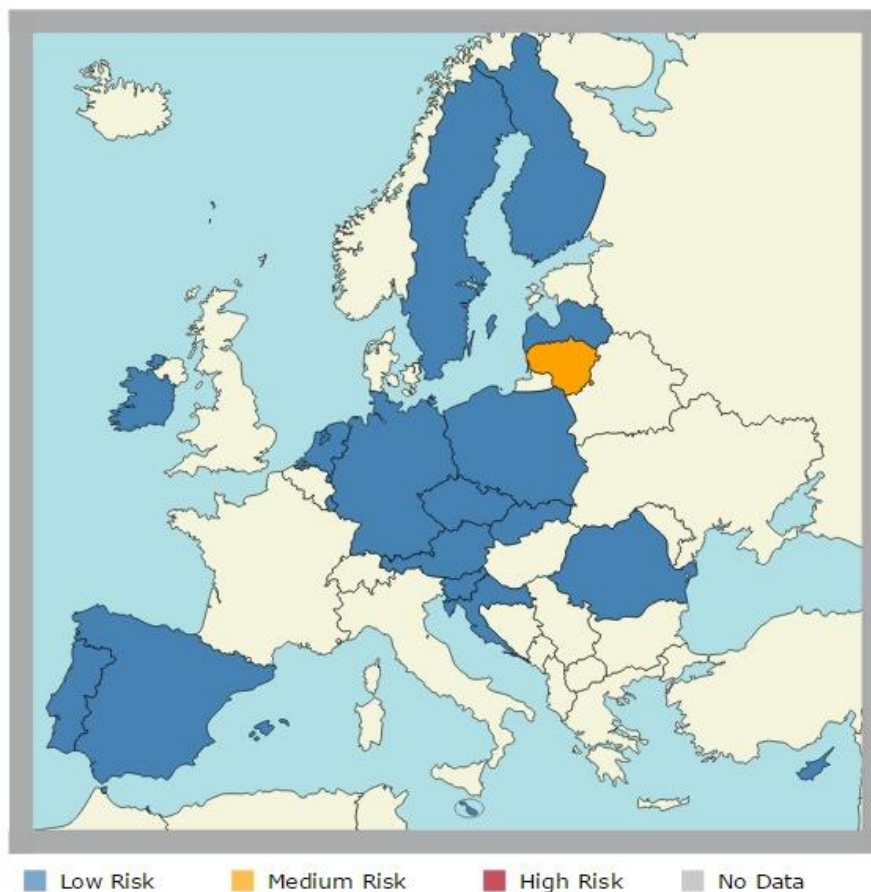


Figure 15. Politicisation of Control Over Media Outlets' Indicator – Map of Risks per Country

*Politicisation of control over media distribution networks*

The third indicator, which assesses the risk for the political independence of the media system, is ‘politicisation of control over media distribution networks’. The aim of this indicator was to assess the transparency of the data relating to the political affiliation of media distribution network owners, and the level of discrimination by politically affiliated radio and television distribution networks, as well as those for print media. Examples of the discriminatory actions that were considered have included unfavourable pricing and the posing of barriers to the media accessing the distribution channel.

The analysis shows that distribution networks present a minimal risk from political influences in the EU, since in all but one of the countries studied they seem not to be politically affiliated and not to be conducting discriminatory actions. Lithuania is the only country in which distribution networks have been assessed as being at a medium risk from political influence, since there seems to be evidence that some radio, television and print distributors are politically affiliated. All other countries in the sample score a low risk.



**Figure 16. Politicisation of Control Over Media Distribution Networks' Indicator – Map of Risks per Country**

*State advertising*

The fourth Political independence indicator aims to assess the importance and influence of state advertising on the media system. As was found in the previous implementation (CMPF 2015), the state can exert political pressure over commercial media by channelling funds, in the form of advertising, to particular, and usually to only a few, media outlets. This kind of influence may be especially important in times of financial crisis, when commercial media outlets are struggling to survive, and for local media outlets, which may be more dependent on relationships with local governments and the funding received for running their ads. In order to assess the risk for media that may stem from state advertising, this indicator consists of sub-indicators that address the regulation of state advertising, its distribution, and its importance in the advertising market.

The analysis points to the fact that this type of risk is one of most expressed and common in EU Member States, since only four of the countries studied score a low risk (Portugal, the Netherlands, Latvia and Luxembourg), two of which are on the verge of medium risk (Latvia and Luxembourg). In addition, seven countries are assessed as being at high risk from state advertising (Croatia, the Czech Republic, Ireland, Lithuania, Malta, Slovakia, and Slovenia), and eight countries at medium risk (Austria, Cyprus, Finland, Germany, Poland, Romania, Spain, and Sweden).

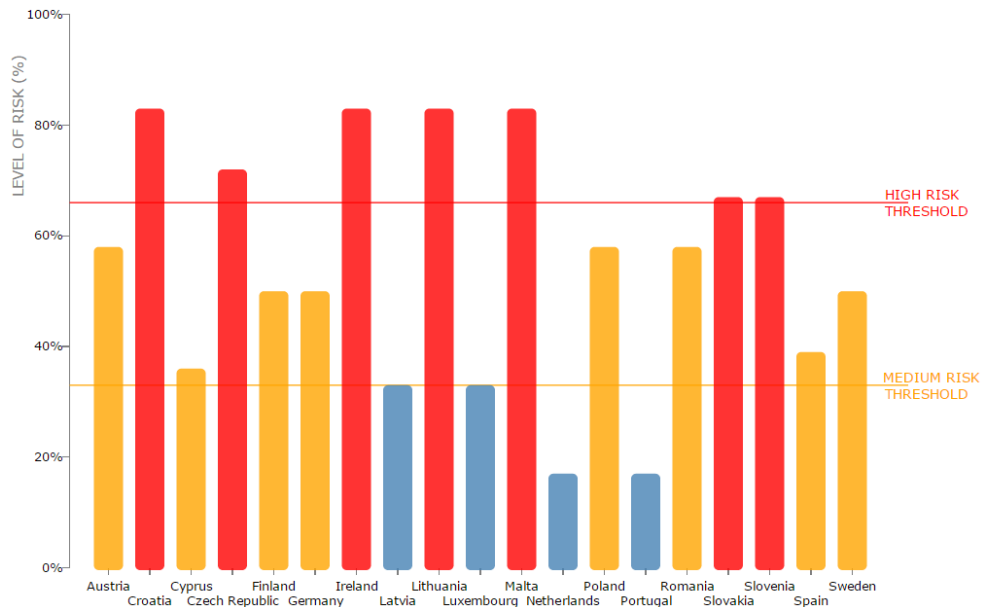
It is worth noting that seven of the nine countries whose risk from state advertising is set at 50%, or higher, are countries which have acceded to the EU since 2004. However, the lack of regulation regarding the distribution and securing of transparency for state advertising has also been found in other European countries, for instance, Germany, Ireland and Malta. Overall, eight of the 19 examined countries do not have rules relating to the distribution of state advertising to media outlets, or these rules are not transparent.<sup>9</sup>

Similarly to the issues faced in the implementation of the indicator ‘Politicisation of control over media outlets’, one of the challenges in assessing the risk from state advertising was the lack of data about its distribution and its importance within advertising markets. Specifically, in only a handful of countries was this kind of information available, and the reasons for the lack of data among the 14 countries which did not have it vary, due to the specificities of national media markets and their legislation. Building on this, there was an attempt to establish whether or not the lack of data about the distribution of state advertising and its importance for advertising markets should be seen as being problematic and/or as highlighting the problems with transparency that are related to state advertising. Of the 14 countries in which this kind of data was missing, the lack of data was described as being problematic in 10. Croatia is an example of a country in which the lack of data on state advertising is considered problematic. State advertising was part of a high-level corruption scandal in Croatia a couple of years ago, and this case may serve as a warning about how state advertising may be (ab)used in a context in which there is neither regulation nor transparency with regard to how it is distributed (for more details, please consult the Croatian narrative report, attached). Only in the Czech Republic, Germany, Latvia and Portugal, have local experts declared the lack of data on state advertising not to be a cause for concern.

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<sup>9</sup> Croatia, the Czech Republic, Germany, Ireland, Lithuania, Malta, Poland, Slovakia.





**Figure 17. State Advertising Indicator – Risks per Country**

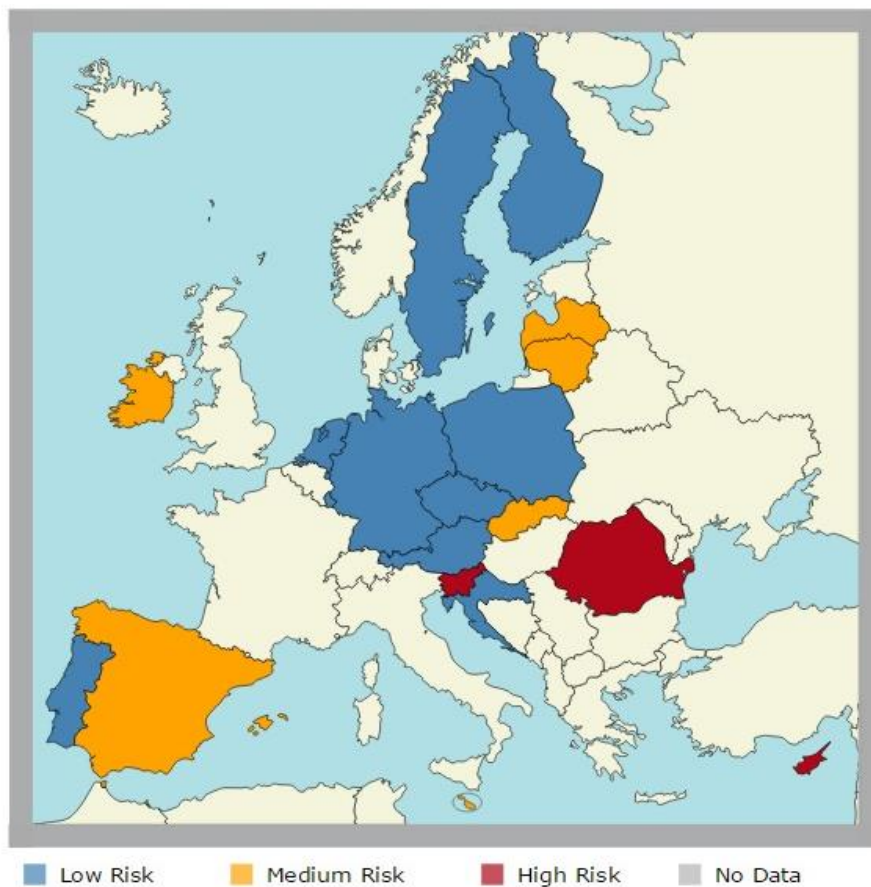
### *Independence of PSM governance and funding*

The fifth ‘Political Independence’ indicator is designed to measure the risks for the independence of PSM governance and funding. Accordingly, this indicator consists of two sub-indicators, one assessing the risks stemming from appointments to the PSM management boards, and another looking at the risks arising from PSM funding. The reason why it is deemed important to establish the risks for the political independence of the PSM are tied to its perceived role in society and its relationships with the state. PSM systems are usually established by the state, which, in some cases, still has an influence over them. Given that the PSM are thought of as being media that are both owned by the public and responsible to it, that are characterised by nationwide access, and that produce content for all communities (Smith 2012), it is feared that PSM which are under political influence will no longer fulfil the above-mentioned roles. Specifically, it is feared that this will produce biased content and reduce the ability of citizens to make informed choices. In order to secure its independence, it has frequently been suggested that the state should have a minimal ability to interfere with the appointment procedures to its boards and to exert influence by funding (Bardoel and Haensen 2008; Benson and Powers 2011; Council of Europe 2012; Hanretty 2009; Papatheodorou and Machin 2003).

With regard to the sub-indicator that assesses the risks from the politicisation of appointments to PSM boards, the focus was on examining whether regulatory framework ensures that the appointment procedures are clear, transparent, and also minimise the possibility of political interference, and the extent to which these safeguards are implemented. In addition, it whether the state can interfere with the salaries of PSM employees was also examined. In relation to the sub-indicator assessing the risks from PSM funding, the legal framework for funding the PSM was examined, as well as the state’s ability to arbitrarily change the level of funding, and the amount of direct state funding.

The analysis shows that in three countries there is a high risk to the political independence of the PSM, namely, in Cyprus, Slovenia, and Romania. In six other countries, potentially significant vulnerabilities for the PSM system were detected, with PSM systems in Austria, Latvia, Lithuania, Malta, Slovakia, and Spain assessed as being at medium risk. Poland<sup>10</sup> and Ireland scored a low risk, but they are close to the medium risk benchmark; while the other countries studied score a low risk.

Within this MPM implementation, Portugal scored a low risk from political influence over the PSM, due to the recent establishment of the Independent General Council, which is to appoint PSM board members and to act as a buffer between the State and the PSM. However, it remains to be seen how these new legal safeguards will be implemented. Overall, the analysis that is related to this indicator points to the fact that certain PSM systems remain vulnerable to political influence, but also that some European PSM systems are changing, and their development should be monitored.



**Figure 18. Independence of PSM Governance and Funding Indicator – Map of Risks per Country**

<sup>10</sup> The assessment completed for this report was conducted between April and October 2015, thus not taking into account new media law developments that sparked the criticism of various international and national organisations.

*Independence of news agencies*

The last ‘Political Independence’ indicator is concerned with the ‘independence of news agencies’. It consists of two elements: one measures the concentration of the news agencies’ market, and the other aims to establish the political affiliation of the leading news agencies. Although an argument may be made that news agencies in today’s digital environment are a less important source of information than they previously were, local partners agreed that news agencies remain relevant players in the news information market. They can even be seen as being more important nowadays than they were before, due to the time and resource pressures of producing media content, as a result of which some journalists simply copy and paste news from the wire in order to satisfy the 24/7 news demands.

The analysis reveals that risks for media pluralism in regard to news agencies exist in all of the countries that have national news agencies.<sup>11</sup> In around half of our sample the risk stems from the concentration of the market, while, in a number of countries, the risk also stems from the fact that at least one of the leading news agencies is politically affiliated. This affiliation is often a consequence of a historical relationship with the state, which is the agency’s owner and/or funder.

Overall, three countries score a high risk (Cyprus, Slovenia and Slovakia), while all of the others that have news agencies score a medium risk. Of the countries scoring a medium risk, this risk assessment primarily reflects the market concentration in eight cases (Austria, the Czech Republic, Finland, Germany, Latvia, the Netherlands, Portugal and Sweden), while in the rest of the countries that scored a medium risk it also reflects the fact that (some of the) leading news agencies are Government controlled (Croatia, Lithuania, Poland, Romania, Slovakia, and Spain).

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<sup>11</sup> Ireland, Luxembourg and Malta do not have national news agencies, so the risk was not measured in these countries.

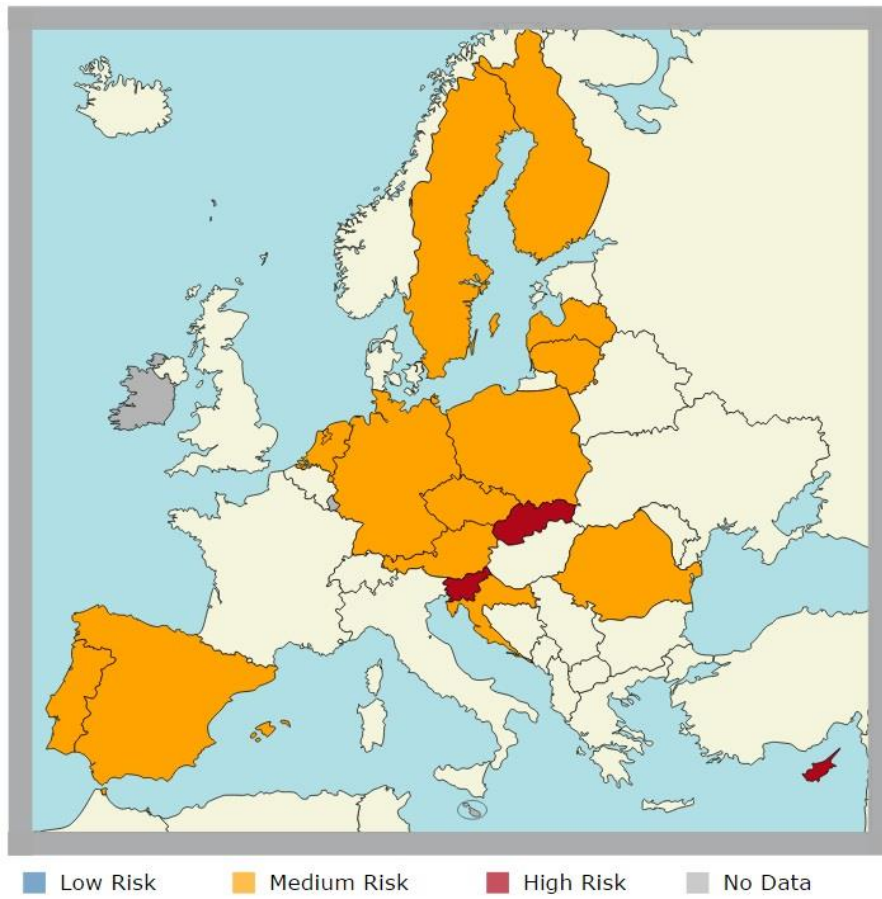


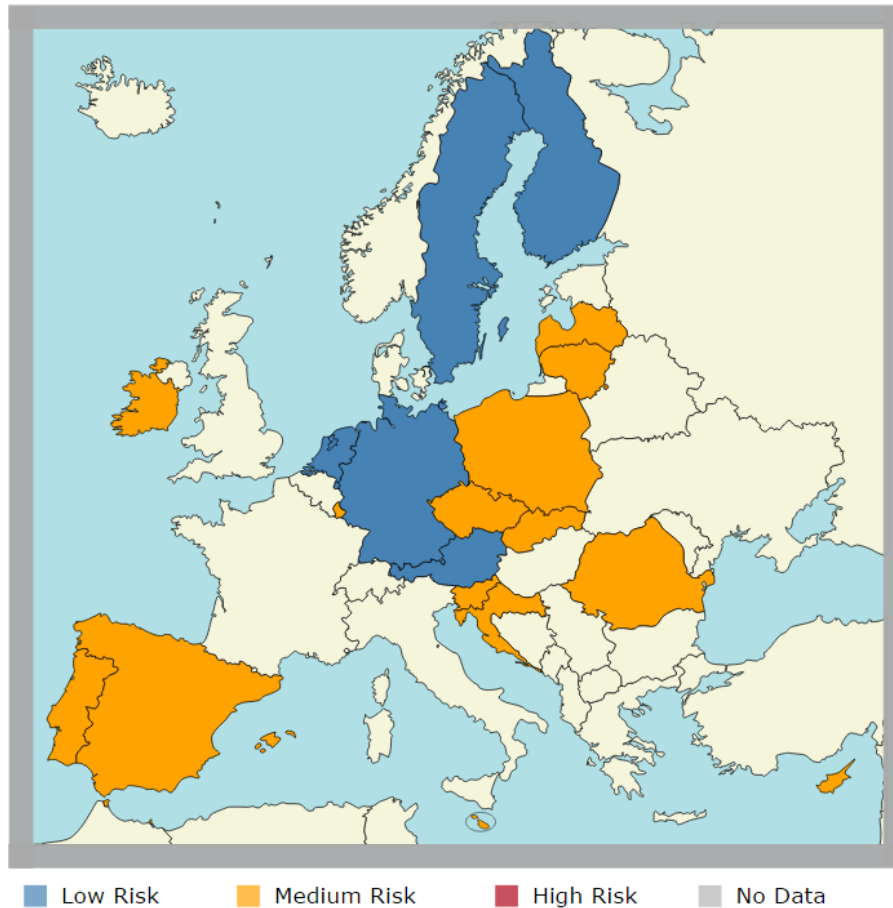
Figure 19. Independence of News Agencies Indicator – Map of Risks per Country

#### 1.4 Analysis of Social Inclusiveness

Social inclusiveness indicators are concerned with access to airtime and media platforms for different cultural and social groups, for local/regional communities, and for people with disabilities. They assess both the regulatory safeguards for, and the actual access to, media by various groups. The indicators also consider the extent of the centralisation of media systems; the universal access to the PSM and the Internet; and the quality of the countries' media literacy policy, as well as the level of the digital media skills of the population. The 'Social Inclusiveness' domain consists of six indicators:

- Access to media of different social and cultural groups, and local communities
- Availability of media platforms for community media
- Access to media for the physically challenged people
- Centralisation of the media system
- Universal coverage of the PSM and the Internet
- Media literacy

Comparative analysis of the risks in the 'Social Inclusiveness' area shows that no country scores a high risk across the whole domain. Most countries (14 of 19) score a medium risk, and five score a low risk (Sweden, Germany, the Netherlands, Finland, and Austria), as illustrated on the map in Figure 20. The only country scoring a low risk across all indicators is Sweden (9% average risk). All the other countries that, on average, display a low risk across the domain (Germany, the Netherlands, Finland, and Austria) have at least one indicator that scores a medium risk.



**Figure 20. Social Inclusiveness Domain – Map of Risks per Country**

The medium risk in the Baltic countries (Lithuania and Latvia) is mainly due to underdeveloped policies on access to media for people with physical challenges, and on media literacy. Moreover, Latvia has limited safeguards and support for community media (high risk score), which hinders the provision of independently created information and pluralistic discussions in the Latvian media system. Ireland shows a particularly high risk in relation regarding the access to media for different social and cultural groups, mainly because the RTÉ, Ireland's national public-service media organisation, does not seem to provide sufficient access to the airwaves for different social and cultural groups to the airwaves.<sup>12</sup>

#### *Access to media of different social and cultural groups, and local communities*

The indicator focuses on PSM (as opposed to commercial channels), and measures the existence and implementation of regulatory safeguards for access to airtime on PSM channels to different social and cultural groups, and the access of these groups to airtime, in practice. Moreover, the indicator assesses whether regional or local communities are involved in the production and distribution of content; whether the PSM broadcast local news programmes regularly, and if the PSM have legal obligations to:

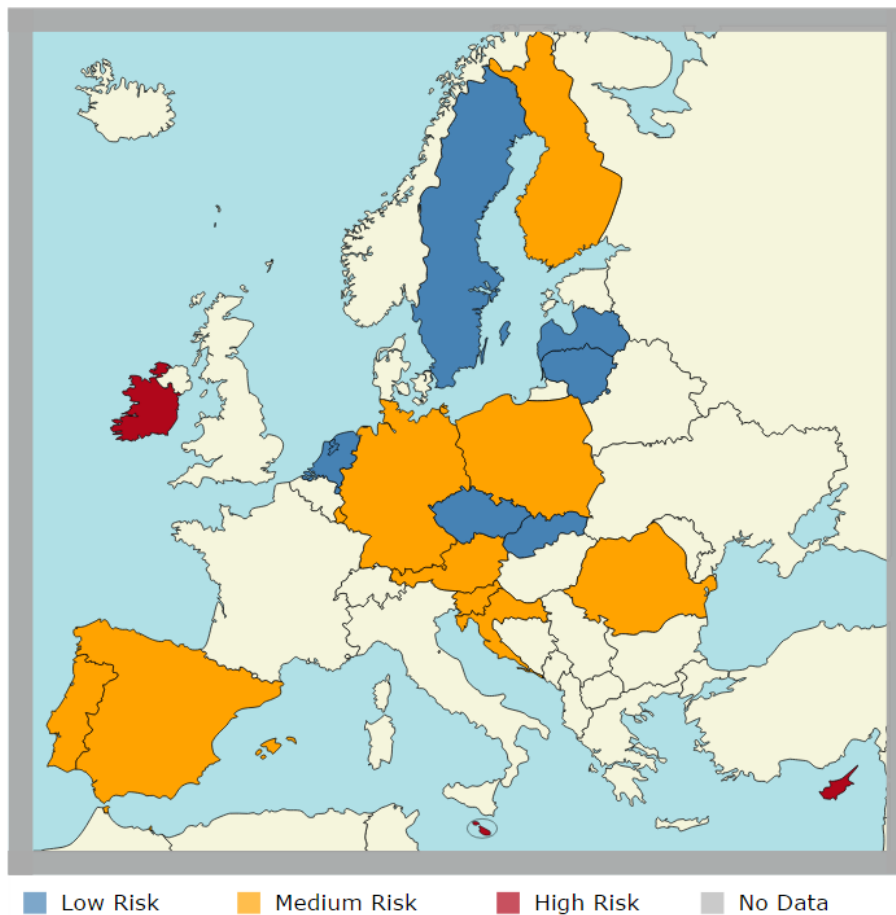
- keep its own local correspondents

<sup>12</sup> For example, the RTÉ (RaidióTeilifís Éireann) schedules rarely include any programming that focuses on the interests of ethnic minorities within Ireland (see further details in the Irish country report, attached).

- have a balance of journalists from different geographical areas
- have national news available in local languages

Most countries are in the medium risk band, six countries, geographically spread across the EU, are in the low risk band, and three small countries (Cyprus, Ireland and Malta) show a high risk (see Figure 21).

For example, in the case of Cyprus, there are no regulatory safeguards for access to airtime on PSM channels for different social and cultural groups, including minorities. In practice, these groups also have limited access to airtime. Access to airtime in Cyprus is mostly reserved for politicians, political parties, trade unions and other elite groups' representatives. The case of Malta is also quite emblematic. The Maltese law does not guarantee access to different social and cultural groups, and local media are almost non-existent (except for community radio stations). Experts claim that the lack of legislation on access to media for social and cultural groups is mostly due to the fact that the Maltese population was rather homogenous until recently, and hence there was no need for such regulation. However, they also emphasise that, due to immigration, the structure of the Maltese population is changing, and legislation securing this kind of access should be discussed.<sup>13</sup>



**Figure 21. Access to Media for Different Social and Cultural Groups, and Local Communities Indicator – Map of Risks per Country**

<sup>13</sup> This information is taken from Malta's country report, attached, where more details can be found.

It is also worth noting that the comparative analysis of results for this indicator has shown that the definition of minorities used in MPM2015 was problematic and requires further analysis. Minorities were defined on the basis of the definition used by the Special Rapporteur of the United Nations' Sub-Commission on the Prevention of Discrimination and Protection of Minorities.<sup>14</sup> In particular, the definition specified that, to qualify as minorities in the framework of the media pluralism analysis, the people in question have to be nationals of the state and to constitute over 1% of the population.<sup>15</sup> This was rather restrictive, since six of the 19 countries under analysis did not have minorities, according to this definition. Luxembourg is a case in point: despite having circa 46% of non-nationals amongst its population (Institut national de la statistique et des études économiques 2015), these do not qualify as minorities.

#### *Availability of media platforms for community media*

This indicator focuses on the availability of platforms for community media. In particular, it assesses whether community media is considered in the law to be a distinct group alongside commercial and public media, if the law safeguards the independence of community media, and if there are provisions reserving frequencies for this type of media. From the point of view of practice, the indicator assesses whether the state provides any support to community media, and whether the dedicated radio/TV channels and newspapers are proportionate to the minority populations in the country.

The indicator on the availability of media platforms for community media shows a very mixed picture, with five countries scoring a low risk, eight a medium risk, and six a high risk.

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<sup>14</sup> There is no internationally agreed definition about which groups constitute minorities. For example, the Framework Convention for the Protection of National Minorities (FCNM) of the Council of Europe does not offer a definition of a “national minority”, as there is no general definition that is agreed upon by all of the Council of Europe’s Member States. The CMPF has decided to use the following definition, which was given by the Special Rapporteur of the United Nations’ Sub-Commission on the Prevention of Discrimination and the Protection of Minorities, Francesco Capotorti, which is often adopted by UN organisations: “a cultural or social group numerically inferior to the rest of the population of a State, in a non-dominant position, whose members – being nationals of the State – possess ethnic, religious or linguistic characteristics differing from those of the rest of the population and show, if only implicitly, a sense of solidarity, directed towards preserving their culture, traditions, religion or language.” (UN 1979).

<sup>15</sup> The definition of ‘minorities’ is relevant in the case of two indicators: ‘Access to media of different social and cultural groups, and local communities’ (I1.1.6) and the ‘Availability of media platforms for community media’ (I2.2-I2.7).



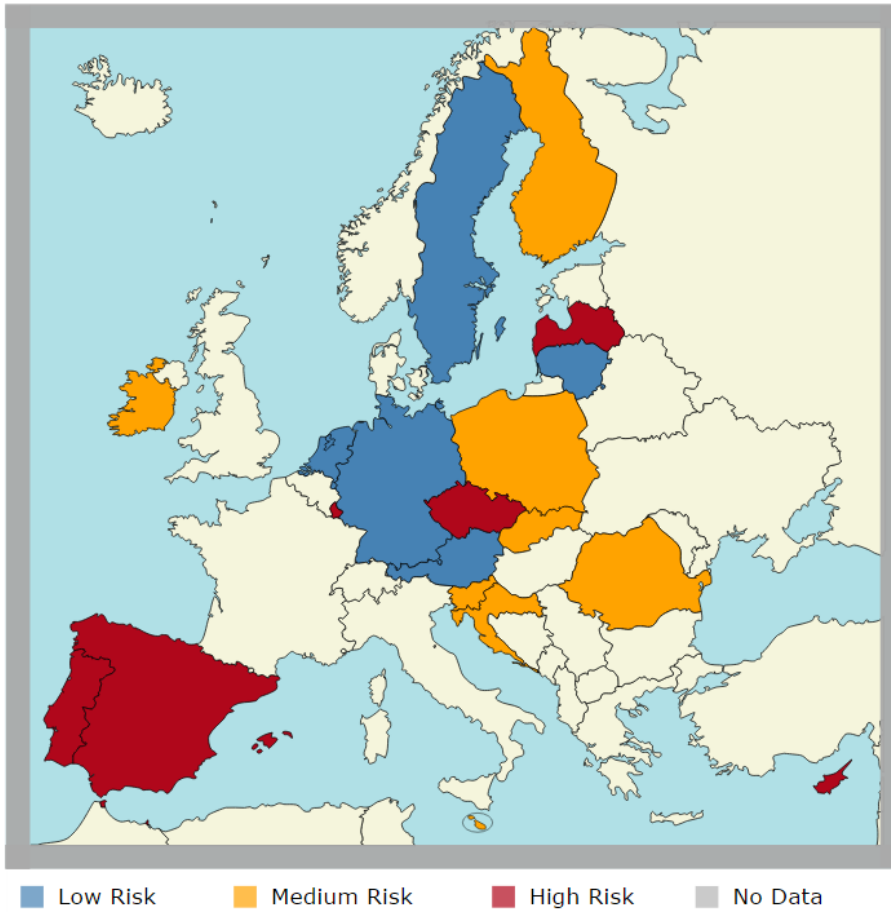


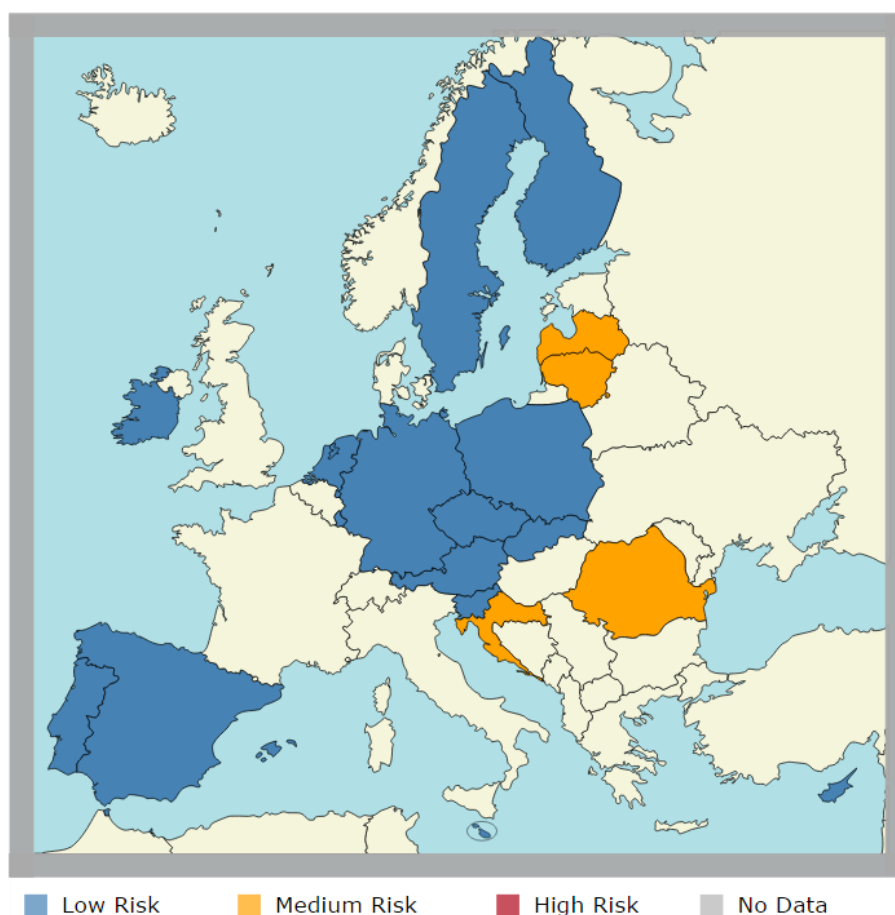
Figure 22. Availability of Media Platforms for Community Media Indicator – Map of Risks per Country

*Access to media for the physically challenged people*

This indicator assesses the existence and implementation of policies for the promotion of access to media content and services by people with physical challenges. This is the indicator displaying the lowest risk in the ‘Social Inclusiveness’ domain.

Most countries (15) score a low risk, including eight with a negligible risk, and none of the countries scores a high risk. This means that the majority of countries have a state policy on access to media content by people with physical challenges.

Moreover, in practice, most countries also address the issue by having subtitles and sound descriptions available for people with hearing impairments who watch TV. The four countries that score a medium risk (Romania, Latvia, Lithuania and Croatia) all have both an underdeveloped policy and insufficient support for people with hearing impairments. It should be noted that the general low-risk situation may also be due to the limited issue coverage of this indicator, which only consists of two variables.<sup>16</sup>



**Figure 23. Access to Media for the Physically Challenged People Indicator – Map of Risks per Country**

<sup>16</sup> The two variables of the indicator focus on (i) the availability of state policy on access to media content by physically challenged people, and on (ii) the availability of subtitles and sound descriptions that are available for people with hearing impairments, who watch TV.

*Centralisation of the media system*

This indicator assesses the legal safeguards for regional or local media by examining whether the law recognises them as being specific categories of media with special missions and obligations; whether the law reserves frequencies for regional/local radio or TV, and whether the media regulation prohibits networking arrangements between regional/local and national media. In terms of practice, the MPM examines whether the state supports regional/local media through subsidies, or other policy measures, and conducts a ‘decentralisation test’, which serves to assess the share of newspapers that is published regionally, and the percentages of the audience shares of regional/local radio and TV.

Most countries (11) rank a medium risk on this indicator, and two present a high risk. One of the high risk countries is the Czech Republic, where the results point to insufficient legal safeguards for local and regional media, and the absence of state support for these types of media. In particular, regional and local media are not recognised in Czech media law, and the law does not reserve any frequencies for local or regional radio/TV. Moreover, there is no systematic state funding for these categories of media. The other high-risk country is, rather unexpectedly, Finland. This is because the Finnish legislation has no provisions to support or protect local media, and this has resulted in limited subsidies for this type of media. Moreover, in practice, regional television channels do not exist, and the audience for regional radio channels is limited.

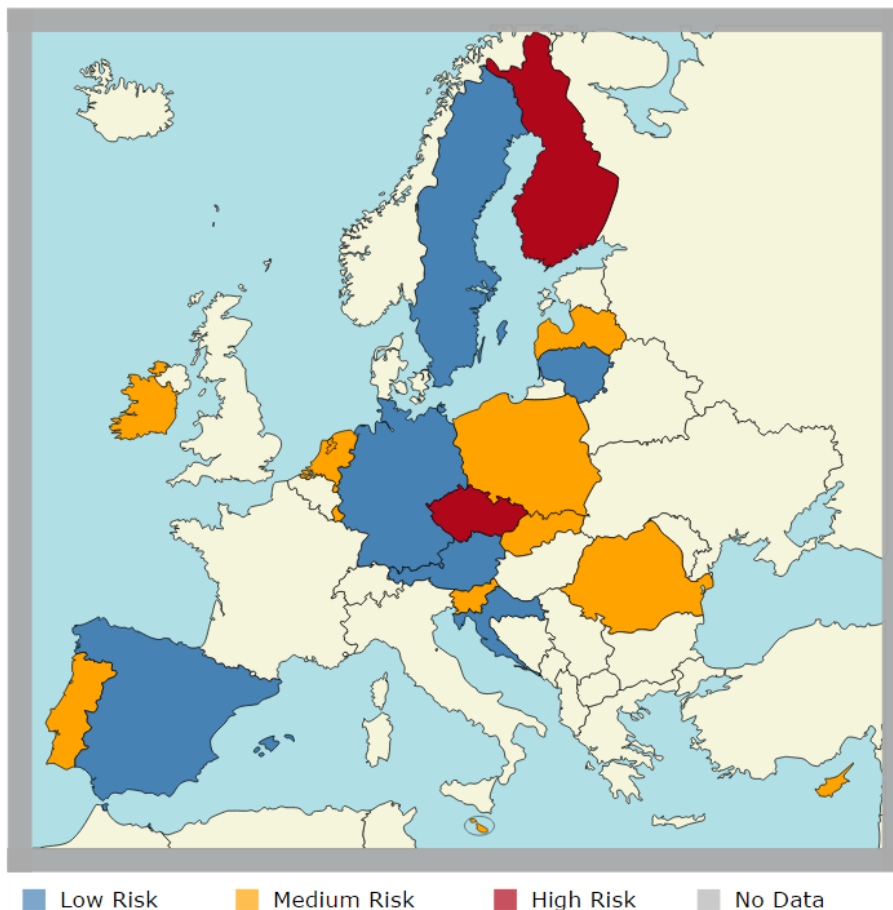
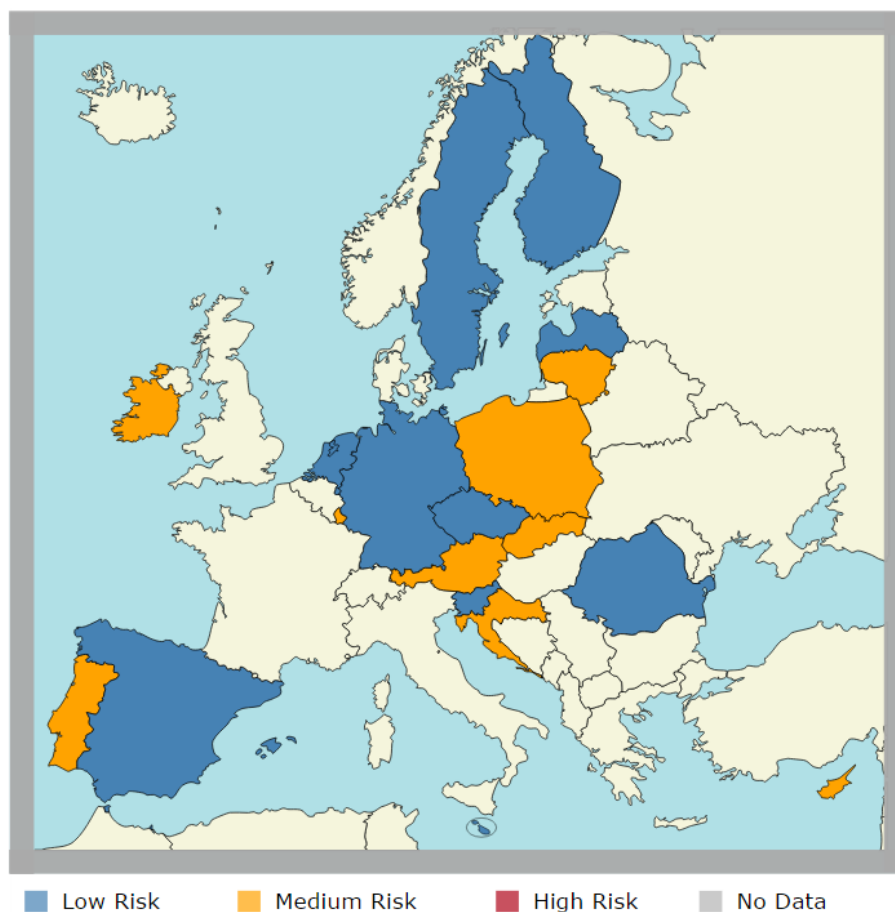


Figure 24. Centralisation of the Media System Indicator – Map of Risks per Country

*Universal coverage of the PSM and the Internet*

Most of the 19 countries have good PSM and Internet coverage. There are 10 low risk countries, and there is no high risk country.

The PSM coverage is assured almost everywhere in EU-19, except in Luxembourg. Luxembourg is a peculiar case, since there are no “proper” PSM, as such, in the country. There is only a public service radio channel (Radio 100.7), which is financed and controlled by the state. To compensate for this gap, the state has signed a ‘public service mission’ agreement with the private RTL Group, which dominates the Luxembourgish radio and TV media market.<sup>17</sup> In addition, it is worth noting that despite the absence of a high risk for the indicator as a whole, several countries show high risk with regard to broadband coverage (Poland, Croatia, Ireland, and Cyprus).



**Figure 25. Universal Coverage of the PSM and the Internet Indicator – Map of Risks per Country**

<sup>17</sup> CLT-UFA, of which RTL is a subsidiary group, has signed a contract with the government in which it agrees to assume a ‘public service mission’ (the last agreement was signed in 2007 for a period of 13 years). See more details in the Luxembourgish country report, attached.

*Media literacy*

The media literacy indicator is the indicator in the ‘Social Inclusiveness’ domain in which the highest number of countries shows a high risk (8 of 19 countries). The media literacy<sup>18</sup> indicator assesses the availability and quality of the country’s media literacy policy; as well as digital literacy, which is measured by the level of Internet usage and the digital skills of the population.

A large majority of the 19 countries have no media literacy policy, or they have an underdeveloped one. Only four countries (Germany, the Netherlands, Finland, and Sweden) have well-developed media policies.

Many expert teams expressed concern about inadequate or fragmented media literacy policies in their countries. Three of the 19 countries do not have any media literacy policy at all (Croatia, Malta and Cyprus).<sup>19</sup>

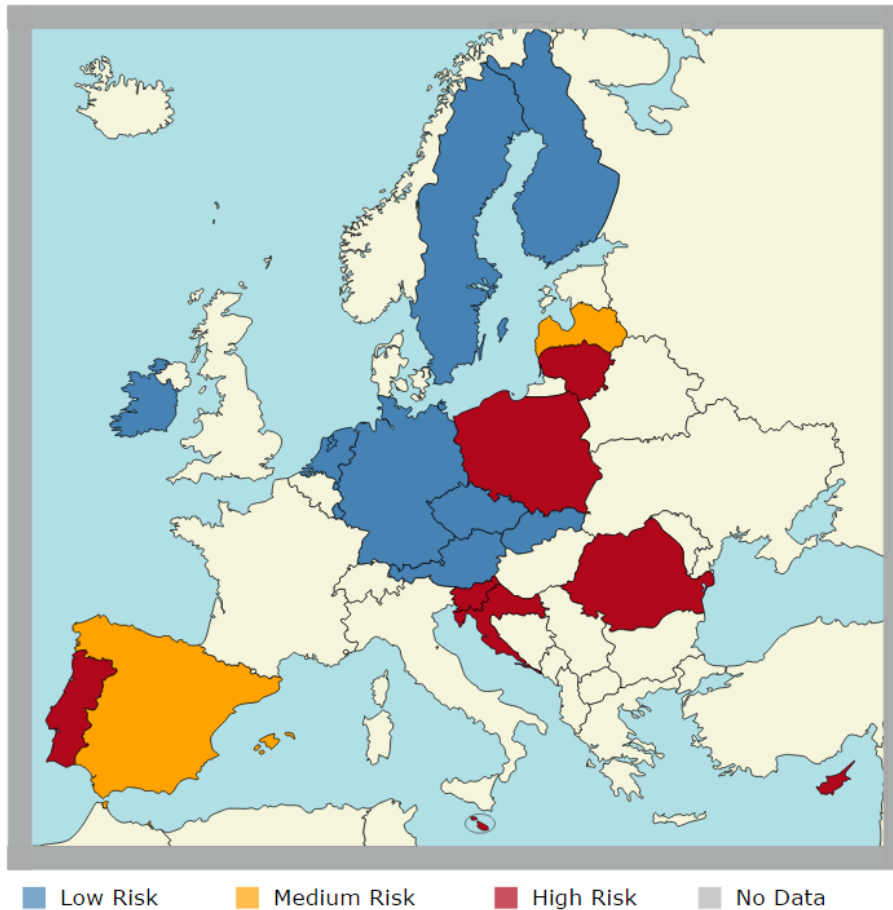
The existence and quality of media literacy policies across countries does not seem to be random. Our analysis indicates that the four countries with well-developed media literacy policies all have median incomes surpassing the EU-28 average by at least EUR 4,000. On the other side of the spectrum, the three countries with no media literacy policies have median incomes that are below the EU average.<sup>20</sup>

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<sup>18</sup> Media literacy was defined in accordance with the EU’s Audiovisual Media Services’ Directive: “Media literacy refers to the skills, knowledge and understanding that allow consumers to use media effectively and safely. Media literate people are able to exercise informed choices, to understand the nature of content and services, and to take advantage of the full range of opportunities that are offered by new communications technologies. They are better able to protect themselves and their families from harmful or offensive material.”

<sup>19</sup> To increase reliability, the country team answers relating to media literacy policy were peer-reviewed by the national groups of experts.

<sup>20</sup> A more detailed analysis of this relationship, carried out by Matteo Cernison and Alina Östling will be available in a forthcoming working paper from the CMPF.



**Figure 26. Media Literacy Indicator – Map of Risks per Country**

The other two variables in this indicator focus on digital literacy, and measure Internet use and digital skills. The most complex among these variables is the one measuring digital skills. It is a composite indicator that is derived from the Digital Scoreboard Agenda, and it consists of four dimensions: information skills, communication skills, problem solving skills, and software skills for content manipulation.<sup>21</sup> However, the media literacy indicator does not include variables that measure the ability to interpret or to critically assess on- or offline content. This gap is due to the absence of a universal definition of critical understanding of media, and to the lack of reliable and comparable data across Europe.

The results on digital aspects of literacy show contrasting results. About half of the countries (9) score a low risk on Internet usage, and, at the same time, almost as many score a high risk (7). In terms of digital skills, only three countries score a low risk. Most (12 countries) score a medium risk, meaning that between 51% and 75% of the population has basic digital skills.

<sup>21</sup> Source: European Commission (2014), Digital Agenda Scoreboard. Individuals with basic or above basic digital skills. <http://semantic.digital-agenda-data.eu/dataset/digital-agenda-scoreboard-key-indicators>.

## 1.5 Conclusions

The findings of the MPM2014 and MPM2015 implementations, even if producing tentative results, clearly show that **no EU Member State is today free from risks to media pluralism, and also that each country faces specific problems or shortcomings, which reflect its media and political landscape.** The findings of the two pilot-test implementations have highlighted that measuring risks for media pluralism is an essential exercise for the promotion of media pluralism and freedom values. The Monitor is a tool that supports policymakers, researchers and civil society in understanding the threat to media pluralism in different media systems through research, analysis and the provision of country data.

The Media Pluralism Monitor tool has been developed over the course of two pilot-test implementations, which took place in 2014 and 2015 and which were funded by the EU. These two test implementations have revealed the extent and complexity of the problems in measuring threats to media pluralism in the EU Member States, and the challenges relating to the comparison of different values. Even more importantly, the findings have highlighted that no country is free from risks to media pluralism.

The risk analysis for ‘Basic Protection’ shows that all but one country score a low risk. However, several countries come close to the medium risk threshold, with a risk level of 25% or more. Given that the ‘Basic Protection’ indicators represent the regulatory backbone of the media sector in every contemporary democracy, this apparently low level of risk in certain situations may still reveal a threat to media pluralism.

The ‘Market Plurality’ domain, which is concerned with transparency and concentration of media ownership, is the domain with the highest risk. Five countries score a high risk, and nine countries score a medium risk in this domain, highlighting a potential threat to external pluralism.

In the domain of ‘Political Independence’ which is concerned with the politicisation of the media, as well as with the independence of PSM and news agencies, no country scores a high risk for the overall domain. Most countries score a medium risk, with seven being at low risk from political influence over their media systems.

Similarly, no country scores a high risk in the ‘Social Inclusiveness’ domain, which focuses on media literacy as well as the access to, and availability of, media for different groups in the population. Most countries (14 of 19) scored a medium risk.

Even if some of the domains show limited risk levels, it is important to emphasise that high risks to media pluralism appear across all of the four MPM domains. This is illustrated in Figure 27, which shows indicators in which at least one of the 19 countries scored a high risk.

Results

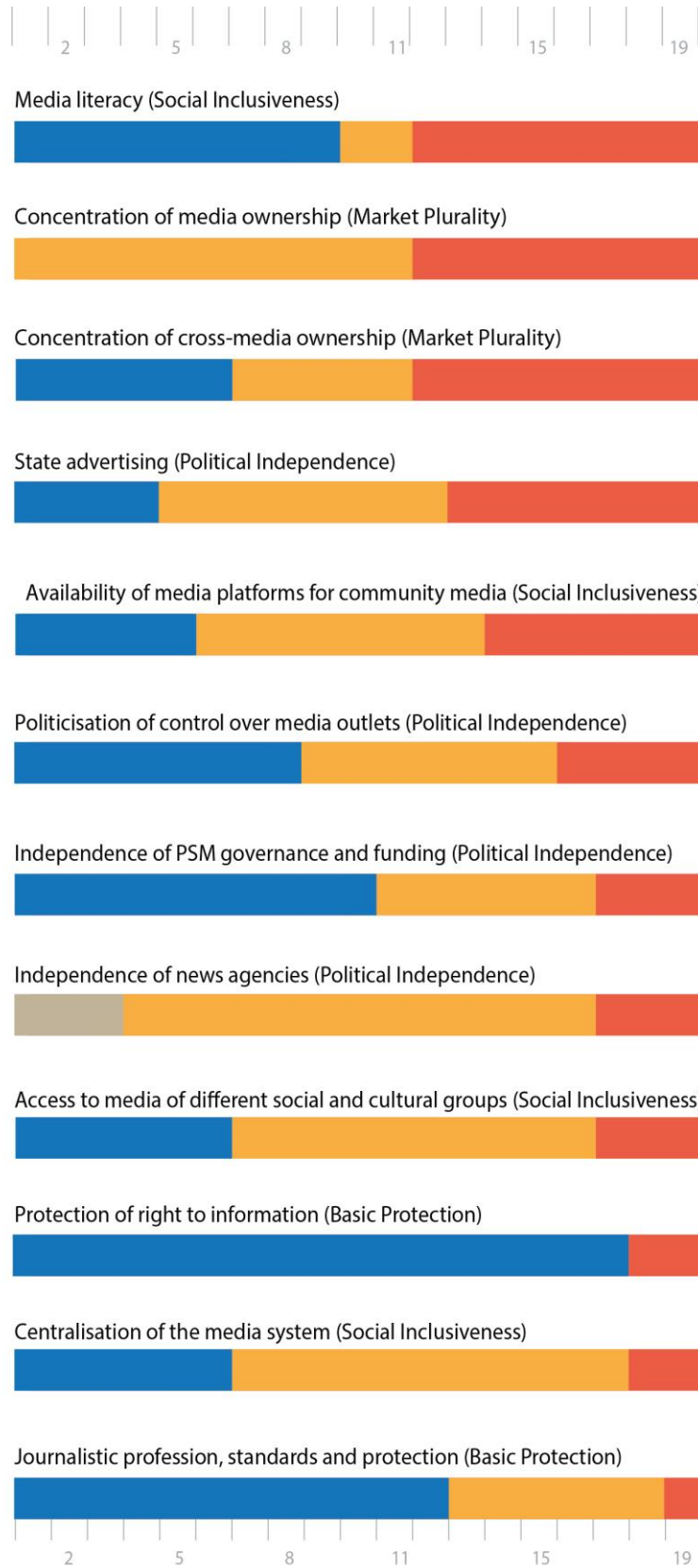


Figure 27. List of Indicators with Highest Scores



‘Basic Protection’ is the domain where the fewest countries scored a high risk (see Figure 27). The indicators in which some countries (three) show a high risk are the ‘Protection of right to information’ and ‘Journalistic profession, standards and protection’. The trend of the indicator on the standards of the journalistic profession seems alarming in the European context. ‘Market Plurality’ is on the top of the list of the worst indicators. Eight countries scored a high risk, respectively, in regard to the concentration of media ownership and of cross-media ownership.

‘Social Inclusiveness’ and ‘Political Independence’ are domains in which the major number of countries scored a high risk on one or several indicators.<sup>22</sup> The most worrying ‘Social Inclusiveness’ indicators are those on media literacy and on access to media for different social and cultural groups, as well as for community media. In the ‘Political Independence’ domain most indicators (four of six) have countries scoring a high risk. Here, the high risk indicators focus on state advertising, the politicisation of control over media outlets, the independence of PSM governance and funding, as well as that of news agencies.

In conclusion, the results of the MPM implementation demonstrate that measuring the risks for media pluralism is an essential exercise for the promotion of media pluralism and freedom values. The Monitor allows policymakers, researchers, and civil society to obtain a snapshot of the state of play and, potentially, of the trends that are related to media pluralism and media freedom in a given country.

Each domain of the implementation of the MPM presents its own challenges, whether through the differences in the legal and institutional set up, the variety of political landscapes, the differences in the perception of media realities, or in the widespread lack of key data for measuring media pluralism. The pragmatic and systematic approach to underlining these problems, backed up by a tested and standardised methodology, represents the strength of the MPM, thereby offering research results that are comparable across countries, but, at the same time, they are country-specific in providing individual assessments and concrete guidance on how to assess a specific situation from an objective stance. Detailed results for each country can be found in the Appendixes of this report (online) as a result of the work done by the national country teams.

At a time of widespread economic and political crisis, and of rapid evolution in the digital world, the risks to media pluralism and the democratic project remain pressing throughout Europe, while they often receive insufficient attention and resources. As the High Level Group on Media Freedom and Pluralism have concluded in their report (2013: 4): ‘To be able to fulfil a more proactive role, the EU needs to be able to access up-to-date information on the state of media freedom and pluralism in the Member States (monitoring), as well as developing a deeper knowledge of this rapidly-changing sector.’ The impartial and tailored implementation of the MPM tool in the EU aims to help to fill these knowledge gaps by providing essential up-to-date and comparable analysis of media freedom and pluralism, both in the EU and beyond. This monitoring exercise is essential for mapping and managing the potential risks to media freedom and media pluralism.

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<sup>22</sup> ‘Political Independence’ has 17 countries that score a high risk on an indicator, and ‘Social Inclusiveness’ has 19 countries that score a high risk on an indicator.



## PART II

### 2. Methodology

**The Media Pluralism Monitor 2015 organised the risks for media pluralism into four main domains of risk: ‘Basic Protection’, ‘Market Plurality’, ‘Political Independence’ and ‘Social Inclusiveness’.** This categorisation allows for an assessment that encompasses the different components and meanings of “media pluralism”. These domains are assessed according to the scoring of **19 indicators** in total.

The research design of the MPM2015 was based on a **questionnaire** that was compiled by the **national country teams**, which consisted of experts in media pluralism and media freedom. The questionnaire was composed of **legal, economic and socio-political questions** in order to allow an assessment of media pluralism risks in any given country, taking into account the legal framework, its implementation, and the effective conditions of the media landscape. Legal and socio-political questions are closed, while economic questions ask for a numeric value that is translated into a level of risk. This method allowed for the gathering of both quantitative and qualitative data, which proved to be crucial in assessing the risks for media pluralism in the EU. Additionally, this method allowed for the quantitative analysis of answers and the production of a numerical risk assessment, which was important in obtaining comparable results across countries.

**A second group of experts**, which included national stakeholders and experts in the area, **conducted a review of the answers to questions that required a qualitative type of measurement and/or a lack of measurable and easily verifiable data.**

The data were collected using an online platform that was developed by the CMPF. The CMPF checked and supervised the quality and consistency of the data collected and of the methodology used.

The final assessment per area of risk was carried out using a standardised formula, that was developed by the CMPF.

Each variable/sub-variable that was assessed by a question received a score from 0 to 1 according to the answer to that specific question. The legal questions (yes/no replies) have been rated 0 or 1. The other variables (three-option replies) have been rated 0/0.5/1 according to the band into which the reply falls. The overall result is the average of the average of the variables of the same type.

#### *The research design*

The research design of the MPM2015 follows that of the MPM2014. The MPM is a tool that is designed to identify the potential risks to media pluralism in Member States. The risks are assessed within four main domains: ‘Basic Protection’, ‘Market Plurality’, ‘Political Independence’ and ‘Social Inclusiveness’, thus allowing a holistic screening of threats to media pluralism, which are not restricted to a sectorial analysis. The MPM2015 embraces a broad notion of media

pluralism that encompasses political, cultural, geographical, structural and institutional dimensions of the concept. The risks in any given domain are assessed through the relevant indicators that are then evaluated through a questionnaire that is made up of legal, economic and socio-political questions. As was established for the MPM2014, the MPM2015 mostly focuses its analysis on news and current affairs. However, it must be noted that, as in MPM2014, “all indicators that assess the general universality of media coverage and the outreach of the diffusion of information” (CMPF 2015) are included in the MPM2015. “They are considered to be basic indicators that are relevant to the infrastructure and universality principles as a whole. In particular, indicators on pluralism *vis à vis* minority coverage, outreach to disabled people, and media literacy, are preserved as part of this holistic principle” (CMPF 2015).

The MPM2015 is mostly centred on secondary data analysis, the information for which is collected through a questionnaire-based method, which is supplemented with primary data gathered through interviews, where this was needed, and the analysis of legal documents, together with a group of experts’ evaluation of the variables that were difficult to measure and/or that required a qualitative type of measurement and/or that showed a lack of measurable and easily verifiable data. The secondary data analysis is the only method which is considered to be able to produce reliable and valid findings in the context of this project, due to the time and resource-constraints. Given that its main advantages are that data can be gathered in a faster and less expensive way, the secondary analysis of the available data is deemed to be the best possible option for assessing risks for media pluralism across a large sample in a short period of time (within the 12 months of the project). In addition, the first MPM pilot-test implementation revealed that there are many reliable, available materials which can be used as primary and secondary sources, e.g., national laws, case law, decision practice, governmental documents, NGO reports, official statistics, and academic research. Hence, drawing on these sources is a logical decision, due to the availability of data and resources.

Data for MPM2015 was gathered through a structured questionnaire with closed questions (except for the economic questions, but benchmarks are set for these in order to calibrate them into qualitative answers – please see the ‘User Guide’ in the Appendix 3 [online] for details). This method allowed for the gathering of both quantitative and qualitative data, which proved to be crucial in assessing the risks for media pluralism in the EU. Additionally, this method allowed the quantitative analysis of answers and the production of a numerical risk assessment, which is important in order to obtain comparable results across countries.

#### *Methodological limitations*

The second pilot-test implementation of the Monitor in 2015 has highlighted certain areas which need further refinement so as to make the final research instrument as applicable and reliable as possible.

The main methodological challenge during the development of the Monitor has been to select the right variables for measuring media pluralism, to standardise the variable questions and to aggregate the variables into meaningful indicators that can be used to calculate risk. In order to

allow the scrutiny of our method and its potential limitations, this report presents all our indicators and the formula that is used to calculate risks.

Although the results of the MPM2015 should be taken more as an indication of risks, than as their final assessment, the findings of the second pilot-test implementation reinforced some of the findings of the MPM2014 (<http://monitor.cmpf.eu.eu/results-2014/> and CMPF 2015), thus pointing to their validity. The findings of the MPM2015 also allowed for the identification of areas in which media pluralism in the EU Member States might be at more or less risk. However, further monitoring and analysis are needed in order to obtain a better understanding of the threats which a national media system may be facing.

Finally, this analysis also pinpointed that data which are critical for assessing risks to media pluralism are missing in several areas across the EU Member States. These data are particularly important for the transparency of the relations between the media and politics. Hence an effort to collect these data should be made in the future in order to allow a more nuanced and accurate evaluation of the threats to media pluralism in the EU.

Despite the Monitor's limitations and challenges, which are emblematic of all international indices, the MPM is a useful tool that can be used to provoke public debate and to inform policy developments, as well as to promote the release of relevant data and to inspire further research.

## 2.1 MPM2015 structure and calibration

All of the questions in the MPM2015 questionnaire have been classified as being either variables (coded as X0.0) or sub-variables (coded as X0.0.0). Some variables are stand-alone, meaning that they do not have any corresponding sub-variables, while other variables, alongside the opening variable question, also have one or more sub-variables, which, together with the opening question, contribute to the risk assessment of the variable. Further, variables are grouped into sub-indicators, and sub-indicators into indicators, which are integral parts of each MPM2015 domain.

In addition, each question in the MPM2015 questionnaire has been classified as belonging to one of the four question types: Legal existence (L-e) questions focused on whether or not a particular provision exists in a country's legal framework; Legal implementation (L-i) questions, designed to examine whether due process is in place to ensure the effectiveness of the legal safeguard; Socio-political (S) questions were those that asked about the extent to which a legal safeguard is implemented, or that examines the actual practice (i.e., a reality check); while economic (E) questions were designed to assess the risk based on the economic data (e.g., market revenues, advertising shares, direct government grants to the PSM) that are related to media pluralism.

In order to determine the risk for each variable, sub-indicator and indicator, a standardised formula has been applied to the entire MPM2015 questionnaire. The formula was designed by drawing from similar studies in which indices were based on a list of questions/indicators whose answers were calibrated on a scale from 0 to 1 (e.g., Gilardi 2002; Hanretty 2009). Hanretty and Koop's (2012: 204) overview of indices for independence that are used in academic research also confirms that 'for items with multiple responses, response scores have typically been equally distributed along the interval [0,1].' This method of transforming answers, both quantitative and qualitative, into numerical values on a set scale, has been well developed in the theory of fuzzy sets. Specifically, the process of calibration in the fuzzy set qualitative comparative analysis (fsQCA) allows for the transformation of quantitative and qualitative answers of both a dichotomous (e.g., yes-no) and a polychotomous (e.g., low, medium, high risk) nature, into a scale from 0 to 1 (Ragin 2008a, 2008b, 2009). Consequently, the same method of calibration has been used to assign values to the answers to the MPM2015 questionnaire.

Each variable/sub-variable received a score from 0 to 1, according to the answer to the specific question, with scores closer to 0 pointing to a low risk assessment, and those closer to 1 pointing to a high risk assessment. Specifically, answers to the Legal-existence (L-e) questions, whose response type was yes/no, were coded as 0 or 1. Further, questions with a three-option reply (low, medium, high risk) were coded as 0, 0.5 or 1, according to their risk assessment. The same calibration was applied to the Economic questions (E), whose answers were firstly transformed into qualitative replies (low, medium, high risk), based on set benchmarks (please see MPM2015 User Guide for details).

One of the innovations of the MPM2015 has been the introduction of the possibility to answer using the options 'not applicable' and 'no data' to all questions. The option 'not applicable' has been introduced to better capture the specificities of the national contexts and to allow for the exclusion of questions which are irrelevant, or that are applicable to a country's

media system. For example, if a country does not have any recognised minorities, as defined by the MPM2015, all of the questions relating to minority media were coded as ‘not applicable’. This answering option was also used in variables with logically dependent sub-variables. For example, if the variable question asks whether there is a media law that aims to secure the pluralism of political viewpoints in the PSM reporting, and the answer to this question is ‘no’, then other sub-variables of this variable which ask about the existence of the body monitoring the law, its powers, etc., have also been coded as ‘not applicable’. It was decided that all questions coded as ‘not applicable’ would be excluded from the analysis and would not contribute to the risk assessment of the variable (if the question was a sub-variable), or the sub-indicator, since questions answered in this way were deemed to be irrelevant to the context being examined.

In regard to the ‘no data’ answering option, this was introduced primarily to allow researchers more flexibility in answering economic questions. As the previous implementation has shown (see CMPF 2015), some of the economic data are missing across many of the EU Member States, and in order to better capture this information, MPM2015 offered the option of a ‘no data’ answer. Following the choice of this answer, the country teams were asked to evaluate whether the lack of data represents a transparency problem within their national context, i.e., to evaluate whether the lack of data should be seen as being problematic in their country. In this way also, the specific characteristics of the national context were accounted for, since there may be a variety of reasons why certain data are not available/accessible across EU Member States, and not all of these reasons may be causes for concern.

In order to ensure that all ‘no data’ answers contributed to national risk assessments in the same way, a standardised procedure to assign values to the ‘no data’ answers was developed by the CMPF. According to this procedure, each ‘no data’ answer was coded and assigned one among three possible values:

- 1) Low Risk, is linked to a value of 0.25;
- 2) High Risk, is linked to a value of 0.75;
- 3) Missing data are interpreted as a ‘not applicable’ answer and are excluded from the analysis.

The number of the ‘missing data’ values was limited, as much as possible, and was adopted only as a residual category in cases where comments that evaluated the reason behind the lack of data were missing, incomplete, or were impossible to interpret.

In other cases, the following procedure was applied:

Firstly, if the team member took a position in the answer, indicating that a high risk is present, or, in contrast, that the lack of data is not problematic, the CMPF has followed this suggestion and has coded the ‘no data’ accordingly, with either a low or a high risk value. In cases where the answer was vague, or where its meaning had to be deduced, the following criteria were considered:

- a) Taking into account the local context: If the data are not collected because they are considered to be of limited interest, e.g., because the country is too small to collect detailed information, because a particular medium has a very limited reach, etc., a ‘low risk’ value was assigned

- b) If there is a legal requirement to collect the lacking data, a ‘high risk’ value was assigned
- c) For questions concerned that are with the audience data and the revenue/market share data:
  - if the country presents data on audience, but not on revenues/market share: the market share data is excluded from the analysis, i.e., the answer is given a ‘missing data’ value, meaning that the findings are based on the audience variable alone. In other words, the revenue data are considered to be optional.
  - if the country presents data on the revenues, but not data on audience shares: the lack of audience shares data is coded as being ‘high risk’ in all cases, since it is the standard reference for the market.
  - if the country produces neither data on the audience, nor on the market share: according to above mentioned rules, the lack of audience shares’ data is coded as being ‘high risk’, and the lack of market shares data as being ‘missing data’

All ‘no data’ assigned values have been double coded, meaning that two independent coders assigned to each ‘no data’ answer one of the three values. In cases where the coders disagreed, a discussion was held between the coders until a consensus about the final value was achieved.

#### *MPM2015 aggregation method*

The aggregation method relied on the approaches used in previous, similar studies (for an overview see Hanretty and Koop 2012), but taking into account the traditions and logic of the Media Pluralism Monitor Project. Specifically, the method based on the mean of the item scores, used as the most common aggregation method in calculating indices, was updated to take into account the logic of the MPM, which has traditionally relied on the groupings of legal, socio-political and economic indicators. Consequently, the procedure for establishing the risk assessment of an indicator was as follows:

- 1) calculate the mean of L-e within one variable (variable + sub-variables)
- 2) calculate the mean of L-i within one variable (variable + sub-variables)
- 3) calculate the mean of 1) and 2). This is the value of the L variable (the L variable is ‘e’ or ‘i’ according to the type of opening question/variable)
- 4) calculate the mean of the L-i variables within the sub-indicator
- 5) calculate the mean of the L-e variables within the sub-indicator
- 6) calculate the mean of 4 and 5 to get the L value within the sub-indicator
- 7) calculate the mean of E variables within the sub-indicator
- 8) calculate the mean of S variables within the sub-indicator
- 9) calculate the mean of 6), 7) and 8). This is the result of the sub-indicator.
- 10) the value of the indicator is the mean of all its sub-indicators.



Finally, the risk assessment of the domain is calculated as the mean of all its indicators. It should be noted that all values were presented as percentages for ease of use and interpretation (e.g., a score of 0.46 is presented as a risk of 46%).

The procedure for determining the risk assessment of variables, sub-indicators, indicators and domains, detailed above, allowed the MPM to benefit from a standardised formula for all levels of the Monitor. This enhanced the comparability of results among the different levels of the Monitor, decreased the arbitrariness in assessing the risk assessments of the various indicators, and, overall, this increased the validity and reliability of the findings. Furthermore, this formula also contributed to establishing a better balance between the evaluation of the legal framework (L variables) with the evaluation of the actual practice, captured by socio-political and economic variables. Finally, the MPM2015 formula also enabled the establishment of risk assessments which are better tailored to the specificities of the national contexts (through the introduction of the 'not applicable' and 'no data' answers). In this way, the differences between the Member States were better captured and reflected in the risk scores.

## 2.2 Improvements from MPM2014

In the course of the project, the CMPF revised the MPM2014 tool and developed a new MPM version (MPM2015), which was tested in 19 EU countries. The revision of the MPM2014 tool consisted of a thorough analysis of the shortcomings that were noted in the first MPM implementation. Based on this analysis, the CMPF teams updated some of the indicators and variables, revised the User Guide, and adapted the online platform in line with the new questionnaire.

The analysis of the shortcomings of the first MPM implementation was based on the SMART criteria. These criteria were used during the pilot-test of the MPM2014, and the CMPF asked the local teams of the 9 selected countries to score and assess the validity of each of the 34 indicators:

- Specific (if it had a sufficiently precise meaning, and a clear and direct link with media pluralism);
- Measurable (if the indicator could be expressed by quantitative or qualitative scores);
- Achievable/Attainable, if data were available or it were technically possible to obtain data within a reasonable time frame and at a reasonable cost;
- Result-oriented: if it were feasible to define reliable border values; if there were general agreement over interpretation of results;
- Time-bound: data can be collected frequently enough to inform the progress and influence the decisions (data on this criterion were not provided by all the teams, as it was not mandatory to reply to the related question, since the MPM was supposed to measure the status of media pluralism at a given moment in time).

In general terms, the analysis of the SMART data showed that legal indicators were assessed as being the most clear and specific, and were well selected and useful, for the specific purpose of assessing the risks for media pluralism. A better differentiation between the adoption of legal measures and their implementation was suggested, as well as a more detailed correspondence between the questions on the existence of a legal framework and the existence of a relevant monitoring and sanctioning system, appeal mechanisms and their effectiveness. In some cases, major revisions were carried out that were based on the SMART analysis.

All of the economic indicators were generally assessed as having a clear and direct link with media pluralism and freedom. Some questions were raised on the availability of the data requested, on the clarity of the methodology for measurement, and on the need to better differentiate the indicators, depending on whether they were applied to small or big countries (see the discussion on the coefficients, below). The socio-political indicators were generally assessed as effectively describing the most important aspects of media pluralism and media freedom. As formulated, they had a sufficiently precise meaning, but they were the most problematic in terms of measurability and attainability. In particular, the use of content analysis was criticised as being both too expensive and too limited in scope.

Building on these reflections, the CMPF again analysed the logic of the MPM2014 in order to assess whether the tool was covering all the possible risks, taking into account also the internal

assessments that the CMPF elaborated during the 2014 test.<sup>1</sup> Moreover, the current academic and policy debates on media pluralism topics were taken into account. In particular, the CMPF checked whether any new essential component for the assessment of media pluralism in news and current affairs needed to be added.

The CMPF made an additional effort to further simplify the MPM, in order to obtain a more user-friendly and streamlined tool than the already simplified MPM2014, and to enhance its general usability. The key methodological issues addressed were:

- The application of coefficients to certain variables
- The balancing of different types of variables (legal, economic, and socio-political)
- The clarifications of variables and the enhancement of the online platform
- The improvement of the measurements of pluralism in the digital world
- Accounting for the lack of data, and cases in which the country teams claimed that certain indicators were not applicable in a specific media landscape.
- The standardisation of the method for measuring risks across indicators and domains.

These issues are discussed in the following sections.

### *Coefficients*

The issue of whether certain variables need to be weighted by coefficients was raised following the pilot implementation of MPM2014. Several stakeholders expressed concern that some variables might not accurately capture the media pluralism risks in all of the EU countries due to the specific characteristics of the media markets in their countries. Consequently, the application of coefficients was thoroughly debated in the CMPF, in particular, the following issues:

- How to account, if at all, for market size in measuring the risks arising from media ownership and concentration?
- How, if at all, should the consumption and the impact related to different media (i.e., TV, radio, print, internet) be accounted for in evaluating the risks for pluralism?

The argument in favour of applying coefficients is, as stated above, that specific characteristics of the media markets, or the consumption of news through a preferential media, should be taken into account in order to produce a more accurate evaluation of the media pluralism risks. Information which could be used for such weighting might include the population size, GDP, audience shares, or market shares per medium.

There are, however, several counter arguments against applying coefficients. Firstly, the decision to apply a particular coefficient would mean that there is an implication of a causal connection between the independent (coefficient) and dependent variable (that which is being weighted). With the example of the influence of market size on media concentration, the

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<sup>1</sup> Please note that the application of the tool in Italy was carried out directly by CMPF researchers.

problem is in determining, with some degree of certainty, that it is precisely the size of the market which is influencing the media concentration. In other words, the reason why media markets are concentrated in different countries may vary, and the application of a particular coefficient, which may be relevant for one, but not all, countries, would produce misleading results. Secondly, the most plausible independent variables which could be used for weighting do not seem to be connected in a linear fashion with the dependent variables. Specifically, while small market size may be connected with concentrated markets, there is no evidence to suggest that large markets are connected with significantly less concentration in media markets. Hence, applying coefficients would distort the data if they were applied to the entire sample of the countries analysed.

The final decision not to apply coefficients was taken following data analysis, which confirmed that it is not possible to claim that one factor has a decisive influence across the EU Member States and that must be taken into account. The most obvious example of this is that the MPM2015 results show that small countries do not necessarily score a high risk in the 'Market Plurality' domain. On the contrary, almost all of the countries that score a low risk for this domain can be characterised as being countries with small markets (Croatia, Cyprus, Malta, Slovenia). Hence, applying coefficients in this context could not be justified.

Furthermore, the decision not to apply coefficients was also taken with the aim of minimising the researchers' interventions in the data and findings. In other words, it was deemed better not to intervene in the results by mathematically altering them for any reason, and eventually to explain them by contextualisation.

#### *Balancing legal, socio-political, and economic variables*

In the process of restructuring the MPM, the CMPF also dedicated particular attention to the balance between legal, socio-political, and economic variables. To compensate for the overemphasis on legal issues in MPM2014, and to better capture the complex nature of some of the media pluralism aspects, many of the variables concerning the implementation of legal standards – which had previously been classified as legal – have been changed into socio-political variables. This allowed for a wider range of answers (three options, versus yes/no categories) and the answers captured more of the nuances of media pluralism for MPM2015.

Further, the MPM2015 indicators have been clustered around common themes, making the distinction between legal and non-legal indicators less rigid, and allowing for different types of variables to be measured within a single indicator. In this way, MPM2015 took a more holistic approach to measuring risks, since the risk assessment of each indicator reflects the risks from the legal, economic, and socio-political perspectives combined.

#### *Update of the user guide and enhancement of the online platform*

A major innovation in the online platform was the addition of explanations about what exactly is being assessed by each variable, and the provision of suggested sources for each

variable, or sub-variable. This has been proven to be extremely useful in avoiding confusion and in significantly reducing the requests for clarification from country teams. A particular effort was devoted to checking the consistency of the Glossary and to modifying the definitions according to the SMART assessments in 2014.

The combination of better-defined variables, explanations about what is being measured, and in what way, and revised definitions, has resulted in a clearer and more comparable monitoring tool. Further, the requirement for country teams to provide comments in the online platform for each variable (e.g., a summary of the relevant law in English) and to indicate the relevant sources for each variable, has allowed the country teams to explain their answers and to tailor them as necessary. This innovation has also allowed the CMPF to gather a great wealth of useful information and sources that relate to media pluralism and freedom in the EU.

### *Digital indicators*

The MPM2015 has expanded and refined the use of digital variables in respect of the previous MPM versions. If compared to the MPM2014, the CMPF has changed several indicators that assess the risks for pluralism in digital environments. CMPF is engaged in a permanent debate with other academics and institutions who are discussing these topics in order to find suitable solutions for the measuring of the plurality of the offer and of the consumption of information online, with a special focus on the role of the content intermediaries of the web. With the new variables, we have strengthened the capacity of the MPM to assess these types of risks.

MPM2015 puts emphasis on the digital dimension in three of the four risk domains (in the Basic Protection, Market Plurality and Social Inclusiveness domains). It addresses key media pluralism aspects, such as:

- The safety of journalists, and the violation of freedom of expression online;
- The ownership concentration of Internet content providers and Internet service providers;
- Net Neutrality;
- The access to, and quality of, the Internet infrastructure;
- The use of the Internet and digital skills.

In particular, the new variables aim to:

- Put more emphasis on the digital dimension in the ‘Basic Protection’ domain (i.e., by asking about threats to the digital safety of journalists, filtering, and censorship in social networks).
- In the ‘Market Plurality’ domain, the CMPF added variables with which to assess the market shares of internet content providers, including digital intermediaries, and online content consumption concentration. Moreover, the CMPF took into consideration the revenue market of digital intermediaries in assessing the cross-ownership concentration.

- Concerning Net Neutrality, with the new variable, the CMPF has designed a softer approach to assessing the risk of control over data flow. The outcome for this variable is obtained by combining the concentration of ISPs in a given country and the existence of regulatory safeguards on net neutrality.
- As for access to the Internet, the CMPF now covers this, with variables on the broadband coverage of the rural population and on the overall broadband penetration in the country, in the ‘Social Inclusiveness’ domain.
- The quality of access is measured by the speed of broadband (upload and download) in the ‘Social Inclusiveness’ domain.
- Internet use and digital skills are considered to be an important part of media literacy, and they are measured in the ‘Social Inclusiveness’ area.

The digital indicators of the MPM2015 were discussed during a meeting with the British media regulator, the Office for Communication (Ofcom), scholars at the London School of Economics and the Political Science Media Policy Project, at the Reuters Institute for the Study of Journalism, commercial enterprises that specialise in digital audience research, and a number of experts in digital media pluralism. The meeting was held at the LSE’s premises in London. The conclusion of this discussion was that measuring pluralism in the digital world remains a very challenging task, and that the best method for measurement remains to be found. MPM2015’s variables, which aimed to assess media pluralism online, seem to capture some, but not all, of the aspects of online pluralism, but stakeholders warn that reliable comparative data, which would allow for the assessment of the elements which have emerged as being particularly important for online pluralism in recent years, are not being collected (e.g., the audience shares of online content providers, the role of news aggregators, such as Google, the role of social networks in providing news, etc.). The methodological effort and the data gathering in this area is still ongoing and are relatively far from being concluded.

### *Formula*

The formula used in the Media Pluralism Monitor 2014 relied on the proposed formula of the initial MPM from 2009. Accordingly, MPM2014 had a scoring-grid structure with differences in the ways in which the risk assessments of the indicators of different types were calculated. For example, each question in a socio-political indicator contributed to the indicator’s risk assessment in the same way, while this wasn’t the case with the legal indicators. Another issue that was detected in relation to the MPM2014 formula related to the scoring system for legal indicators, since these scoring systems differed from indicator to indicator. In addition, it was pointed out in the discussion following the MPM2014 data analysis that scoring criteria for some of the legal indicators appeared too strict, while, for some others, they appeared too loose. For example, the indicator assessing the risks from the ‘Regulatory safeguards for the independence and efficiency of the relevant national authorities’ was described as being too strict, as a low risk assessment was possible only if all of the criteria were satisfied (i.e., all 31 questions had to be answered with ‘yes’).

Analysis of the MPM2014 formula also revealed that the MPM's methodological design could be better grounded in an established empirical background, particularly in those theories and methods that deal with indices and comparative measurements, in order to be more in line with academic practice and modern research traditions.

Hence, one of the fine-tuning exercises was an attempt to standardise the calculation of risks across all of the indicators and domains, and, in this way, to increase the comparability and validity of the entire tool. Consequently, the formula for measuring risks in MPM2015 was changed. The MPM2015 research design and its methodological underpinnings are described above.

### 2.3 Changes introduced per domain

Alongside the general methodological innovations that are described above, a number of changes were made to the MPM tool in order to improve the structure and the coherence of the domains, the indicators, and the variables. While the substance and the spirit of the MPM remain the same, its restructuring into four domains and 19 indicators has made the tool even more user-friendly and more accessible to a broader public.

Variables which were found to be problematic during the first pilot-test have either been modified or re-worded, and an attempt was made to better define what was being measured in order to allow for a more precise picture to emerge. As a result, some variables which were considered problematic, or that were simply too vague, were either removed or were broken down into different questions. Furthermore, a number of variables, which were not present in the MPM2014, but which were considered to be important in capturing media pluralism and freedom today, were added, including, for instance, the safety of journalists and, in particular, their digital safety.

A detailed description of the changes that have been introduced to the MPM is available in Annexe 2 (online), the MPM2013/14 and in the MPM2015 comparison table.

#### *Basic protection domain*

The ‘Basic Protection’ domain in MPM2015 corresponds to the ‘Basic’ domain in MPM2014. Being composed of indicators that aim to assess the basic safeguards for freedom of expression and media pluralism, this part of the MPM was not deeply changed, but it was fine-tuned according to the remarks that arose from the MPM2014’s implementation.

In particular, the first indicator on the basic protection of the freedom of expression was enhanced with a more detailed analysis on defamation. In general, the indicators, composed mostly of legal variables, have been balanced with more socio-political variables, which have stressed the component of the “reality check” in the final assessment of the effectiveness of guaranteeing the basic principles.

The indicator that was modified the most is that on the status of journalists (Journalistic profession, standards and protection) that merges the indicator on regulatory safeguards for the journalistic profession with that on the presence of professional associations providing advocacy for editorial independence and respect for professional standards. Moreover, the indicator was enhanced in order to better take into account the issues of journalists’ working conditions and the safety of journalists, including their digital safety. As mentioned above, the indicator on media authorities that is implemented under the MPM2015’s methodology and formula, needs further refinement.



### *Market Plurality domain*

The ‘Market Plurality’ domain in MPM2015 corresponds to the ‘Media Ownership and Control’ domain in MPM2014.

While the indicator on media ownership transparency is maintained in the same format as the one in MPM2014 (with just the introduction of a socio-political variable, which aims to balance the legal questions with a “reality check”), the two indicators on ownership concentration merge the legal indicators with the economic ones on market concentration.

The result is, then, that for the indicator on the concentration of media ownership, three MPM2014 indicators are merged: that on the regulatory safeguards against the high concentration of ownership and/or control, with the economic indicators that measure the effective concentration of the media markets, both in terms of market shares and audience/readership shares.

As mentioned, above, in this report, the MPM2015 changes the approach of MPM2014 (oriented to measure the risks to media pluralism through assessing the risks to fair access to digital online platforms) and takes into better account the online dimension of market plurality, in terms of the availability and consumption of online content. This results in an indicator that is enhanced with legal variables so as to assess the existence of any framework that regulates the concentration of the market for online content providers, and with economic variables on the ownership concentration of Internet content providers. The indicator on ownership concentration contains, moreover, two variables that measure the risks for network neutrality: an economic variable assessing the concentration of the ISP market, and a variable assessing the existence of regulatory safeguards for the impartial transmission of information, without regard to content, destination or source.

The indicator on cross ownership concentration merges the MPM2014’s legal and economic indicators on cross ownership (regulatory safeguards against a high degree of cross ownership between television and other media and the number of sectors in which Top8 firms/owners are active).

### *Political independence domain*

The ‘Political Independence’ domain is that which corresponds to the ‘Political Pluralism in the Media’ domain in MPM2014. Although the domain has been restructured, it remains focused on assessing the risks for media pluralism that are associated with the politicisation of media content, public service media, commercial media outlets, media distribution networks, and news agencies.

The main issues that the CMPF has improved in this domain, with respect to the previous MPM version, are:

- The simplification of the assessment of political bias in the media, through the replacement of its method of measurement (content analysis has been replaced by secondary data analysis)

- The differentiation between the risks for commercial media outlets and media distribution networks, through the disintegration of MPM2014 indicator 30 (political control over media and distribution networks' ownership)
- The strengthening of the indicator assessing the risks from state advertising, by adding additional methods of assessment, and through its elevation to a stand-alone risk.

With regard to the first point, it is worth mentioning that the simplification of MPM in 2014 had already heavily reduced the use of content analysis, if compared with what was initially planned in the 2009 version of the Monitor. For the purposes of the pilot implementation in 2014, the sample for content analysis included the news and current affair programming of two TV channels in each country during the European Parliament election campaign, which was held in May. Due to resource constraints, the analysis focused on campaign reporting on only two days in the entire campaign. The limitations of the sample raised questions about the validity and reliability of the findings from the content analysis, and also of the conclusions which could be derived from this data.

Hence, the results of the data collection for MPM 2014 showed that an effective and reliable implementation of the content analysis method demands a longer monitoring period, and also the inclusion of a wider variety of media outlets and platforms. In addition, this type of international research undertaking would need to ask for the co-ordinated training of the coders, in order to ensure inter-coder reliability across countries, and to ensure the validity of findings. Consequently, the lesson learned from the MPM2014 implementation was that content analysis is too resource intensive (in terms of time, people, and money) and this is at odds with the budget constraints of the MPM project.

It was thus decided to change the method of measurement of the variables assessing the political bias in the media. Desk research has shown that there is secondary data, often national case studies of political bias that are based on content analyses of media, which can be used to assess political bias in the media. Accordingly, in the MPM2015, the issue of political bias in the media is assessed by the following socio-political variables:

P.1.3. Is there evidence to suggest that audiovisual reporting on commercial channels offers balanced and impartial representation of political viewpoints in news and informative programmes?

P1.4.7 Is there evidence to suggest that audiovisual coverage of electoral campaigns on PSM offers proportional and non-biased representation of the different groups of political actors?

The suggested method for the measurement for these variables is academic research on the topic of political bias in the media, or, alternatively, case law, decision practice, press reports, the reports of independent bodies or NGOs, ethics councils, the press council, the press complaints' commission, the media ombudsman, etc.

Although conducting a cross-national content analysis will ensure the universality of the criteria according to which political bias is measured, it was estimated that the validity of data would not be significantly reduced by relying on secondary data that are derived from the national research of political bias. These national studies, or reports, have the advantage of taking into consideration nation-specific patterns of biased reporting, and of examining political bias in

a more nuanced way, than would perhaps be the case for an unavoidably resource-limited cross-national analysis.

Furthermore, in order to be able to better differentiate between the risks for the political independence of commercial media outlets and media distribution networks, Indicator 30 from MPM2014, entitled: political control over media and distribution networks' ownership, has been disintegrated and split into two indicators. The new indicator was designed to assess the risk arising from the politicisation of commercial media outlets, and it has been strengthened by adding variables that aim to measure the extent to which each media market (audiovisual, radio and print) is politicised, in practice, by examining the reach (audience shares) of the politically affiliated media in different media markets. The other new MPM2015 indicator, which assesses the risks from the politicisation of media distribution networks, has been designed to focus solely on assessing the extent to which media distribution networks are politically affiliated, and/or take discriminatory actions. This differentiation proved to significantly clarify the risks for the politicisation of the media system, since the indicator assessing the politicisation of commercial media outlets proved to be one of the most problematic, while that on the politicisation of media distribution networks, showed the lowest risk levels across EU-19 (for further detail, see Section 1.3 of this report).

Finally, another major improvement of the domain that assesses the risks for the political independence of the media was the establishment of a stand-alone indicator that assessed the risks from state advertising. In the first pilot-test implementation, Indicator 31: political control over media funding by advertising, was designed to assess the risk from state advertising, but it was not a stand-alone indicator that contributed to the risk assessment of the domain, rather, it was combined with two other indicators so as to assess the risk from the excessive politicisation of media ownership/control. In the discussion about the implementation of the MPM2014, local teams, who carried out the implementation, argued that the indicator assessing state advertising had not been given enough importance, since the state, particularly in some of the countries of Central Eastern Europe, has a history of abusing state advertising in an effort to politicise commercial media outlets. Following this discussion, the decision was taken that the indicator that assessed the risks from state advertising would be a stand-alone indicator, directly contributing to the risk assessment of the 'Political Independence' domain. In addition, in order to make the indicator more comprehensive, several new variables were designed and were added to MPM2015. These were concerned with assessing the importance of state advertising in different national media markets (television, radio, print) by looking at the share of state advertising as part of the overall medium's advertising market.

*Social Inclusiveness domain*

‘Social Inclusiveness’ became a new domain by merging the previous indicators on cultural, geographical and type/genre issues. The new ‘Social Inclusiveness’ domain groups together indicators that are concerned with the access to, and availability of, media for different, and particularly for vulnerable, groups in the population. They assess the regulatory and policy safeguards for access to the media by various cultural and social groups, by local communities, and by people with disabilities. Moreover, they assess the centralisation of the media system, and the quality of the country’s media literacy policy, as well as the population’s digital media skills.

One of the key issues that was improved by the CMPF, in this domain, in respect of the MPM2014 version, was the clarification of definitions and the removal of terms or variables that could not be clearly defined. In particular, the term “minorities” was not interpreted in a common way by the country teams during the implementation of the MPM2014. The CMPF has therefore elaborated a more detailed definition, one that is mainly based on that of the Special Rapporteur of the United Nations’ Sub-Commission on the Prevention of Discrimination and the Protection of Minorities. Another example of an unclear term that was used in MPM2014 was “local events”, in the variable “Does the PSM cover local events regularly?” Given that no clear and relevant definition of “local events” could be found in the literature, this variable was dropped from the MPM2015. Moreover, the variable: “what is the combined ownership of regional/local and national media outlets by the same company?” was removed, because the sampling procedure (proposed by MPM2009) was unclear, and because the established thresholds were neither explained nor referenced clearly. Finally, as in the other domains, the question of legal implementation was given careful consideration and the set of legal implementation sub-variables was assigned to specific variables (e.g., I1.1.1-I1.1.5), as opposed to the indicator in general.

## 2.4 Data collection

Given that the MPM2015's research design, as was that of MPM2014, rests on two main methods – a questionnaire and a group of experts' evaluation – two main types of data were collected during its implementation – answers to the questionnaire, and comments from the experts engaged in the evaluation of the answers.

### *The questionnaire*

The MPM2015 questionnaire was answered by national teams that were composed of renowned experts in media pluralism and media freedom in each of the countries analysed, excluding Malta, for which the CMPF carried out the data collection in order to have first-hand experience of implementing the tool. For several reasons, co-operation with national teams of experts proved to be essential during the implementation of the MPM2015. Firstly, due to the necessity of relying on secondary data, which is often in the native language, it was essential to have local experts who were able to collect these data, but also to evaluate their reliability and validity. Another benefit of using a local team to implement the Monitor was the ability to build on their access to their local networks, particularly access to the local stakeholders. Given that one of the objectives of this project was to establish and maintain contacts with the relevant stakeholders, local teams' input in growing the network of informed stakeholders who join in the discussions on media pluralism, has proved to be invaluable. Finally, local teams are fundamental in providing answers to socio-political questions, those about the extent to which a legal provision related to media pluralism is actually implemented. In answering some of these questions, local teams have to provide their expert evaluation, since objective ways of measurement are sometimes missing. Hence, having a reliable and independent local team which consists of renowned experts in this field, was crucial for the implementation of this project.

Local teams which carried out the implementation of the MPM2015 (see Figure 28).

Local teams provided answers to the questionnaire, which were accompanied by comments in which the rationale for the answer was described, and the sources on which the answer was based were given on the online platform which was designed during the pilot-test implementation in 2014, and which was further developed in 2015. The platform allowed for centralised data collection and the comparison of answers, and it is an invaluable asset in a cross-national comparison of this scale. The online platform contains not only the questionnaire and the answers to it, but also detailed descriptions of variables/questions, suggested databases and methods of measurement, a glossary containing definitions, FAQs, and other elements which were designed in co-operation with local teams in order to facilitate data collection and to ensure its comparability and high quality.

Country	Institution	Key person
Austria	Institute for Comparative Media and Communication Studies (CMC) Austrian Academy of Sciences	Josef Seethaler
Croatia	Institute for Development and International Relations (IRMO)	Paško Bilić
Cyprus	University of Nicosia	Christophoros Christophorou
Czech Republic	Charles University	Vaclav Stetka
Finland	University of Jyväskylä	Heikki Kuutti
Germany	Hans Bredow Institut	Hermann Schroeder
Ireland	Dublin City University	Roddy Flynn
Latvia	Riga Stradins University	Anda Rozukalne
Lithuania	Vytautas Magnus University	Aukse Balcytiene
Luxembourg	University of Luxembourg	Raphael Kies
Malta	CMPF	CMPF
Netherlands	University of Antwerp	Miriam van der Burg
Poland	University of Krakow	Beata Klimkiewicz
Portugal	Universidade Nova de Lisboa	Francisco Rui Nunes Cádima
Romania	Median Research Centre	Marina Popescu
Slovakia	School of Communication and Media	Andrej Skolkay
Slovenia	University of Ljubljana	Marko Milosavljević
Spain	Univ. Castilla – La Mancha	Juan Luis Manfredi Sanchez
Sweden	University of Gothenburg	Mathias A. Färdigh

**Figure 28. MPM2015 local teams**

Another benefit of the online platform as a centralised data collection vehicle was that it allowed the CMPF to continuously monitor the progress of the data collection, in order to verify the quality of the responses, and to provide feedback to the local teams on how to review their answers in order to increase their quality and/or comparability. Specifically, during the data collection of the answers to the MPM2015 questionnaire, the quality and comparability of the answers was checked by the CMPF following two checkpoints (one at the end of May, when 50% of the answers for the questionnaire were due, and another at the end of June, when 100% of the answers to the questionnaire were due. Frequent centralised verifications of the local teams' answers were necessary in order to ensure that all of the teams had understood a question in the same way, that the sources used for the answers were relevant and adequate, and that the evaluations of the answers were carried out and were based on the same criteria across countries. In addition, frequent validation points have ensured that the final datasets are as complete and comparable as possible, and also that the time-frame and deadlines for the project were followed and respected.

One of the biggest challenges to the MPM2015's implementation was to ensure the validity and reliability of the data, which were based on the evaluations and answers to those questions for which no objective measurement exists. Building on the experience of the first pilot-test implementation, this implementation also relied on the revision of particularly sensitive and/or

difficult to measure questions by national experts and stakeholders. This part of the research design ensured that the validity of the results was increased, and that relevant stakeholders had a say in the project and an opportunity to share their views and opinions.

#### *Group of experts' procedure*

In comparison to the first pilot-test implementation, this part of the methodology was more robust and standardised. The procedure for the group of experts' evaluations was as follows. The process was started by the local teams' nomination of seven experts and stakeholders in the national media system. All local teams were asked to nominate specialists with substantial knowledge and experience in the field of media, who have a good reputation in their professional community. The group of national experts was supposed to consist of experts from various fields, namely:

- 2 Academic/NGO researchers on social/political/cultural issues that are related to the media;
- 1 Academic/NGO researcher in media law and/or economics;
- 1 Representative of the media regulators;
- 1 Representative of a journalists' organisation;
- 1 Representative of a publishers' organisation;
- 1 Representative of a broadcasters' organisation.

The aim of this specific composition of the group of experts was to ensure that all of the relevant stakeholders were represented, and their views taken into account.

Following the nomination, the CMPF team looked at the experts' profiles to ensure that there were no conflicts of interest and that the experts had sufficient expertise to participate in the project. Once the group of experts for a particular country was defined and confirmed, experts were given access to the MPM2015 platform and the questions that they were supposed to evaluate. These questions, and the local teams' answers to them, were previously checked by the CMPF team and were revised in collaboration with the local team if there were a need for this. Hence, the answers to the questions that were subjected to the experts' evaluations were as complete as possible and they were motivated by comments and sources before the experts were given access to them.

Once they were granted access, the experts were asked for confirmation of the accuracy of the country team's evaluation. Each member of the group of experts recorded their agreement or disagreement with the scoring on the MPM platform, or, alternatively, they had the option to declare that a specific question did not fall within his/her field of expertise. In a case when an expert disagreed with the scoring, they needed to provide a short written explanation and a suggestion for an alternative score on the platform. Once experts had finished their evaluations, the country teams were asked to review the feedback of each member of the group of experts and to take their views into account when providing the final answer to the questions that had been subjected to expert evaluation. Country teams did not necessarily need to change their answers if any of the experts disagreed with their initial answer, but if this were the case, they

were asked to explain why they had decided to keep their original answer and to address, in a comment to the final answer, any disagreement that was expressed by the experts involved.

Although the procedure described above ensured that this part of the methodology was applied to all countries' data in a standardised and consistent way, which increased the comparability of the findings and the robustness of the method, several challenges were faced in its implementation. In the first place, a problem was detected in regard to nominations in small countries, in which some of the organisations whose representatives were sought did not exist, or where there is limited availability. For example, there were difficulties in nominating representatives of all of the stakeholders in countries such as Cyprus, Malta and Luxembourg. In such cases, exceptions were made, and their group of experts consisted of fewer than seven representatives. Additionally, another challenge which was faced was in ensuring the nominated experts' participation. Given that the Monitor's language is English, some experts faced language barriers, while some others weren't able to participate due to time constraints and previous engagements. Due to the time constraints of the project, the decision was made that the group of experts' procedure was considered finished, either by the fact that all of the nominated experts had participated, or that each question has been evaluated by more than half of all experts (i.e., four of seven) by the time that the data collection had to close in order that the project meet its deadlines.

The group of experts, both as a method and as an activity involving stakeholders, proved to be of great value to the project. From the methodological perspective, this procedure ensured higher reliability and the validity of answers to particularly sensitive and/or difficult to measure questions. Experts also contributed to data collection by providing alternative information and sources, which the country teams might not have initially taken into account. Finally, by employing this procedure, it was ensured that a range of opinions from the most relevant stakeholders within a media system were acknowledged and made known. The group of experts' procedure was also beneficial to the project as an activity through which relevant stakeholders were not only informed about the project, but were also able to be actively engaged in it, and were asked to share their views and opinions.

In conclusion, there are several lessons which can be drawn from the MPM2015 data collection. In the first place, the data collection showed that most primary (e.g., legal documents) and secondary (e.g., academic research, NGO reports) data that relate to media pluralism and freedom are available across the EU Member States and can be used for comparative analysis. However, the MPM2015 implementation also revealed that certain important datasets are missing, and these are, in particular, related to economic data. For example, media market shares/revenues, and the shares of state advertising within a medium's advertising markets, are data which are either not available or are inaccessible in several of the countries studied. This points to the fact that there may be a need for action at either the national or the EU level, which would lead to the collection and analysis of these datasets, and so enable a more accurate assessment of the risks for media pluralism in Europe.

In addition, following the two pilot-test implementations, it was established that the questionnaire-based method is well suited for large, cross-national comparative research. This method has also been found to lead to more accurate and reliable findings if it is triangulated with other methods. Conducting interviews with knowledgeable experts, or with institutions'



representatives, was identified as being good practice in answering the questions from the questionnaire for which there were no available, or reliable, secondary data. The ‘group of experts’ procedure proved to be essential in validating difficult to measure questions and/or those which may be particularly sensitive to subjective evaluations. Overall, the multi-method approach that was applied by the MPM2015 was found to increase the validity of the findings and to contribute to a more nuanced and holistic assessment of risks for media pluralism in EU Member States.

### *Missing data*

The two pilot-test implementations have already identified some missing datasets, i.e., it was revealed that certain information which is relevant in assessing the threats to media pluralism across the EU Member States is neither available nor accessible in some, or all, of the countries.

Specifically, according to the MPM2015, only in four of the 19 EU Member States examined does the public know who effectively owns the media, i.e., all of the media owners are publicly known. This points to a fundamental problem, since without the information about who owns the media, it is challenging to understand potential biases in media content, and also to evaluate risks that may stem from media concentration. In addition, the implementation of MPM2015 has also revealed that only in six of the 19 countries in the sample is the information about the political affiliation of media owners publicly available and transparent. Again, without this information it is difficult for the public to understand the biases in media content, to evaluate the eventual interests behind the causes which the media advocate, and it is also challenging to assess the risks for media pluralism that may stem from the excessive politicisation of the media system, where the information about the extent of this politicisation is neither available nor accessible.

Assessing risks from media concentration has proven to be challenging, and this is also due to the fact that, for many EU Member States, there is no accessible information about the media’s market shares and revenues. In particular, this information was unobtainable in eight countries in relation to the audiovisual sector; nine countries in relation to the radio market, 10 for the print market, and, finally, information about the market shares of internet content providers was found to be missing in 16 of the 19 countries that were studied through MPM2015. Given that, in almost all of the countries, there was data about the media’s audience shares, the fact that the information about the media’s market shares is missing may not be so problematic, but it does, nonetheless, point to the fact that there is little publicly and widely known about the media’s revenues in the EU Member States.

As can be observed from the MPM2015’s findings, mentioned above, the most problematic media sector for assessing the risks for media pluralism is the digital media sector. Not only because, in the majority of countries, the data about online content providers’ revenues is not available/accessible, but also it is very difficult at the moment, and probably impossible, to examine the audience shares of online content providers at a national level in a comparable manner, and to assess the degree to which this media market is concentrated within the national context. The second pilot-test implementation of the MPM, and the discussions with the stakeholders and private enterprises that specialise in analysing online audiences, have revealed

that not only is this kind of information presently not being collected by any institution or company, but also that there are no best practices in relation to how to gather this type of information across the EU countries, nor are there attempts to collect it.

Finally, another piece of information which is relevant in assessing the threats to media pluralism, and which was found to be missing in most of the countries analysed, is the data about the shares of state advertising within the media advertising markets. In other words, MPM2015 has revealed that it is only rare countries that have data about the importance of state advertising for the television, radio and print advertising markets, since data for all, or some, advertising markets was found to be missing in 14 of 19 countries studied. Of course, this does not necessarily mean that the state is trying to hide this information, and/or that it is using state advertising to channel funds to particular media outlets, but it does create a situation in which the distribution of state advertising is not transparent, and this mechanism for exerting pressure over commercial media is more prone to manipulation and misuse.

Given that the MPM2015 has revealed the significance of these missing datasets, it is deemed important that an effort is made for the data that is relevant in assessing the threats to media pluralism be collected on a national and/or international level.

Furthermore, it would also be beneficial if there were better and stronger co-operation among the national regulatory authorities of the EU Member States, since, in this way, it might be possible to standardise the type of data that is collected, and the methods of their measurement. In this regard, the establishment of ERGA sounds very promising. National institutions may be able to exchange best practices for data collection, particularly in situations where data are challenging to obtain (e.g., data about media's political affiliation). Better co-operation and communication among these institutions could also lead to the exchange of best practices relating to how the legal provisions that aim to safeguard media pluralism, and those that are related to dealing with infringements can be effectively implemented.

Finally, particular emphasis, in the coming years, should be given to collecting data that is related to pluralism in the digital world, and the analysis of this data, with an aim of understanding better how the lack of pluralism online is manifested, and what kind of risks stem from the lack of pluralism in the digital world. Certain attempts have been made to gather data about online audiences and online content providers, but one of the first obstacles in comparing diverse datasets is at the definitional level, since there is no consensus among academics, nor in the industry, about how online content providers should be defined, about who counts as an online content aggregator, and about how the provision of news on social networks should be taken into account and analysed. In this sense, more discussions at the international level are needed that aim to reach a working consensus which would allow the collection of the relevant data and their analysis. Furthermore, the assessment of online pluralism could benefit from better co-operation with both media outlets and businesses that are specialised in analysing online audiences (e.g., Alexa, comScore). For example, by co-operating with companies that gather data about online traffic and audiences, it is possible to examine the existing methods for the analysis of online pluralism, and perhaps to develop alternative methods for online data analysis which would produce comparable national datasets based on a consistent understanding of the key terms and actors.

### 3. Beyond MPM2015

Following the two pilot-test implementations of the Media Pluralism Monitor (in 2014 and 2015), and particularly based on the experiences of the MPM2015 implementation and the lessons learned from it, in 2016 a new Media Pluralism Monitor will be developed and it will be applied in 28 European Countries and two Candidate ones (Montenegro and Turkey)<sup>1</sup> (MPM2016). Improvements will be made, both to the tool (the questionnaire) and to the method of its implementation, in order for this research instrument to be able to detect the threats to media pluralism across the EU Member States in a comparable manner, while still capturing the specific characteristics of national media systems, and to do so within tight deadlines.

The final research instrument will rely heavily on the MPM2015, but it will include minor modifications that are based on:

- the evaluation of the tool after its second pilot-test implementation
- results based on the data collection in the 19 countries,
- new developments in the field of media,
- newly available data.

The modifications will take into account, for instance, the new issues that have been added to the indicators on media literacy and on access to the media by people with disabilities, in order to better capture the current risks for media pluralism. In addition, where results have shown that the data are not available across the EU, for reasons other than transparency, the variables are suspended, and, in cases where new measures for monitoring the digital media have been identified and data made available, new questions addressing these issues will be added.

Particular focus on the refinement of the MPM2015 and the development of the next research instrument, will again be put on the improvement in the balance between questions, thus aiming to assess the legal framework, and those aiming to assess actual practices. The first attempts at this had already been made in the fine-tuning of the MPM2014, but the second pilot-test implementation has shown that more needs to be done in this regard. Moreover, significant effort is being put into further streamlining the tool, in the sense that more symmetry is being developed among the indicators and domains during the process of refinement.

The simultaneous application of the MPM tool in all of the Member States will promote and facilitate the development of more informed comparative academic studies, and novel research on the themes of pluralism and media freedom in the EU. At the same time, the comparative validity of the tool and its widespread application to all Member States will allow best practice cases to emerge and will call attention to situations that point to a major risk and that may call for a deepening of the analysis, or even for specific policy interventions.

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<sup>1</sup> <http://cmpf.eui.eu/News/All/1601MPM2016Grant.aspx>



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## **Annexes**

### **Annexe 1. Country Narrative Reports:**

<http://monitor.cmpf.eu.eu/mpm2015/results/>

### **Annexe 2. MPM2014 and MPM2015 comparison table:**

<http://monitor.cmpf.eu.eu/mpm2015/results/>

### **Annexe 3. MPM2015 Questionnaire and User Guide:**

<http://monitor.cmpf.eu.eu/mpm2015/results/>

<http://monitor.cmpf.eui.eu>

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