

Monitoring reports

The nine country reports were drafted by local experts with the support of partner NGOs. All country reports are based on the same methodology, contain recommendations, and include the following sections:

- General broadcasting environment
- Regulation and licensing of the television sector
- Regulation and management of public service television broadcasting (PSB)
- Commercial broadcasting
- Programming

The overview report was drafted by media experts who also edited the single country reports. It includes comprehensive tables of comparative data. The country reports and the overview report include concrete recommendations to governments, international organisations and regulatory bodies aimed at ensuring that television can play its democratic role.

The complete set of reports, together with the overview, are published in a volume in English. Each country report is also published in translation. All are also available online at www.mediapolicy.org

Further information on this project

This is a project of EUMAP, the EU Monitoring and Advocacy Program of the Open Society Institute, and of the Media Program of the Open Society Foundation. For further information on EUMAP see www.eumap.org; for further information on the Media Program see www.soros.org/initiatives/media.

For the full text of the reports; the methodology text; the list of local experts who conducted the monitoring and of NGOs who supported them, and for additional information on this series of reports, please see www.mediapolicy.org. Copies of the report may be requested by using the order form available at www.eumap.org/puborder.

For regular updates on follow-up activities, see www.mediapolicy.org/tv-across-europe. For further information please contact Marius Dragomir (Marius.Dragomir@osf-eu.org) or Miriam Anati (manati@osieurope.org).



Television across Europe: More channels, less independence

Follow-up monitoring reports 2008

Monitoring television regulation, policy and independence

Television, a pillar of democracy and open societies, is changing at a breakneck pace, affecting the patterns and models of production, transmission, consumption, marketing, financing and ownership.

To take the measure of these changes and assess their impact on the independence of television – especially in the new democracies of Central and Eastern Europe – the Open Society Institute (OSI) has mapped the main developments in broadcasting legislation, policy and markets in nine countries:

Albania, Bulgaria, the Czech Republic, Italy, Lithuania, the Republic of Macedonia, Poland, Romania and Slovakia.

These countries were all included in OSI's *Television across Europe* monitoring project published in 2005 which covered 20 countries. The new reports are sequels, measuring the progress – or lack of it – in improving the independence and pluralism of broadcasting over the past three years. A regional overview defines and interprets trends across the region.

As with the previous series of reports, these surveys are addressed to policymakers, civil society activists and academics, as a contribution to bringing about change where this is needed.

Key patterns

- The trend in viewing is *fragmentation*, as more people gain access to more ways of watching TV.
- Ownership is *consolidating*, reducing the suppliers of media content.
- Technology is *converging*: telecommunications, cable, satellite, mobile operators and traditional broadcasting merge, with consequences for traditional media structures.
- As channels multiply, the broadcast licensing process is *streamlined*.
- Broadcast regulators are *in retreat* as media markets expand.
- Public service broadcasters are *underfunded, over-burdened* and *self-doubting*.
- While internet search engines and other news-aggregators increase the availability of news and information, their contribution in reportage or assessment is very limited. More information does not necessarily make people better informed.

Main regional findings and recommendations

Public service broadcasting

In most monitored countries, public service broadcasters (PSBs) suffer from mounting politicisation and pressure, flawed funding models, and disintegrating reputations. PSBs respond to governmental and party interests more than to the public interest. Parliaments, Governments, regulators and other interested parties should start a public debate about the future of PSB, with an emphasis on depoliticised governing structures, access to new platforms and independent public funding.

Commercial television

Transparency of ownership remains a major problem. Parliaments should ensure that laws on digitisation contain provisions on ownership concentration among players in the digital chain, including broadcasters, telecoms companies, multiplex operators and other service providers.

Regulators

With the spread of digitisation and new technologies, broadcasting regulators are passing through turbulent times. In general, national regulators have gained in operational independence, but their politicisation continues apace and only few of them have taken initiatives allowing a more diverse range of operators to enter the market. Governments should support the unification of technical and content regulators into a single body, while Parliaments should adopt legislation ensuring independence and sufficient capacity to cover the integrated sector.

Digitisation

Legislation on digitisation has been enacted in most of the monitored countries and should be urgently adopted in the remainder. Provisions on preventing the formation of dominant positions in the digital chain are being developed, but only in some countries.

Public consultation

Although debate on media policy and reform has intensified, most Governments and Parliaments still avoid consulting civil society in a meaningful manner. It is crucial to involve civil society and media organisations when preparing policy and legislation for the media.

Programming

Public service content has not been boosted through incentives or obligations. Programming for minorities is left to public service broadcasters, while commercial broadcasters have little if any incentive to address this important constituency.

Public education and awareness-building

There has been no combined effort by Governments, Parliaments or broadcasters to promote media literacy. Where it happens at all, such work is usually carried out by NGOs.

Local TV and community radio

Local TV stations still struggle financially and often function as tools in the hands of their owners, either municipalities or entrepreneurs with a range of other businesses.