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Final report on the study commissioned to Mr D. WARD by the MC-S-MD

**"the assessment of content diversity in newspapers and television in the context of
increasing trends towards concentration of media markets"
(David WARD, Director, Centre for Media Policy and Development)**

**Media Division
Directorate General of Human Rights**

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Executive summary and conclusions

1. The study could not identify a direct link between media concentration (structural and market) and content diversity and pluralism in quantitative terms. This is not to conclude that there is not a link between concentration of ownership and content diversity. However, such a direct relationship is not evident in either the diversity of content of newspapers or on television channels over the monitoring period in quantitative terms. Other factors such as resources, size of markets and regulatory obligations are also key factors in determining the range of programming.
2. The data on content diversity collected for this report does not indicate a strong link between concentration of markets and the diversity of content. Markets that are strongly concentrated can demonstrate similar levels of content diversity as markets that are less concentrated.
3. News on television is abundant and viewers have access to a wide range of national news. Extended news bulletins represent a significant genre of programming in three of the countries in the sample and although news coverage is dramatically reduced in Croatia the public have access to a range of news coverage.
4. Whilst television news is a growing industry other strands of programming that provide analysis and information about political or current affairs are marginal.
5. Newspapers also provide a wide range of news and information on national issues. However, the range of international news is limited and in some cases represents a very small percentage of overall content.
6. Where commercial broadcasters have minimum or no positive regulatory obligations there is a distinct lack of programming of high social value and an absence of domestic investment in programming with a heavy reliance on imported programmes.
7. Imported programmes remain overwhelmingly US produced and there is little trade in programming between the countries in the sample. There is a notable reliance on US fiction in a number of countries whilst non fiction tends to be domestically produced.
8. There is a marked difference between public service broadcasters and commercial channels across countries in terms of programming investment in areas that do not attract large audiences as well as domestic production.
9. There appears to be a growing separation of broadcasters with three tiers identified in this study 1) public service broadcasters 2) established commercial broadcasters with some high social value programming 3) commercial broadcasters whose schedules are essentially entertainment and import based.
10. A broad range of stakeholders have access to both television and newspapers. There are however, some fairly significant differences in terms of the kinds of stakeholders that have access across countries and also in certain areas across the two media within countries.

INTRODUCTION

The debate about media pluralism is essentially governed by an assumption that the structures of any one media market impact on the nature and range of content available to the public. However, despite the fact that in the majority of discussions about media ownership and media pluralism the terms are often elided, the two concepts are not necessarily identical. On one hand internal pluralism raises questions of coverage, quality and diversity of programming rather than the amount of actors present in the market. On the other hand structural pluralism relates to the plurality of undertakings active in a specific market and the perceived need to constantly maintain a plurality of actors and outlets in the media sector as it is important for the members of any particular society to have access to a broad range of views and opinions to enable individuals to make an informed choice on a variety of public matters.

This study investigates whether media markets that demonstrate varying levels of concentration produce different degrees of content pluralism, both across programme genres and in terms of the range of subjects covered and actors that have access to television news as well as the subjects and range of actors in the content of newspapers. Although the protection of structural pluralism remains a key policy objective in the media sector its impact on content pluralism in a comparative context has been a neglected field of research. As far as we are aware there are no existing studies that have employed a common methodological framework that the study can compare its findings to, in order to assess, whether the processes of concentration in the newspaper and television markets over the last 20 years, has actually affected the diversity and range of content. In this respect, it is limited in that without prior studies that map out trends as to the impact of concentration on content, it is not possible to assess fully whether increased structural concentration affects the diversity of content.

The study assesses the diversity and range of programming on television and news coverage in newspapers and on television over a two week period in four countries. It provides quantitative data and analysis as to the range of programmes on television (genre), as well as range of stories covered in the news (TV and newspapers) and the range of actors that gain direct access to the news. The four countries have been selected to represent wider clusters across the Council of Europe's member states, and although not exhaustive in terms of geographic scope it gives some indication of the diversity of output across countries. It is not qualitative in scope and does not assess the quality of content or coverage as the objective of the study is to assess the range and diversity of television and newspapers in a comparative context. The terms of reference for the study are as follows:

To assess the relationship between the economic process of concentration and media content from a number of angles, such as:

- political pluralism (access to the media by politicians, civil society and social groups);
- cultural pluralism;
- source diversity;
- pluralism of programme categories and types of programmes.

The study has selected a number of media markets (television and newspapers) in order to compare whether different degrees of concentration (structural and market) demonstrate differences in content diversity and the range of information the public have access to.

Methodology

The monitoring and coding was organised by the Centre for Media Policy and Development, Zrinjka Perusko, Department for Culture and Communication, Institute for International Relations (Croatia) and the Norwegian Media Authority.

Television

Using a standard genre system the study calculates the range and diversity of programme genres on television 24 hours per day over two weeks.¹ It identifies the balance between programme genres and establishes the frequency of certain genres. It also assesses the percentages of domestic productions/imports and the frequency of repeats on the television channels in the sample.

Secondly, it assesses the diversity of national evening news bulletins based on a content analysis of television news bulletins between 17:00-00:00 hrs daily. In this respect, it calculates 1) the subjects covered by the news 2) the actors that have direct access to the news (i.e. the actors that actually speak in the news clips). The unit of context in this case is therefore all news bulletins in the sample period, while the recording units are each individual piece of news. All pieces of news composing the news bulletin have been coded, including news related to lighter topics, e.g. show business and fashion news.

Newspapers

The newspaper part of the study assesses the diversity of national daily newspapers. It is based on a content analysis of the main body of the newspapers in the sample over a two week period. In this respect, it calculates 1) the subjects covered by the newspapers 2) the actors that have direct access to newspapers (i.e. the actors that are directly quoted in the newspapers). The unit of context in this case is therefore all news articles in the sample period, while the recording units are each individual piece of news.

Sample

Newspapers and television channels were monitored for a two week period from the 24.10.2005 to 6.11.2005 daily. Sunday editions of newspapers were excluded from the monitoring, but otherwise all newspaper editions and television channels were monitored for the study. The full sample of media outlets is included in the appendix. The channels and newspapers were selected based on three criteria: ownership, market share and where relevant i.e. newspapers, the political persuasion of the publication.

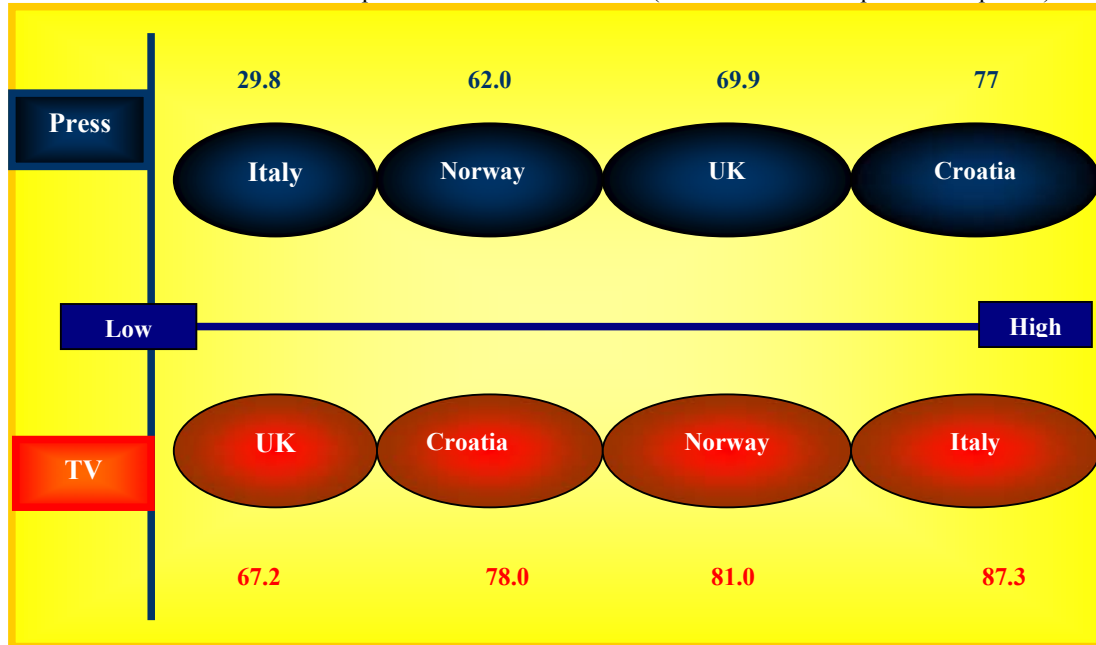
Levels of concentration

Based on the market share of the top three companies Italy has the most concentrated television market with two companies, Rai and Mediaset enjoying 87.3 per cent of market share. Although some way behind Italy the television sectors in Norway and Croatia also both demonstrate high degrees of concentration in the market. The UK has the most plural market with the leading companies enjoying below 70 per cent of market share, though this remains, according to the Herfindahl-Hirschman Index, a highly concentrated market.² Chart 1.0 is organised based on the market share of the top leading companies in the respective markets. It demonstrates wide variations in the diversity of the newspaper and television sectors both across countries and in some cases such as Italy, between the two mediums, within individual countries.

¹ Television listings magazines were used to assess genre diversity across the sample.

² The Herfindahl-Hirschman Index (HHI) measures market concentration. It is calculated by squaring the market share of each firm competing in the market and then summing the resulting numbers. Markets in which the HHI is between 1000 and 1800 points are considered to be moderately concentrated and those in which the HHI is in excess of 1800 points are considered to be concentrated. In the case of the television sector all of the markets in the sample are considered highly concentrated whilst in the newspaper sectors there are wider differences between the countries and levels of concentration.

Chart 1.0: Market concentration in press and television markets (based on share of top three companies)



Note: Italian television data is based on market share of two companies.

In contrast to its television market Italy has the most plural newspaper market. Croatia's newspaper market demonstrates the highest degrees of concentration and the UK market is also characterised by high concentration with three titles enjoying nearly 70 per cent of the market.

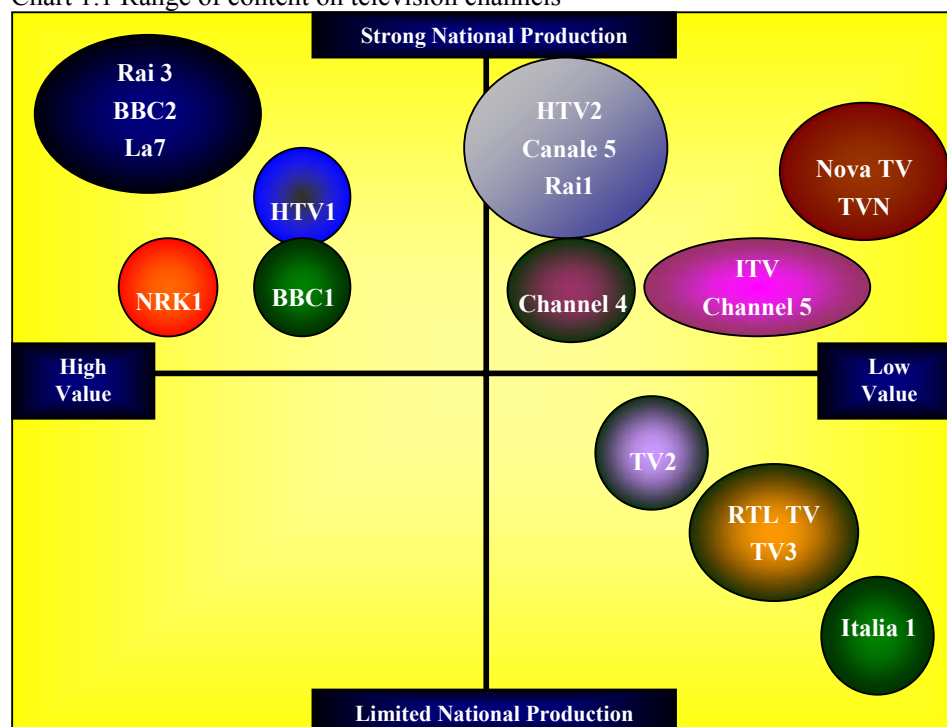
COMPARATIVE ANALYSIS

Diversity of programming on television

Based on genre diversity there are three kinds of channels covered by the monitoring. The first tier is composed of public service broadcasters that have greater levels of programming of high social value such as documentary, news and current affairs. The second group consists of traditional free-to-air channels whose programming, although largely entertainment based, have certain percentages of programming of high social value. And, finally the third group of broadcasters' content is almost entirely entertainment based, with high percentages of imports and marginal amounts of programming of high social value and a narrower range of content.

Based on the levels of domestic production and range of programming of each channel three tiers of channels are evident. Tier one is composed of channels that have high degrees of programming of high social value. In the case of Rai3, BBC2 and La7 this is also coupled with high percentages of domestically produced programming. NRK1, HTV1 and BBC1 also demonstrate high degrees of programming of high social value, though their schedules have less percentages of domestic programming and a greater percentage of imports.

Chart 1.1 Range of content on television channels

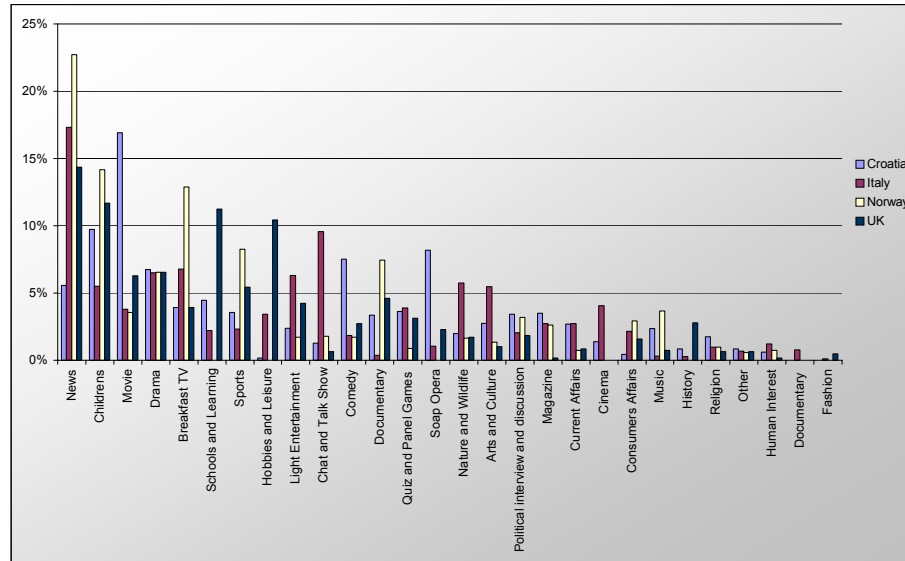


The second group is comprised of established commercial channels that broadcast above average levels of domestic programming, but whose schedules tend to be structured around entertainment based programming. This second group also includes the popular entertainment based channels of the public service broadcasters in Croatia and Italy. The third and final group is channels that are predominately entertainment based and demonstrate a heavy reliance on imported programming. Italia 1, RTL TV and TV3 all structure their schedules according to a heavy reliance on entertainment based genres and, furthermore, large percentages of imported programming.

The single most notable trend in the diversity of genres is the marked differences in overall output of public and commercial broadcasters. On average only one of the top four most prominent genres on

television are shared by the public and commercial channels. The single most prominent category on public service television channels are news bulletins followed by children's programming. News is particularly high as a percentage of output in Norway (representing 23 per cent of total output of NRK1) and in Italy (17 per cent). Only in Croatia is the news not the single most prominent genre on public service television. NRK 1 also devotes the greatest amount of time to children's programmes, though it does not have any schools and learning programmes, unlike the other public service broadcasters in this study.

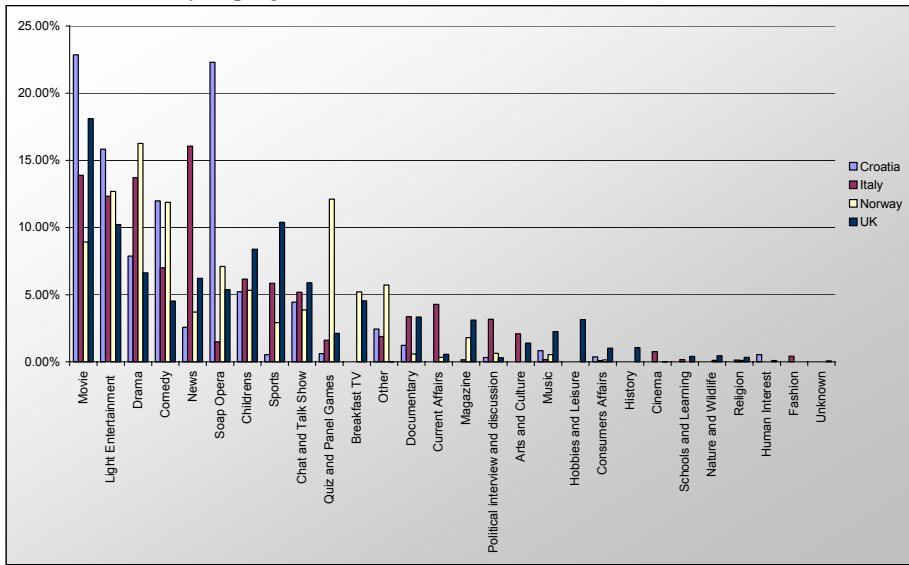
Chart 1.2: Diversity of programme genres on public service television channels



The Croatian public service broadcaster, HTV tends to rely heavily on movies compared to the other countries in a similar manner to the commercial broadcasters, whilst breakfast television is a major genre for NRK, that although performs comparatively well on news and children's programmes does, less so, across genres such as arts and culture and current affairs. Rai's overall output demonstrates a wide range of content across genres, and as a result of Rai 3's coverage has the highest percentage of arts and culture and nature and wildlife programming. The BBC's overall coverage shows a wider balance across genres, despite the fact that the two Rai channels have a greater emphasis on programmes of high social value.

In contrast, the most prominent genres on commercial television are movies and light entertainment programming. In this respect, Croatia has the greatest percentage of entertainment based programming and soap operas and movies represent the largest single genres aired by commercial television channels. This is reflected across the genre spectrum and leads to a narrower range of genres. Commercial broadcasters in Norway also demonstrate similar patterns of output and their programming is governed by a narrow range of entertainment based strands. Italian and UK commercial broadcasters' schedules are also led by entertainment genres, though there is a greater degree of balance between different kinds of genres. This is particularly evident in Italy due to La7 and Canale 5's extended news bulletins. Italian commercial television also aired a greater percentage of current affairs, political interviews and art and culture which La7 is especially strong in. UK commercial broadcasters perform better across genres such as history.

Chart 1.3: Diversity of programmes on commercial television channels

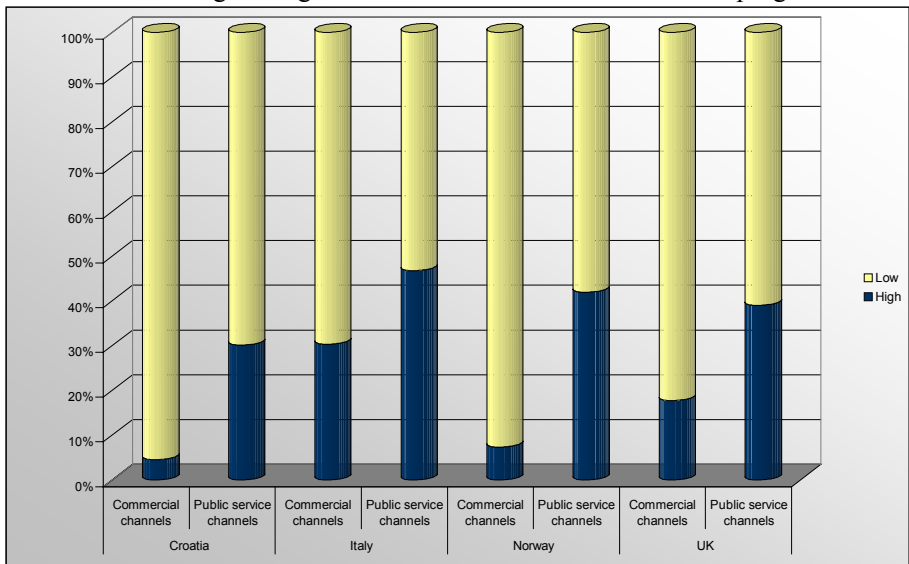


Balance between entertainment based and high social value programming

The differences between the kinds of programmes broadcast by public and commercial channels are reflected in the balance of programming. Across all countries the public service broadcasters supply a greater percentage of high social value programming. Italian, Norwegian and the UK public service broadcasters have a similar balance in entertainment based programme genres with programmes of high social value ranging from 41 per cent in the UK, 44 per cent in Norway and 47 per cent in Italy, of overall output. Croatian public service television aired the lowest percentage of programming of high social value (30 per cent).

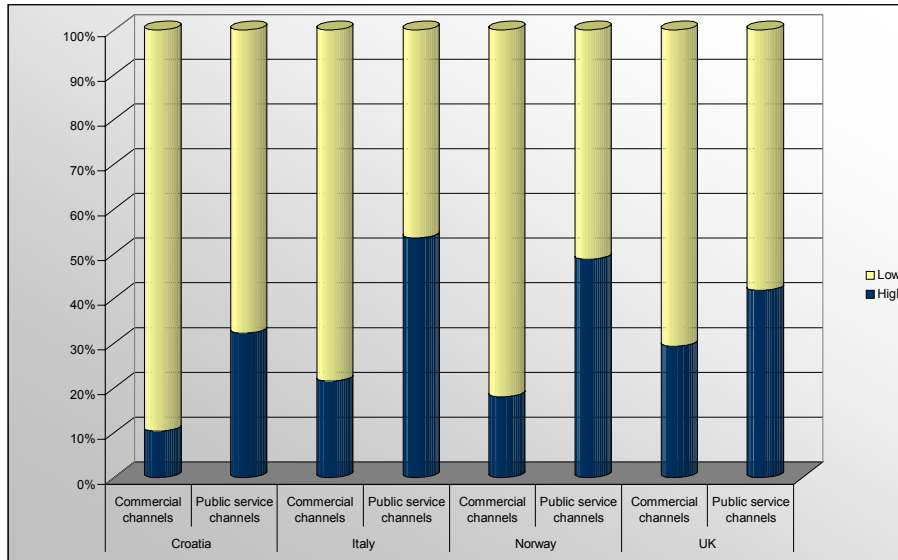
In contrast, the ratio of entertainment based and programming of high social relevance changes considerably on the commercial channels. In Norway and Croatia commercial broadcasters' output is dominated by entertainment based programming and in some cases, programmes of high social value represent largely insignificant amounts of output.

Chart 1.4: Percentage of high social value vs. entertainment based programmes



During peak time viewing there is an increase in the percentage of programming of high social value mainly as a result of extended news bulletins of all the channels in the study. Only in Croatia is there not a fairly notable increase.

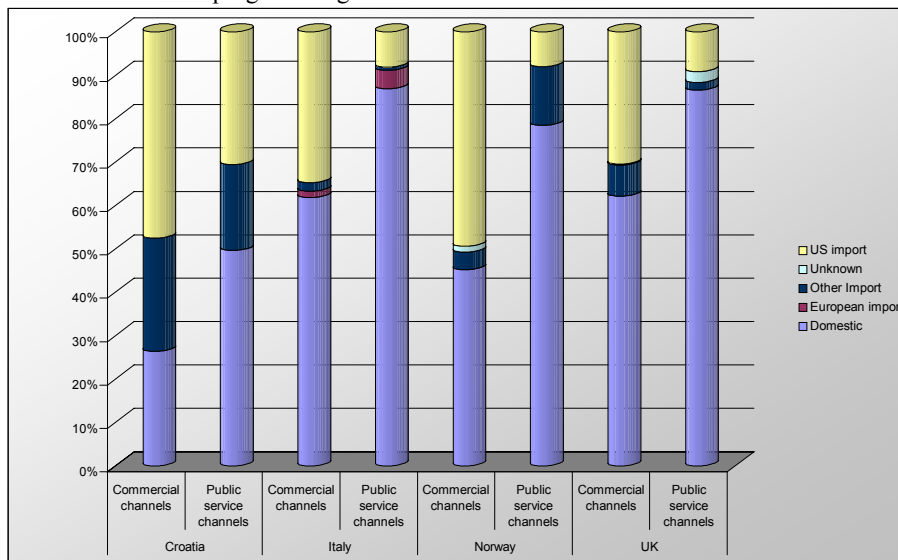
Chart 1.5: Percentage of high social value vs. entertainment based programmes during peak time viewing³



Source of programming on television

The two larger markets, Italy and the UK, have stronger domestic production bases than both Croatia and Norway and there is a marked difference in reliance on imported programming. The highest importer of programmes is Croatia and its commercial television channels demonstrate a heavy reliance on imports, as is also the case in Norway.

Chart 1.6: Source of programming

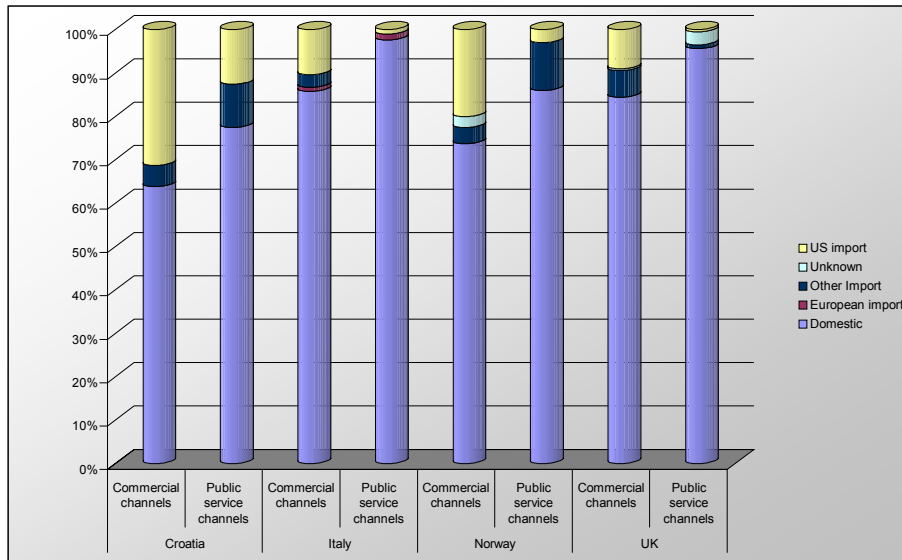


Italian and UK channels demonstrate extremely similar percentages in the balance between domestic productions and imported programming. However, there is also a significant difference between public

³ Peak time viewing was taken to be between 1800-2330.

and commercial channels across all countries. As an average public service channels have 24 per cent more domestic programming than their commercial counterparts.

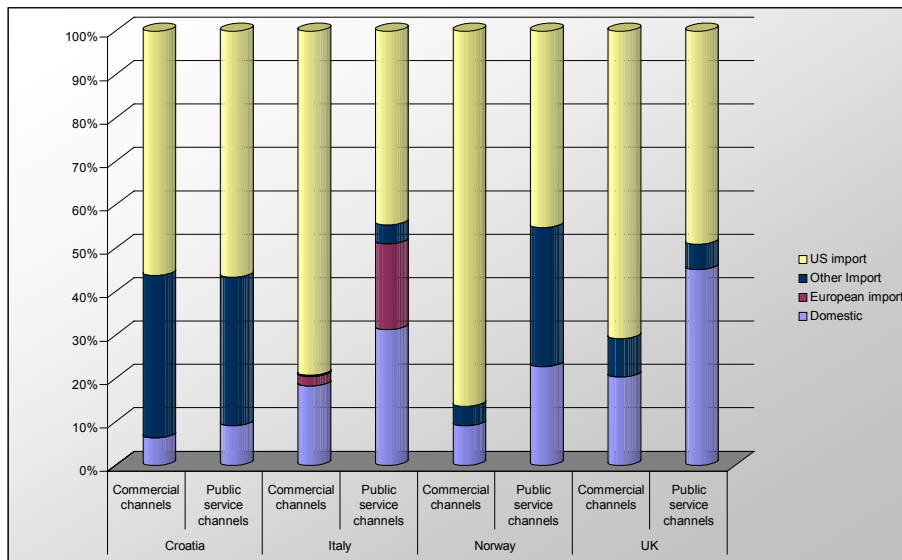
Chart 1.7: Source of non fiction



In this respect, non fiction tends to be dominated by domestically produced programming, again, mainly a result of the large amount of news bulletins. However, domestic production is also strong in other important genres such as current affairs and documentaries.

All channels rely heavily on imported programming for fiction and US programming dominates the supply of fiction. Croatia, Italy and Norway also import a large percentage of programming from third countries. The public service broadcasters in the UK aired the largest percentage of domestic fiction (above 40 per cent) whilst this dramatically declines for both Croatia and Norway to below 20 per cent of all fiction broadcast.

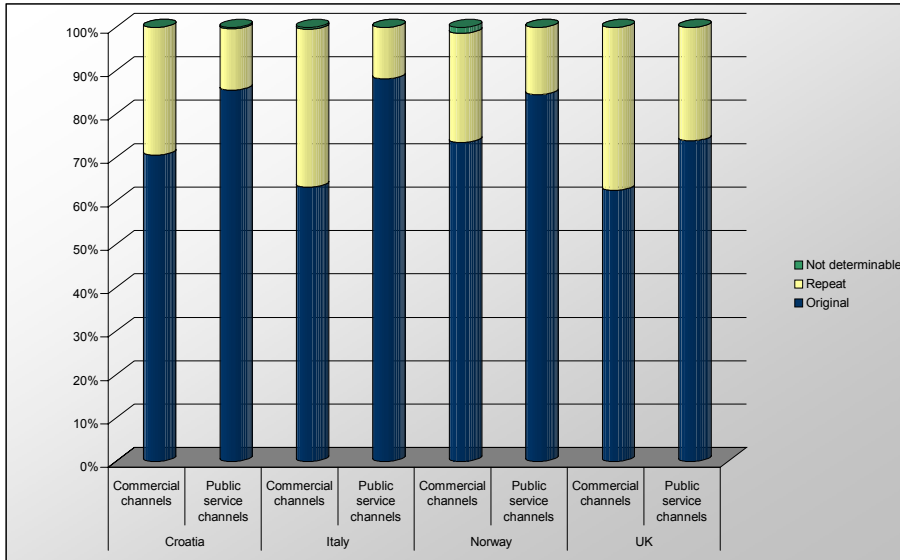
Chart 1.8: Source of fiction



Balance between original and repeat programming on television

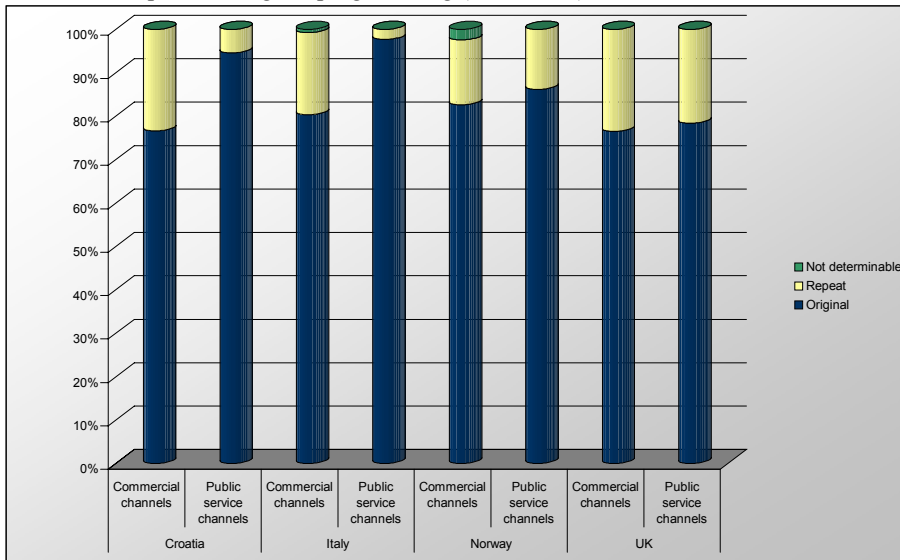
The frequency of repeats on television also tends to be governed by the large number of repeats of movies and other fiction genres. Overall, commercial channels aired more repeats than their counterparts in the public sector with an average of 16 per cent more repeats across commercial channels. Commercial channels in the UK and Italy tend to carry the greatest percentage of repeats.

Chart 1.9: Repeats or original programming



There are significant differences between non fiction and fiction in terms of the ratio of original first runs and repeats. Non fiction output has a high percentage of first runs on the channels.

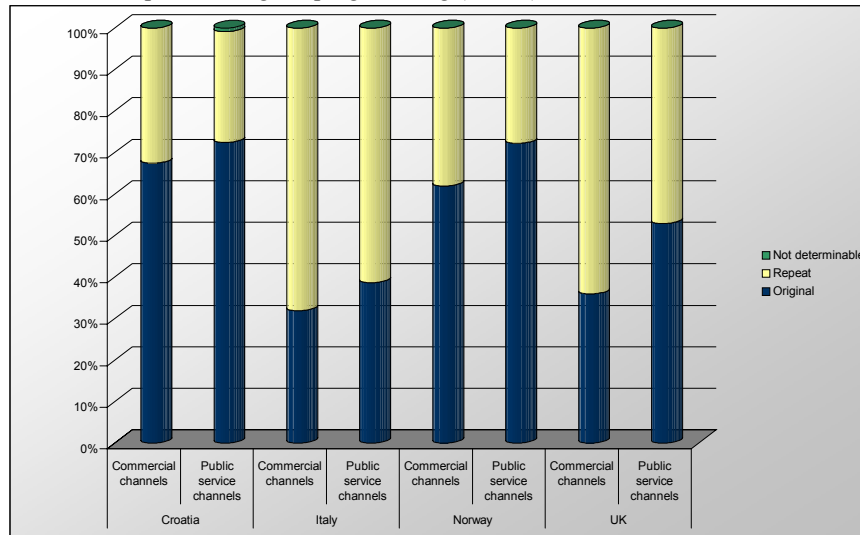
Chart 1.10: Repeats or original programming (non fiction)



Fiction tends to rely far more heavily on repeated programming. The schedules of the commercial broadcasters in Italy and the UK demonstrate a high reliance on repeats in these programme genres. Over 70 per cent of Italian commercial broadcasters' fiction were repeats and in the UK repeats on commercial channels represented 64 per cent. The public service channels, although showing more original fiction also rely heavily on repeats in these genres. Over 60 per cent of fiction on Rai was

repeated, whilst on the BBC this was 50 per cent. Croatia and Norway have greater percentages of first run fiction rising significantly.

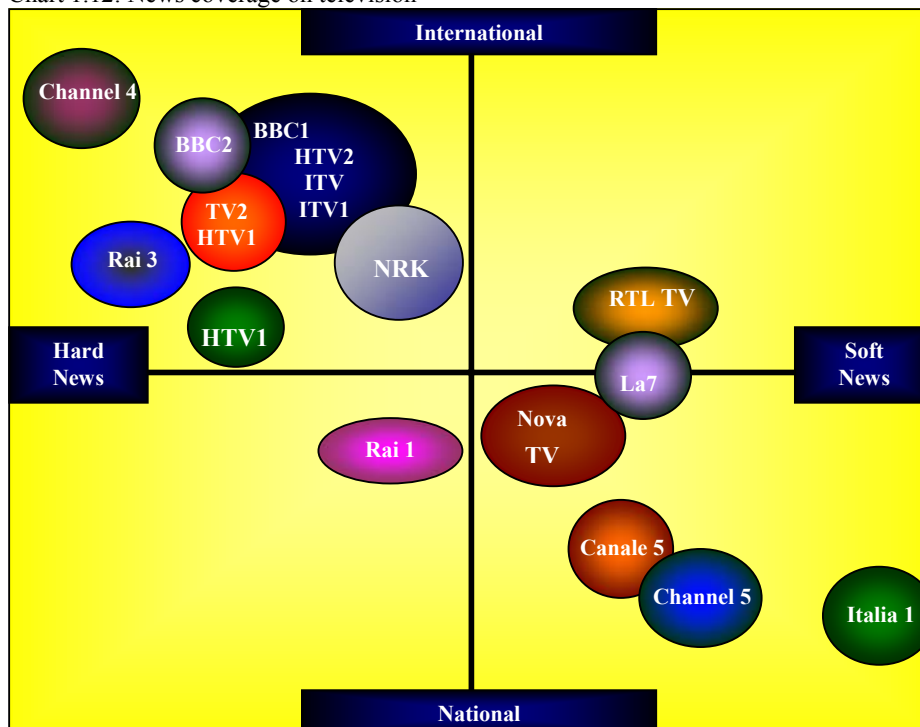
Chart 1.11 Repeats or original programming (fiction)



Television news coverage

The nature of television news also follows similar trends with a cluster of public service broadcasters whose news is largely dominated by hard news stories. Channel 4 also provides similar hard news, though BBC2's position should be seen in the context of its art and culture coverage which has been classified as soft news. In this context, it would shift towards the left hand side of the scale on a similar level to Channel 4 and Rai 3. The UK channels also have the greatest percentage of international news coverage whilst Rai 1 news tends to contain nationally based subject areas.

Chart 1.12: News coverage on television

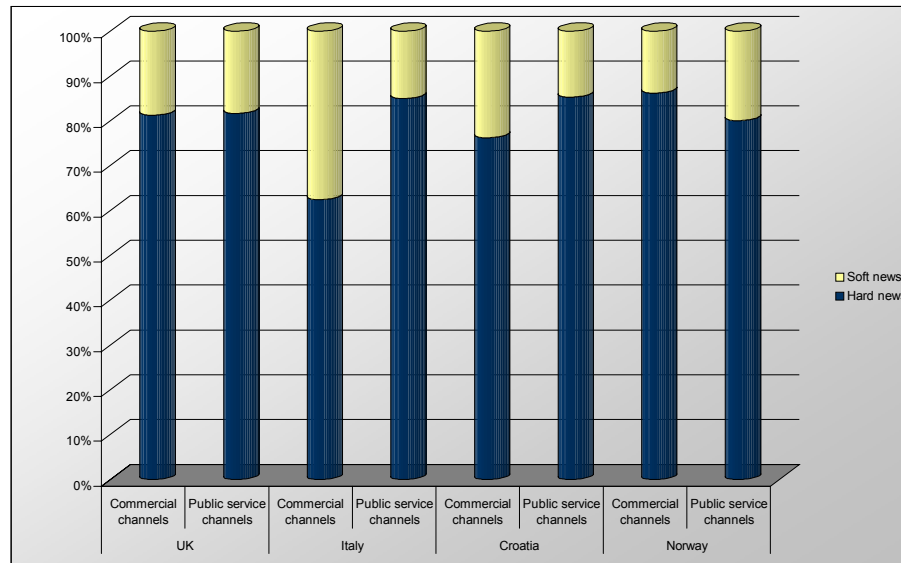


The channels that have larger percentages of softer news items such as Canale 5, Channel 5 and Italia 1 also, following the same pattern as in the tabloid press, tend to have a greater national focus and only a small percentage of international news items.

Diversity and range of television news bulletins

There is an abundance of television news available to viewers and most of this news tends to be composed of hard news items. With the exception of Italian commercial television news, hard news items, represented above 70 per cent of news stories.

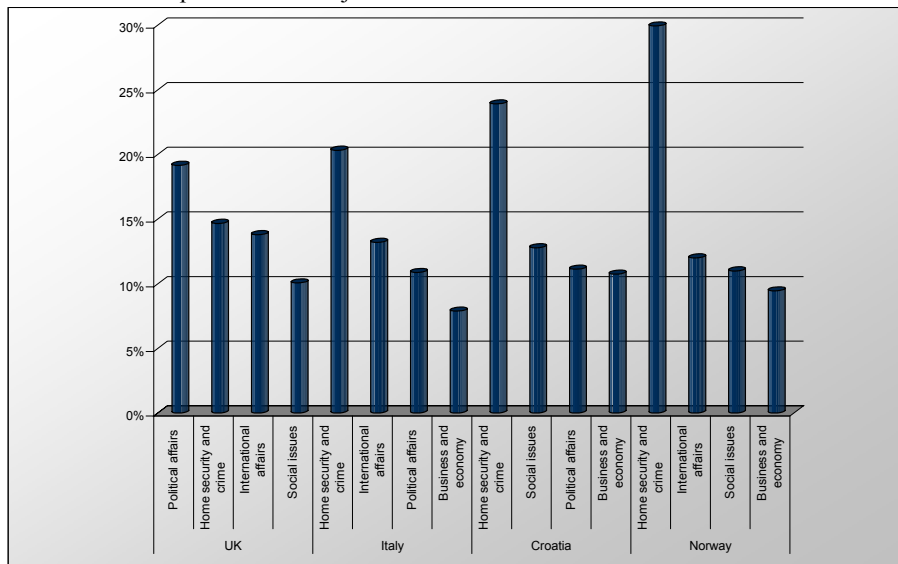
Chart 1.13: Balance between hard and soft news⁴



The UK television news demonstrated the highest percentage of hard news items with a little under 80 per cent across channels. This is largely a result of Channel 4 and BBC2's extended news bulletins.

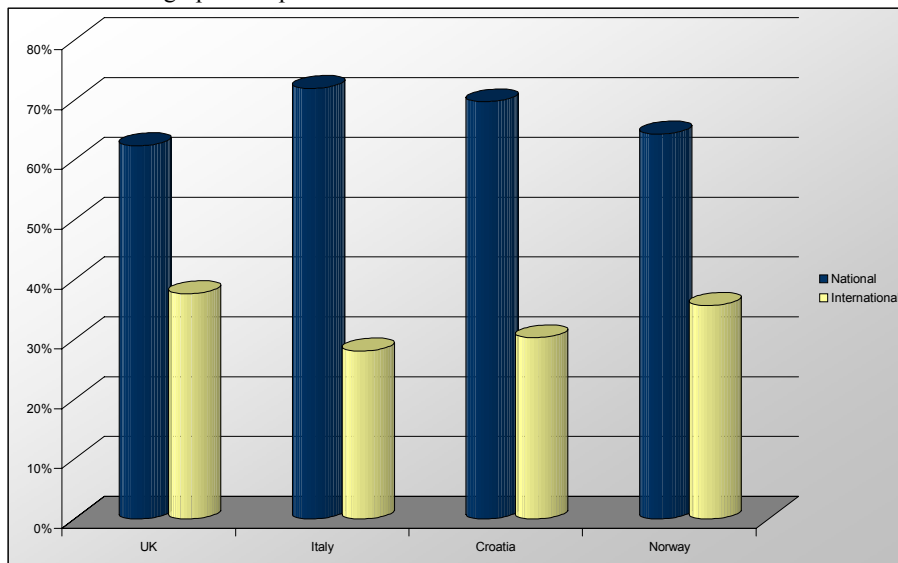
⁴ The subject of news clip have been reclassified according to the distinction between hard news (business and economy, consumer affairs, education, environment, health, home security and crime, international affairs, party political affairs, political affairs, public services, social issues) and soft news (arts and culture, celebrity, entertainment, human interest, lifestyle, religion, science, sports, women issues).

Chart 1.14: Most prominent 4 subjects in news bulletins



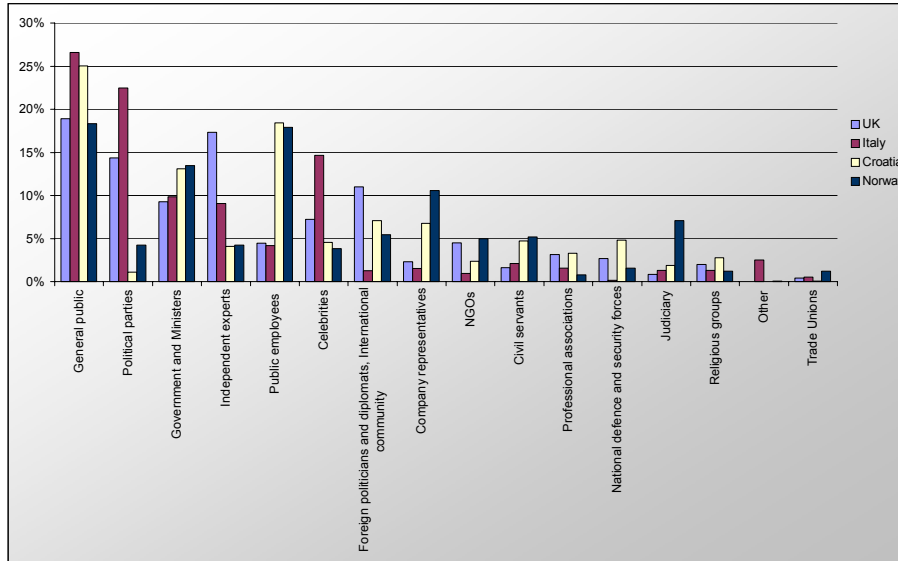
Across the countries home security and crime is the most prominent news item. Only in the UK is it surpassed as a subject by political affairs. Croatian and Norwegian television news tended to have the greatest single subject area (home security and crime). This represented nearly one third of all news items in the monitoring period in the two countries and one fifth in Italy. Other hard news categories such as international affairs, political affairs and social issues also receive significant attention in the news bulletins of all countries.

Chart 1.15: Geographic scope of news stories



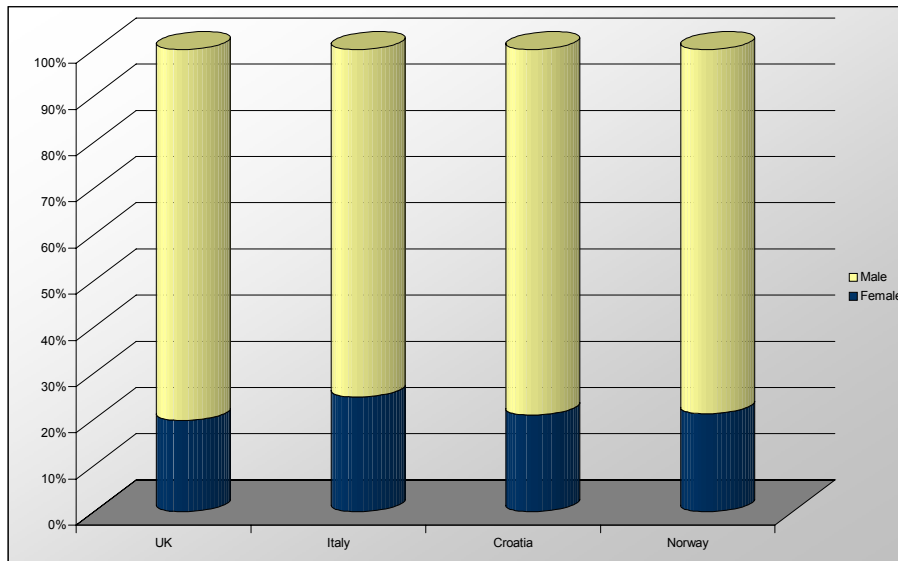
Television news coverage remains predominantly national in scope and across countries domestic news represented an average of 67 per cent of all news stories. The greatest percentage of international news is available on UK television. The least was broadcast on the Italian television news bulletins. International news focused on a very narrow range of areas and news about the international community and North America were the only significant areas where there was wide coverage of events.

Chart 1.16: Range of actors with direct access to news stories



The largest single group to have access to television news were the general public who gained particularly high levels of access in Croatia and Italy (25 per cent and above). Access for political parties was also high in Italy at above 20 per cent of total access. Across countries governments received similar amounts of airtime (between 9 and 13 per cent). Celebrities also play a significant role in Italian news whilst in the UK independent experts play a considerable role. Public employees in Croatia and Norway likewise have considerable access to the news. Generally, there is a wide range of stakeholders that have access to television news though there is a tendency to rely on political institutions and the general public rather than organisations that represent civil society and interest groups.

Chart 1.17: Gender balance of direct access to news stories

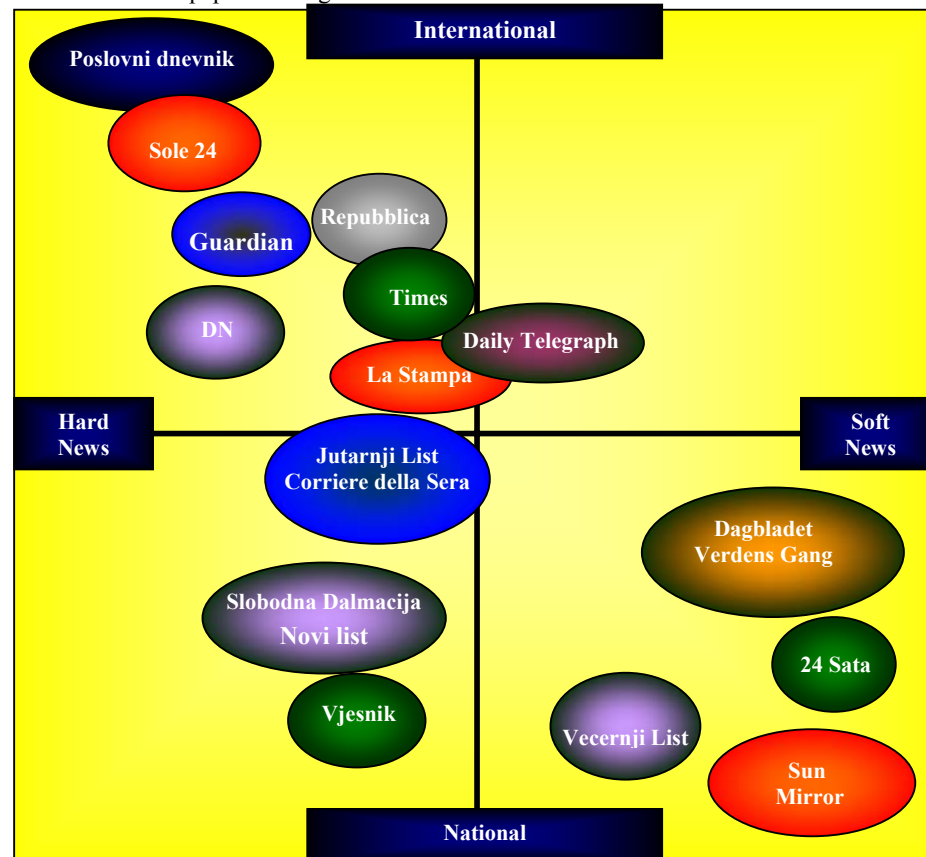


There is however, a significant gender imbalance in terms of direct access to television news across all countries and males dominate access to news. Females on average only represented 21 per cent of actors that were directly quoted or provided commentary in news coverage.

Newspapers

The newspapers in the sample also provide a wide range of diverse news and information. Out of all the titles the business focused ones contain the greatest percentage of international and hard news. Three titles in the sample, Poslovni dnevnik, Sole 24 Ore and DN are business titles. The more generalist newspapers in the UK and Italy represent the second grouping. These papers have fairly similar percentages of hard news as well as international news coverage.

Chart 1.18: Newspaper coverage

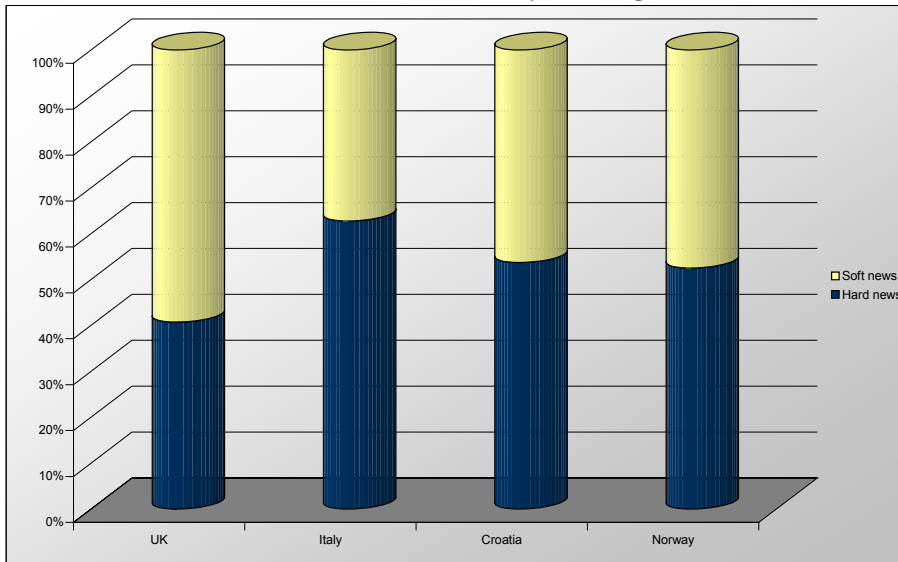


The Croatian press tends to have far more nationally based content as is illustrated above. In the bottom right hand corner of the axis the tabloids in the UK and Croatia demonstrate trends towards national based soft news. These titles contain very limited amounts of international news or hard news and are entertainment driven in terms of their overall content.

Diversity and range of newspaper content

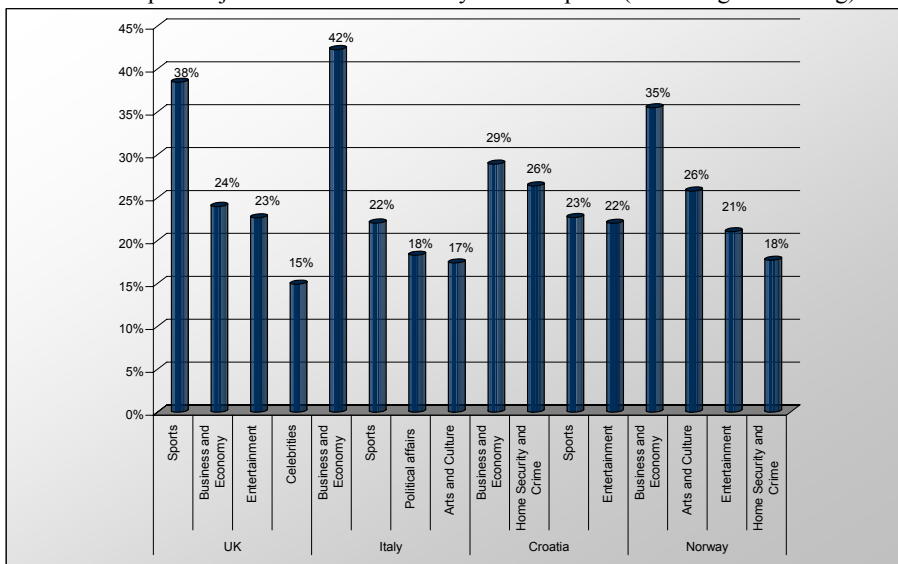
The diversity of content of newspapers was strongly influenced by a range of factors that structure the individual markets. Far greater amounts of softer varieties of news were evident in newspapers in contrast to television news. The UK press particularly, have a high ratio of entertainment and celebrity based news, due to the significant position of tabloid newspapers (41 per cent). Excluding the tabloids this rises to 53 per cent, more in line with the cross country average.

Chart 1.19: Balance of hard and soft news in the daily national press



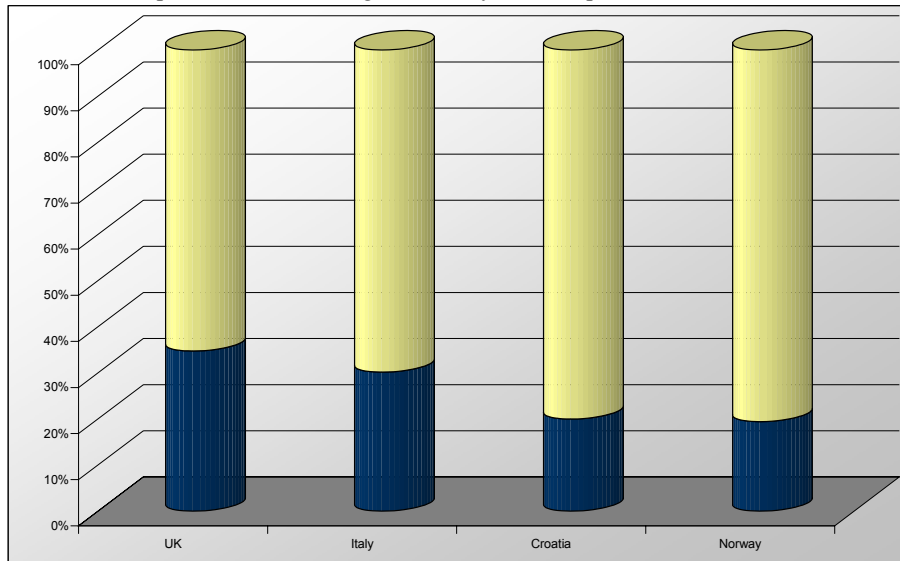
Italian newspapers have the highest percentage of hard news with 63 per cent of their content representing hard news, largely a result of the high percentage of business news. Croatian and Norwegian newspapers have similar ratios of soft and hard news with 54 and 52 per cent respectively, and again this is a result of the business titles.

Chart 1.20: Top 4 subjects covered in the daily national press (excluding advertising)



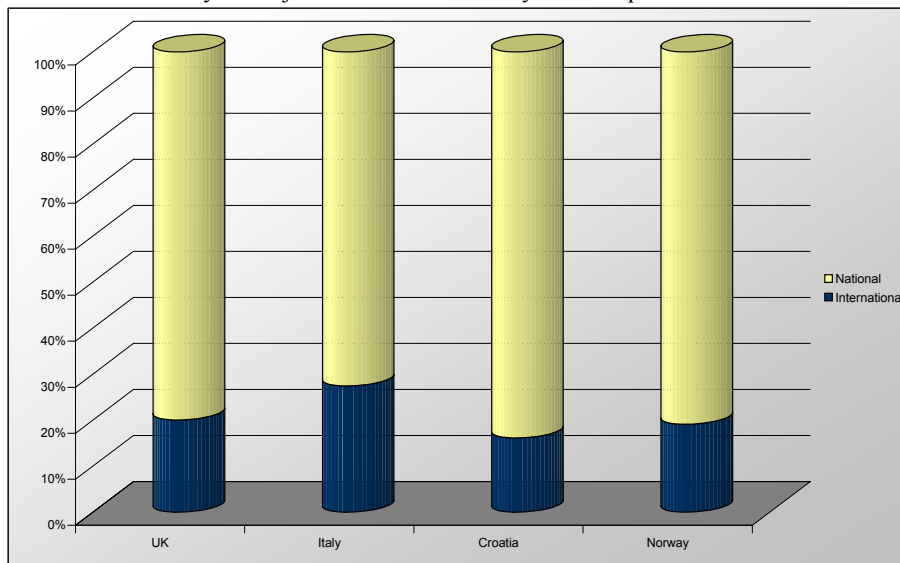
Business and economy is the single largest news category across the countries as in Italy and Norway titles specializing in business remain a key part of the national newspaper sectors. The high degrees of entertainment, celebrity and sport in the UK are a result of the tabloids. Business and economy is also a major subject area of Croatian newspapers followed closely by home security and crime. Norway, Croatia and UK newspapers also have similar percentages of entertainment.

Chart 1.21: Proportion of advertising in the daily national press



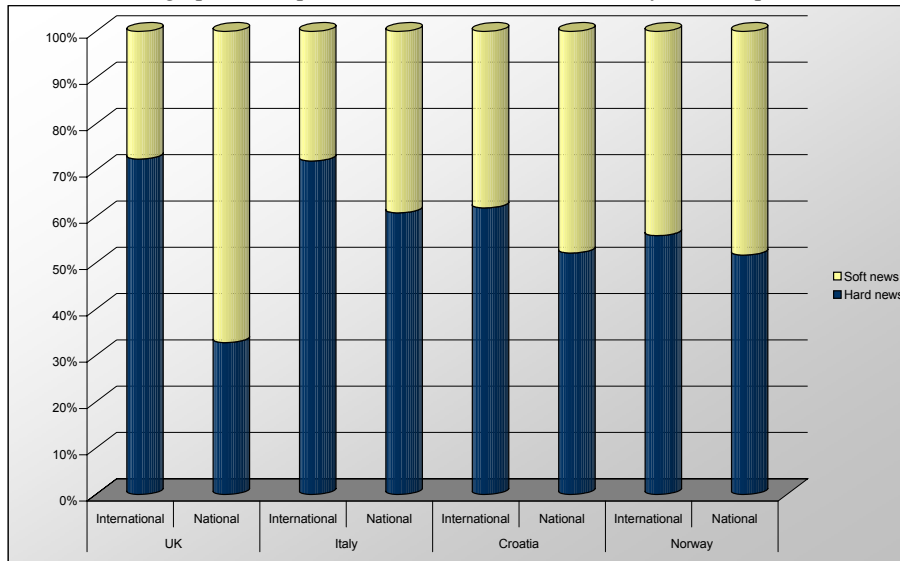
The UK newspapers contain the greatest percentage of advertising with an average across newspapers of 34 per cent. Italian papers have the second largest percentage with 30 per cent and this is reduced to below 20 per cent in Norway and Croatia.

Chart 1.22: Diversity of subjects covered in the daily national press



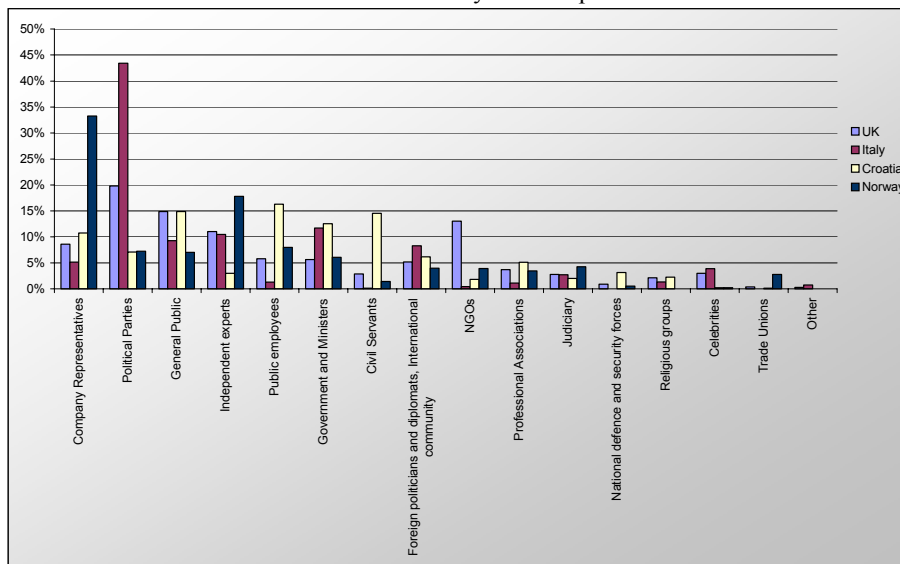
Newspaper content remains nationally based and on average 80 per cent of content is related to domestic issues and events. Italian newspapers have the largest percentage of international news (27 per cent) due to the international focus of Sole 24 Ore's business and economy coverage. International news was also probably exaggerated in Italy over the monitoring period because of Italy's involvement in the breaking story of what was commonly referred to as Nigergate.

Chart 1.23: Geographical scope of soft and hard news in the daily national press



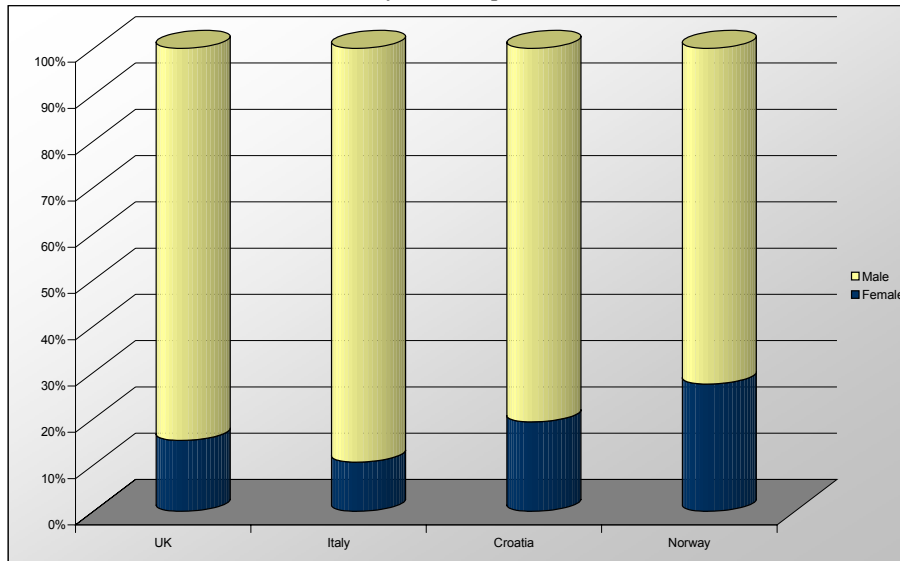
The UK newspapers had the second highest percentage of international news with 20 per cent, though this must be seen in the context of the tabloids having marginal amounts of international news. Norway and Croatia's newspapers contained 19 and 16 per cent of international news respectively. However, in terms of hard news Italian newspapers have a similar ratio to that in the UK newspapers as Italian titles tend to have softer subject areas in their international coverage.

Chart 1.24 Actors with direct access in the daily national press



In contrast to television news there is not a cluster of stakeholders that dominate access to newspapers. Italian newspapers rely heavily on political parties (43 per cent) whilst in Croatia and Norway this category is far less prominent. Due to the business title DN the Norwegian national press has a tendency to provide more direct access to company representatives. The UK newspapers grant NGOs the greatest amount of access of all countries (13 per cent). The Croatian press tended to grant civil servants and public employees wide access as well as government and ministers.

Chart 1.25: Gender balance in the daily national press



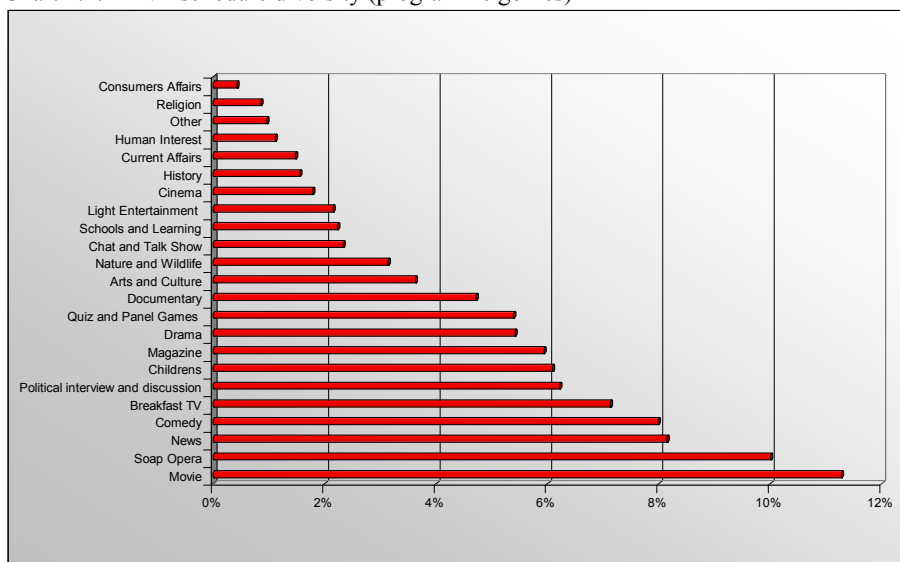
There are wide disparities in the direct access in the print media granted to male and females. The imbalance is greatest in Italy where females only represent 11 per cent of stakeholders that were directly quoted. Norwegian newspapers demonstrate the greatest balance between male and female though it remains highly imbalanced with 27 per cent of direct access allocated to females.

CROATIA

Television

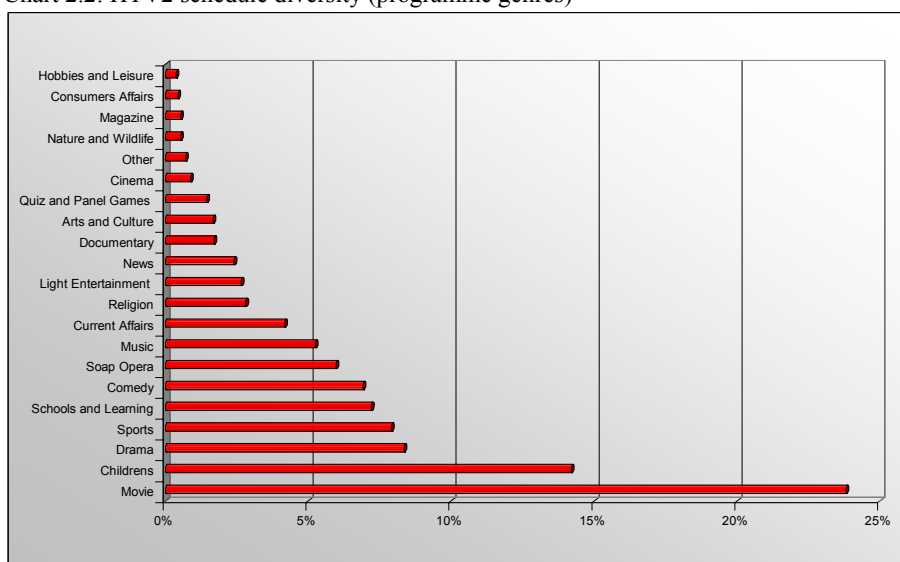
It was not until 2000 that the national monopoly of the public broadcaster HTV was broken with the introduction of national commercial television (regional and local television started in the mid 1990s). Today there are two such national channels, Nova TV and RTL TV operating alongside the two public channels HTV1 and HTV2.

Chart 2.1: HTV1 schedule diversity (programme genres)



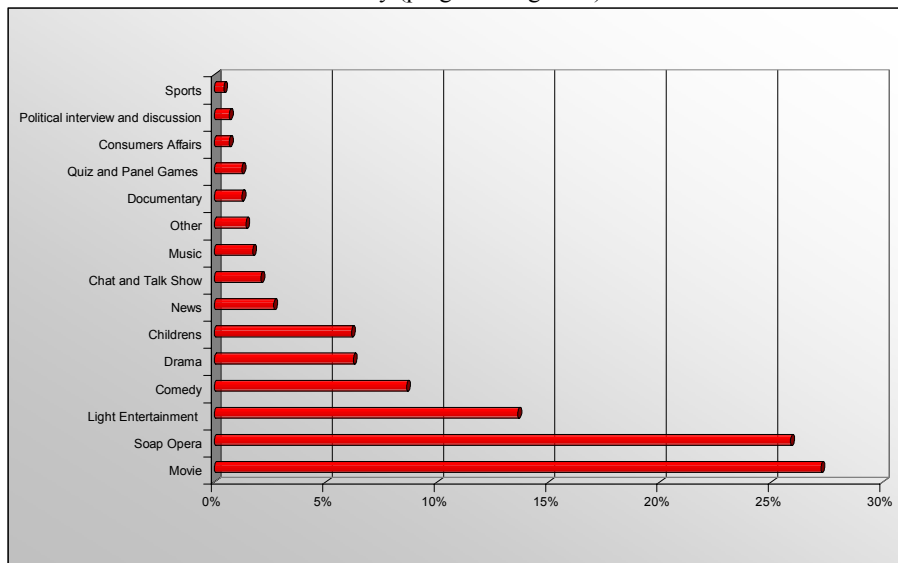
HTV1's output is built on a schedule of entertainment, fiction and news reflected in a large percentage of entertainment based programmes (62 per cent of the overall time) over factual programmes (38 per cent). Movies are the most prominent genre (11 per cent), followed by soap operas (10 per cent), and news bulletins and comedy (both 8 per cent).

Chart 2.2: HTV2 schedule diversity (programme genres)



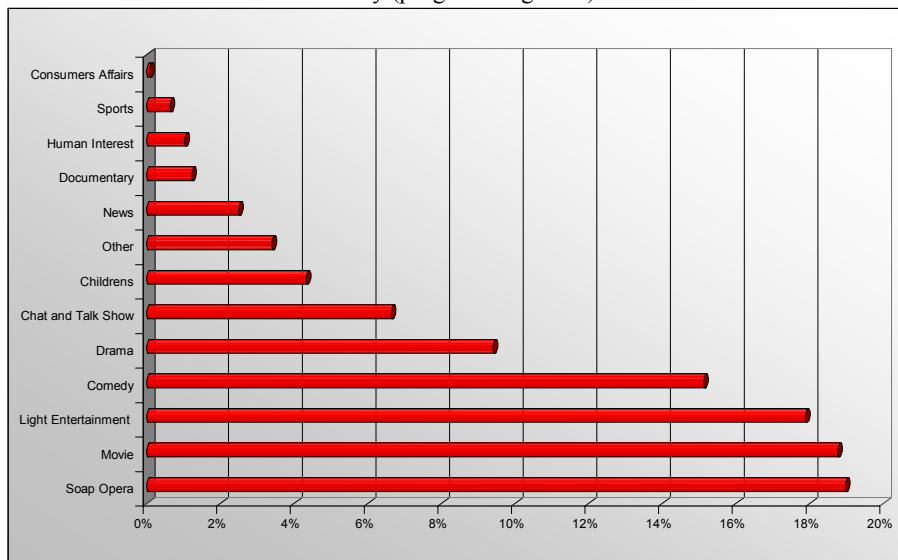
There is also a clear dominance of fiction and entertainment on HTV2 and combined they represent 78 per cent of total programme output for the two weeks of monitoring. Movies and children's programming represent a particularly large percentage of output (24 and 14 per cent respectively). Current affairs represented 4 per cent of total output while news represented only 2 per cent. However, a significant portion of the schedule was devoted to schools and learning (8 per cent).

Chart 2.3: Nova TV schedule diversity (programme genres)

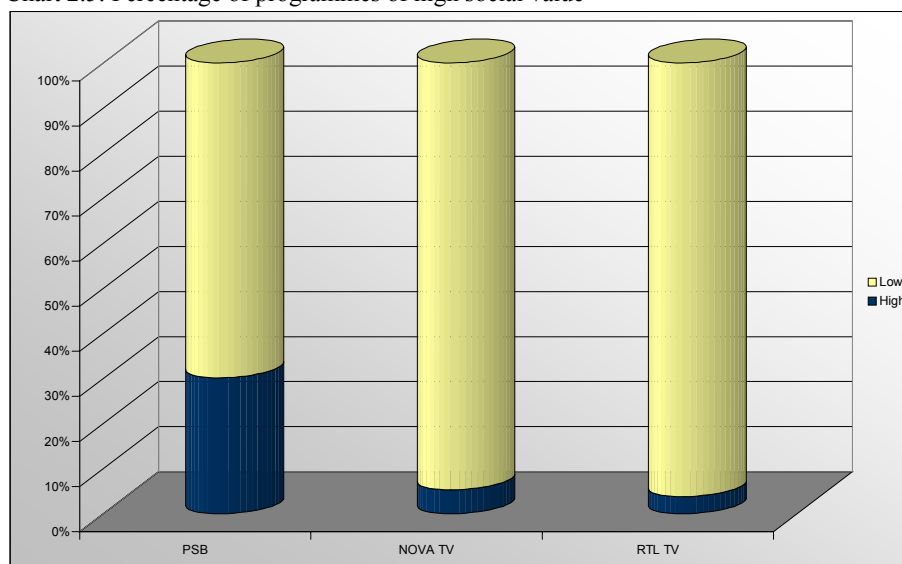


The dominance of entertainment based programming on Croatian television overall is even more evident in terms of Nova TV, whose schedule is mainly composed of fiction (68 per cent) and entertainment (25 per cent). In particular movies and soap operas represent the key programmes of this channel (27 and 26 per cent respectively), whilst news bulletins represented to 3 per cent.

Chart 2.4: RTL TV schedule diversity (programme genres)

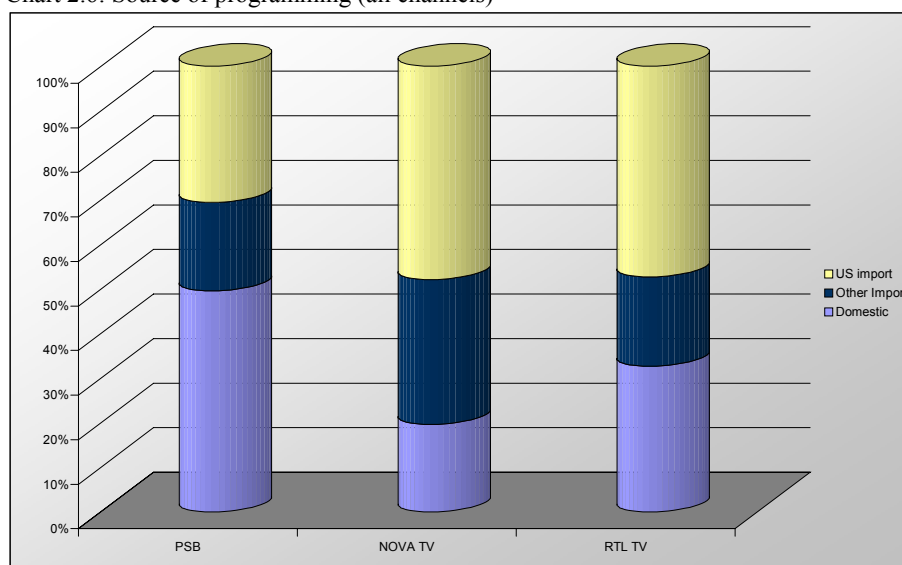


RTL TV's schedule mirrors that of Nova TV and its programming principally consists of fiction (62 per cent) and entertainment (31 per cent), while factual programmes represent only 4 per cent of total output of the channel. Soap operas, movies, light entertainment and comedies are the genres around which the schedule is structured.

Chart 2.5: Percentage of programmes of high social value⁵

There is a consistent tendency towards entertainment based programming across all four channels in the sample and the weight given to programmes of high social value is extremely limited. However, there is a distinction between public and commercial channels in this respect. HTV allocates significantly more resources to these genres (32 per cent across the two channels), principally as a result of HTV 1's schedule as it aired 40 per cent of such genres. In contrast, the two commercial channels provided very little in terms of programming of high social value with Nova TV having slightly more (5 per cent) than RTL TV (4 per cent).

Chart 2.6: Source of programming (all channels)

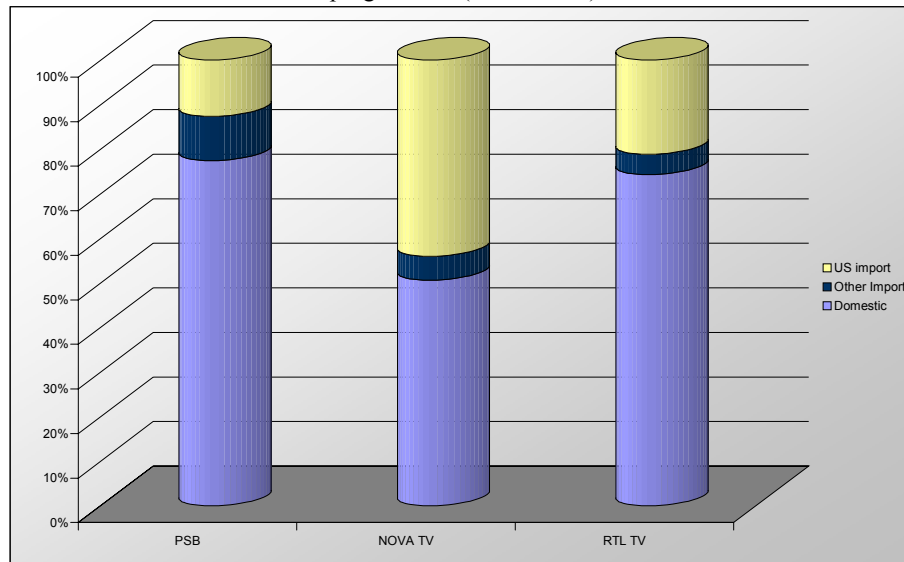


Domestic productions account for 50 per cent of HTV's output with a high level of US imports (31 per cent) with a further 20 per cent imported from third countries. Commercial channels rely even more heavily on imports as US imports and programmes from third countries dominate Nova TV's schedule (48 and 32 per cent respectively). Only 20 per cent of output was domestically produced during the

⁵ HTV 1 and HTV 2 classified as PSB

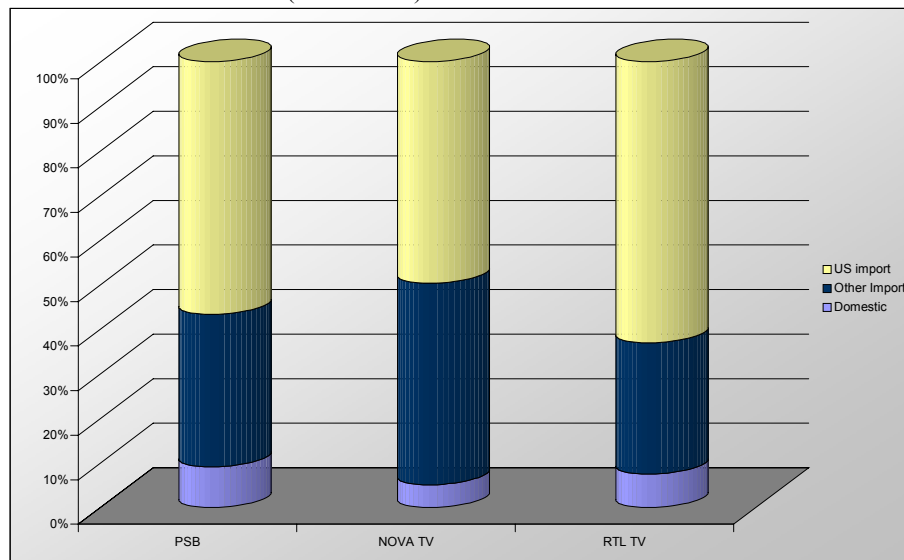
two week period. Although RTL TV's output has a higher percentage of nationally produced programmes (33 per cent) US imports are the principal source of programming (47 per cent) with the remainder imported from third countries.

Chart 2.7: Source of non fiction programmes (all channels)



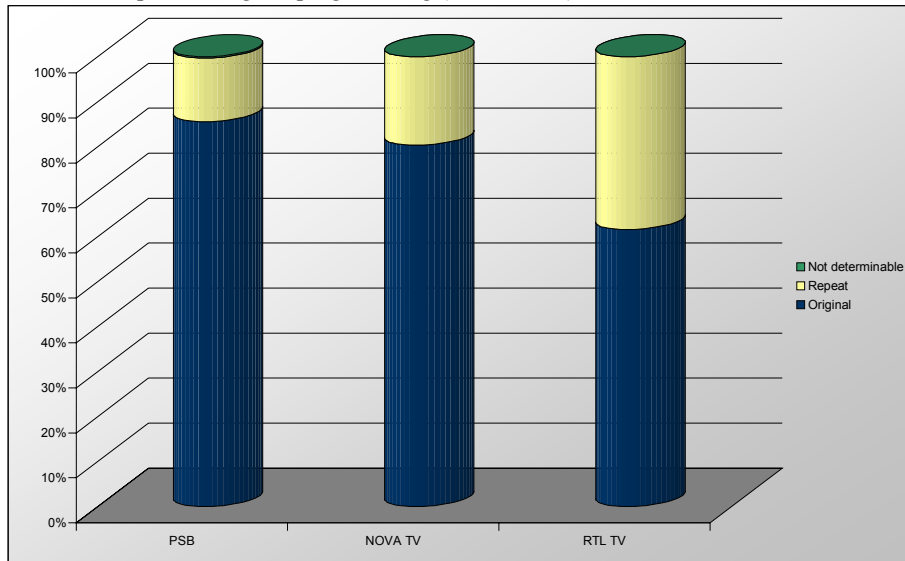
National productions are strongest across all channels for non fiction. 77 per cent of non fiction on HTV1 and HTV2 were domestically produced and the channels are particularly strong in this field in its news, light entertainment, talk shows and children's programmes. Similarly, RTL TV structures its non fiction around nationally produced programmes (74 per cent). Nova TV's non fiction relies far more heavily on imports, especially from the US (44 per cent). 51 per cent of Nova TV's non fiction is however, nationally produced.

Chart 2.8: Source of fiction (all channels)



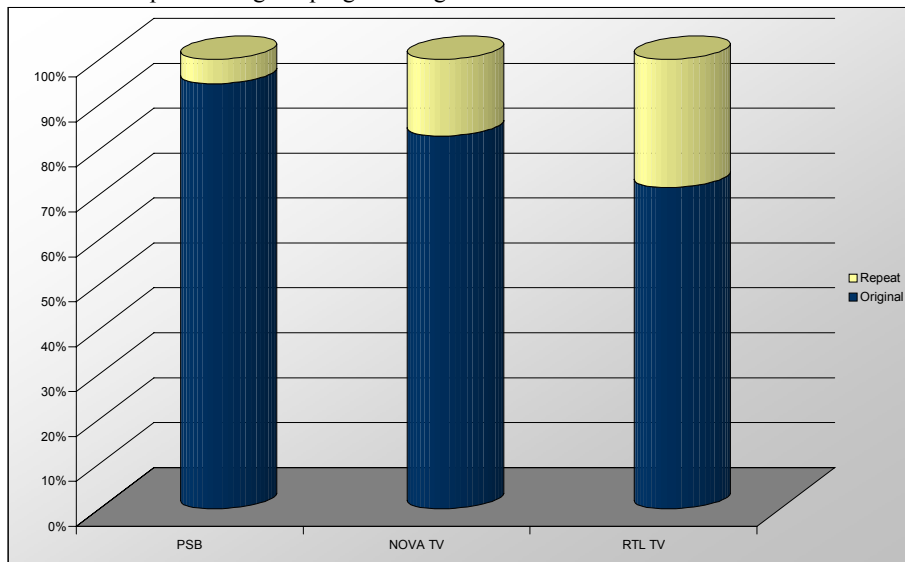
In contrast, fiction is dominated by US imports (56 per cent as an average across all channels) and this is reflected in the very low rates of domestic fiction on all channels (7 per cent). Imports are a key source of fiction across all channels, demonstrating a high reliance on imports.

Chart 2.9: Repeat or original programming (all channels)



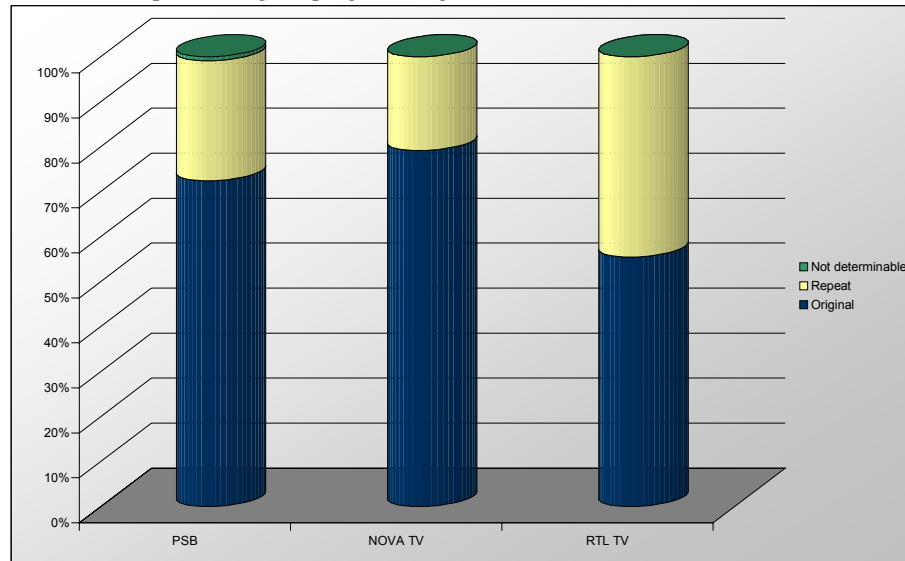
HTV has the highest levels of original programmes (86 per cent) followed by Nova TV (80 per cent) with RTL TV relying more on repeats (62 per cent of its schedule consisted of original programming).

Chart 2.10: Repeat or original programming of non fiction



The majority of non fiction is original across channels and again HTV is the broadcaster with the highest percentage of original productions (95 per cent), followed by Nova TV (83 per cent) and RTL TV (71 per cent).

Chart 2.11: Repeat or original programming of fiction

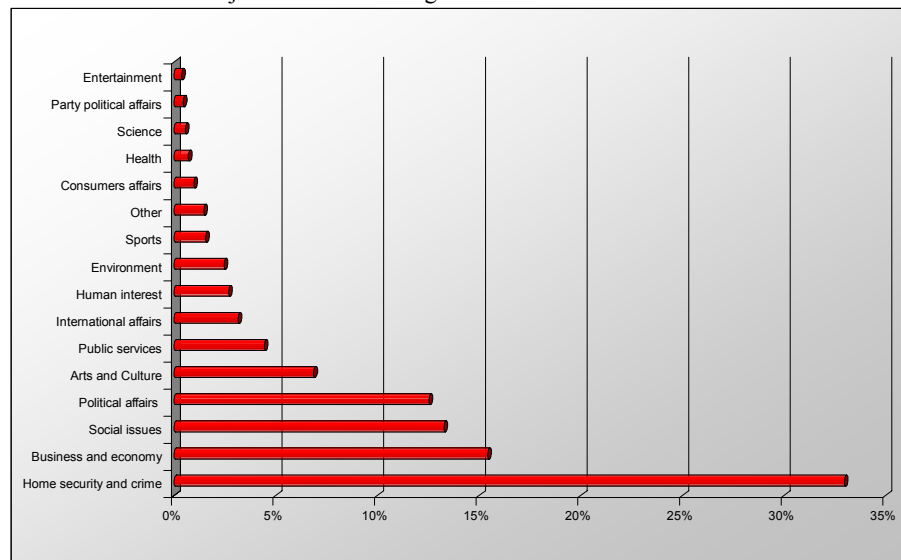


The level of original programmes decreases for fiction, amounting to an average of 69 per cent. HTV and Nova TV are the channels with the highest rates of first run programmes (72 and 79 per cent respectively), while RTL TV relies more heavily on repeats with 45 per cent of its fiction consisting of repeats.

Television news coverage

News bulletins only amounted to 4 per cent of the output of the four channels, with little difference between them. HTV devotes 6 per cent of its output to news coverage, Nova TV 3 per cent and RTL only 2 per cent.

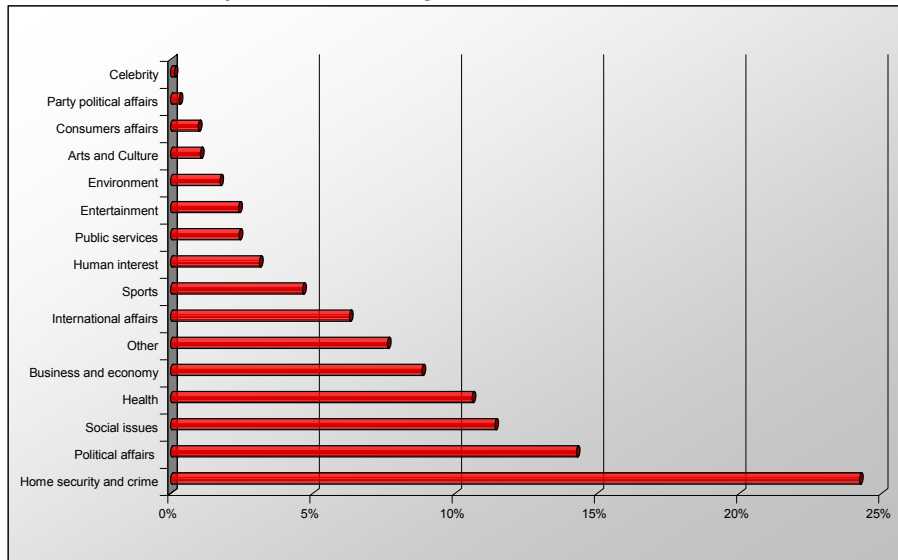
Chart 2.12: HTV1 subject of news coverage



The subject areas covered in HTV1's news were dominated by home security and crime that represented 33 per cent of all news items. This category was composed of stories related to criminal trials during the war in former Yugoslavia, the Paris riots and individual stories about crime. Other

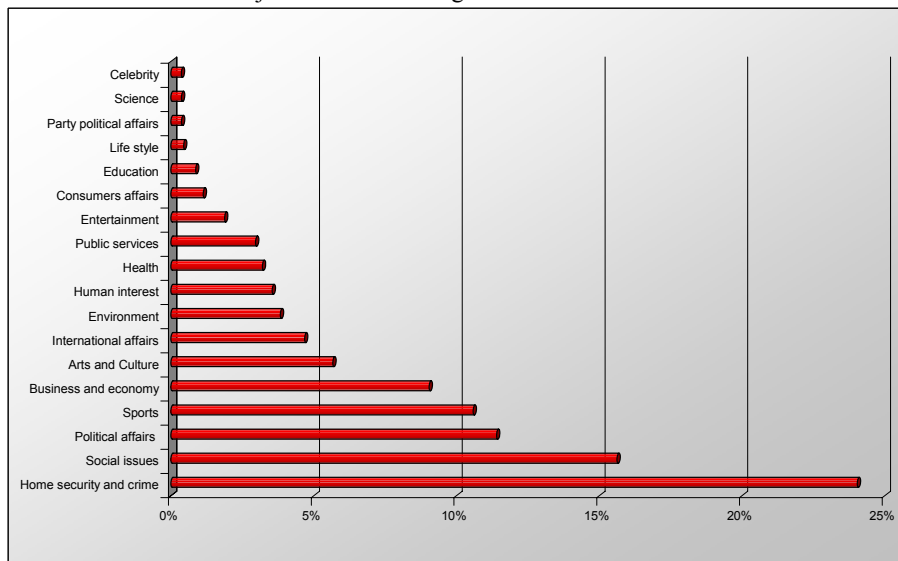
significant subjects were business and economy (23 per cent), social issues and political affairs (both 13 per cent), and health (12 per cent).

Chart 2.13: HTV2 subject of news coverage



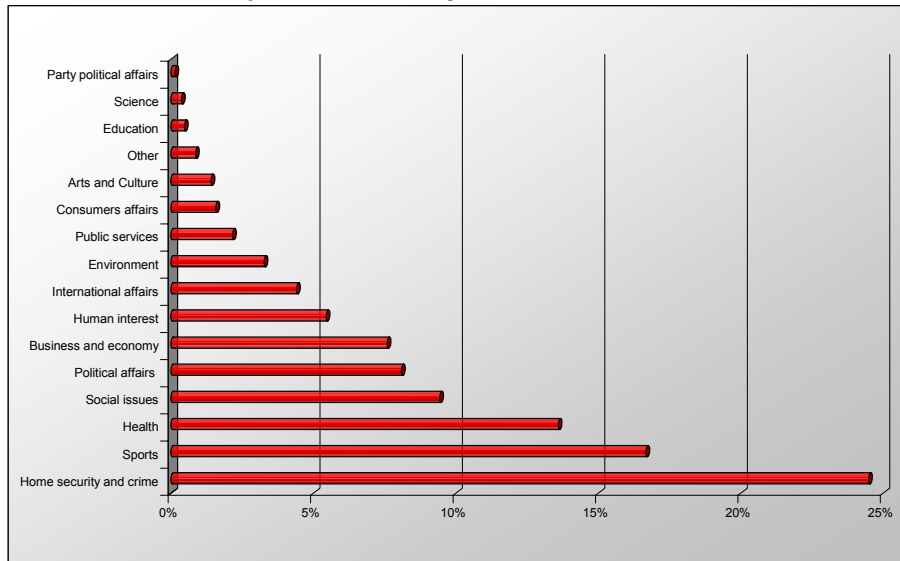
News on HTV 2 follows similar thematic priorities and home security and crime was the most frequently reported category (24 per cent). It was followed by political affairs (14 per cent), social issues and health (both with 11 per cent) and business and economy. Another important area of coverage was represented by the negotiations for Croatia's accession to the EU.

Chart 2.14: Nova TV subject of news coverage



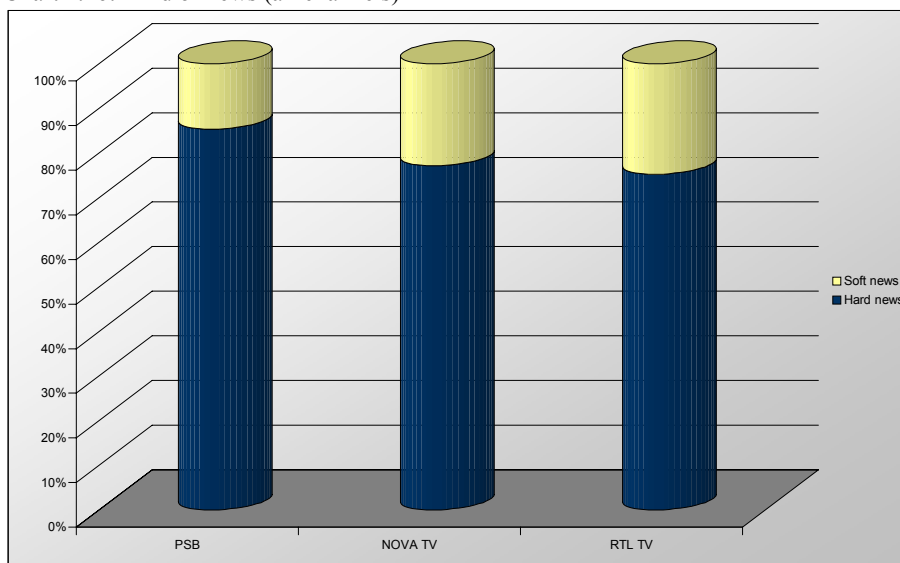
The most prominent subject category on Nova TV's news was home security and crime (24 per cent); a category principally constituted by stories about war crimes trials and riots in Paris. Social issues were the second most significant subject (16 per cent), followed by political affairs and sports (both with 11 per cent) and business and economy (9 per cent). Compared to the other channels, Nova TV places a stronger emphasis on soft news items such as sport and arts and culture.

Chart 2.15: RTL TV subject of news coverage



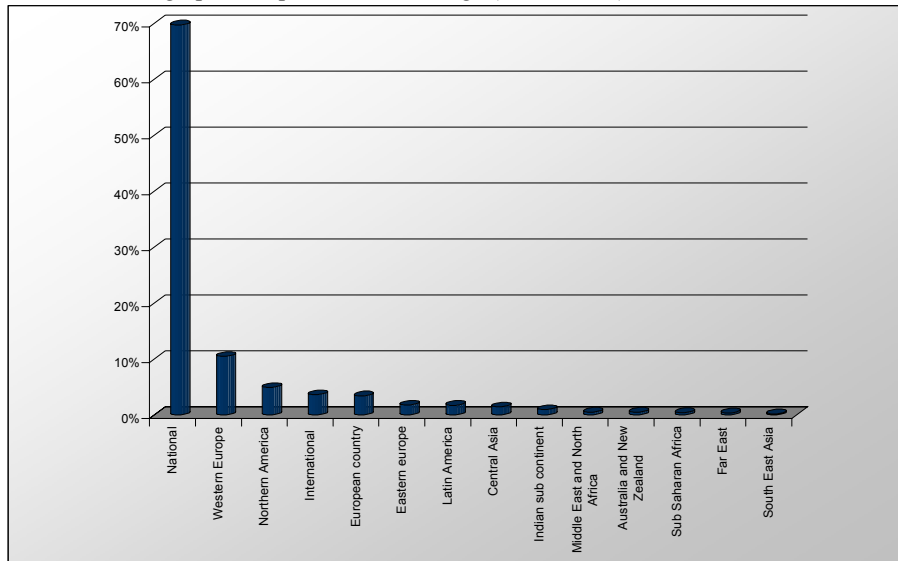
RTL TV's news was also dominated by stories related to home security and crime (24 per cent) as well as sports (17 per cent) and health (14 per cent).

Chart 2.16: Kind of news (all channels)

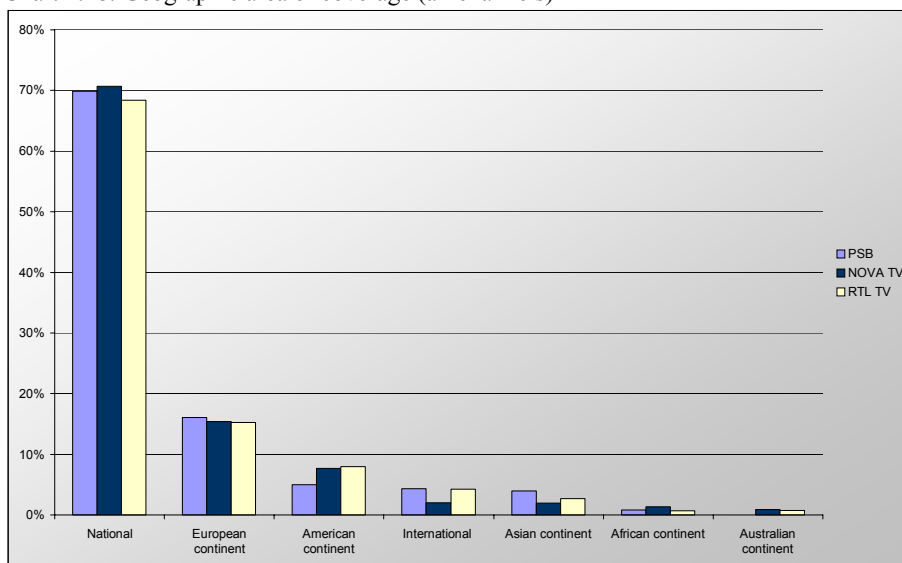


Hard news represents the majority of news items with an average of 80 per cent of all news items classified as hard, with some minor differences in the four channels. Hard news items amounted to 85 per cent of the overall time on HTV, while commercial broadcasters displayed lower rates of coverage for such news: in Nova TV amounting to 77 per cent and on RTL TV 75 per cent.

Chart 2.17: Geographic scope of news coverage (all channels)



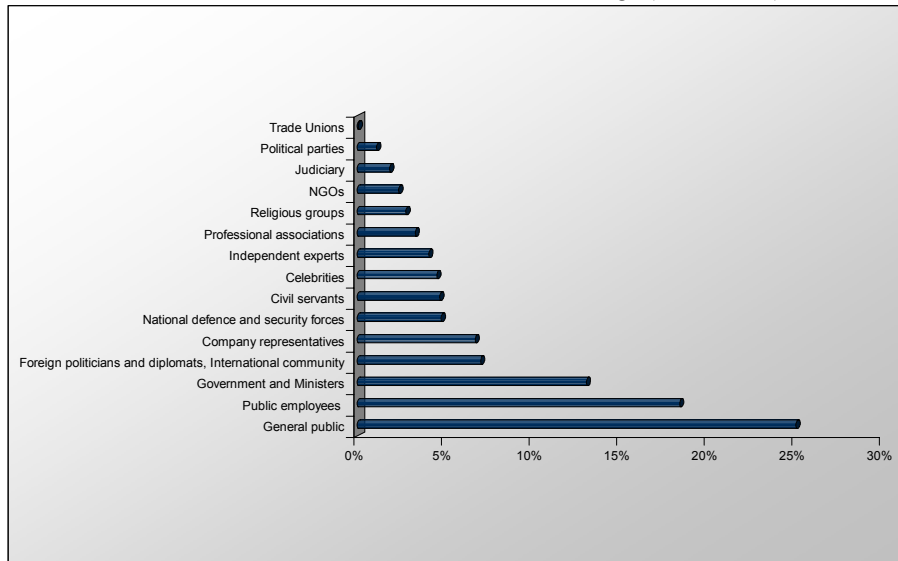
Domestic news dominated news output overall. Nationally based news accounted for 70 per cent of total news time while foreign news amounted to 30 per cent, with Western Europe and North America as the regions receiving the greatest coverage (10 and 5 per cent respectively).

Chart 2.18: Geographic area of coverage (all channels)⁶

The four channels displayed no major editorial differences in regards the geographical scope of news items: on all channels nationally based stories were around 70 per cent while Europe and the American continent were the main areas covered by foreign news.

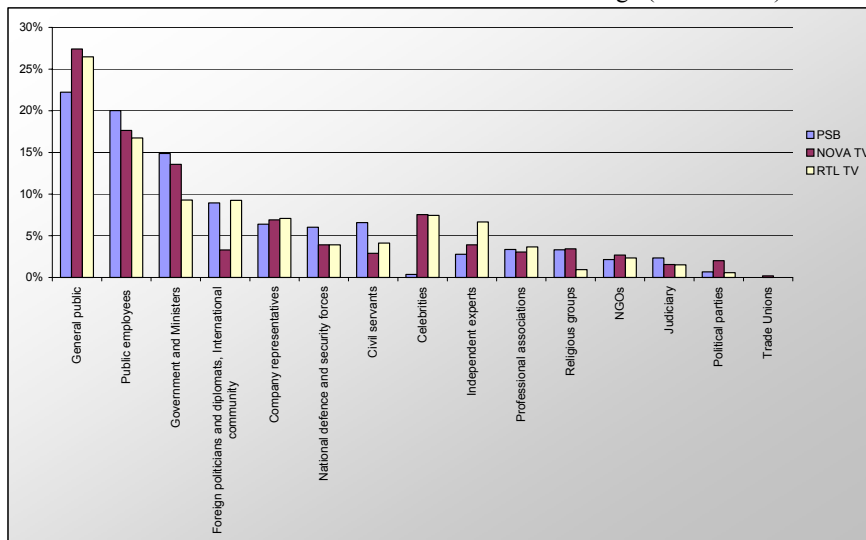
⁶ The different geographical areas have been merged in broader categories.

Chart 2.19: Kinds of actors with direct access to news coverage (all channels)



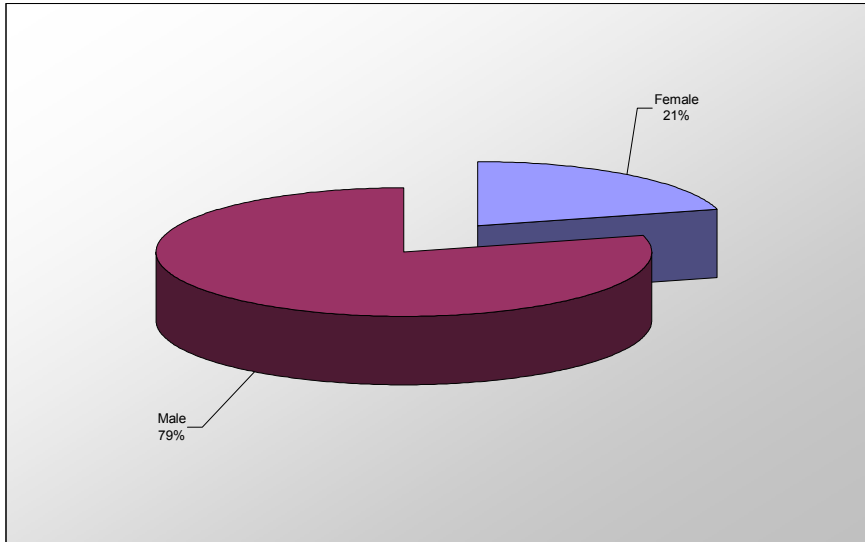
In terms of direct access to news HTV offers the widest space to stakeholders (about 130 minutes in the two weeks monitored), followed by Nova TV (109) and RTL TV (74). Three main kinds of actors dominate news stories: the general public (25 per cent), generally as individuals involved in events or as witnesses to the facts of a story. They were followed by public employees (particularly the police, doctors and teachers) (18 per cent) as well as the Government (14 per cent). Foreign politicians and diplomats received 7 per cent access, mainly as a result of news related to the bird flue pandemic, riots in France and the allegations about CIA camps in the Balkans.

Chart 2.20: Kinds of actors with direct access to news coverage (all channels)



In all channels the main category of actors is represented by the general public, with no major quantitative differences across news bulletins. On HTV channels public employees are the second most relevant category (20 per cent) and the Government received 15 per cent share of all access. Nova TV shows a similar distribution, however, celebrities also represent an important category of stakeholders gaining direct access to bulletins (8 per cent), a category almost totally absent from the public channels. Likewise, RTL TV devotes a significant part of direct access to celebrities and to independent experts (both 7 per cent).

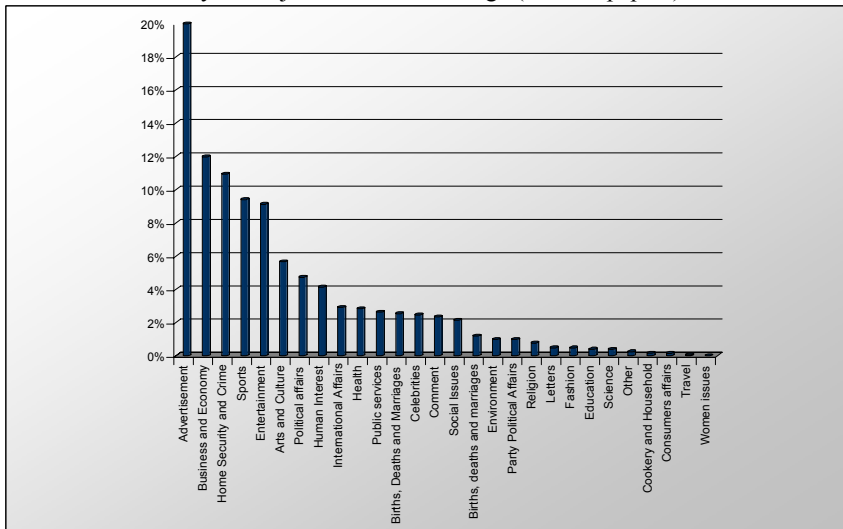
Chart 2.21: Balance in gender between actors in direct access to news coverage (all channels)



A clear dominance of male access is evident in relation to the distribution of direct access among actors (79 per cent as an average), with the partial exception of Nova TV where women have slightly greater access (24 per cent). Women having direct access to the news amounted to 21 per cent of total time and they usually represent the general public, public employees or company representatives.

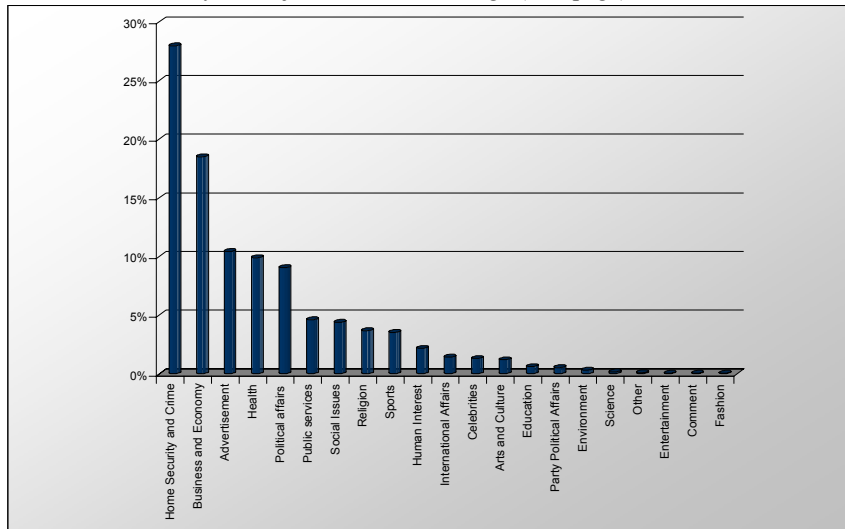
Newspapers

Chart 2.22: Diversity of subjects of news coverage (all newspapers)



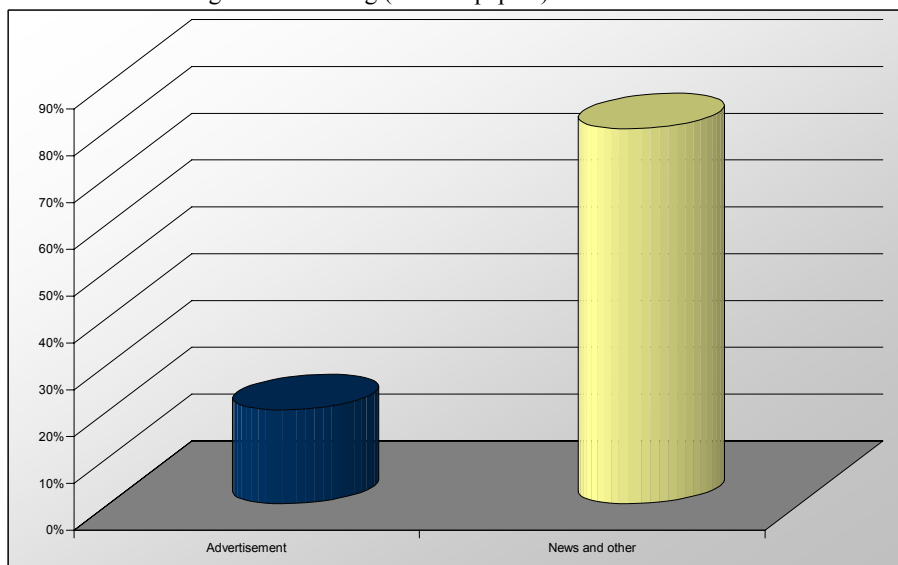
Business and economy is the most prominent topic in the print media (20 per cent) followed by home security and crime (11 per cent). Other prominent subject areas are sports and entertainment. In this regard, the daily press is characterised by the coexistence of two dimensions, one associated with high profile news (home security, business, politics), and the other embodying softer stories such as those related to entertainment, arts and culture and celebrities.

Chart 2.23: Diversity of subjects of news coverage (first page)



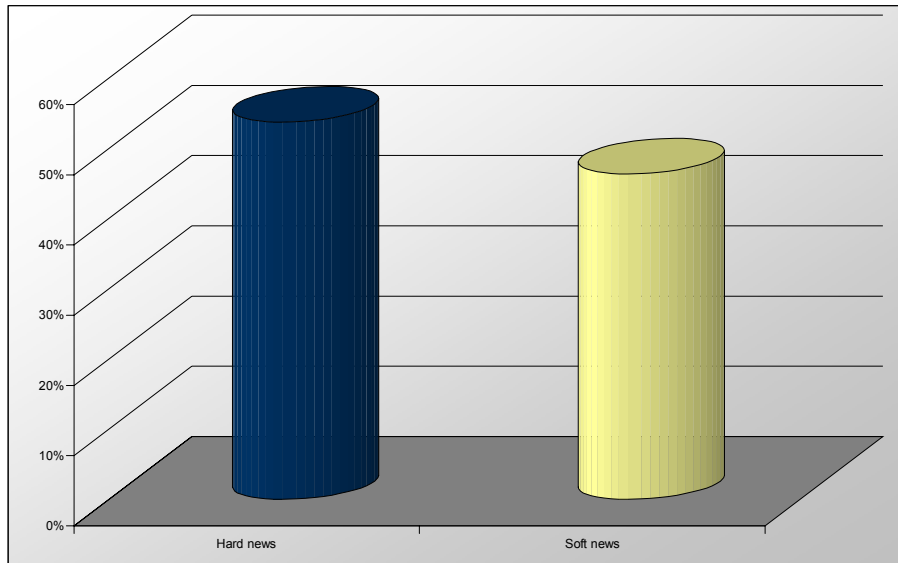
This duality seems less pronounced in relation to news published on the first page of the editions where high profile stories are dominant i.e. home security and business and economy (28 and 18 per cent respectively), followed by health (10 per cent) and political affairs (9 per cent).

Chart 2.24: Percentage of advertising (all newspapers)



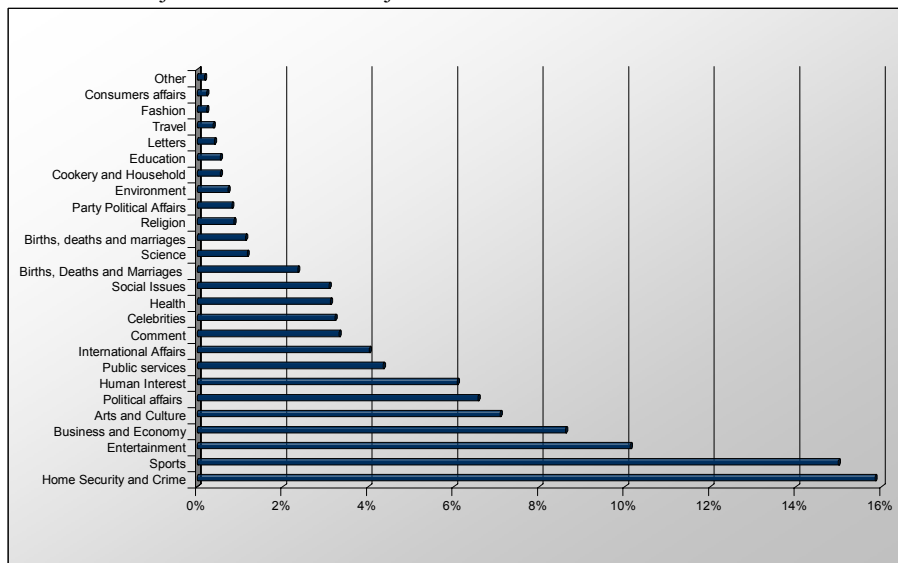
Advertisements represent one fifth of the overall space and Jutarnji List and Vecernji list are the titles with the highest levels of advertising space (28 and 27 per cent).

Chart 2.25: Distribution of hard and soft news



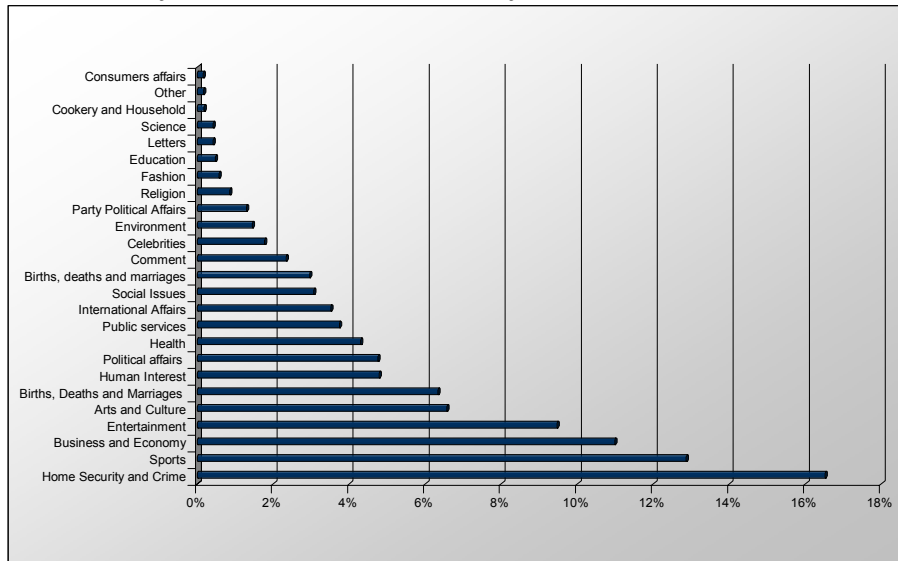
Hard news represents 54 per cent of all news items whilst soft news 46 per cent. This ratio varies across different titles, with hard news rising to 97 per cent in Poslovni Dnevnik and decreasing to 31 per cent in 24 Sata.

Chart 2.26: Subjects covered in Jutarnji list



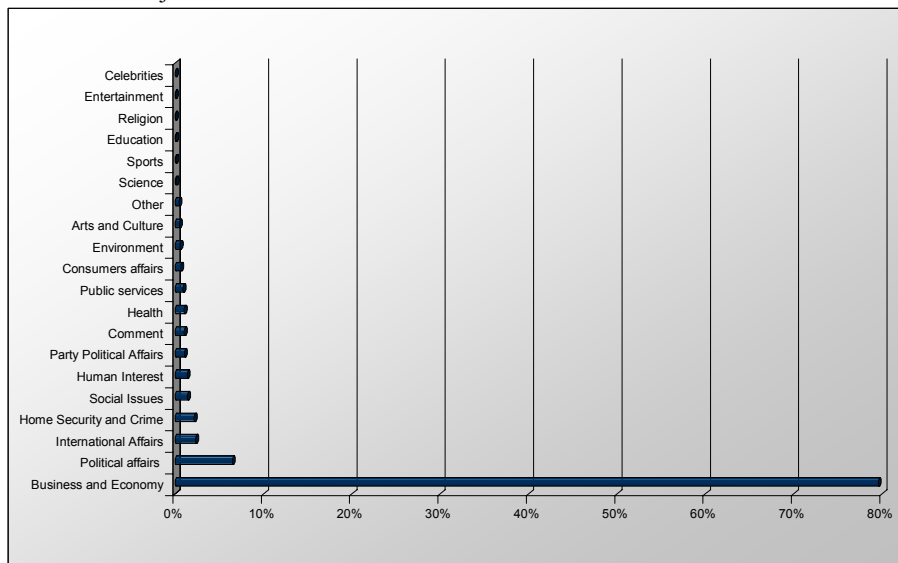
In Jutarnji List the category home security and crime is the most covered subject (16 per cent), closely followed by sports (15 per cent). Entertainment and business and economy represent two other central topics amounting to 10 and 9 per cent respectively.

Chart 2.27: Subjects covered in Slobodna Dalmacija



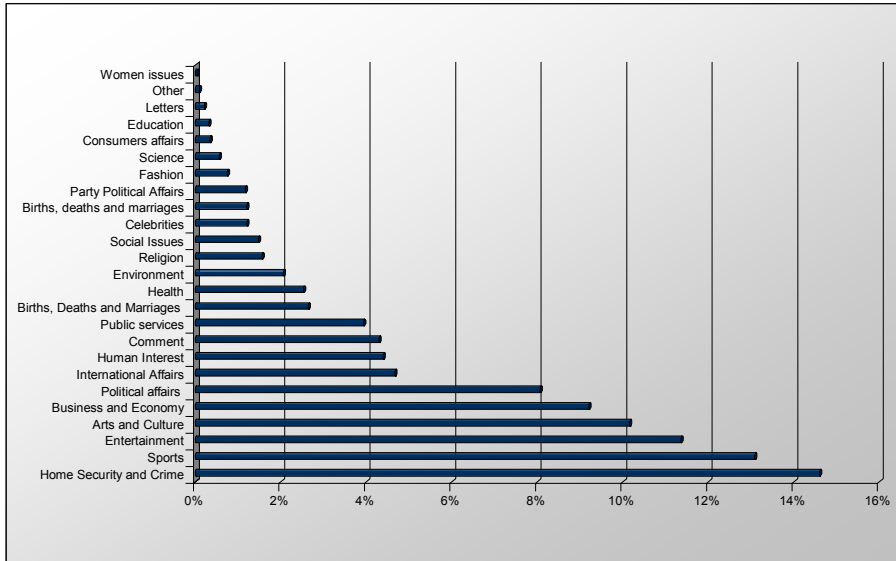
A similar tendency is evident in Slobodna Dalmacija whose articles are divided between hard news, such as home security (17 per cent) and business and economy (11 per cent), and softer news items, principally sports (13 per cent), entertainment (9 per cent) and art and culture (7 per cent).

Chart 2.28: Subjects covered in Poslovni Dnevnik



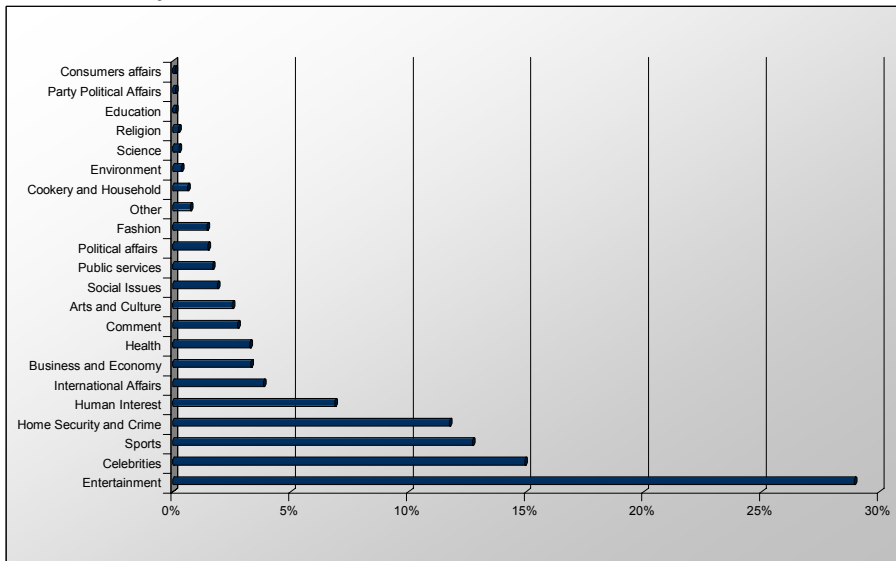
In contrast, Poslovni Dnevnik's content is dominated by news about business and economy (80 per cent of total space) and other subjects occupy an extremely limited position.

Chart 2.29: Subjects covered in Novi List



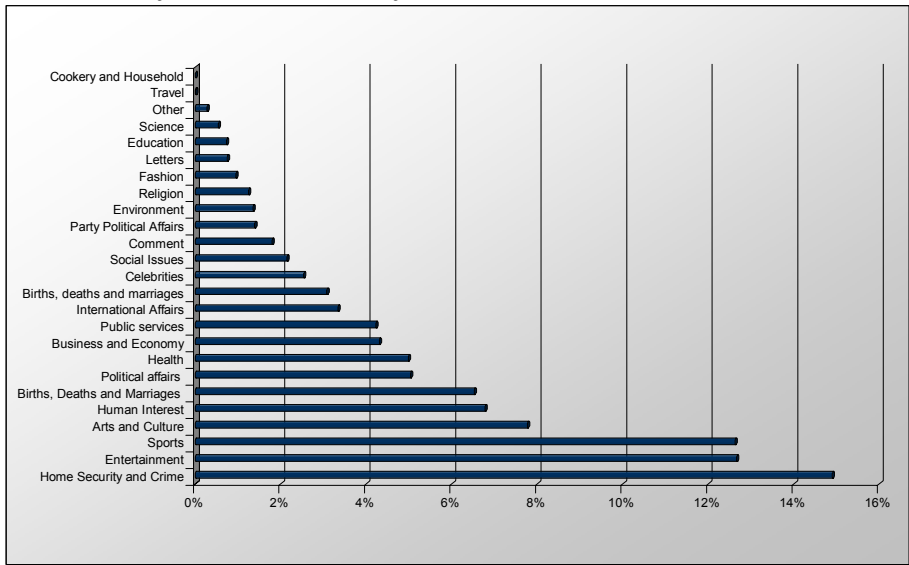
Hard and soft news are almost equally present in Novi List. Home security received 15 per cent, sports 13 per cent, entertainment 11 per cent and art and culture 10 per cent. Business and economy (9 per cent) and political affairs (8 per cent) also received significant attention.

Chart 2.30: Subjects covered in 24 Sata



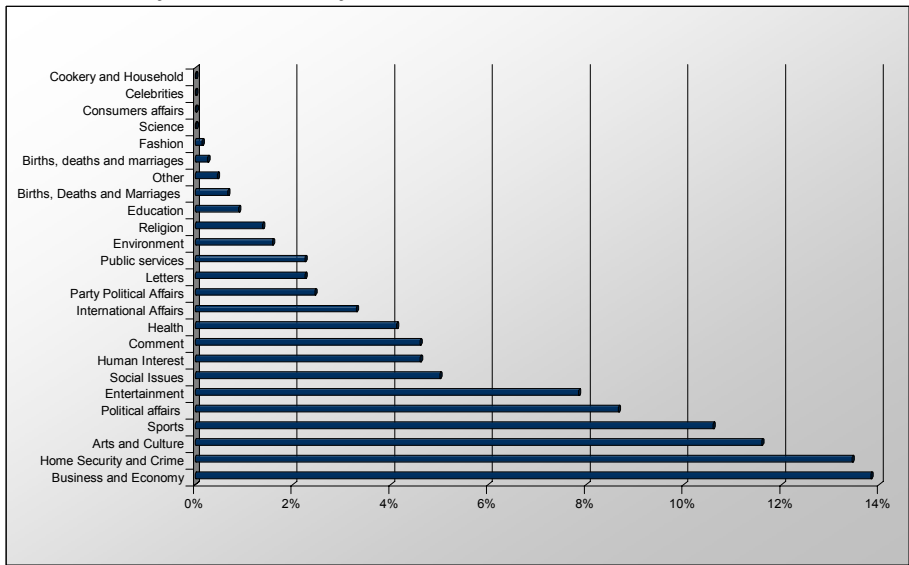
24 Sata's content reflects its tabloid nature. Soft news represented 69 per cent of overall space, with a clear dominance of entertainment based stories (29 per cent). Celebrities, sports and human interest are other prominent subject areas. The main category of hard news is represented by home security and crime (12 per cent).

Chart 2.31: Subjects covered in Vecernji List



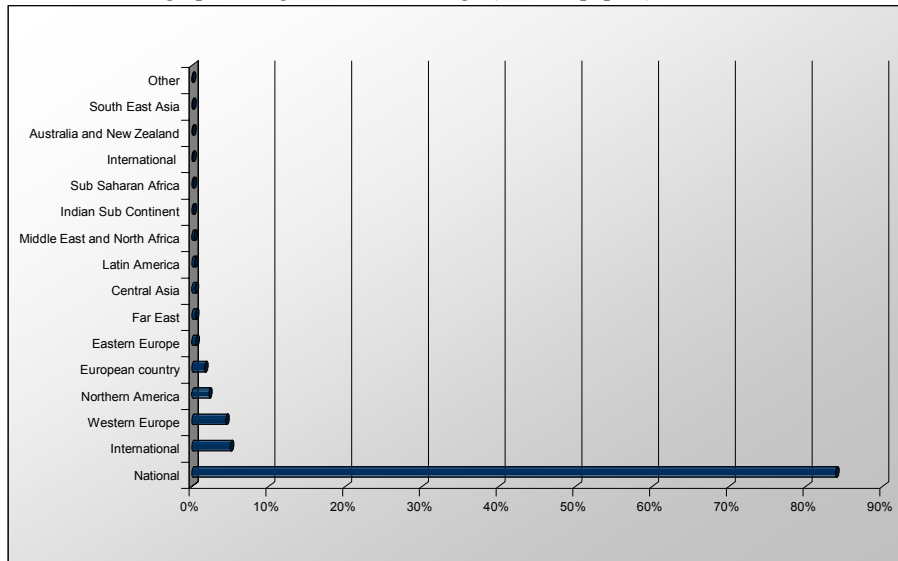
Vecernji List’s coverage is equally divided between hard and soft news. Home security, political affairs and health received the highest amounts of coverage in the category of hard news. Entertainment and sports were the most prominent subject areas in terms of soft news.

Chart 2.32: Subjects covered in Vjesnik



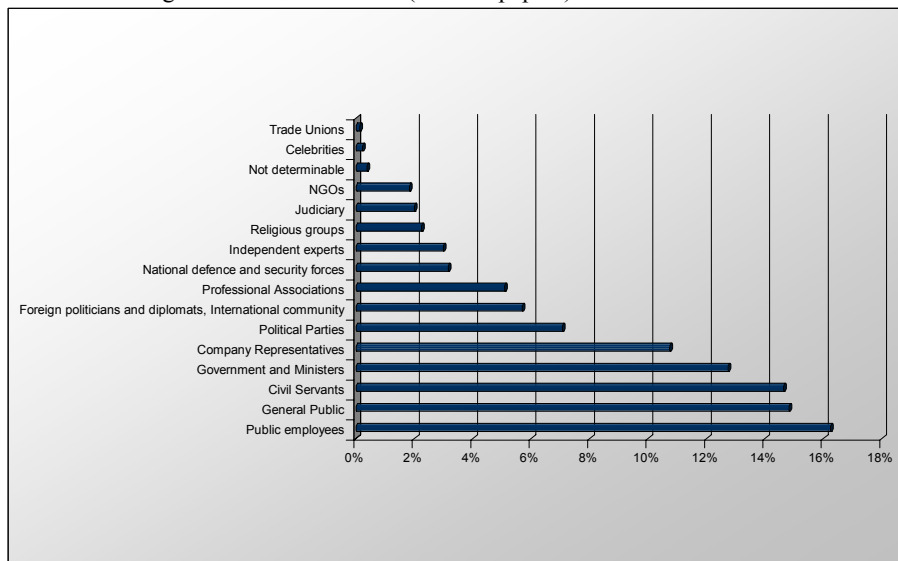
Business and home security and crime are the dominant subjects (14 and 13 per cent respectively) in Vjesnik followed by art and culture (12 per cent) and sports (11 per cent). Political affairs and entertainment are also key subject areas for the title.

Chart 2.33: Geographic range of news coverage (all newspapers)



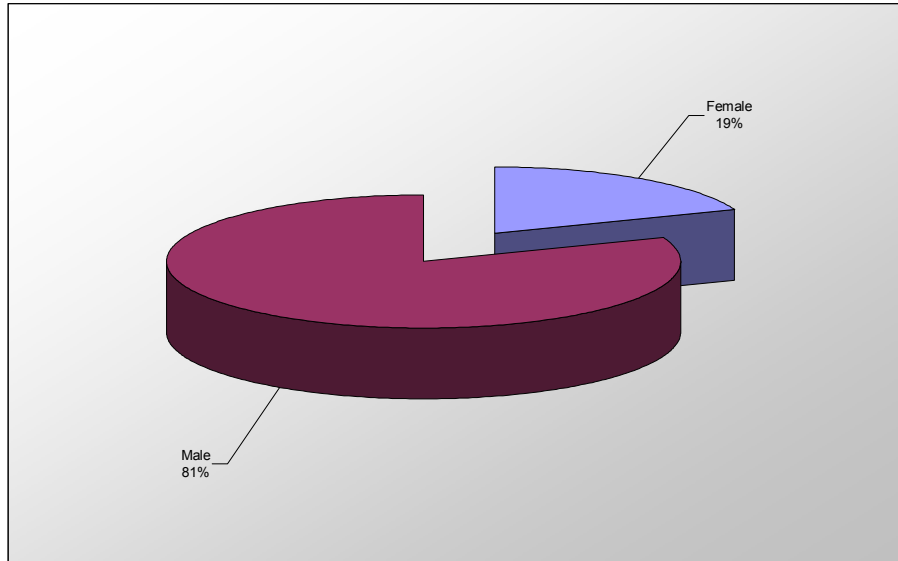
Domestic news constituted 84 per cent of overall space, while foreign stories receive very limited attention. International news mainly focussed on international issues, Europe and North America. Poslovni Dnevnik had the greatest percentage of international news (37 per cent).

Chart 2.34: Range of actors with access (all newspapers)



Public employees (principally working in the education system, doctors and police force) gained the single greatest access of any one group. The general public and civil servants were also prominent (both 15 per cent) as well as members of government (13 per cent) and company representatives (11 per cent). Newspapers show different approaches in their choice of actors. For instance, 24 Sata provided the largest space for the general public, while Poslovni Dnevnik reserved 21 per cent to company representatives.

Chart 2.35: Balance in gender between actors in direct access to news coverage (all newspapers)

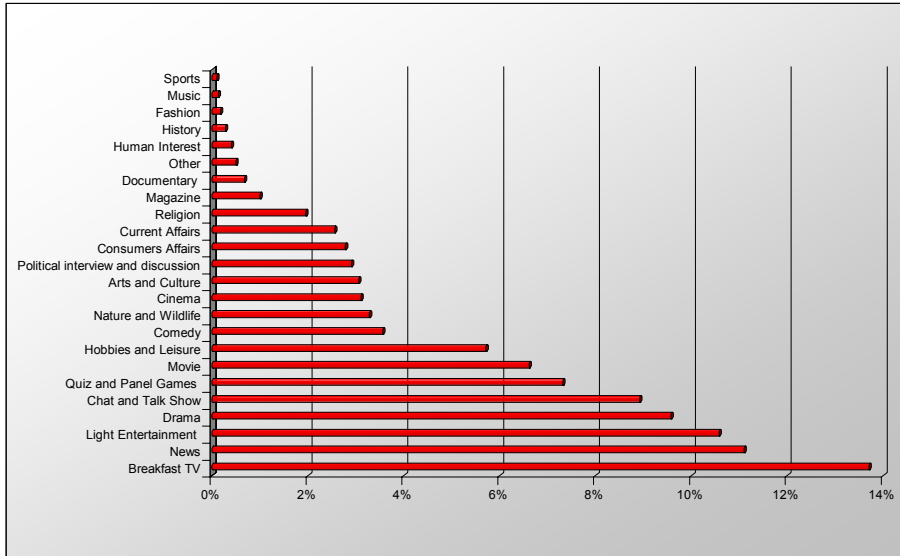


Direct access to newspapers is generally dominated by male actors, whose space amounted to 81 per cent. Women receive limited access and when they do gain access they are principally interviewed as part of the general public or celebrities. Among the dailies no significant editorial differences emerge, although 24 Sata, Poslovni Dnevnik and Vecernji list have the highest levels of access for women (an average of 24 per cent).

ITALY

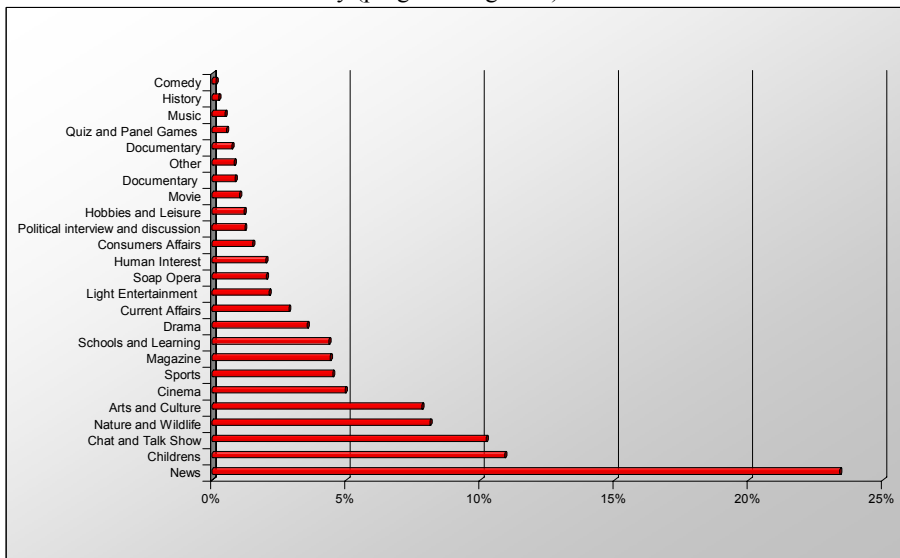
Television

Chart 3.1: Rai 1 schedule diversity (programme genres)



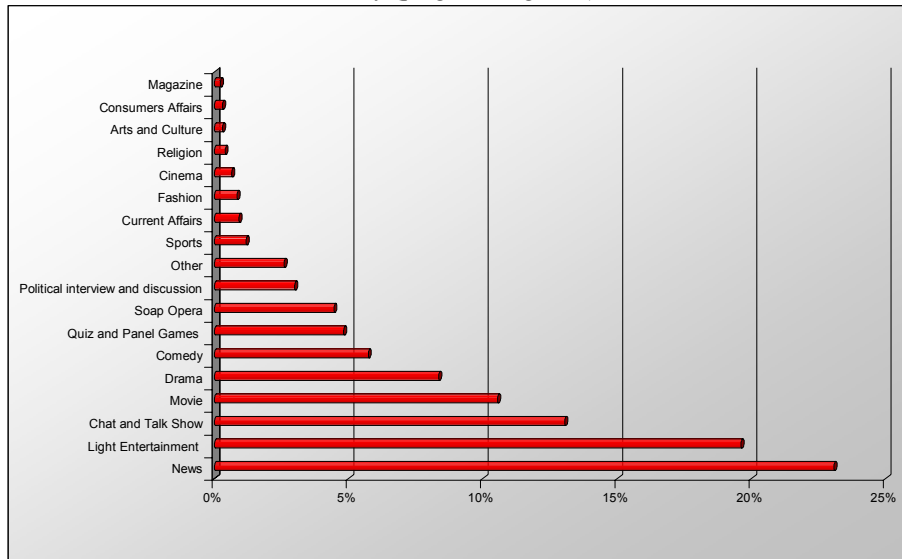
Rai 1's schedule is dominated by breakfast television, news, light entertainment, drama, talk shows and quiz and panel game shows that represented more than 60 per cent of the overall output of the channel during the two week monitoring period. Despite the fact that there is a large number of news bulletins, Rai 1's programme output, is dominated by entertainment strands.

Chart 3.2: Rai 3 schedule diversity (programme genres)



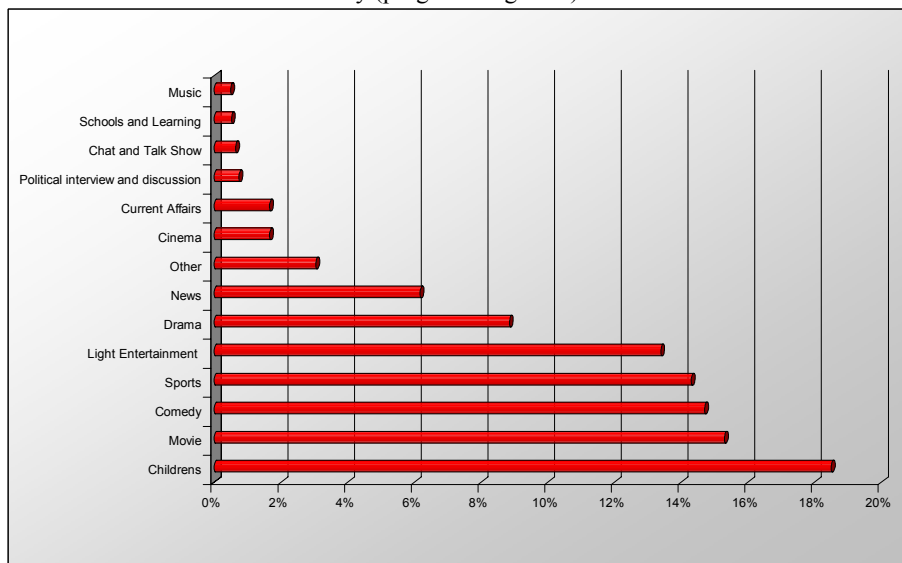
Rai 3's schedule also has a large amount of news, but unlike Rai 1 it carries a large share of children's programmes as well as a greater range of factual programming. Documentary and arts and culture are also prominent in the schedule and the weight of factual programming is reflected in the smaller amounts of fiction and entertainment on the channel than on its counterpart Rai 1.

Chart 3.4: Canale 5 schedule diversity (programme genres)



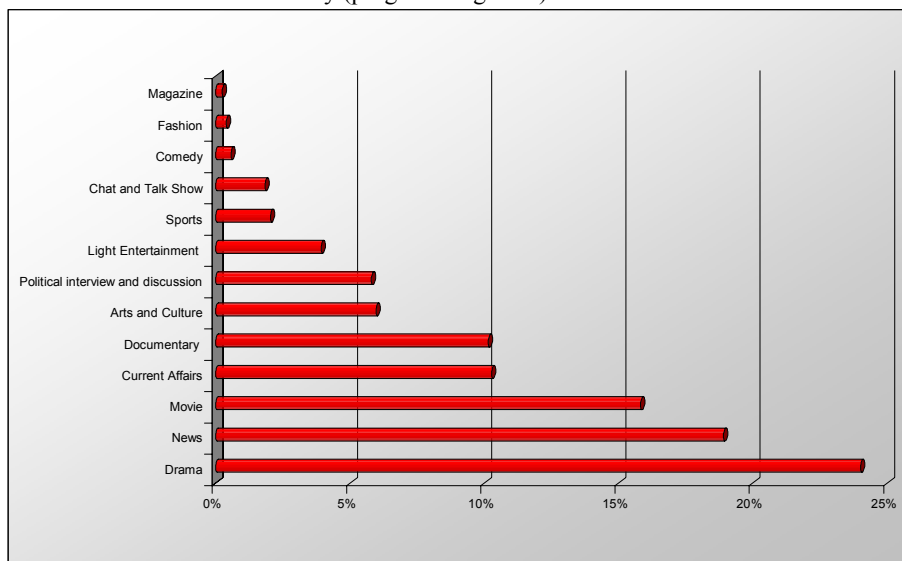
Canale 5's schedule is structured around four main kinds of programmes: news, light entertainment, chat and talk shows and movies, which combined represent more than 65 per cent of its total output. There is also a significant amount of news, which represents the single most prominent genre.

Chart 3.5: Italia 1 schedule diversity (programme genres)

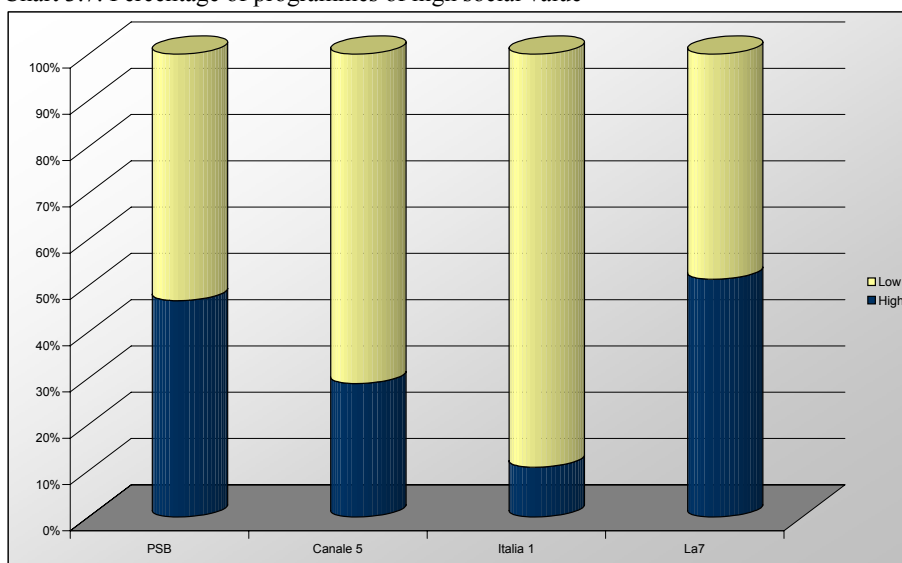


Light entertainment and sports genres tend to dominate Italia 1 output. Children's programmes, movies, comedy, sports and light entertainment constitute more than 75 per cent of overall output while a very limited percentage of time is devoted to news and other factual programmes.

Chart 3.6: La7 schedule diversity (programme genres)



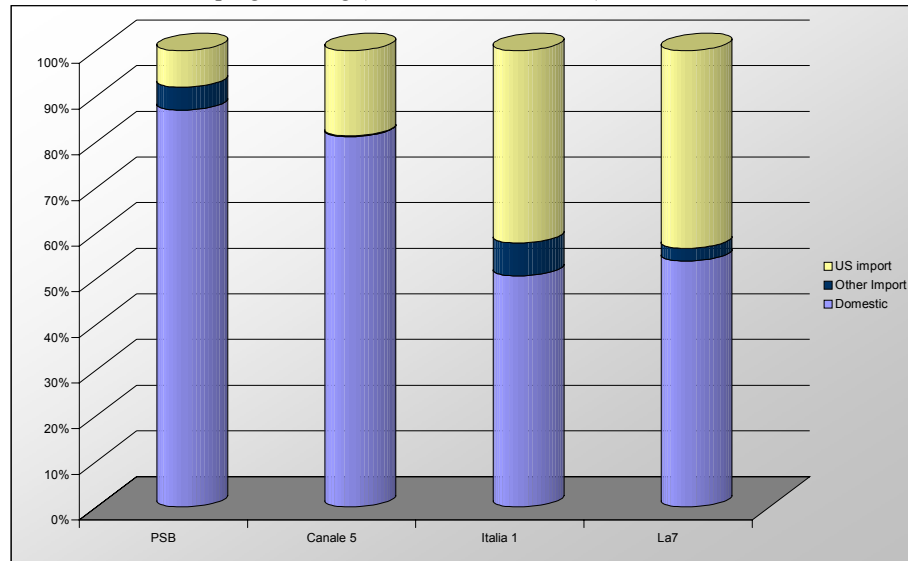
La7 airs a mix of entertainment and factual programmes and has a relatively high percentage of current affairs and documentaries in its schedule. Drama is the most prominent single genre (24 per cent) and it is followed by news and movies. The first five most prominent programme genres represent more than 75 per cent of the output of the channel.

Chart 3.7: Percentage of programmes of high social value⁷

The percentage of programmes of high social value is greater on the Rai channels than on Mediaset ones. However, this is largely a result of the high concentration of such programming on Rai 3, as this category of programming represents 60 per cent of programmes on the channel. On Rai 1 this is reduced to 33 per cent of total output. Of the commercial broadcasters La7 is the channel with the highest levels of high social value programming, which is largely a result of its news and current affairs.

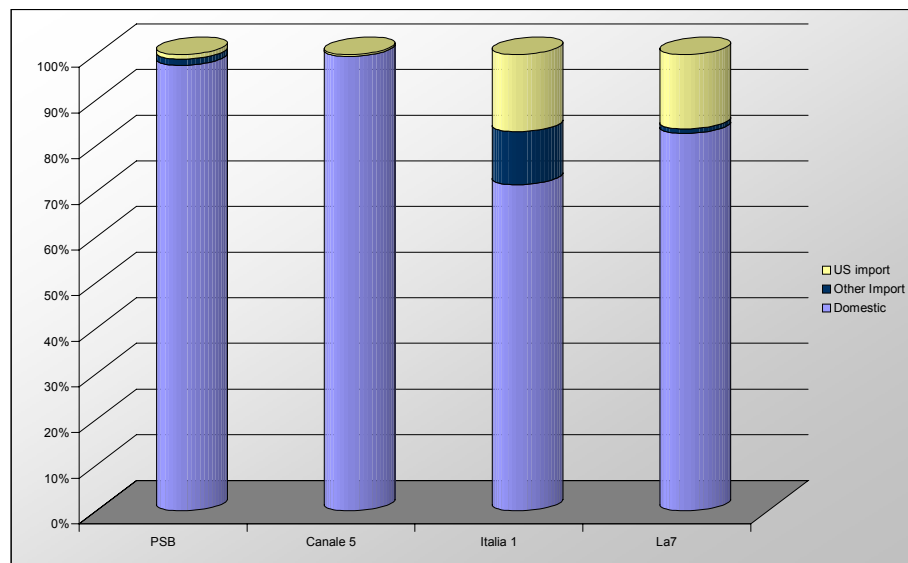
⁷ Rai 1 and Rai 3 classified as PSB

Chart 3.8: Source of programming (all channels monitored)



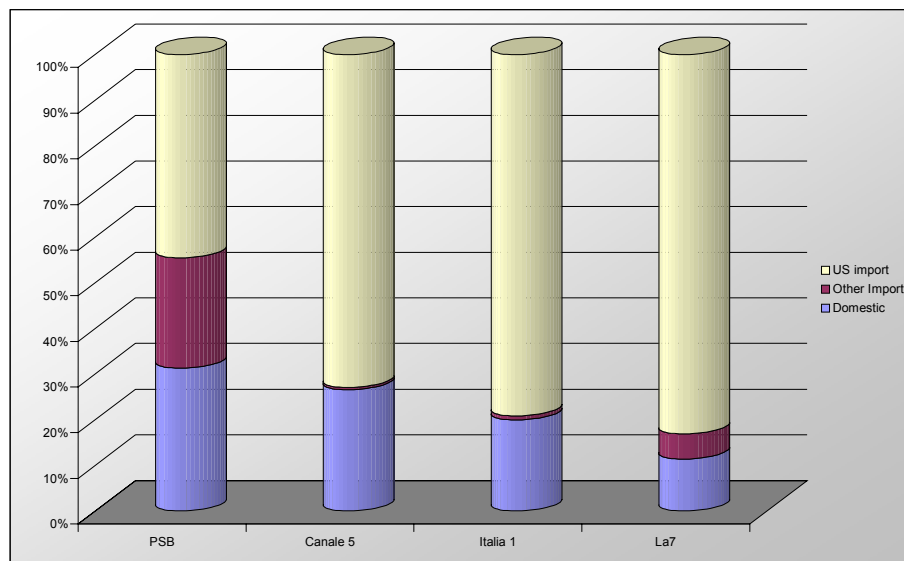
Rai has a strong domestic production base and 87 per cent of its output is domestic productions. Imported programming is therefore limited and it is, furthermore, equally shared between US and other imported productions. Canale 5 also has strong domestic programming with 81 per cent of its schedule domestically produced. In contrast, the remaining two commercial channels, Italia 1 and La7 both rely heavily on US imported programmes.

Chart 3.9: Source of non fiction



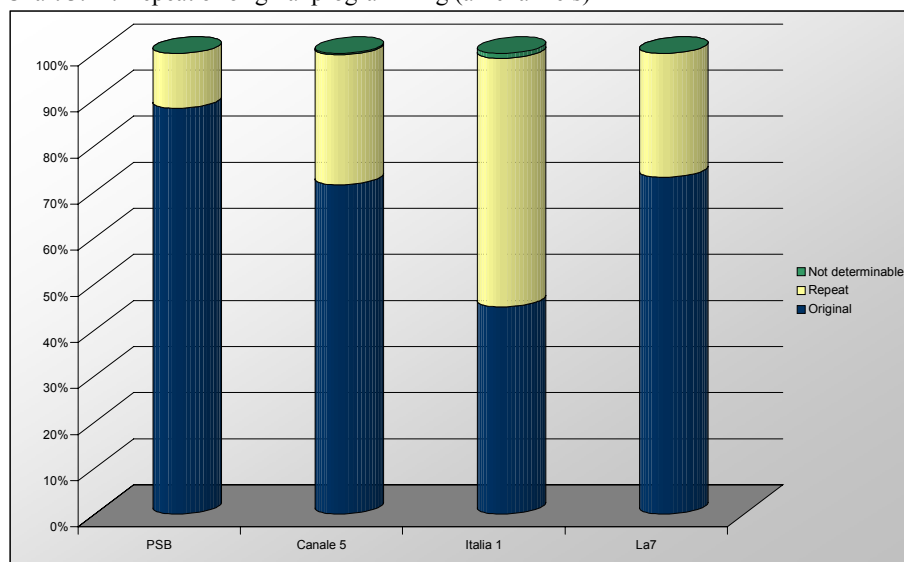
Approximately 98 per cent of Rai and Canale 5's non fiction is nationally produced. Italia 1 has fewer domestic productions in this category of programming (71 per cent). The percentage of domestic productions is also high on La7 (83 per cent) whose schedule includes 16 per cent US imports, mainly represented by CNN news that is aired in the evenings.

Chart 3.10: Source of fiction



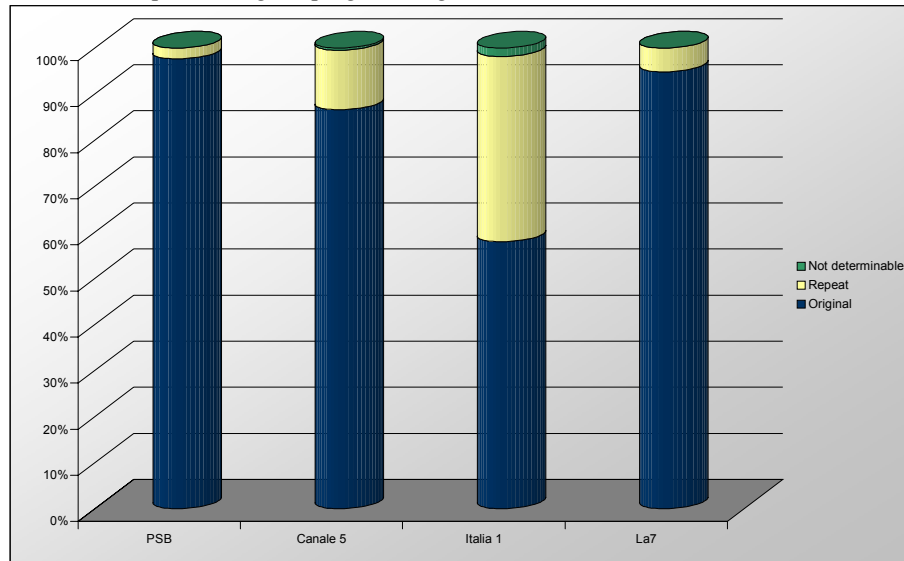
The majority of fiction on Italian television is imported either from the US or from third countries. Although Rai has the highest percentage of fiction that is domestically produced this remains below 30 per cent. The other broadcasters also show a heavy reliance on imports for fiction.

Chart 3.11: Repeat or original programming (all channels)



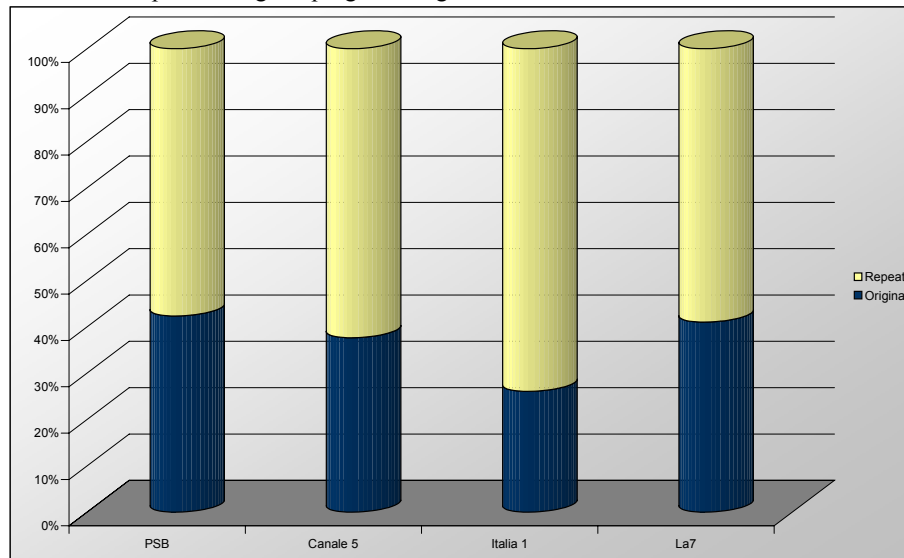
The Rai channels also have the highest percentage of original programming (around 90 per cent), while Canale 5 and La 7 show similar proportions (around 70 per cent of their total output). However, Italia 1 has a high percentage of repeats in its schedule that represent more than half of its total output (53 per cent).

Chart 3.12: Repeat or original programming of non fiction



Rai and La7 devote the largest part of their schedules to original non fiction (98 per cent and 95 per cent respectively) followed by Canale 5 (86 per cent). In contrast, over 40 per cent of Italia 1's schedule is composed of repeats, largely as a result of the evening schedule, which re-broadcasts daytime and children's programmes.

Chart 3.13: Repeat or original programming of fiction

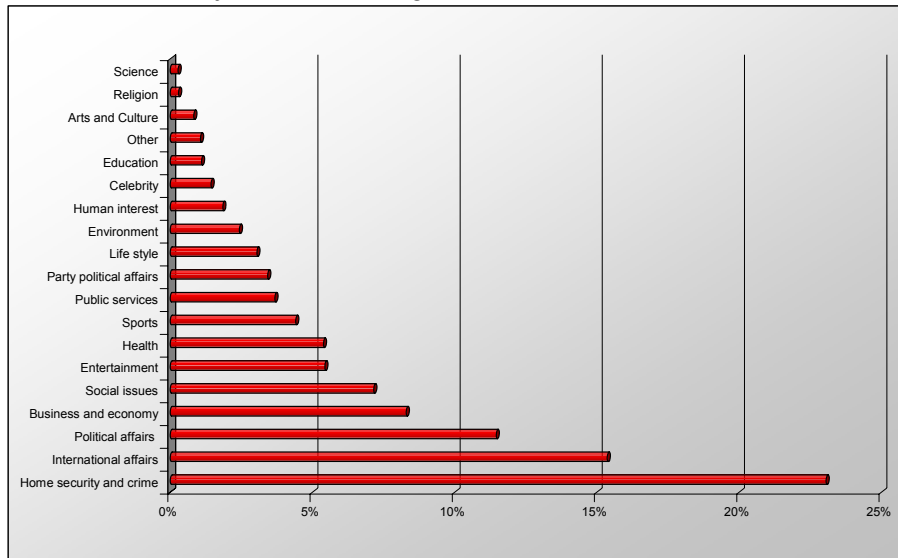


The proportion of repeats significantly increases for fiction across all channels. 58 per cent of Rai's fiction is repeats and La7 have a similar proportion (59 per cent). Higher proportions of repeats were recorded for the two Mediaset channels, amounting to 62 per cent for Canale 5 and 74 per cent for Italia 1.

Television news coverage

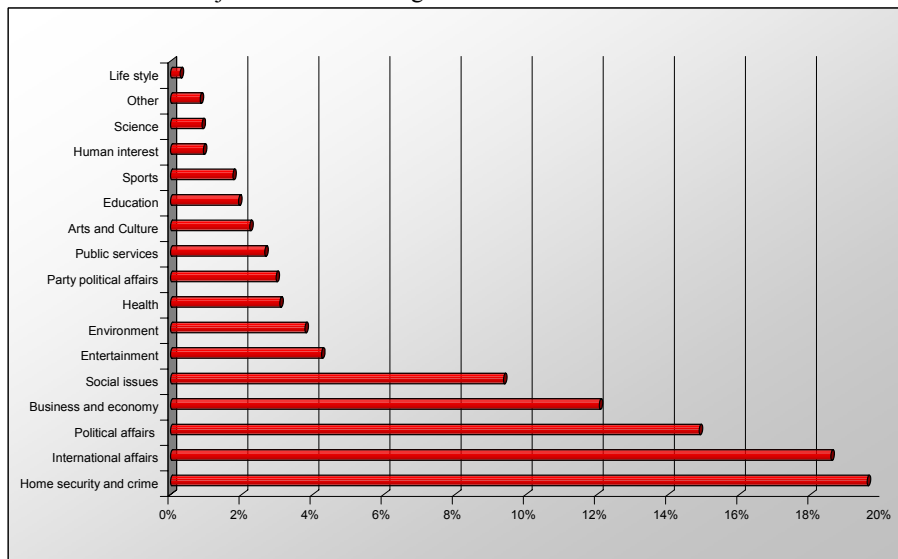
News is a prominent genre on Italian television amounting to 17 per cent of the overall output of the five monitored channels. Rai 3 is the main producer of news (24 per cent of its output), followed by Canale 5 (23 per cent) and La7 (19 per cent). Italia 1 devotes a more limited part of its schedule to news programmes (6 per cent).

Chart 3.14: Rai 1 subject of news coverage



During the two weeks monitored, Rai 1 devoted the largest part of its news bulletins to the category home security and crime that represented 23 per cent of total time. Another prominent category was international affairs, principally focussed on news on the declarations of the Iranian President against Israel and the reactions of the international community, Iraq and the scandal of Nigergate.

Chart 3.15: Rai 3 subject of news coverage

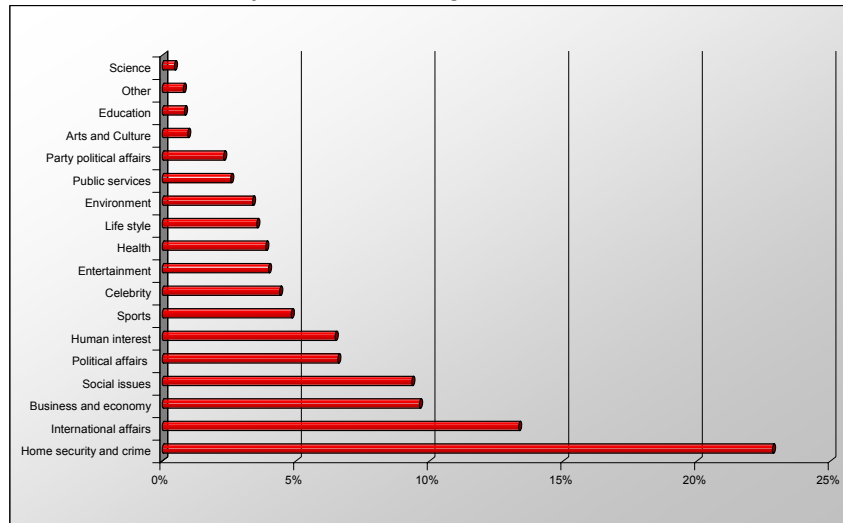


The category political affairs was also important and it was concentrated on the struggle between the Government and opposition about a number of issues, principally Nigergate, the reform of the schools system and constitutional reforms. Significant levels of attention were also recorded for business and

economy, social issues and entertainment. These categories together represented 70 per cent of the subjects of news bulletins on Rai 1.

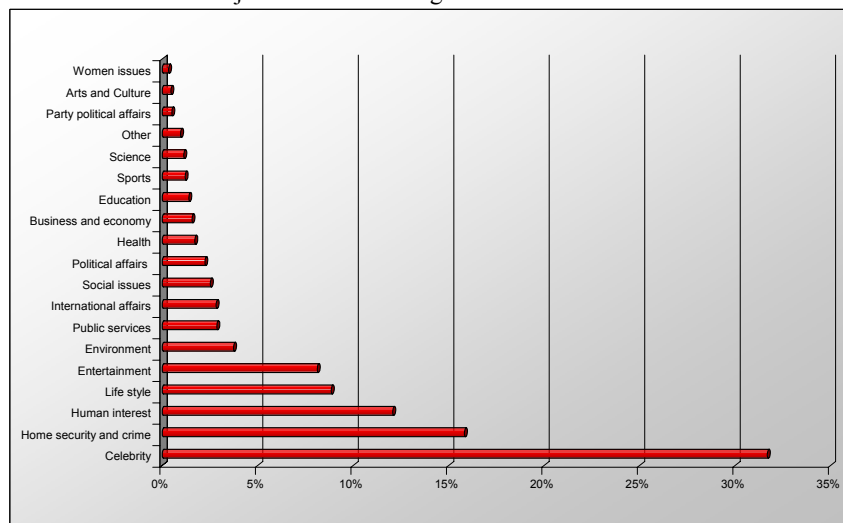
The overall agenda of Rai 3 is similar to Rai 1 as the categories receiving the largest coverage were the same: home security and crime, international affairs, political affairs, business and economy, social issues and entertainment.

Chart 3.16: Canale 5 subject of news coverage



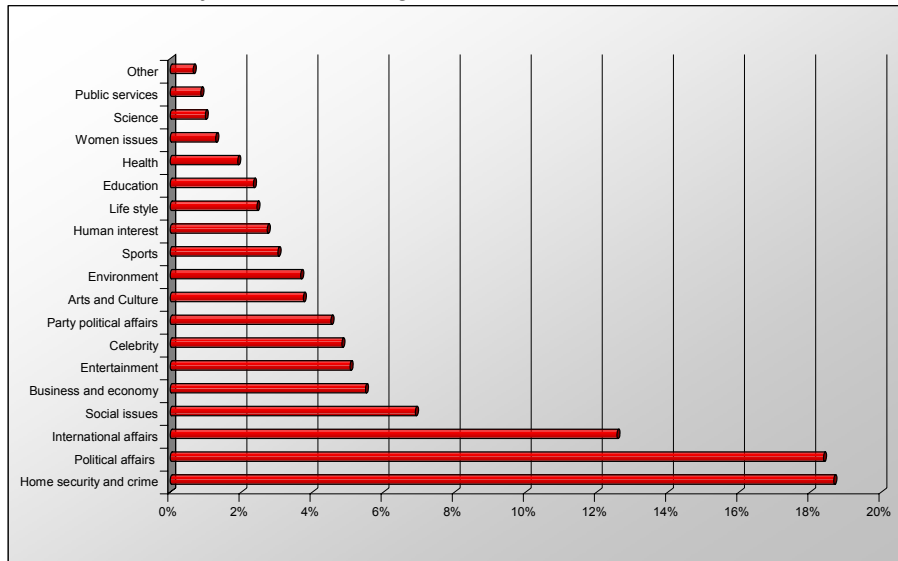
In a similar trend the categories on Canale 5 news do not considerably differ from Rai: with a focus on home security and crime, international affairs, business and economy and social issues. In contrast to Rai, political affairs is less evident in Canale 5 news bulletins, and an important proportion of news items deal with human interest stories (7 per cent).

Chart 3.17: Italia 1 subject of news coverage



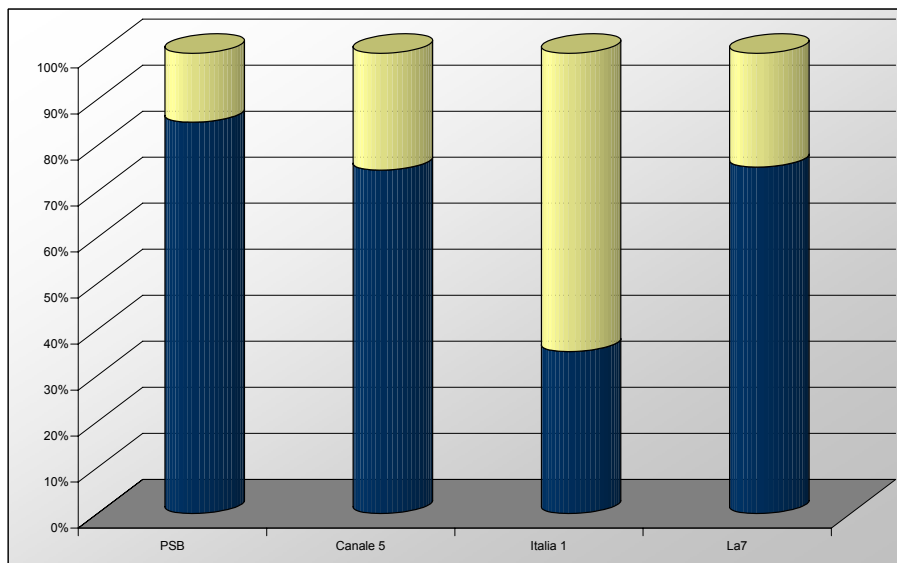
News coverage on Italia 1 was characterised by the dominance of soft news: more than 30 per cent of its prime time bulletin was devoted to the category celebrity, followed by home security and crime and human interest. These three categories add up to 60 per cent of total news coverage on the channel, thus echoing the more entertainment focused nature of the channel on the whole.

Chart 3.18: La7 subject of news coverage



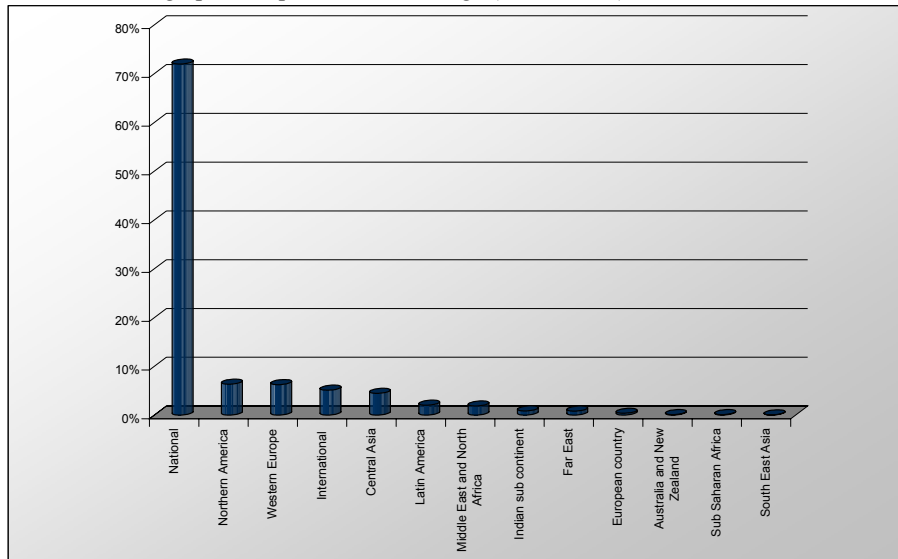
La7 news allocated the largest portion of its news items to home security and crime, political affairs, international affairs, social issues, business and economy and entertainment. The editorial policy followed by this channel does not considerably differ from the Rai channels.

Chart 3.19: Kind of news on each channel



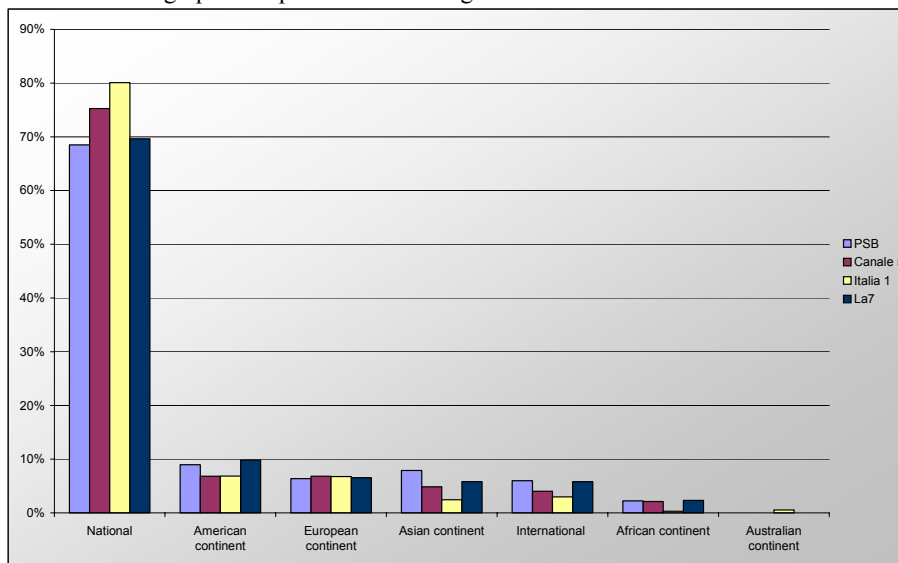
In general Italian news bulletins are dominated by hard news stories, although in different proportions in the five channels. In Rai's news bulletins hard news amounted to 85 per cent of overall time, in La7 and Canale 5 this was 75 per cent while in Italia 1 soft news prevailed (65 per cent).

Chart 3.20: Geographic scope of news coverage (all channels)



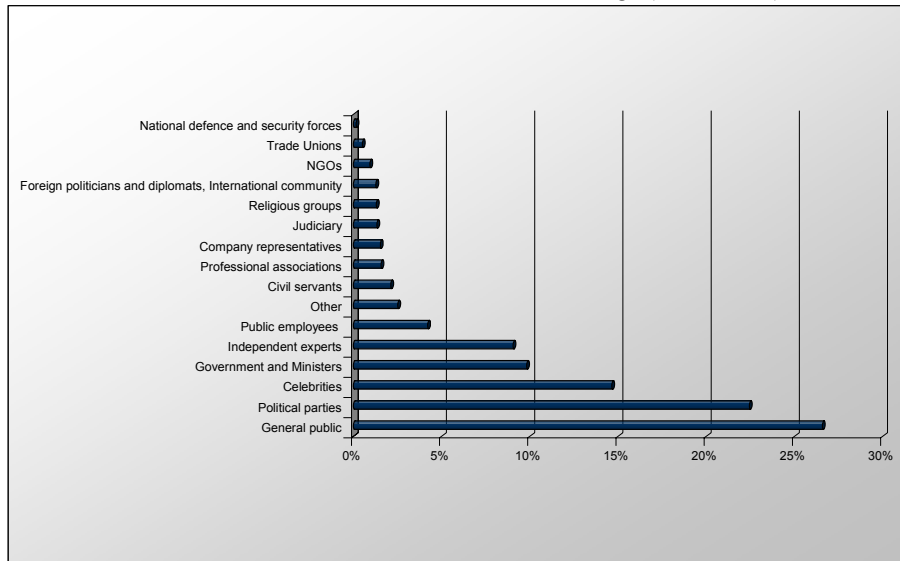
Italian news was dominated by a strong domestic perspective and news stories principally focussed on national events (72 per cent). In its international coverage the regions receiving the largest coverage were North America and Western Europe (both 6 per cent).

Chart 3.21: Geographic scope of news coverage



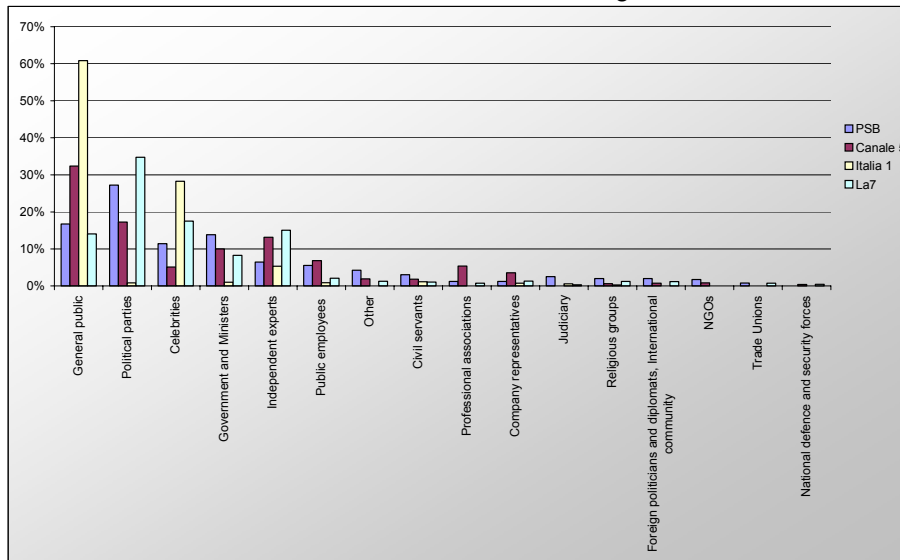
The five channels revealed few editorial differences with nationally based news representing the majority of all news items: Rai channels devoted the largest coverage to foreign stories (31 per cent) that were mainly broadcast on Rai 3 news. Conversely Italia 1 news was mostly centred on domestic stories (80 per cent). Across all channels, Europe and North America represented the main topic of foreign news.

Chart 3.22: Kinds of actors with direct access to news coverage (all channels)



Rai provided the greatest amount of access for stakeholders in terms of direct access (about 160 minutes in the two weeks monitored), more than double that provided by other channels. Actors generally mirror a plurality of social categories, though a few of them dominate airtime: the general public is the category most represented, principally as individuals involved in events or as witnesses to the facts of a story. Political parties are another prominent category (22 per cent) as well as celebrities (15 per cent).

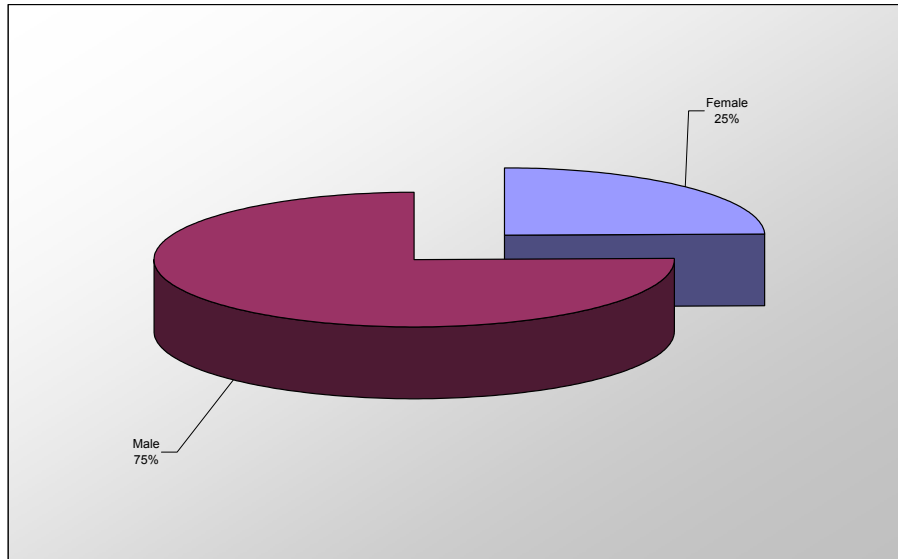
Chart 3.23: Kinds of actors with direct access to news coverage



The news content of the public channels was characterised by a very clear political dimension in the kinds of actors with direct access: political parties, government and ministers represent 41 per cent of overall time. The general public is another prominent category (17 per cent) as well as celebrities (14 per cent). The general public is the first category on Canale 5 news (32 per cent), though political actors are still a pivotal category (political parties, government and ministers representing 27 per cent) while independent experts are the third largest category (13 per cent).

Actors on Italia 1 news were either taken from the general public (61 per cent) or celebrities (28 per cent). This distribution is consistent with the kinds of news on this channel, which were mostly soft news items such as gossip, entertainment and human interest. La7 presents a very peculiar concentration of airtime to political party representatives (35 per cent) and celebrities (18 per cent). This distribution is the outcome of the specific structure of La7 prime time news during the week: each day a guest, often a party member or a celebrity, comments on the news together with the anchorman. In La7 bulletins the general public is also an important category (14 per cent).

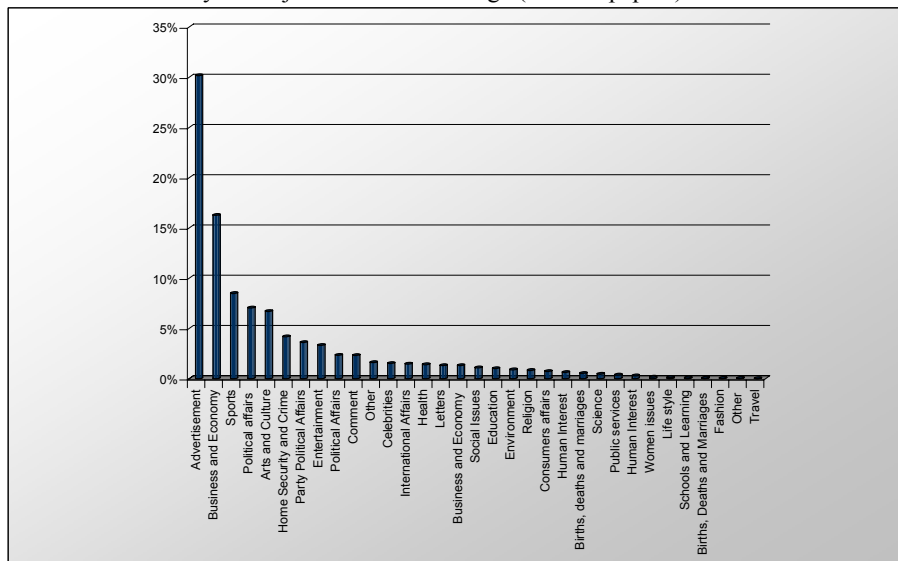
Chart 3.24: Balance in gender between actors in direct access to news coverage (all channels)



There is an evident lack of balance between male and females in direct access across gender: women having direct access to the news represent 25 per cent and most of them fall into the category of the general public. On the contrary, categories such as political parties, independent experts and government are male dominated thus reflecting the existing gender inequalities at real level in such professional realms.

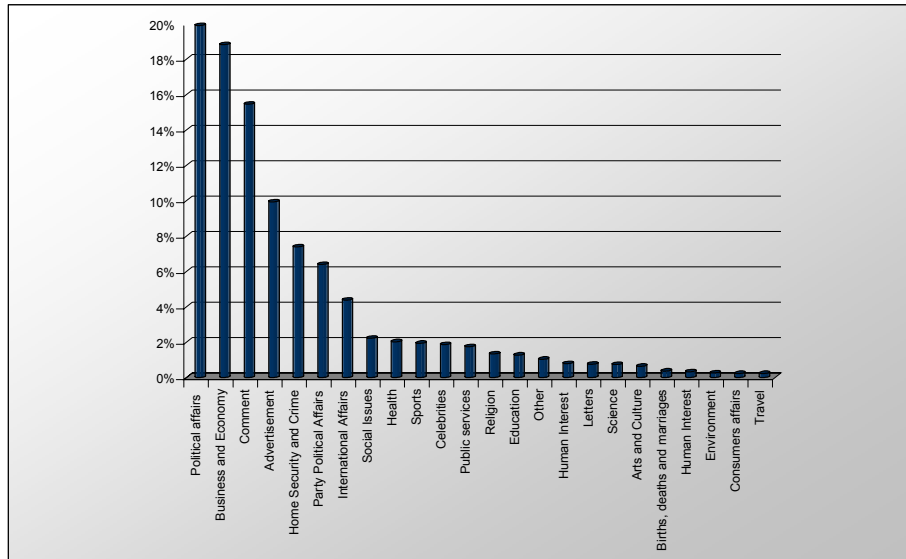
Newspapers

Chart 3.25: Diversity of subjects of news coverage (all newspapers)



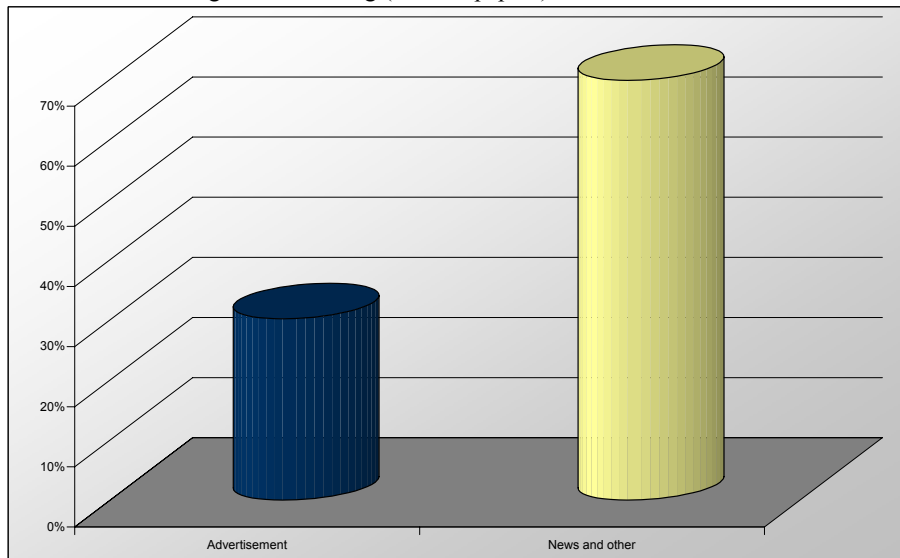
Advertisements represent the largest single category of content in the Italian press amounting to 30 per cent of overall space. In terms of news the topic receiving the largest coverage is business and economy (16 per cent), principally due of the inclusion in the sample of the financial title *Solo 24 Ore*. The other categories are less prominent in quantitative terms; sports (8 per cent), political affairs and cultural news (both 7 per cent) while home security and party political affairs each receive 4 per cent of total space.

Chart 3.26: Diversity of subjects of news coverage (first page)



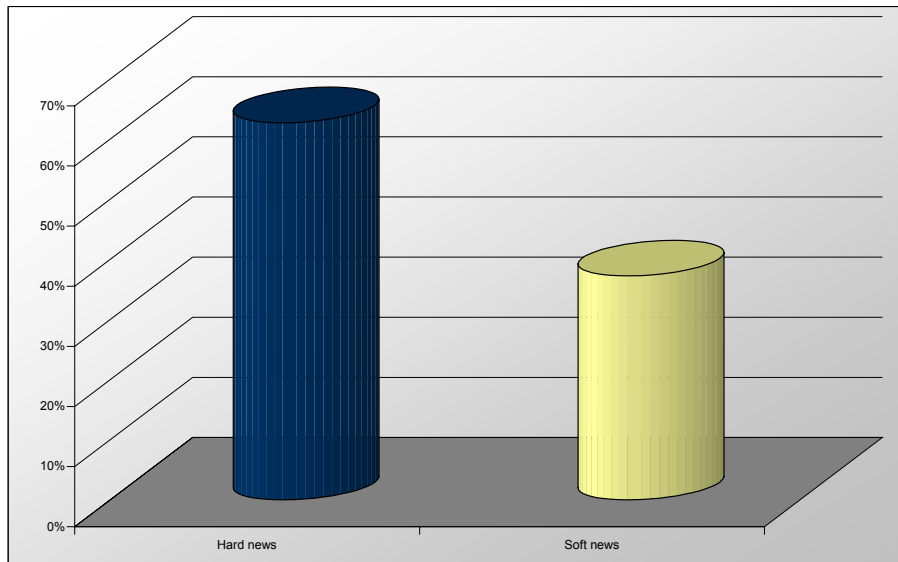
On the front pages political affairs is the most significant category amounting to 22 per cent of total space. The percentage is particularly high on the front page of *Repubblica* (47 per cent). Business and economy represents another key subject area (20 per cent). Other front page subjects include comment (17 per cent), home security and crime (8 per cent) and party political affairs (6 per cent).

Chart 3.27: Percentage of advertising (all newspapers)



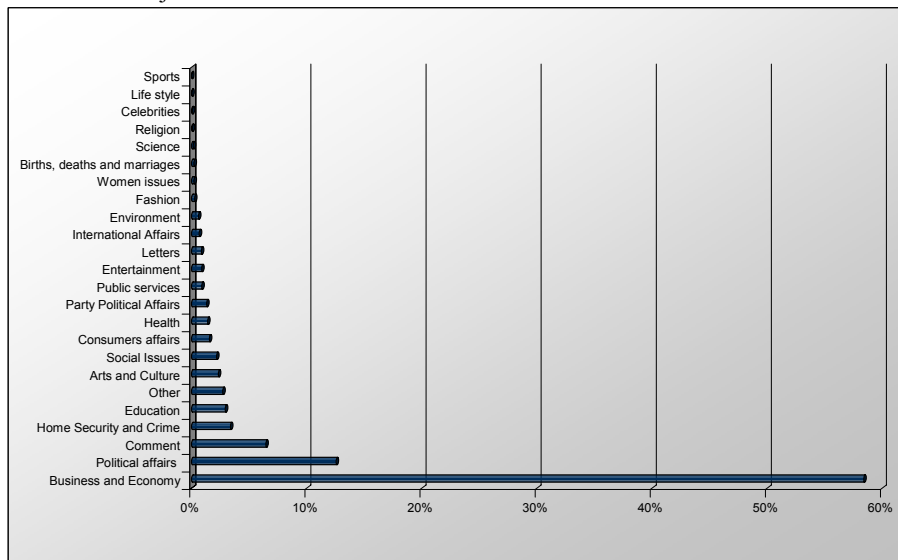
The Italian national press has a relatively high ratio of advertising that accounts for 30 per cent of total space. This ratio displays the highest levels in Sole 24 Ore (38 per cent) while in the other dailies the average is 27 per cent.

Chart 3.28: Distribution of hard and soft news



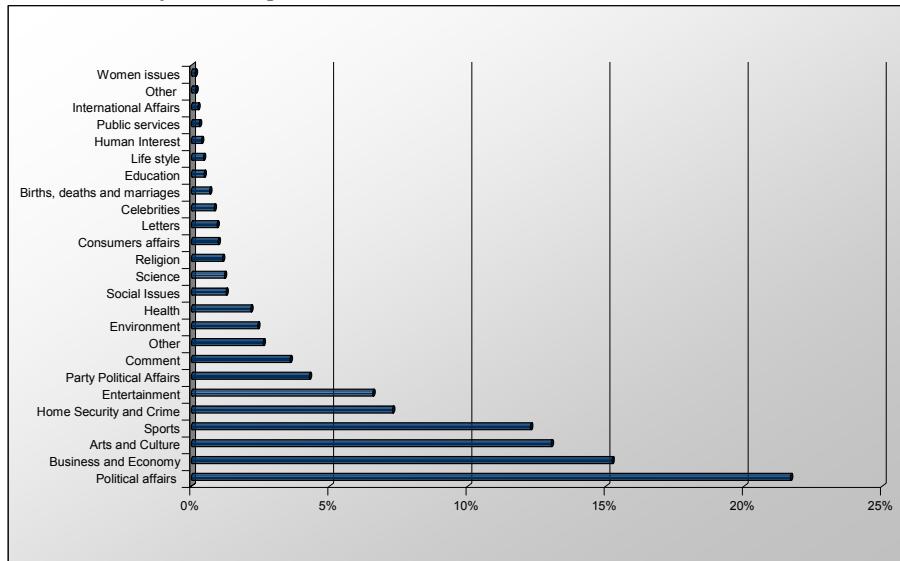
Hard news constitutes the majority of stories in the Italian press (63 per cent of total news content). However, the average must be placed in context of peak values (92 per cent) in Sole 24 Ore. The other dailies devote larger percentages of coverage to soft news, usually accounting for around 50 per cent of overall space.

Chart 3.29: Subjects in Sole 24 Ore



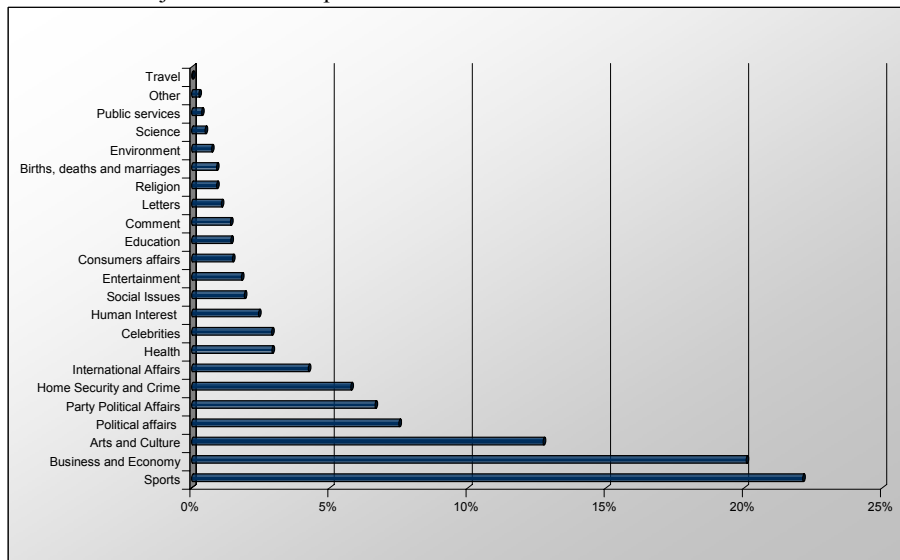
The financial title Sole 24 Ore's pages are rather predictably dominated by business and economic news (58 per cent) while the level of other news coverage is much lower. The only other subject categories with significant coverage are political affairs (13 per cent) and comment (6 per cent).

Chart 3.30: Subjects in Repubblica



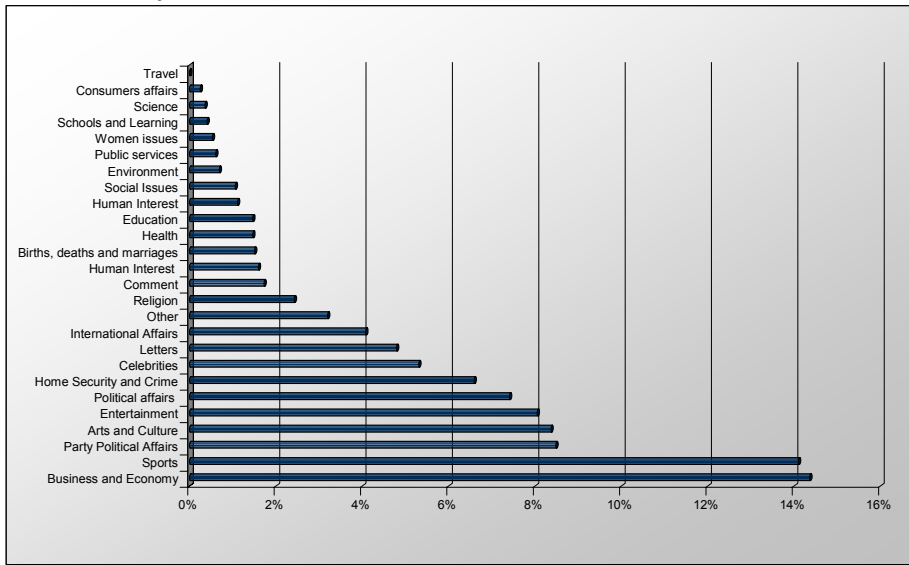
Political affairs represents the most prominent subject category in Repubblica (22 per cent), followed by business and economy (15 per cent), art and culture (13 per cent) and sports (12 per cent).

Chart 3.31: Subjects in La Stampa



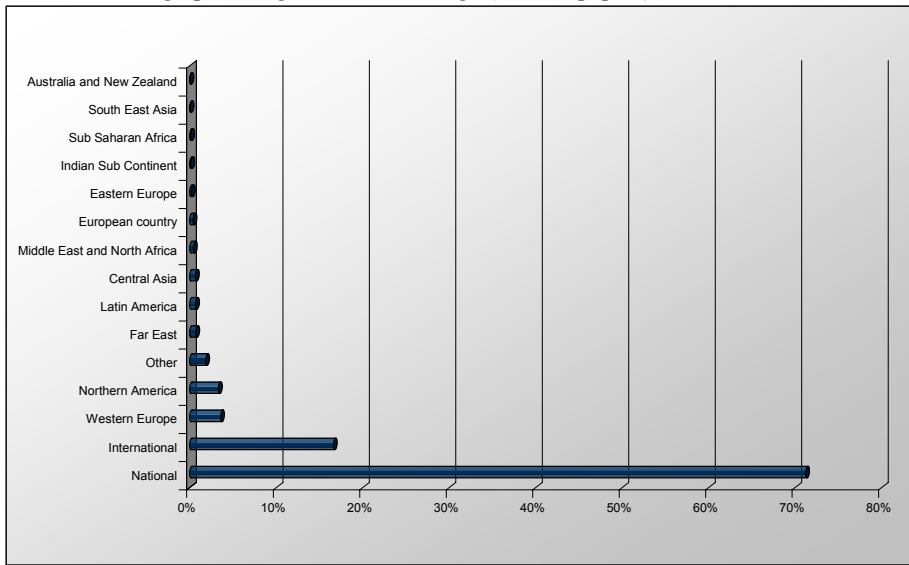
The single greatest subject category in La Stampa is sport (22 per cent) followed by business news (20 per cent). Arts and culture is another important subject area (13 per cent), while more limited attention is devoted to other topics, among which the most prominent are political affairs and party political affairs that received 15 per cent combined and home security (6 per cent).

Chart 3.32: Subjects in Corriere della Sera



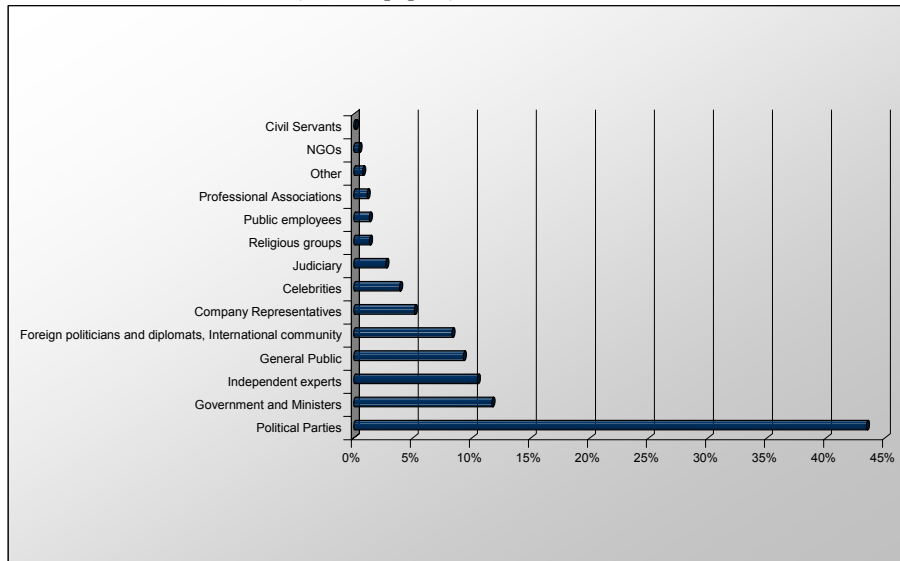
Business news and sport are the most prominent subjects in Corriere della Sera (both 14 per cent), followed by party political affairs, culture and entertainment (8 per cent each). Political affairs and home security are other central categories (7 per cent each).

Chart 3.33: Geographic range of news coverage (all newspapers)



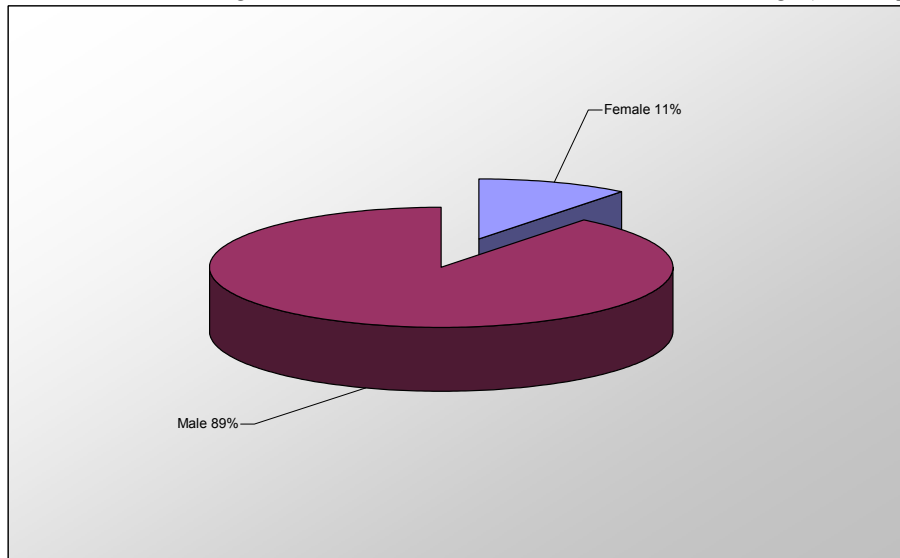
The geographic scope of the content mirrors that of television news: reports have a national focus (71 per cent of coverage), while foreign news plays a more limited role. International news amounted to 17 per cent of news stories, while specific geographic areas represented small percentages of overall coverage.

Chart 3.34: Access of actors (all newspapers)



Politicians, including political parties and the Government, amounted to more than half of stakeholders that had direct access to newspapers (43 and 12 per cent). Independent experts are the third most prominent category (10 per cent), followed by the general public and foreign politicians (9 and 8 per cent).

Chart 3.35: Balance in gender between actors in direct access to news coverage (all newspapers)

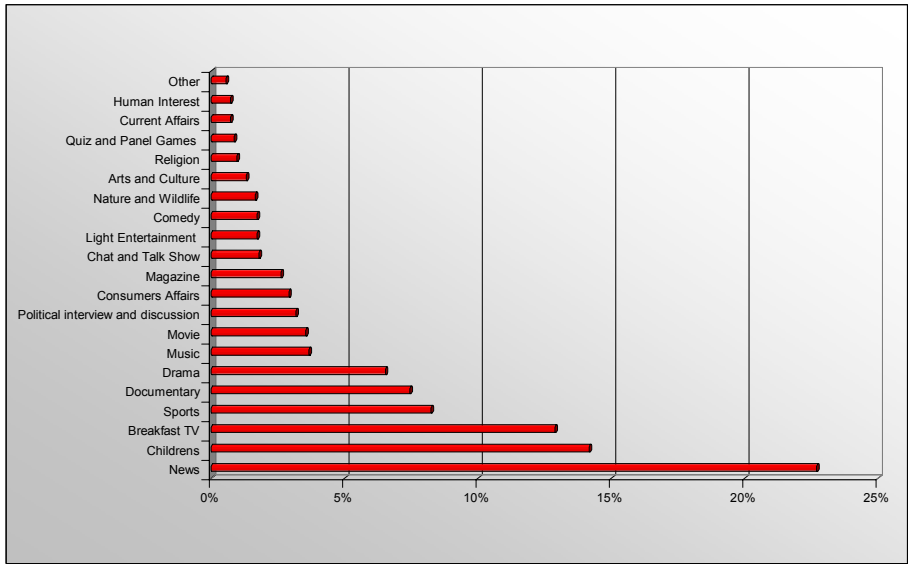


Male actors dominate the space for direct access, receiving 89 per cent of overall coverage. Women are underrepresented with 11 per cent and on many occasions they are interviewed either as the general public or celebrities.

NORWAY

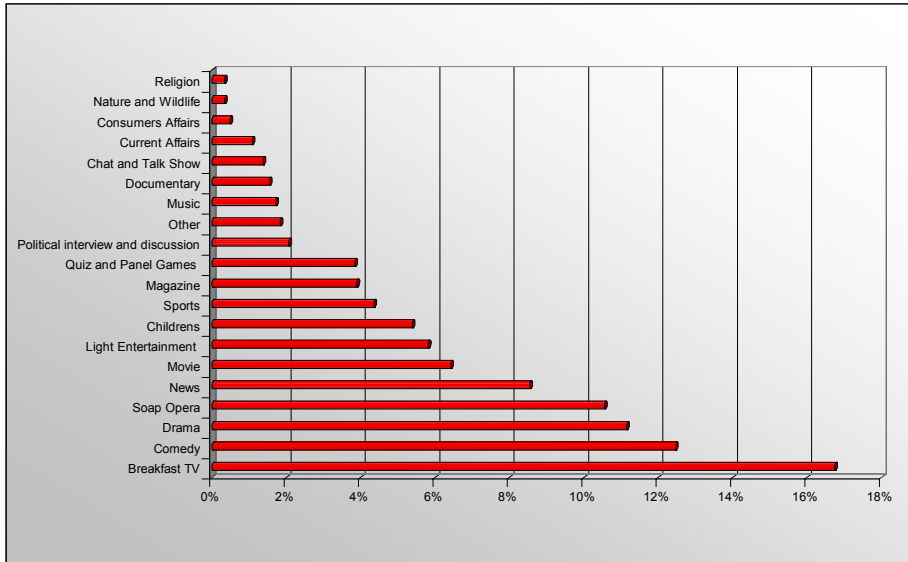
Television

Chart 4.1: NRK1 schedule diversity (programme genres)



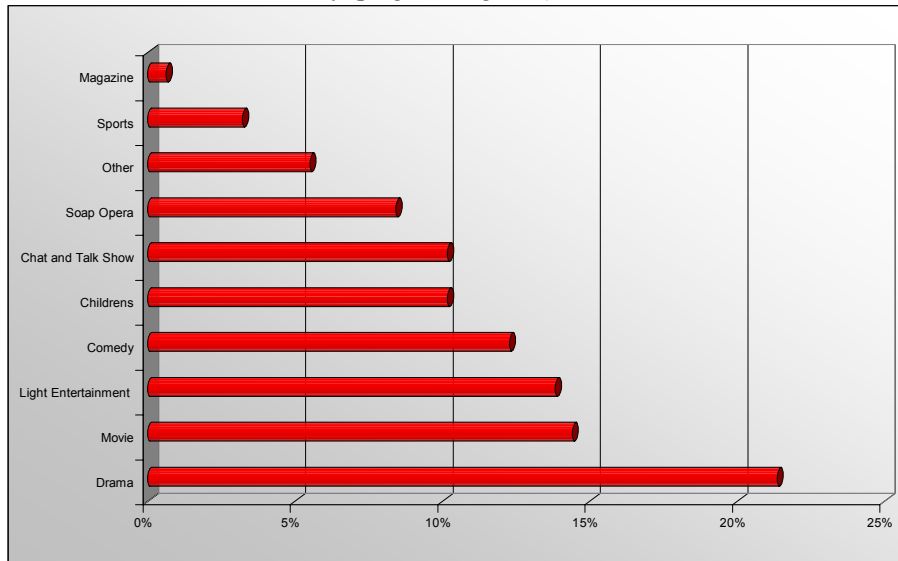
The largest single kind of programming on NRK1 are news bulletins that represent 23 per cent of the total output of the channel. Children’s programming and breakfast television also enjoy a prominent position (14 and 13 per cent respectively). They are followed by sports and documentaries (8 per cent each).

Chart 4.2: TV2 schedule diversity (programme genres)



TV2’s output is dominated by light entertainment, comedy and fiction. Breakfast television is the single most aired genre followed by comedy (12 per cent), drama and soap operas (11 per cent each) and then news bulletins. Current affairs, documentaries and political interviews all represent 2 per cent or less of total output.

Chart 4.3: TV3 schedule diversity (programme genres)



TV3, which is transmitted from the UK, is almost entirely an entertainment based channel. Drama, movies and other forms of entertainment represent virtually all the output of the channel. The same is the case for TVN, though the channel does have a greater number of documentaries and news bulletins. Its schedule is, however, dominated by quiz shows, light entertainment and drama.

Chart 4.4: TVN schedule diversity (programme genres)

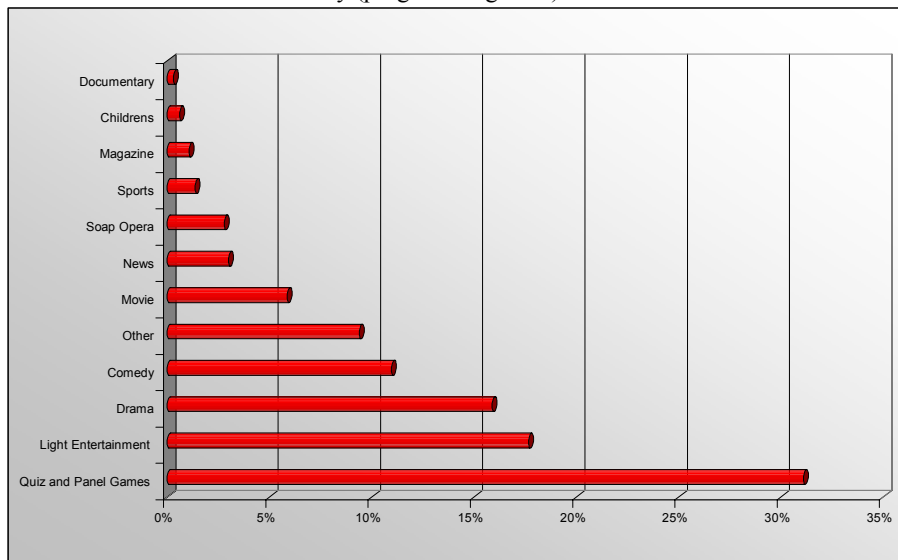
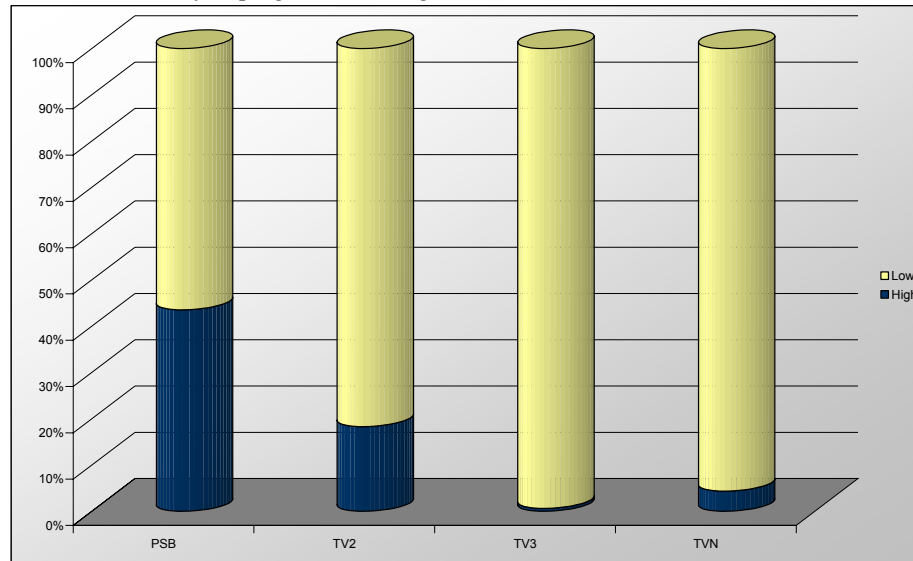
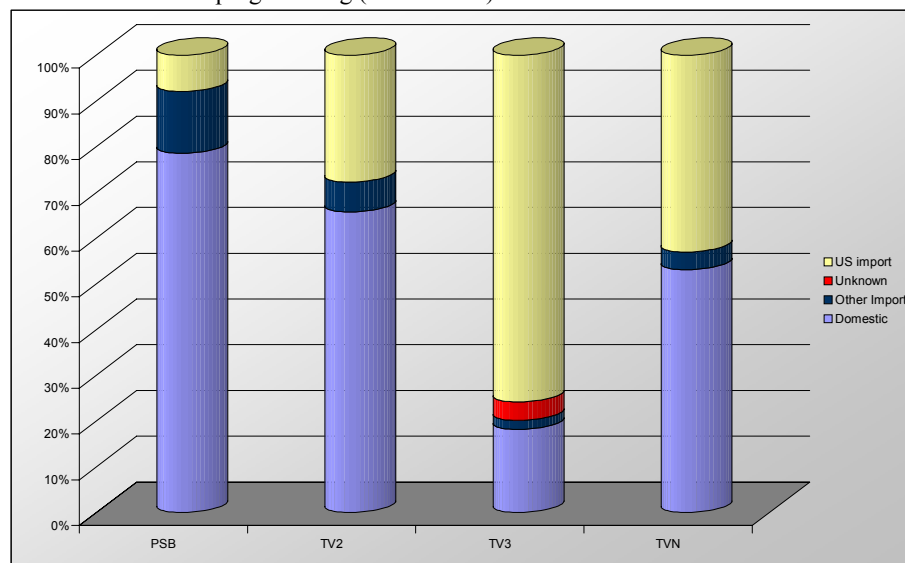


Chart 4.5: Diversity of programmes of high social value



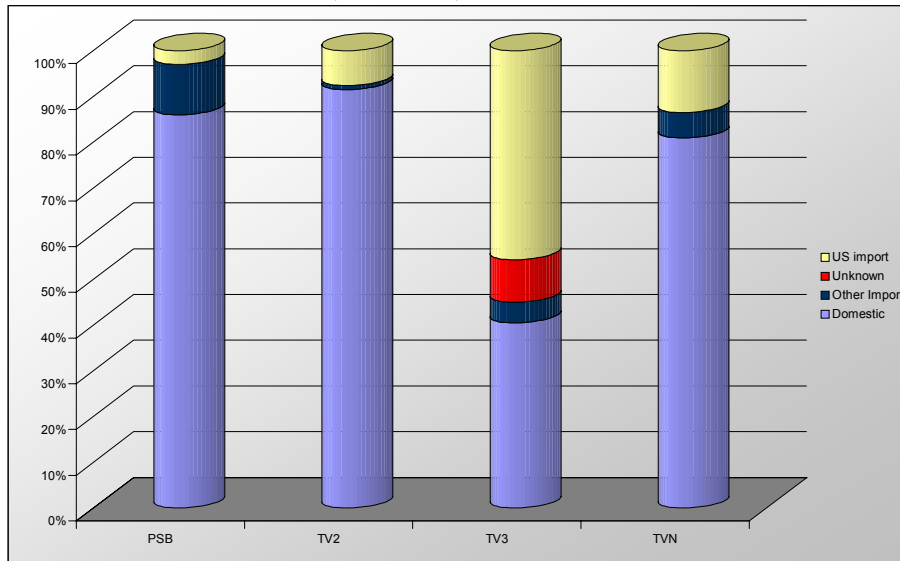
The lack of non fiction is represented in the percentage of programmes classified as of high social value in Chart 4.5 on channel TV3 and TVN. 42 per cent of NRK1's programming is classified as such, though news represents the majority of programmes in this category. TV2 follows NRK1 with 18 per cent of programming belonging to this category and TVN 4.5 per cent. In peak time this rises across channels NRK1 (49 per cent) TV2 (38 per cent) and TVN (13 per cent).

Chart 4.6: Source of programming (all channels)



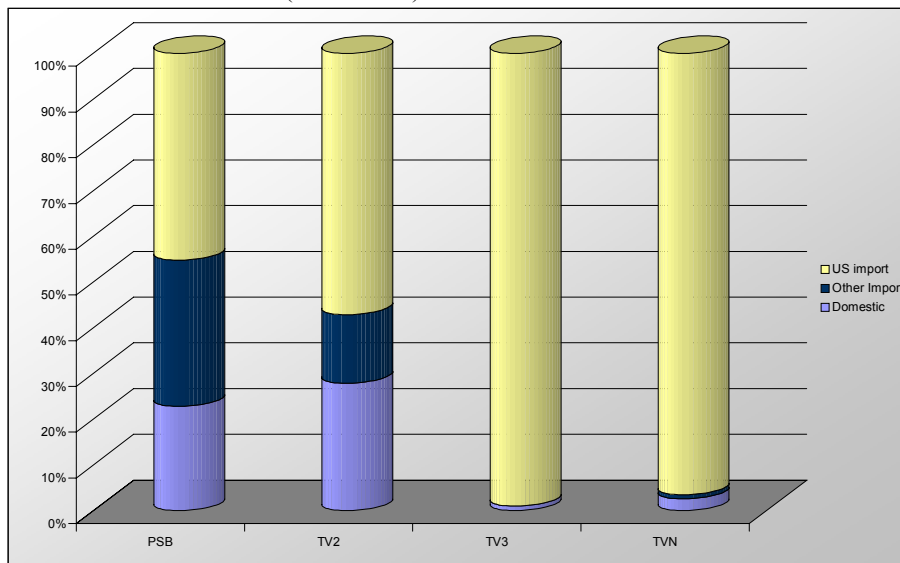
Foreign imports constitute the majority of TV3's output with some 76 per cent of programmes imported from the US. The largest supplier of domestic programming is NRK1 with 79 per cent of its output domestically produced. TV2 also has a strong domestic programming base with 66 per cent of its output composed of domestic programming.

Chart 4.7: Source of non fiction (all channels)



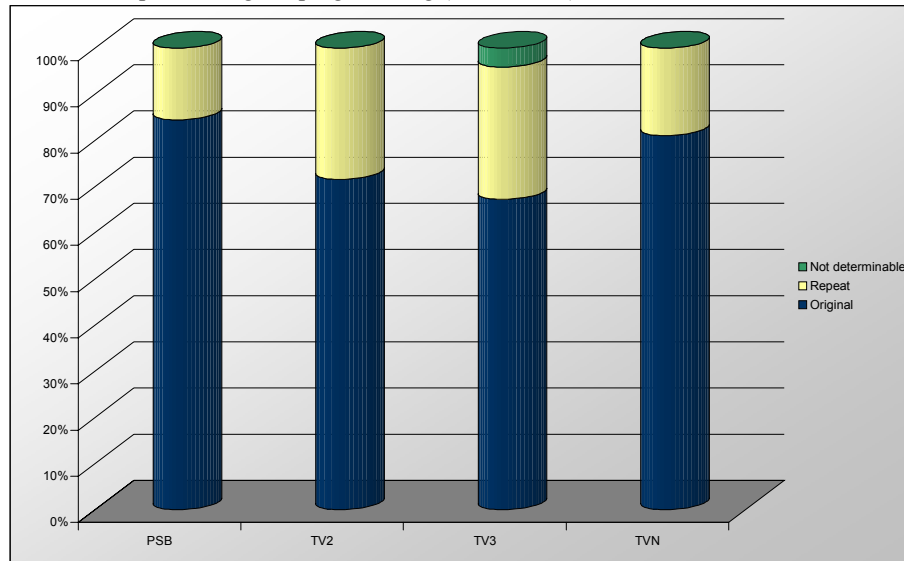
As in the other countries included in this report domestic production in non fiction is greater than fiction largely due to the news and greater investment across the channels is evident in these programmes genres.

Chart 4.8: Source of fiction (all channels)



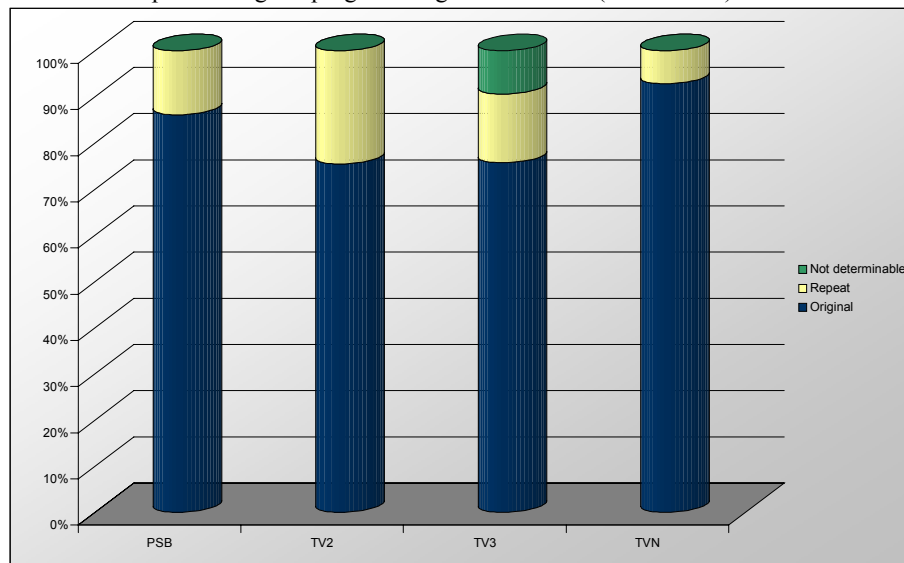
Fiction on TV3 and TVN is almost entirely imported from the US. NRK1 and TV2 also rely heavily on US imports to fill their schedules. 23 per cent of NRK1's fiction is domestic and another 32 per cent imported from third countries i.e. UK and Scandinavia, whilst the remaining 45 per cent from the US. TV2 actually has the greatest percentage of domestic fiction (28 per cent), but less programming from third countries and a greater percentage of US imports (57 per cent).

Chart 4.9: Repeat or original programming (all channels)



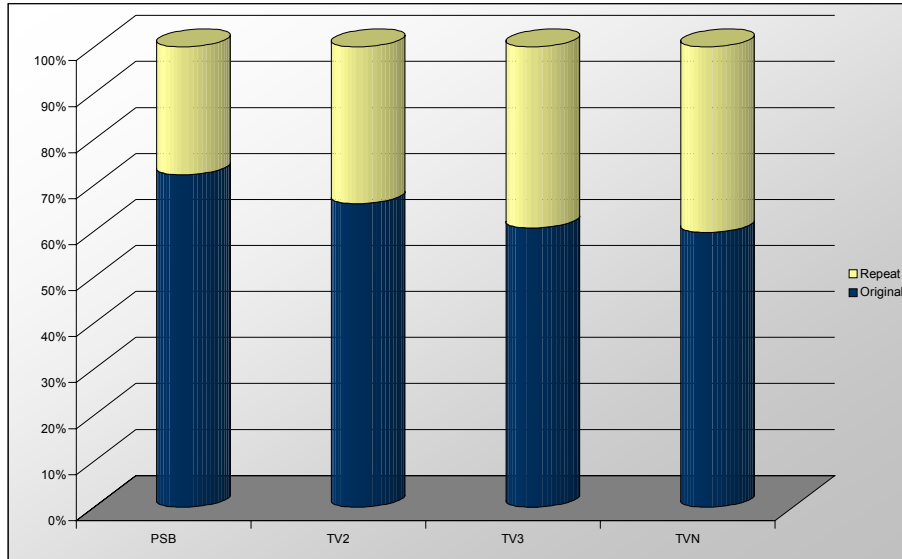
NRK1 has the least number of repeat programmes out of the four channels and nearly 85 per cent of its programming is original, first run showings. TVN also has a strong pattern of original production whilst TV2 and TV3 rely more heavily on repeats (28 and 29 per cent respectively).

Chart 4.10: Repeat or original programming of non fiction (all channels)



The Norwegian channels rely less heavily on repeats for their non fiction largely due to the news. However, there are still significant percentages of repeats of non fiction. On TV2 24 per cent of such programming were repeat programmes, whilst for TV3 repeats represented 14 per cent of non fiction and for NRK1 this fell to below 14 per cent.

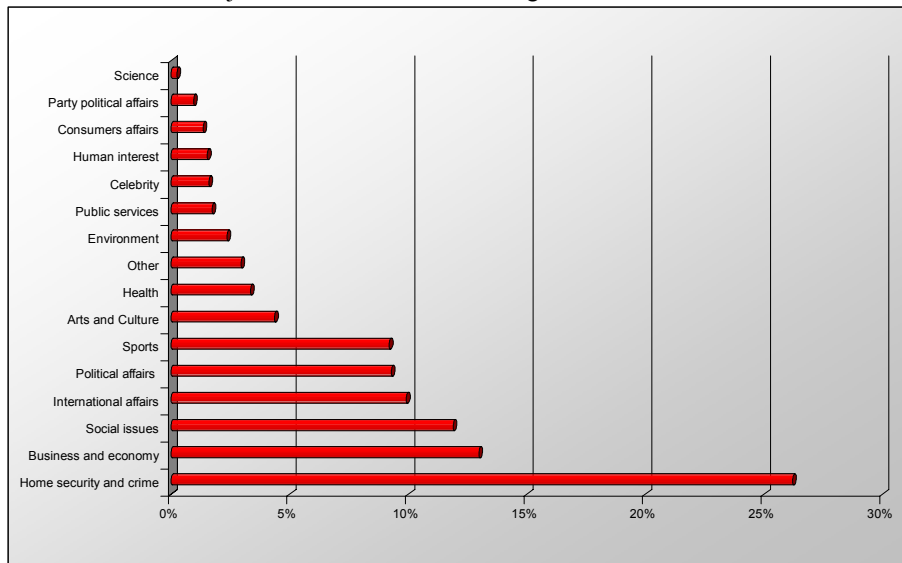
Chart 4.11: Repeat or original programming of fiction (all channels)



Fiction tends to be repeated across all channels with more frequency and there is a fairly dramatic shift in the ratio between original and repeated programmes. For NRK1 the ratio is 72 per cent original and 28 per cent repeats. The remaining broadcasters all have fairly similar repeats/original ratios in terms of fiction ranging from 40 per cent repeats on TV3 and TV Norge and TV2 with 34 per cent of fiction repeats.

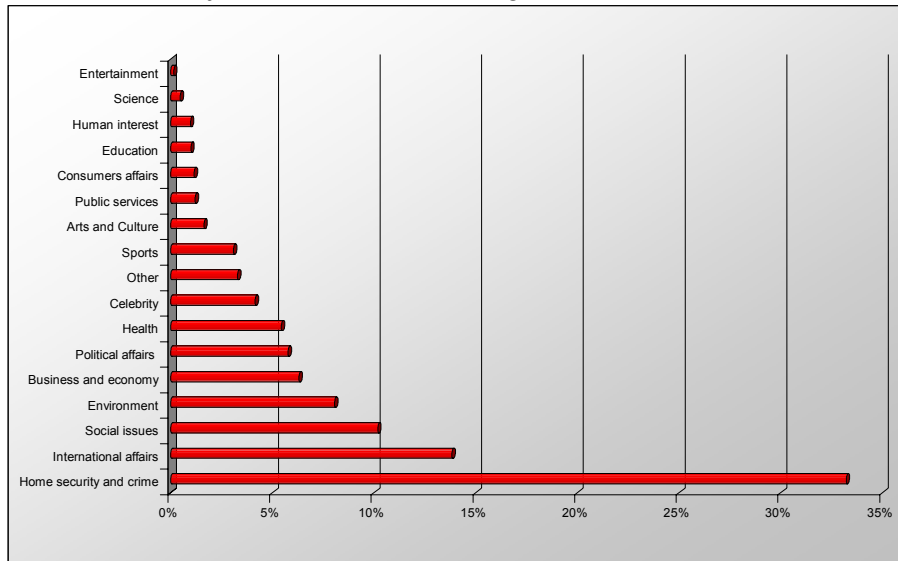
Television news coverage

Chart 4.12: NRK1 subject of television news coverage



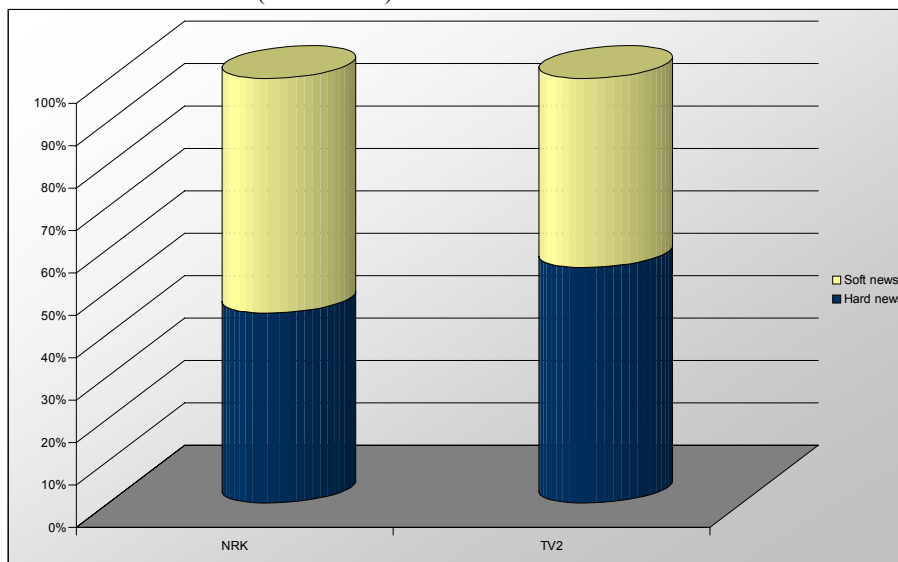
Only NRK1 and TV2 produce extensive news bulletins. The single most prominent news category during the two week monitoring period on NRK1's news was home security and crime that dominated news coverage (26 per cent). It was followed by business and economy (13 per cent) and social issues (12 per cent). International affairs received a little under 10 per cent of overall news coverage.

Chart 4.13: TV2 subject of television news coverage



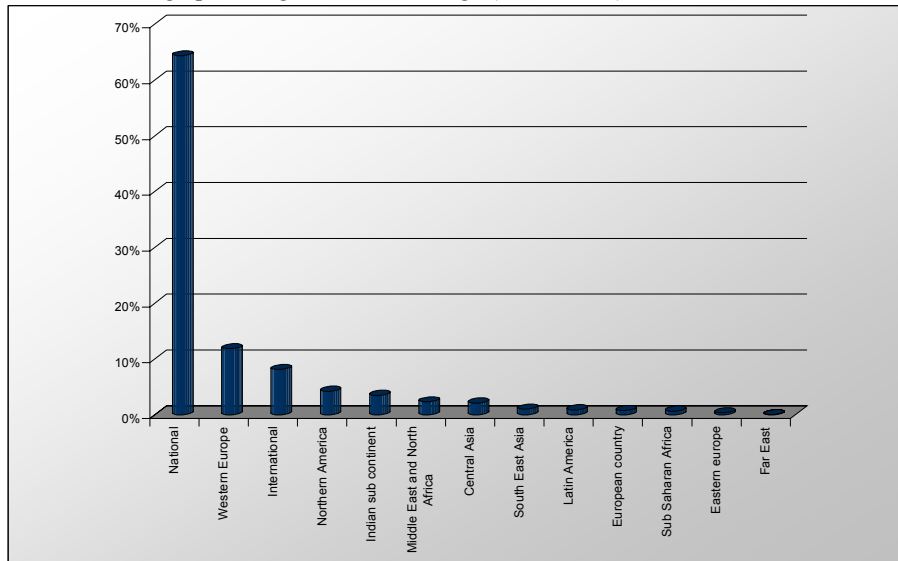
TV2's news was also dominated by home security and crime (33 per cent) and it focused slightly more on international affairs than its counterpart (14 per cent). There is less business and economy (6 per cent), though social affairs and the environment are well represented.

Chart 4.14: Kind of news (all channels)



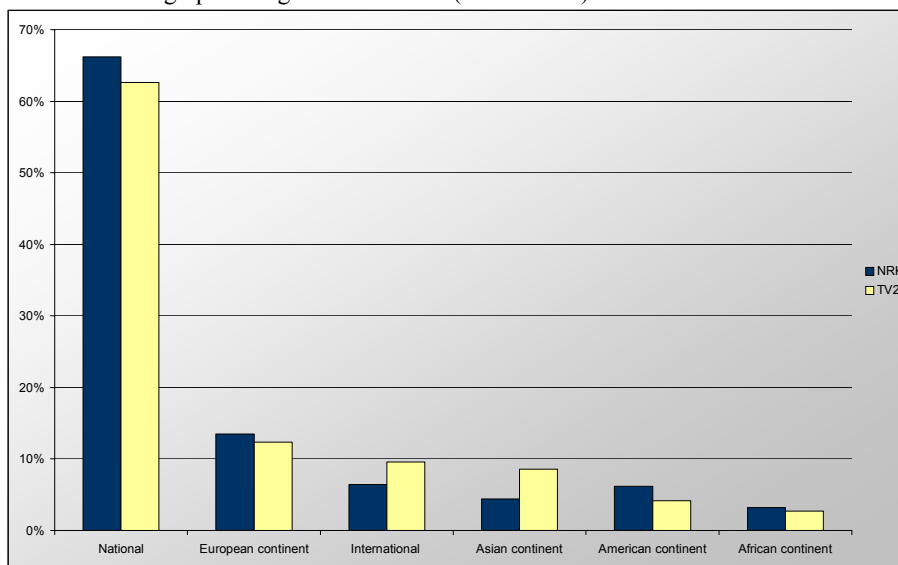
These differences are reflected in the percentage of hard and soft news items on the two channels' news bulletins. TV2 tends to have slightly greater percentages of hard news items (86 per cent) than NRK1 (80 per cent).

Chart 4.15: Geographic range of news coverage (all channels)



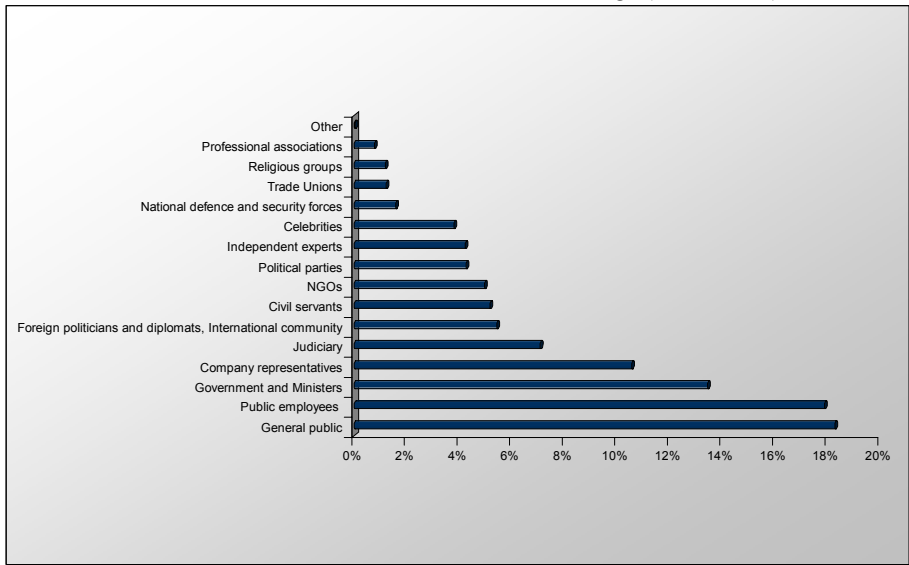
In terms of geographic scope news items remain largely national with 64 per cent of news items concerned with domestic issues. News about other West European countries is the second largest category followed by international affairs.

Chart 4.16: Geographic range of news items (all channels)



Both channels demonstrate very similar trends in their coverage of news from around the world and although TV2 has slightly more international news and news about the Asian continent, as a percentage of news items, there are very similar trends in coverage overall.

Chart 4.17: Kinds of actors with direct access to news coverage (all channels)



Norwegian television news draws heavily on the general public, public employees and government ministers as sources of comment and information. The general public represented 18 per cent of all stakeholders that were interviewed in news bulletins and general public and government ministers another 16 per cent, followed by public employees (14 per cent).

Chart 4.18: Kinds of actors with direct access to news coverage

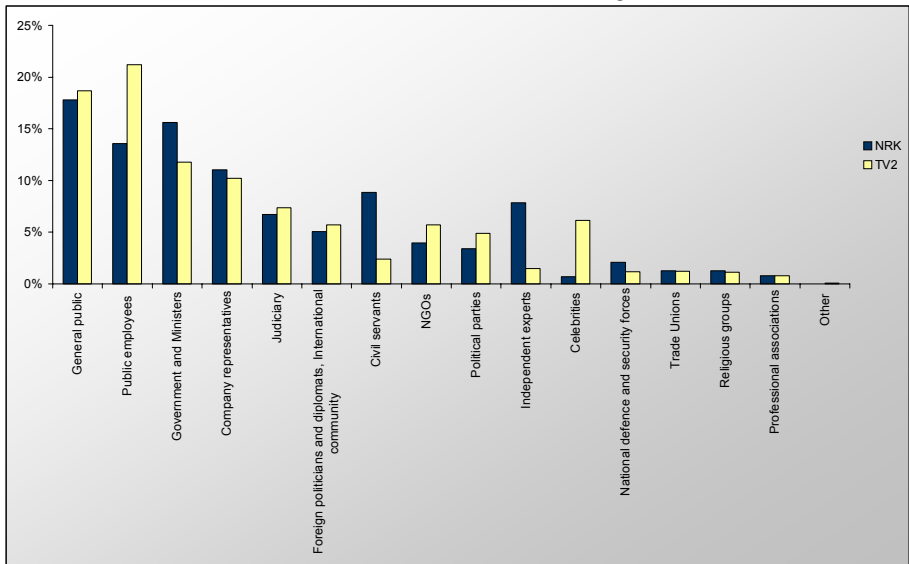
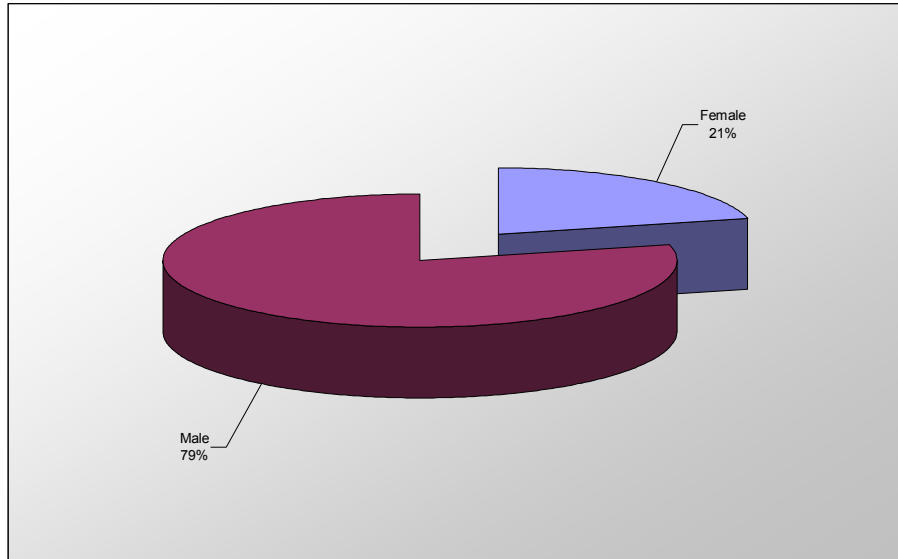


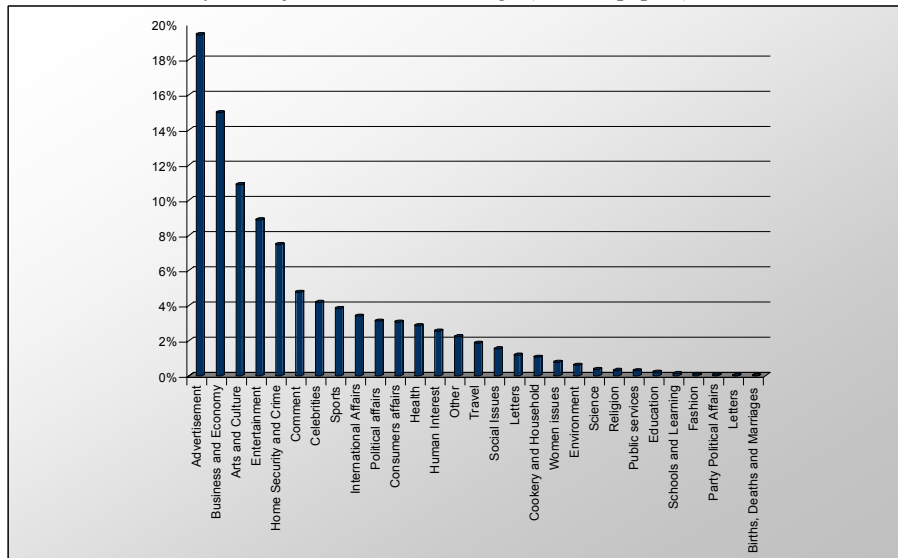
Chart 4.19: Balance in gender between actors in direct access to news coverage (all channels)



Females were under represented in terms of direct access and represented only 21 per cent of those interviewed in news bulletins.

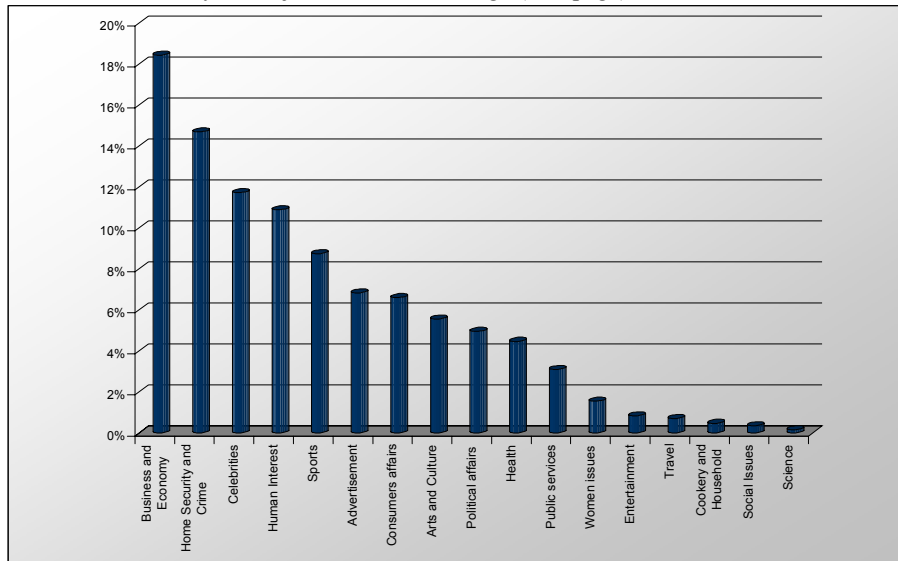
Newspapers

Chart 4.20: Diversity of subjects for news coverage (all newspapers)



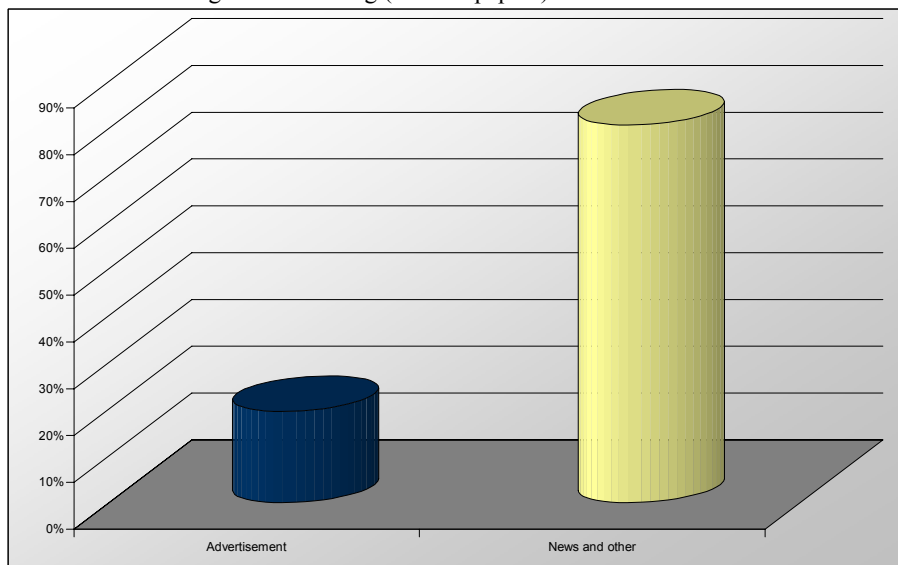
Business and economy is the largest single subject category in the newspapers monitored largely due to the fact that DN is a business newspaper catering to the business community. The fact that the newspaper market in Norway is highly regional also means the national press are a minority in terms of circulation (see appendix). Arts and culture and entertainment also represent significant subject areas for the content of the national daily newspapers in Norway.

Chart 4.21: Diversity of subjects of news coverage (first page)



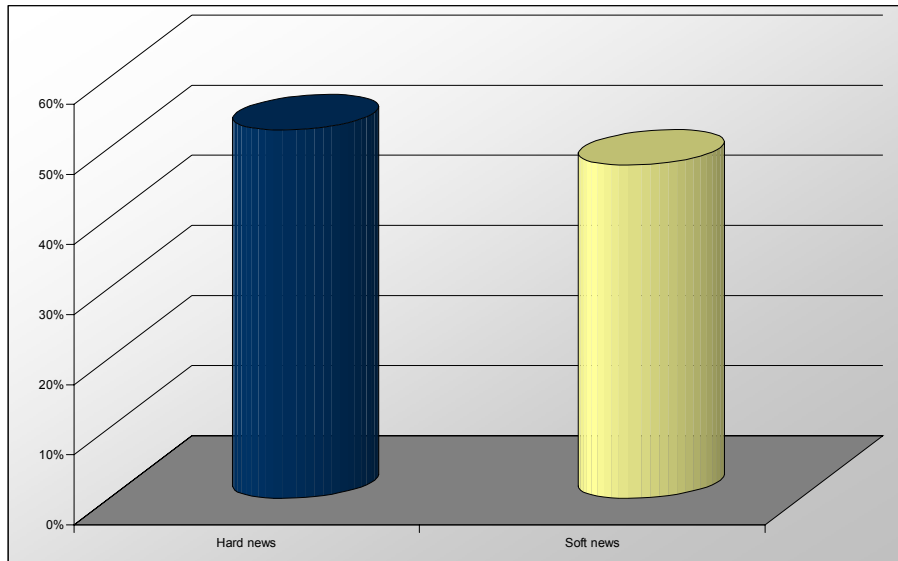
The dominance of business and economic news is reflected in the content of the first pages of the newspapers. Home security and celebrity news is also prominent on the front pages of the titles overall.

Chart 4.22: Percentage of advertising (all newspapers)



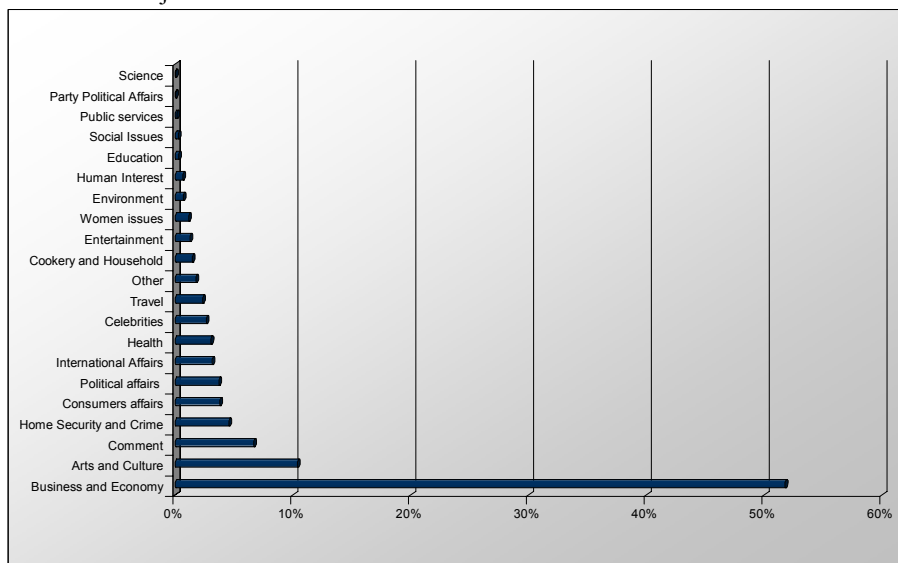
The national press in Norway have a far lower ratio of advertising to content compared to Italy and the UK and advertisements only account for 19 per cent of total content.

Chart 4.23: Distribution of hard and soft news



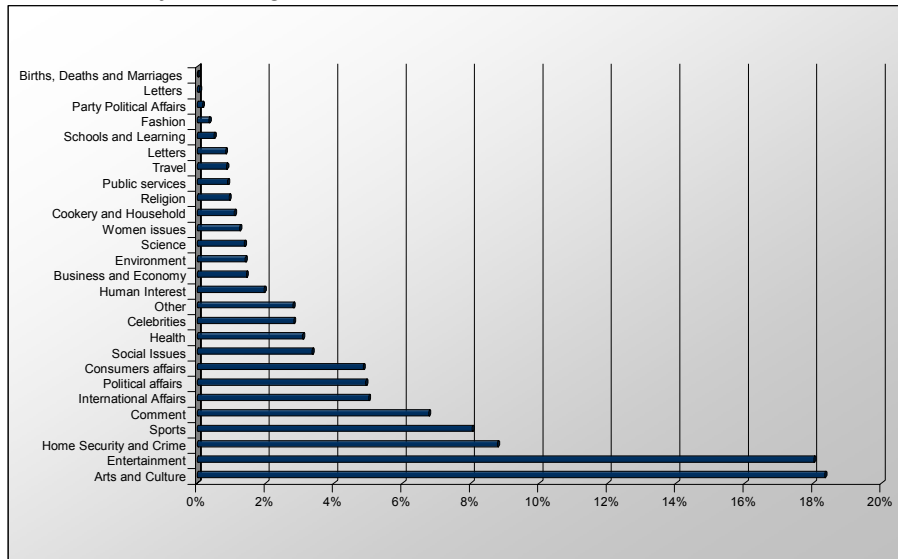
Hard news represents 52.5 per cent of all print news and there is a large percentage of soft news representing the remaining 47.5 per cent.

Chart 4.24: Subjects in DN



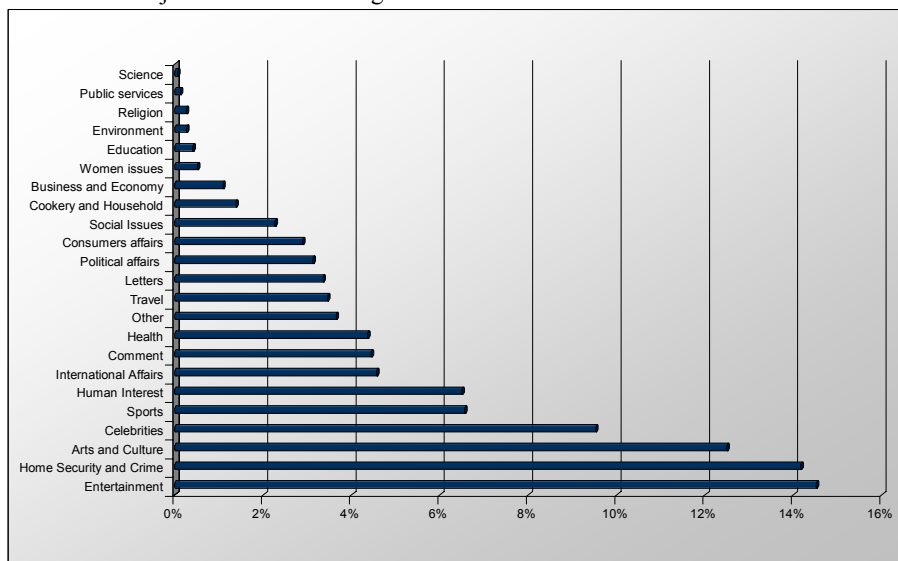
As indicated above DN's content is largely composed of business and economic news (52 per cent) and the range of traditional news coverage is low. The second largest category is arts and culture (10 per cent) followed by home security and crime (5 per cent).

Chart 4.25: Subjects in Dagbladet



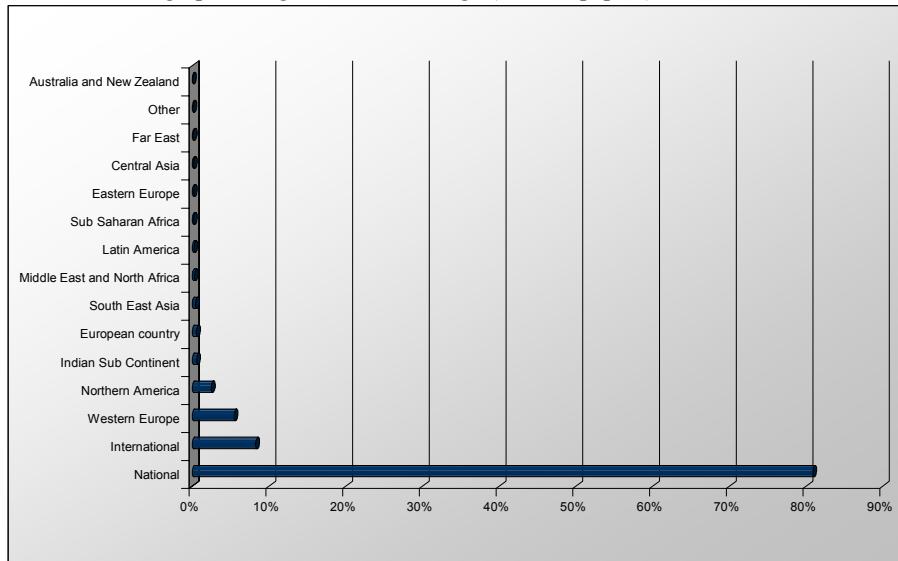
Dagbladet has a high percentage of arts and culture and entertainment that combined represent over 36 per cent of content. Home security and crime is also a popular subject in the title followed by sports.

Chart 4.26: Subjects in Verdens Gang



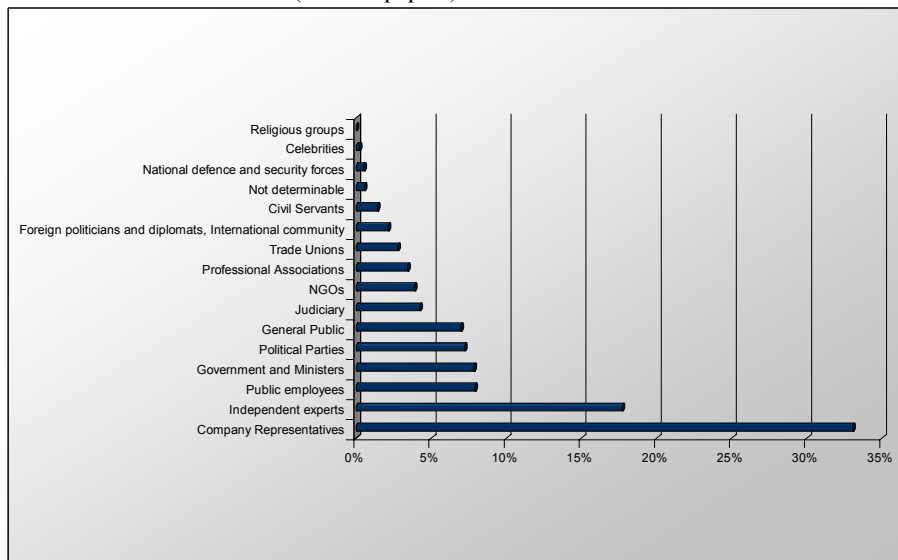
Verdens Gang is the most popularist of the daily national titles and entertainment is the most prominent subject category with 15 per cent of its content focusing on entertainment. Home security and crime is also prominent as is arts and culture, celebrity, sport and human interest stories.

Chart 4.27: Geographic range of news coverage (all newspapers)



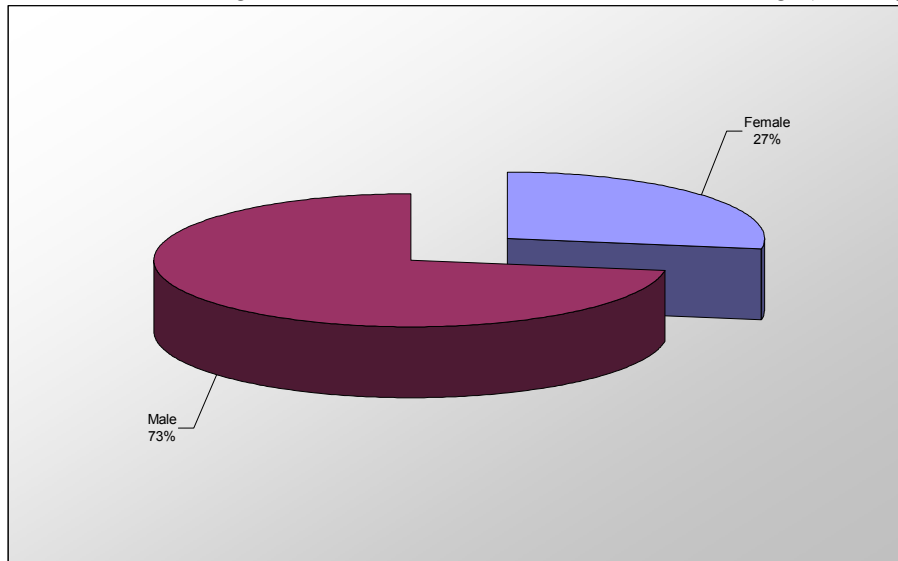
The geographic scope of the content of the newspapers tend to be even more national in focus than in the television news. 80 per cent of all content covered domestic issues. International affairs represented the second most widely covered area (8 per cent) and it was followed by news about West European countries (5 per cent) and then North America (2 per cent).

Chart 4.28: Access of actors (all newspapers)



The business community and company representatives tended to gain the most direct access to the newspapers and this was especially pronounced in the business oriented DN. Overall 33 per cent of stakeholders that were directly quoted in the newspapers was from this category. Independent experts were the second highest (17 per cent) followed by public employees, government ministers and political parties.

Chart 4.29: Balance in gender between actors in direct access to news coverage (all newspapers)



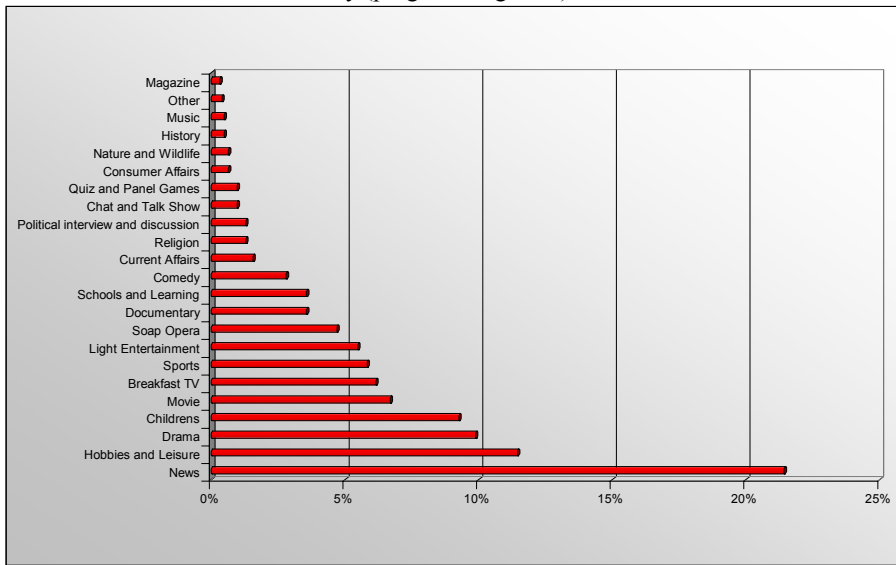
Although improving somewhat on gender balance in television news there remains an imbalance between male and female. Males represented 73 per cent of stakeholders having direct access to newspapers.

UNITED KINGDOM

Television

The diversity of UK television content is highly influenced by the public service remits that all of the terrestrial broadcasters are obliged to meet in terms of programming. These are tiered according to the remits established in the regulatory framework for the different broadcasters (see appendix).

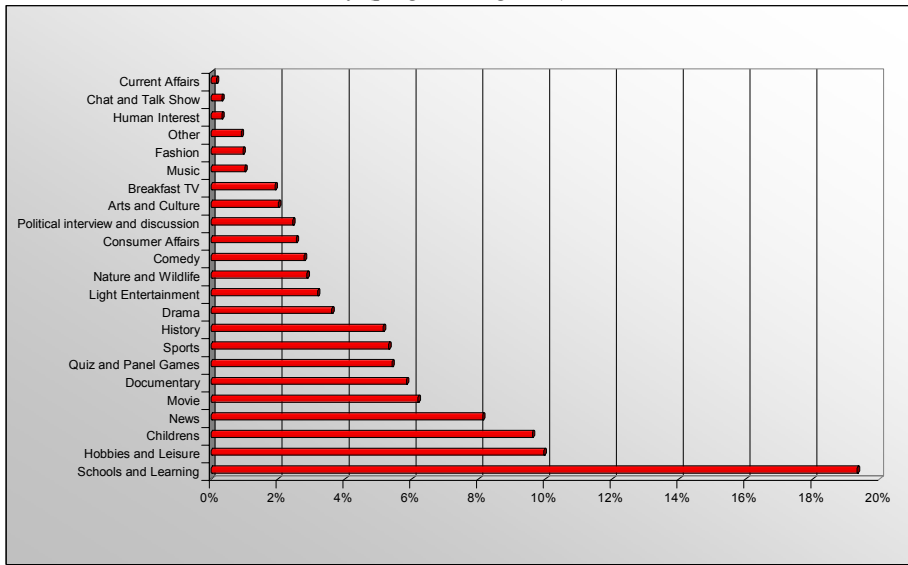
Chart 5.1: BBC1 schedule diversity (programme genres)



BBC1 is the popular channel of the BBC and its output is dominated with lighter entertainment genres. Hobbies and leisure programmes constitute a little under 12 per cent of total output on the channel. Children's programming represented 9 per cent of total content whilst 9.9 per cent of the schedule consisted of drama, which was followed by movies (7 per cent) and breakfast television (6 per cent).

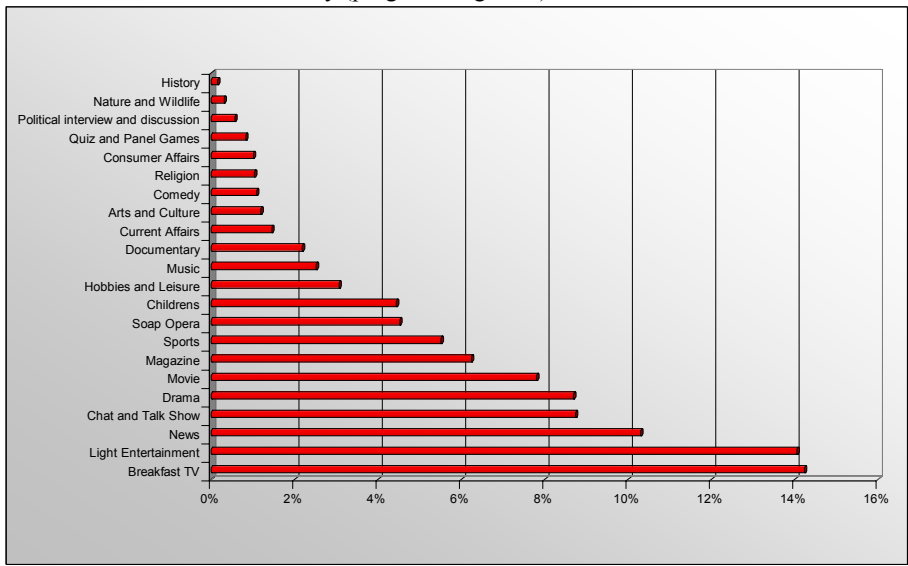
The popular genres constitute key BBC1 programming and there is a distinct absence of arts and culture programming, very minor investment in current affairs and a lack of documentaries, which represent under 4 per cent of the channel's overall output. However, news is prominent in the schedule, though this should be seen in the context of the relaying of BBC News 24, which on weekdays is aired after 0330 hrs until the early morning breakfast television slot.

Chart 5.2: BBC2 schedule diversity (programme genres)



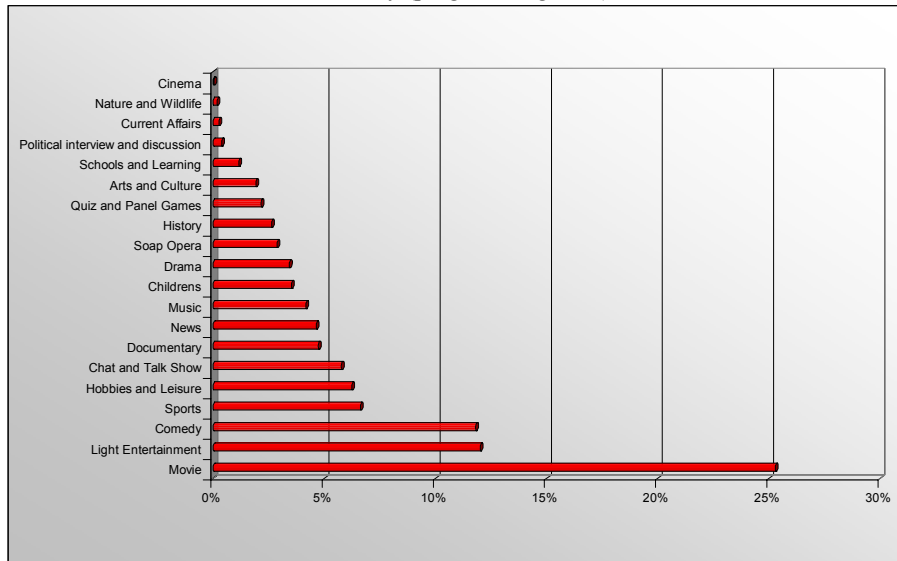
The BBC’s second channel is very much complementary to BBC1 and it carries less entertainment based genres and more programming in such categories as history and documentary, though hobbies and leisure programming remain a significant part of the schedule. Schools and learning programming, aired during off peak hours, also represents a core programme activity for BBC2 (over 18 per cent of total output) as does programming for children (a fraction under 14 per cent of total output).

Chart 5.3: ITV schedule diversity (programme genres)



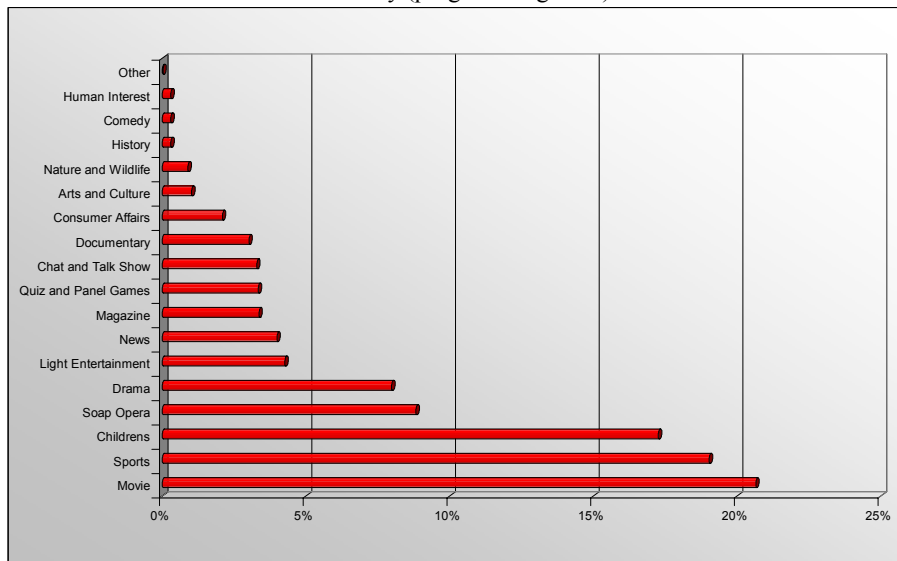
As the UK’s most popular commercial channel ITV’s schedule is dominated by light entertainment and although it does include some programming covering current affairs and arts and culture in its schedule these represent only a very small part of its output. With the exception of the news and breakfast television all of the top ten most prominent kinds of programmes are entertainment based. Documentaries are also a minority activity of ITV.

Chart 5.4: Channel 4 schedule diversity (programme genres)



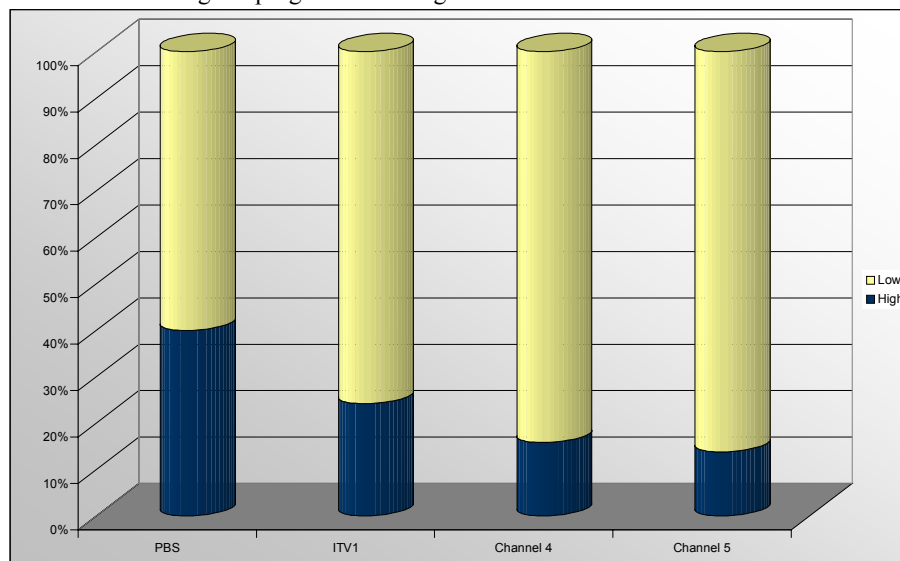
Channel 4 relies heavily on movies to fill its daytime programming (25 per cent of all its output), as is also the case for comedy (12 per cent) that tends to dominate the morning slot and there is a heavy reliance on repeat US imported comedy. A further 12 per cent of output was light entertainment. It does, however, have a greater amount of history, documentary and arts and culture than ITV though its current affairs programming represented below 1 per cent of the channel's output.

Chart 5.5: Channel 5 schedule diversity (programme genres)



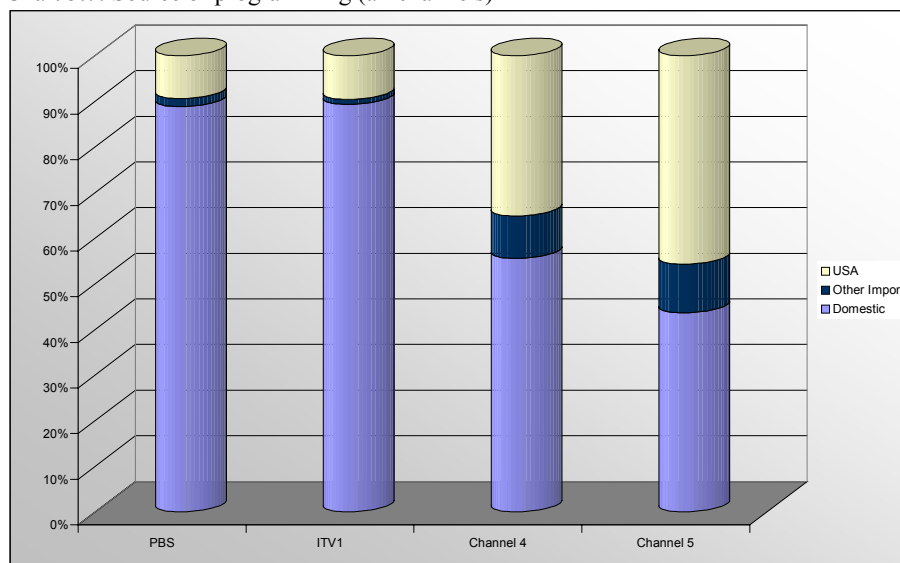
Channel 5 is the channel with the greatest emphasis on entertainment with movies and sports combined representing nearly 40 per cent of the channels' total output. Sports tend to fill the post 0300 slot and consist of world sports and specifically, for the period of the monitoring, the super bowl tournament in the US. It also has an abundance of children's television (17.2 per cent).

Chart 5.6: Percentage of programmes of high social value



There are significant differences between the BBC channels and the other broadcasters in terms of the percentage of time allocated to programming of high social value. The combined total output of BBC1 and BBC2 of programming that is high in social value represents a little under 39 per cent of its overall output. This drops dramatically for ITV (24 per cent), Channel 4 (16 per cent) and Channel 5 (14 per cent). During peak time viewing the two BBC channels broadcast nearly 42 per cent of programming that is of high social value and Channel 4's peak time programming shows a significant increase in these kinds of programme strands (34 per cent). This is also the case for the final two commercial channels due to their extended news bulletins with ITV (29 per cent) and Channel 5 (24 per cent).

Chart 5.7: Source of programming (all channels)



The BBC and ITV are the two biggest investors in domestic programming in the UK and this is reflected in the source of programming of the four broadcasters. The BBC and ITV's domestic programming reflects strong national production with domestic productions of both channels representing above 90 per cent of total output. Channel 4, which commissions its programming from independent producers, has 56 per cent domestic productions and Channel 5, 43 per cent during the

two week period. In terms of non fiction domestically produced programming rises across all channels, particularly on Channel 4.

Chart 5.8: Source of non fiction

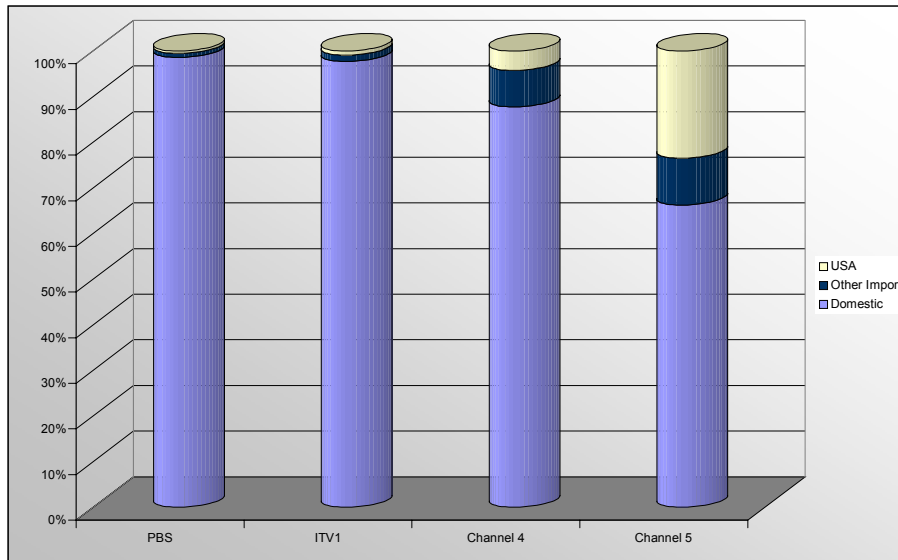
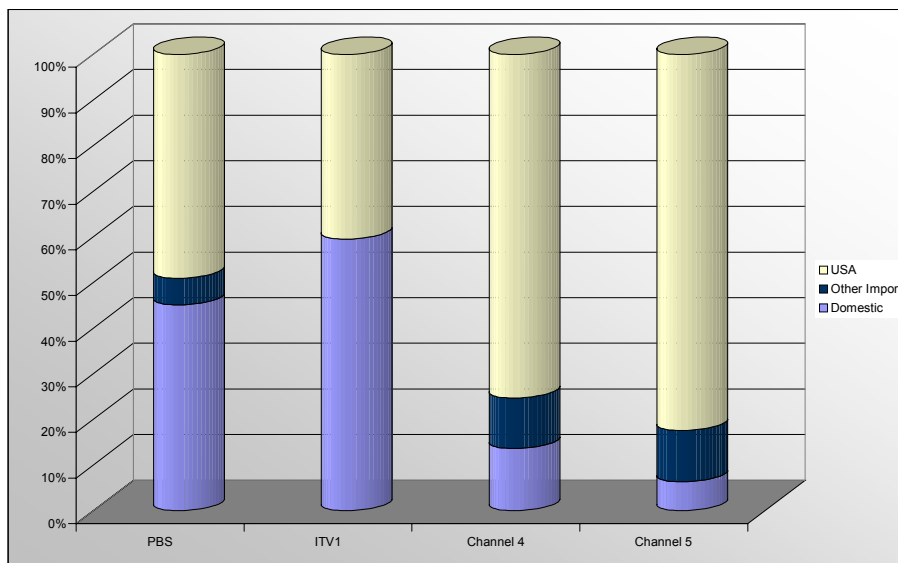


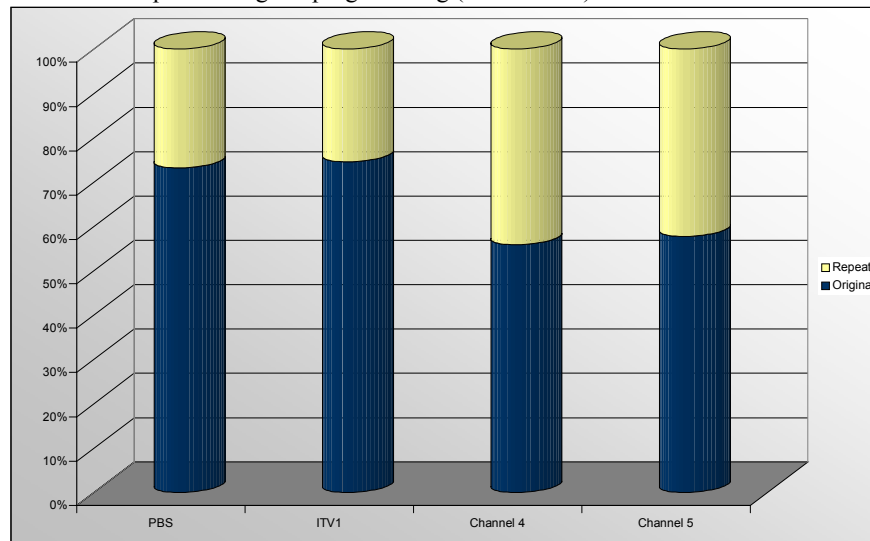
Chart 5.9: Source of fiction



Broadcasters tend to be far more reliant on imports for fiction across all channels and during the two week monitoring period there were no significant nationally produced movies broadcast by any of the channels. US imports dominate this category of programming particularly on Channel 4 and Channel 5.

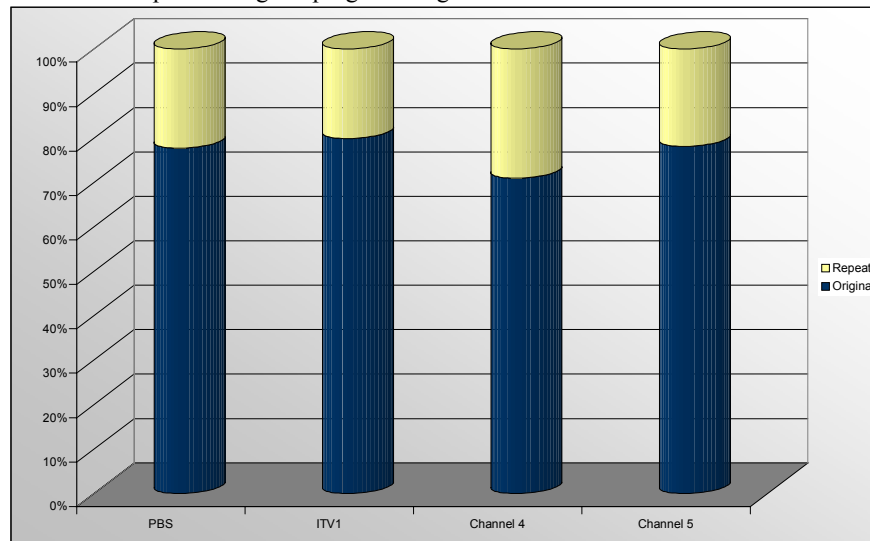
ITV has the greatest percentage of domestic drama and it is followed by the BBC (60 and 45 per cent respectively). Channels 4 and 5 have very little domestic production in this programme strand (14 per cent for Channel 4 and 6 per cent for Channel 5) as it is dominated by US imports. In contrast, entertainment genres (quizzes, light entertainment etc.) are heavily domestic in terms of their origin across all channels. Both the BBC and ITV's entertainment strands are heavily domestic (above 90 per cent in both cases). Channel 4's investment in domestic entertainment is also above 82 per cent, though this drops considerably for Channel 5 (56 per cent).

Chart 5.10: Repeat or original programming (all channels)



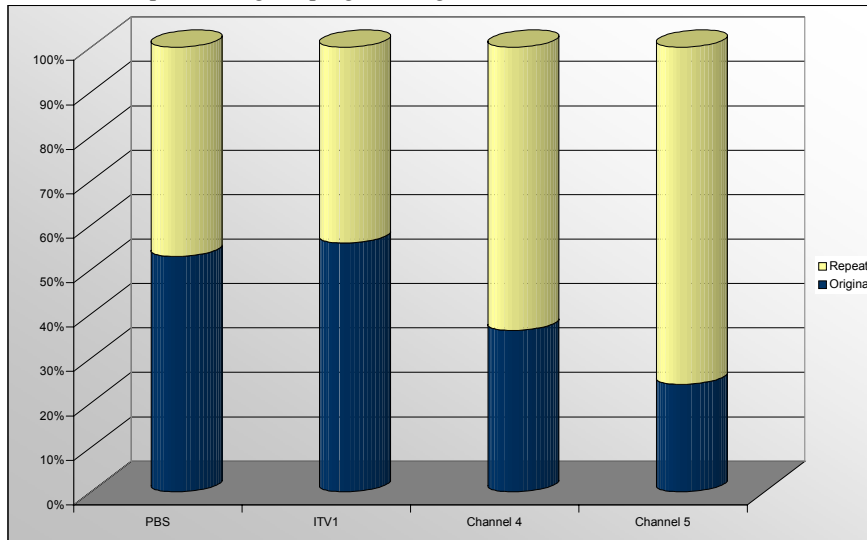
The frequency of repeats on UK terrestrial television is high; especially on the commercial channels. Over 40 per cent of Channel 4 and Channel 5 programming are repeats. For ITV and the BBC channels this falls to 25 and 26 per cent respectively.

Chart 5.11: Repeat or original programming of non fiction



The number of repeats is largely a result of repeats of fiction and 76 per cent of Channel 5's fiction was repeat programming during the two week period. ITV aired the largest percentage of original fiction (56 per cent) followed by the BBC (52 per cent) and Channel 4, 36 per cent.

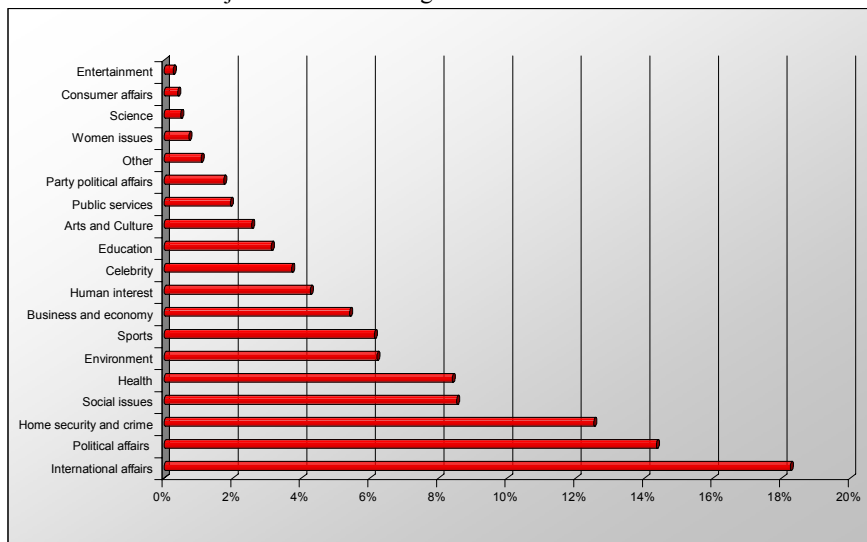
Chart 5.12: Repeat or original programming of fiction



Television news coverage

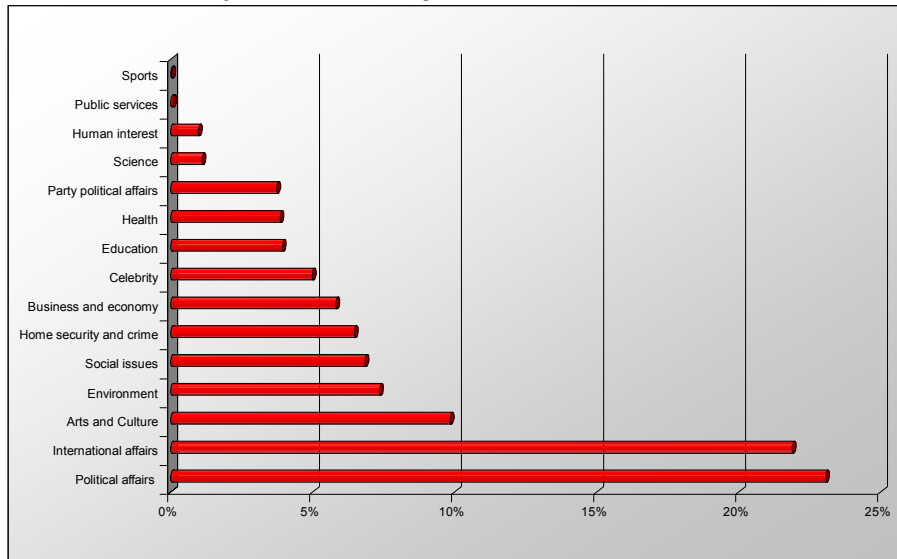
The British public has a wealth of choice in terms of news bulletins to choose from and all of the terrestrial channels carry news bulletins and the BBC, Channel 4 and ITV have considerable news bulletins that are staggered in terms of the time slots they are aired. There are considerable differences in terms of the style of news bulletins and both Channel 4 and BBC2 have extensive and in-depth analytical coverage in this area, whilst Channel 5 and ITV tend to have softer news bulletins.

Chart 5.13: BBC1 subject of news coverage



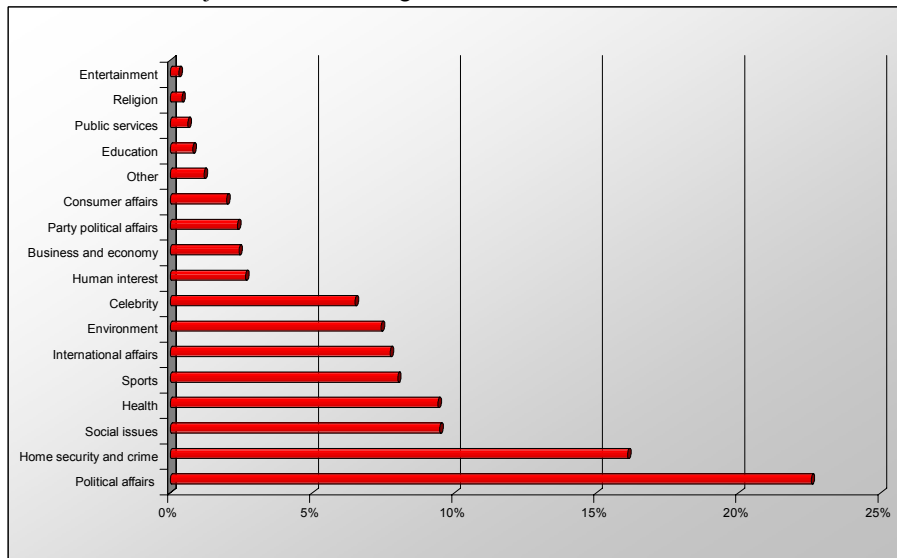
The single largest category of subjects on BBC1 news over the two weeks were international affairs dealing with topics of international relevance such as the United Nations, Iraq and the EU Presidency. This category of news was followed by political affairs that was dominated by the resignation of a Cabinet Minister in the New Labour government. Home security, social affairs and health and the environment were all widely covered in BBC1's news bulletins. Softer news such as celebrity and entertainment represented a small and marginal part of these news bulletins.

Chart 5.14: BBC2 subject of news coverage



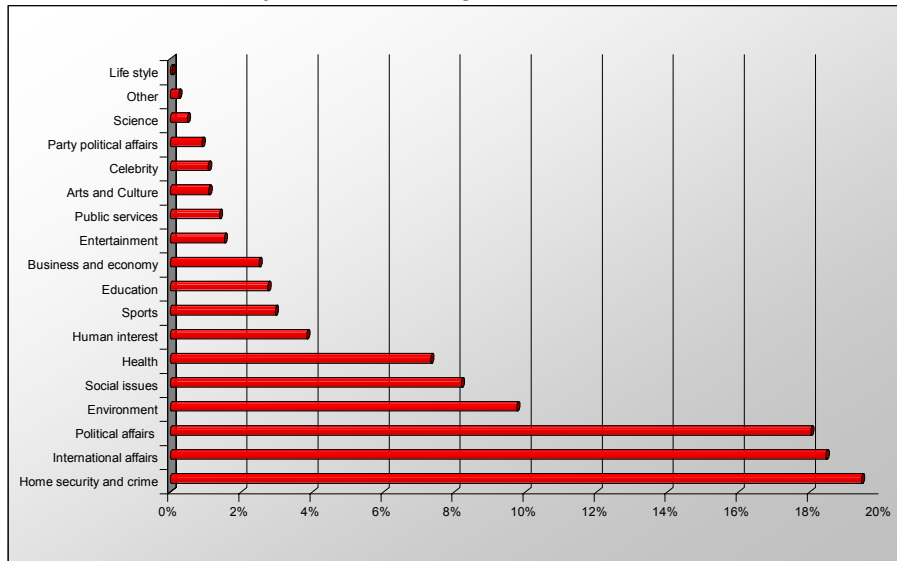
BBC2's coverage demonstrated greater amounts of hard news and it focused upon political and international affairs, which are even more prominent in terms of time allocated to these subjects than on BBC1. However, it also invested heavily in arts and culture, business and economic news and education.

Chart 5.15: ITV subject of news coverage



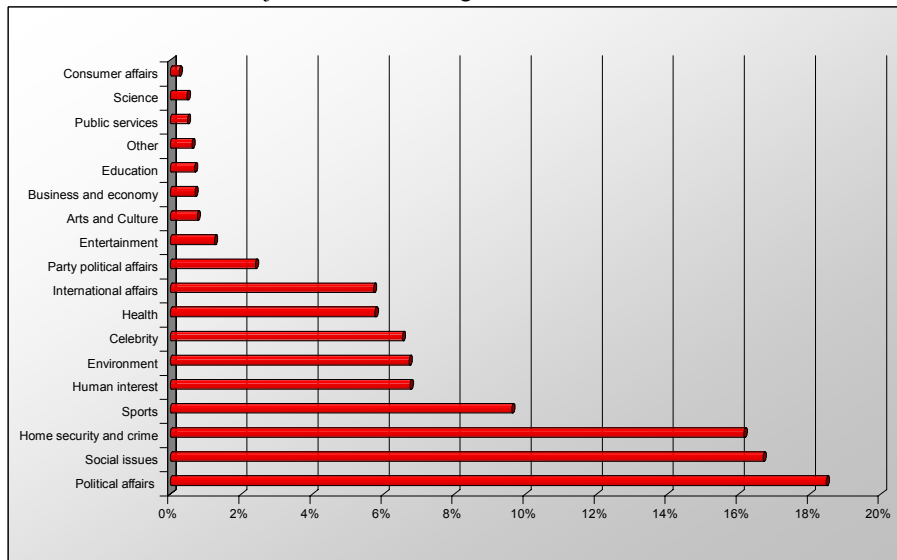
In contrast to the BBC, ITV news relegates international affairs in the news agenda and it represented a little below 8 per cent of overall news stories. Political affairs and home security and crime received the greatest quantity of coverage followed by social issues and health. Mirroring BBC1's news coverage there is a greater amount of celebrity, human interest and sports news in the ITV bulletins.

Chart 5.16: Channel 4 subject of news coverage



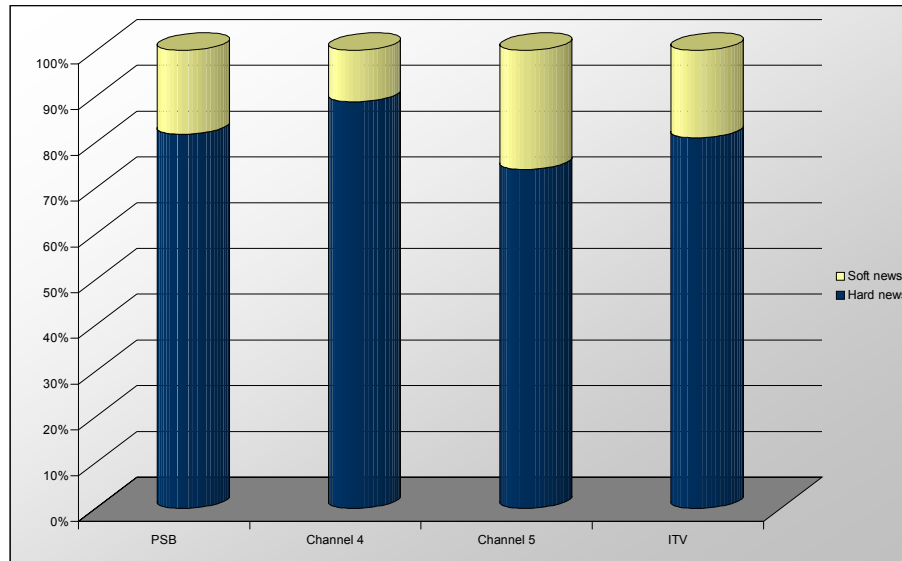
Channel 4 news (ITN is the independent news supplier for both Channel 4 and ITV news bulletins), like its counterpart on BBC2 focused on hard news and the range of subject areas include home security and crime, international affairs and political affairs that collectively represent 57 per cent of news stories.

Chart 5.17: Channel 5 subject of news coverage



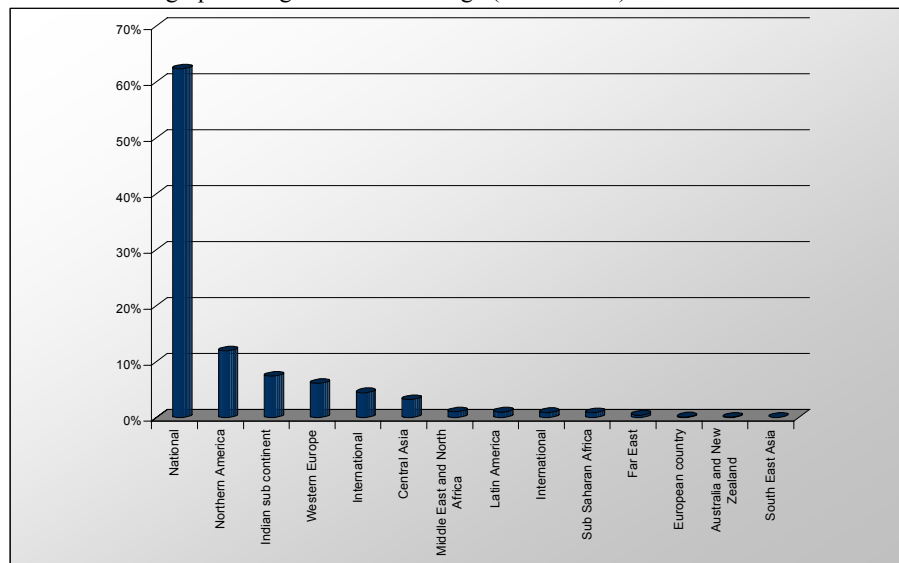
Channel 5 news is produced by Sky News and is far more national in its scope of coverage. As is the case of the ITV news, international coverage is far less prominent than on the other channels' news bulletins. Political affairs represented the single most prominent subject in the bulletins and it was followed by social issues and home security and crime. Celebrity, sport and human interest stories were far more prominent in Channel Five news and together represented 23 per cent of total news output.

Chart 5.18: Kind of news on each channel



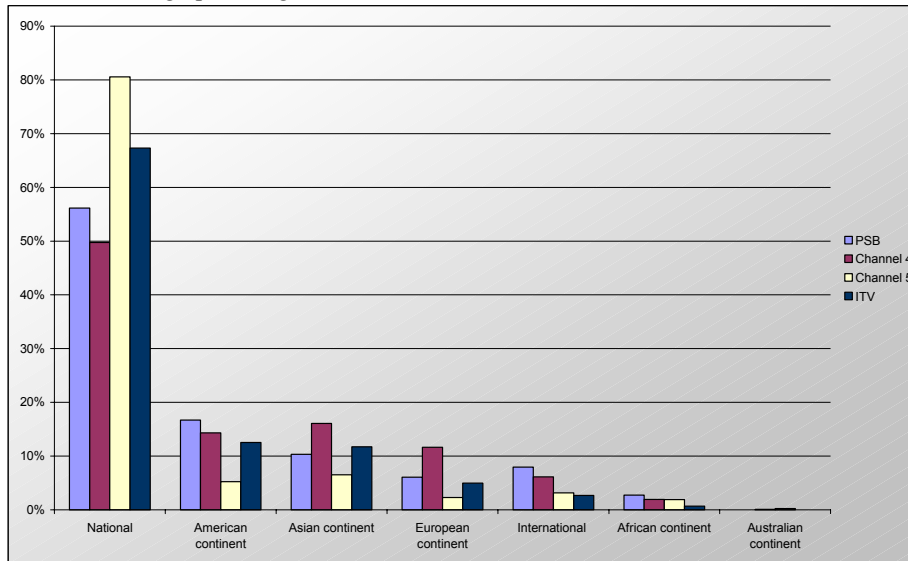
Overall, British news is largely composed of hard news stories, though there is a difference in the content of news stories of the two commercial broadcasters ITV and Channel 5 and the remaining channels, especially in coverage of international affairs and news about other countries.

Chart 5.19: Geographic range of news coverage (all channels)



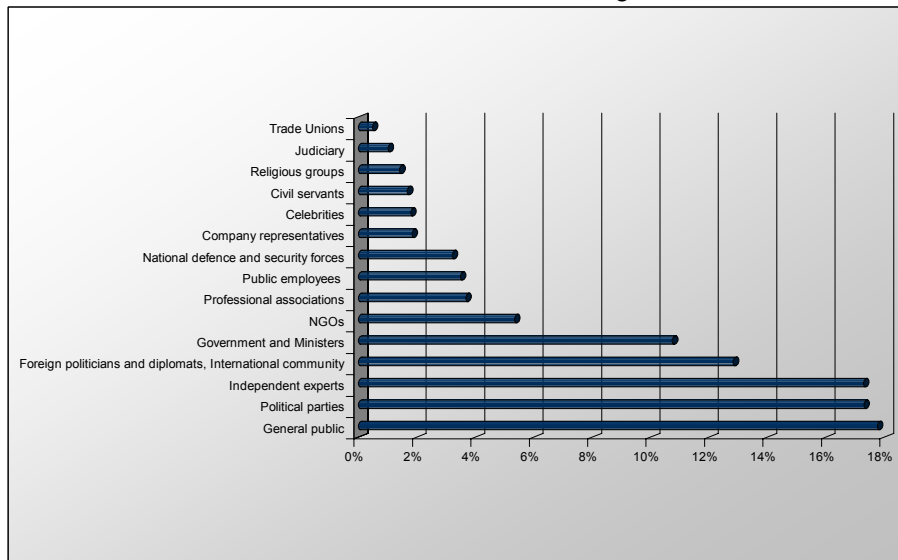
News stories remain largely national in their scope on UK television. Over 60 per cent of all news bulletins contained news that related to UK domestic issues. Of the news items that covered stories from overseas ones about North America were the most prominent followed by the aid developments in Pakistan and then by news about other European countries.

Chart 5.20: Geographic range of international/national news



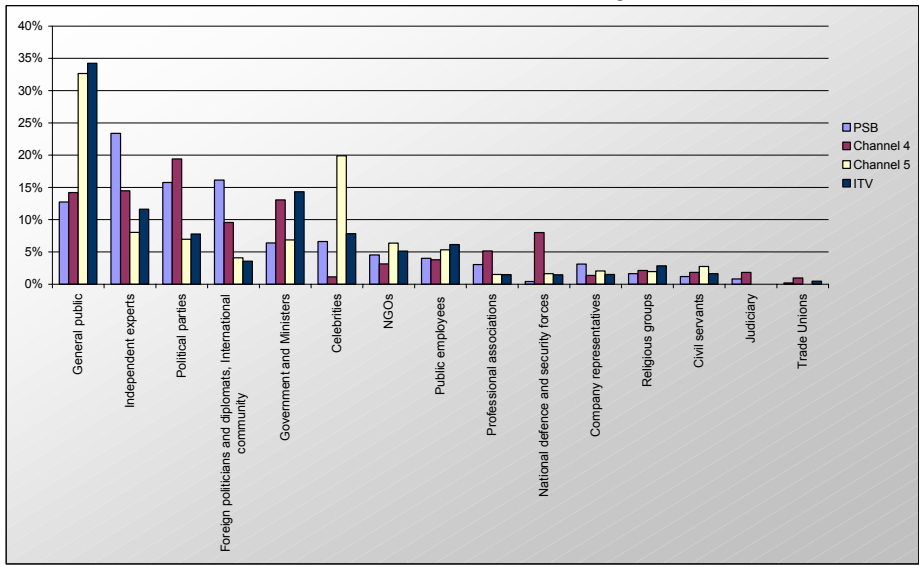
Channel 5's news was the most national in focus followed by ITV. The BBC and Channel 4 provided a far greater range of coverage in terms of international news.

Chart 5.21: Kinds of actors with direct access to news coverage



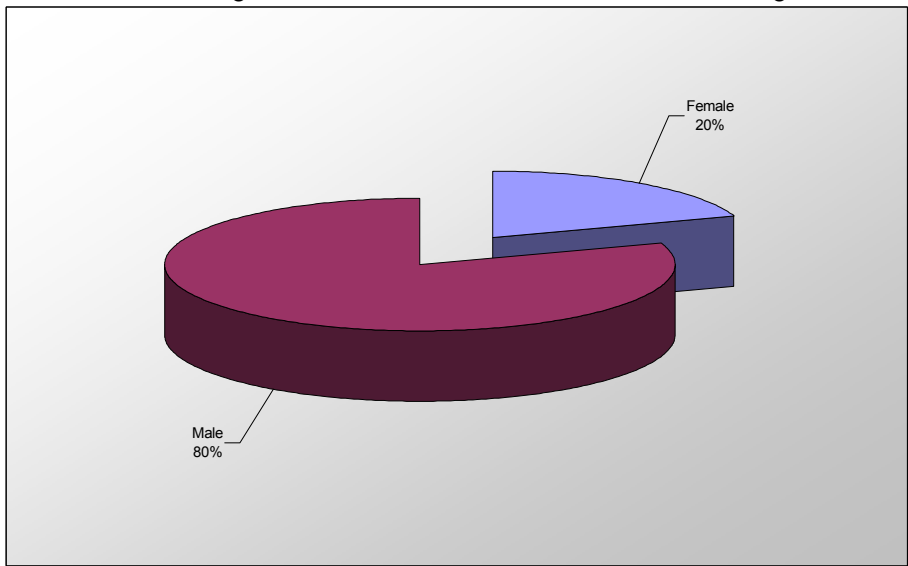
A wide range of actors are represented and have direct access to the television news as they are drawn upon for comment, opinion and expertise. However, the bulletins draw on a different range of sources. Channel 5 and ITV draw heavily on the public in their news coverage whilst there is a greater tendency for Channel 4 and the BBC bulletins to interview opinion makers and independent experts in a more in-depth and analytical manner. Continuing its popular approach to programming in general Channel 5 also draws heavily on celebrities in its news stories and notably the categories, of more substantial experts, is far lower than the other channels.

Chart 5.22: Kinds of actors with direct access to news coverage



In terms of gender there is a wide imbalance between male and females that have direct access to the news. Women only represented 20 per cent of individuals directly quoted in news items.

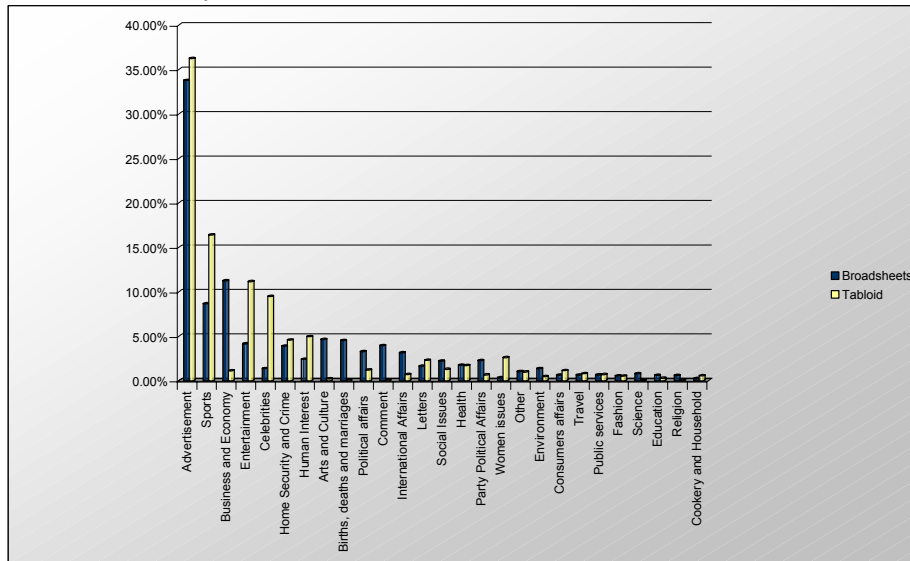
Chart 5.23: Balance in gender between actors in direct access to news coverage



Newspapers

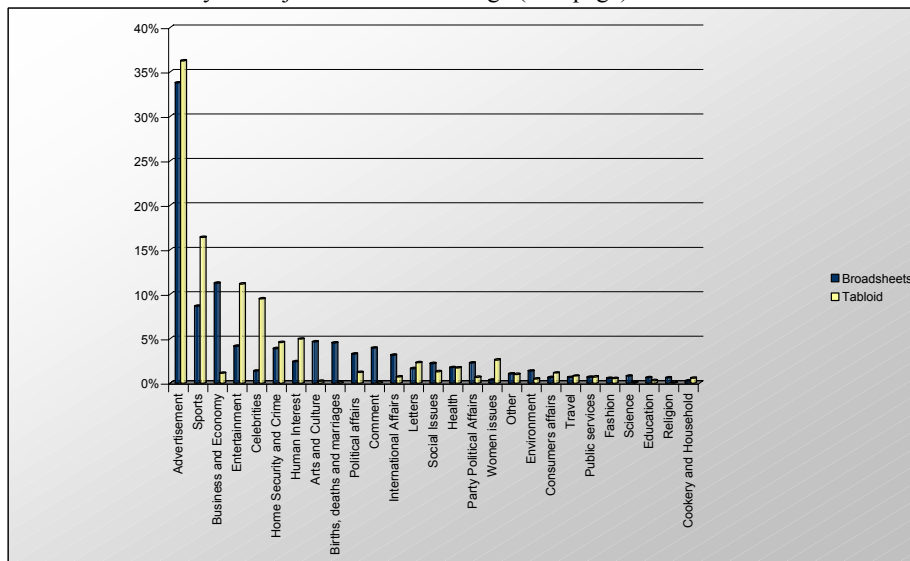
The UK’s national newspaper market is broadly divided on tabloid and broadsheet lines. The actual content of the two kinds of newspapers is markedly different and this is reflected in the different priorities in the kinds of stories covered.

Chart 5.24: Diversity of content between tabloids and broadsheets



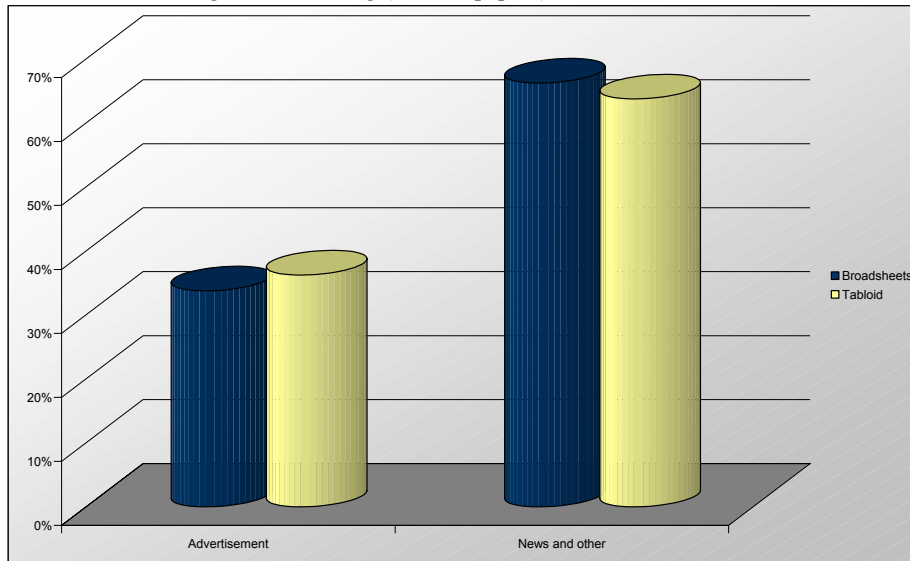
This divide between tabloid and broadsheet is one of the main characteristics of the UK press. Overall, there is a trend in tabloids to report on celebrity, sports, entertainment and home and security issues. During the same period the broadsheets reported on a far broader range of news stories. Sports, celebrity and entertainment accounted for 37 per cent of all content in the tabloids (with another 36 per cent being advertisements) whilst in the broadsheets this was reduced to below 14 per cent.

Chart 5.25: Diversity of subjects of news coverage (first page)



The stories printed on the first page of the titles demonstrate these differences clearly. The tabloids' lead stories are concerned with home security and crime and celebrity (70 per cent of front page coverage was allocated to these two categories) whilst in the broadsheets this is reduced to under 11 per cent.

Chart 5.26: Percentage of advertising (all newspapers)



The percentages of soft and hard news in the different kinds of newspapers is also markedly different. The tabloids have a far greater amount of soft news than their counterparts in the broadsheet sector. However, the wide coverage of sports in the broadsheets does represent a significant part of their overall coverage.

Chart 5.27: Distribution of hard and soft news

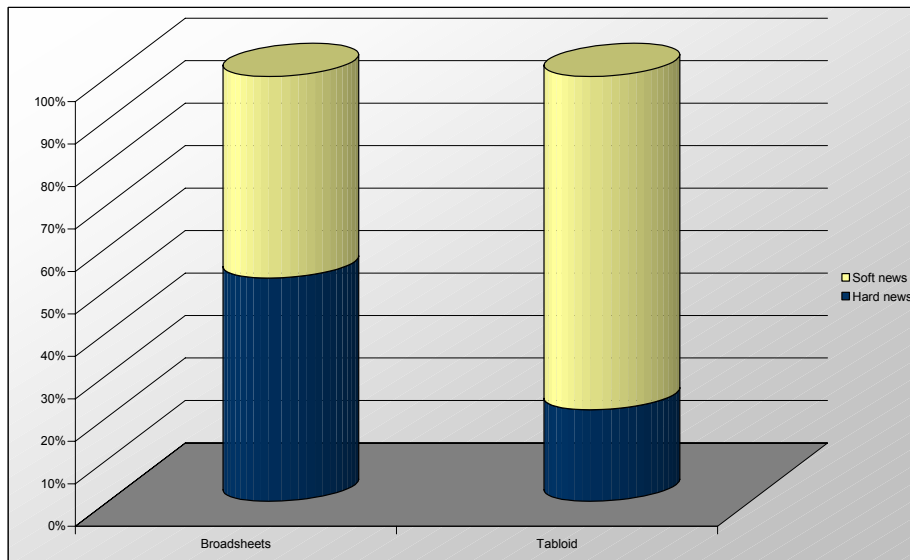
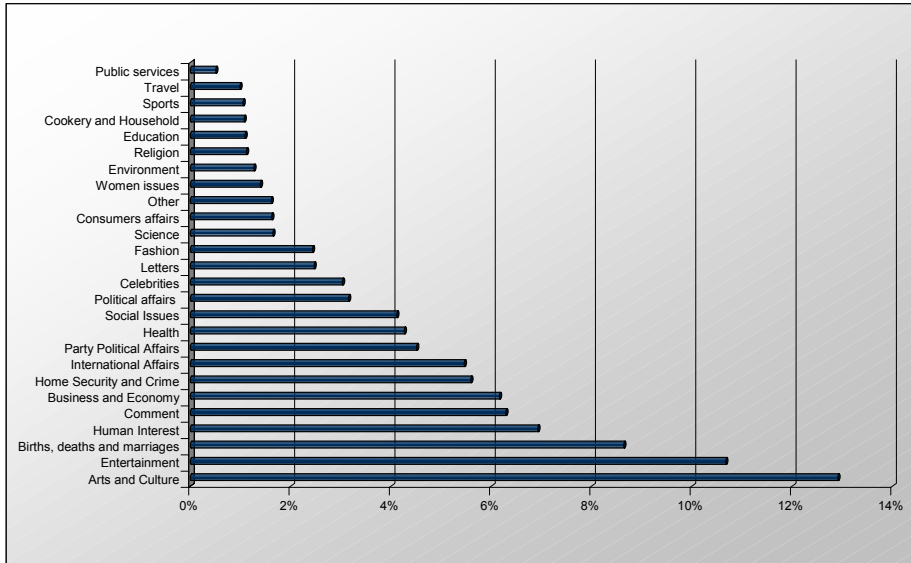
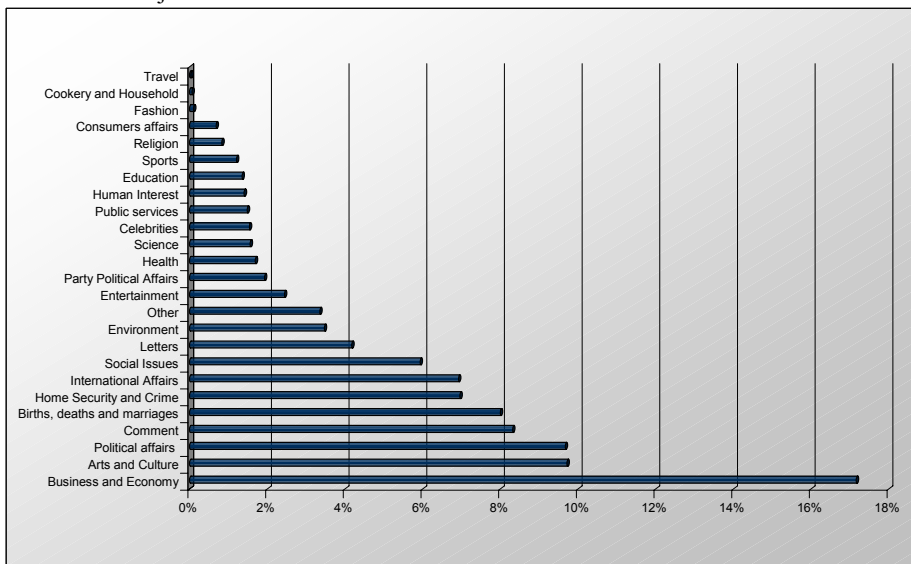


Chart 5.28: Subjects covered in the Daily Telegraph



The Daily Telegraph's coverage focused on a range of issues during the monitoring period and although the largest single subject area was arts and culture followed by entertainment there was wide coverage of hard categories of news including business and economy (6 per cent),⁸ home security and crime (5.6 per cent), international affairs (5.5 per cent), party political affairs (4.5 per cent) and health (4.2 per cent).

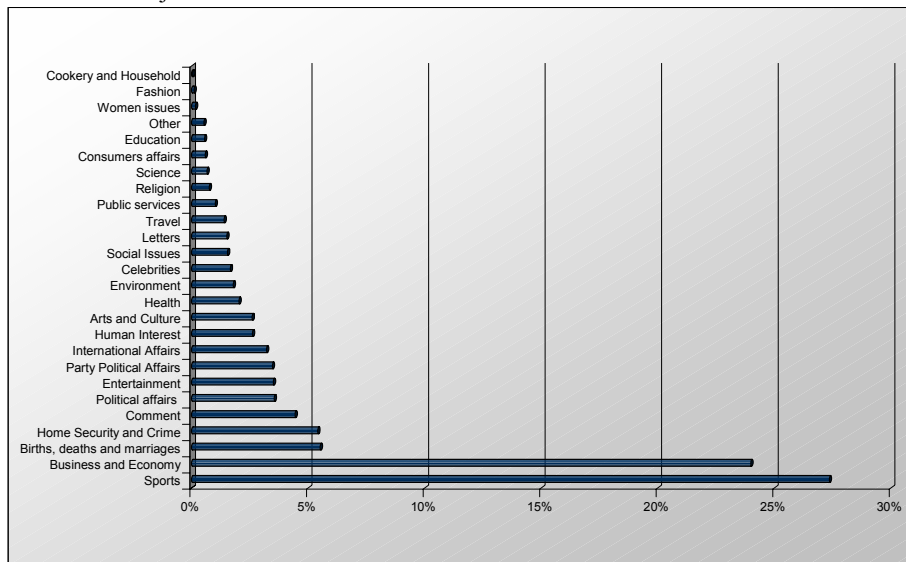
Chart 5.29: Subjects in the Guardian



The Guardian's coverage of hard news also follows similar lines as the Daily Telegraph and business and economy is the most prominent single subject area with 17 per cent of overall coverage. It is followed by arts and culture (10 per cent), political affairs (10 per cent), home security (7 per cent), international affairs (7 per cent) and social issues (6 per cent).

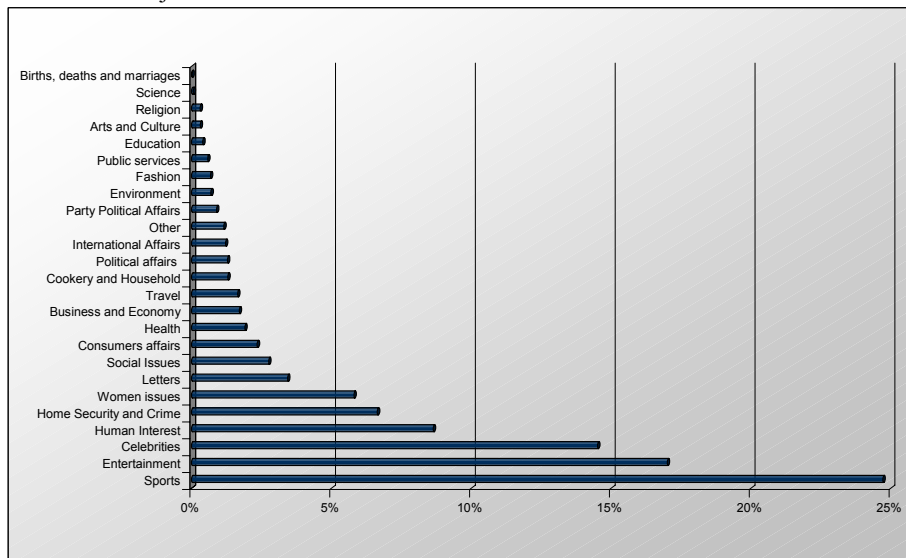
⁸ The Daily Telegraph also contains a Business and Economy section supplement that has not been included in the data analysis.

Chart 5.30: Subjects in the Times



The Times is the largest newspaper in the UK in terms of size and its daily edition runs to some 80 pages. However, sports are an extremely prominent subject area in the newspaper and represents over 27 per cent of its overall content. Business and economy is the second largest subject area covered following the trends in the coverage of the other broadsheet newspapers. The single largest difference is the lower percentage of arts and culture in the Times. This being said the broadsheets all have a wide range of news and cover a number of social and political issues.

Chart 5.31: Subjects in the Mirror



The content of the two tabloids is remarkably similar in terms of priorities. Sport, entertainment and celebrity dominate these publications and with the exception of home security and crime there is actually little in terms of hard news.

Chart 5.32: Subjects in the Sun

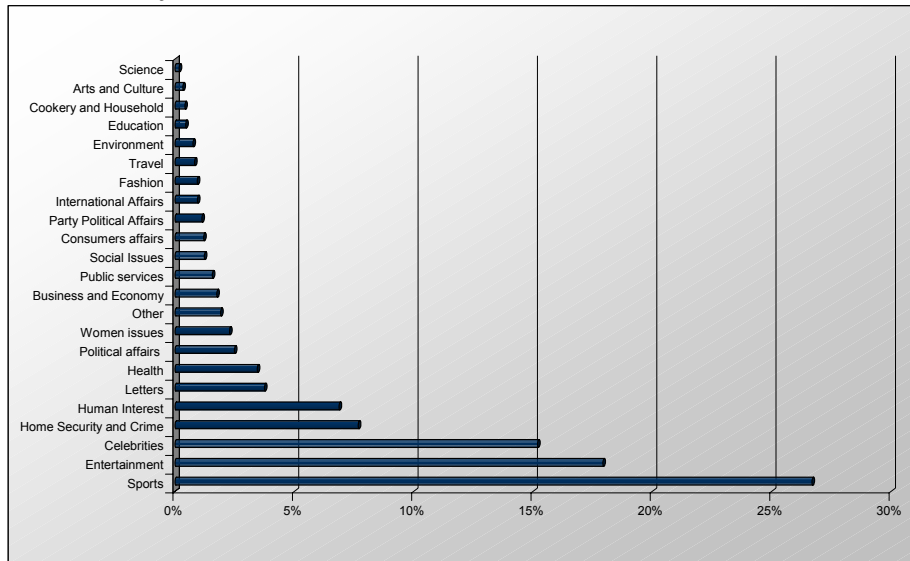
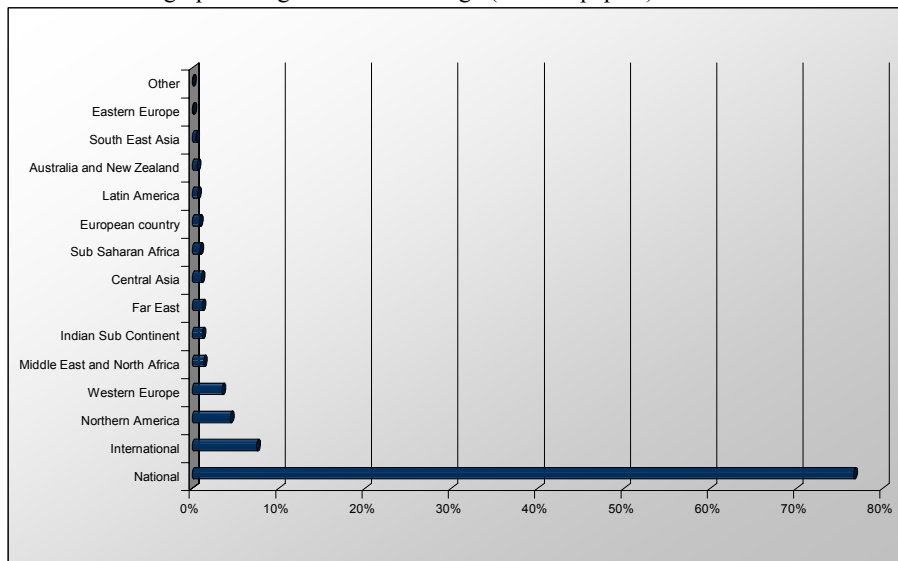
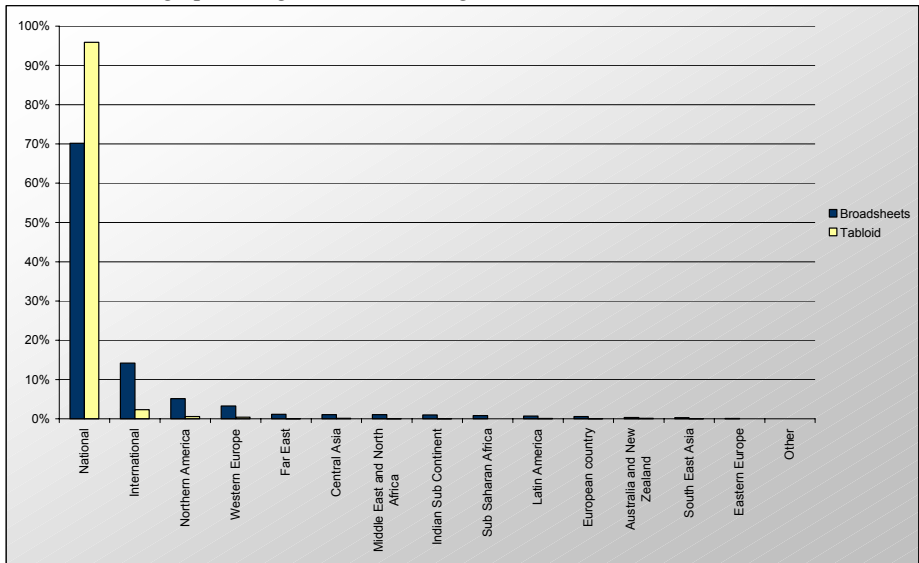


Chart 5.33: Geographic range of news coverage (all newspapers)



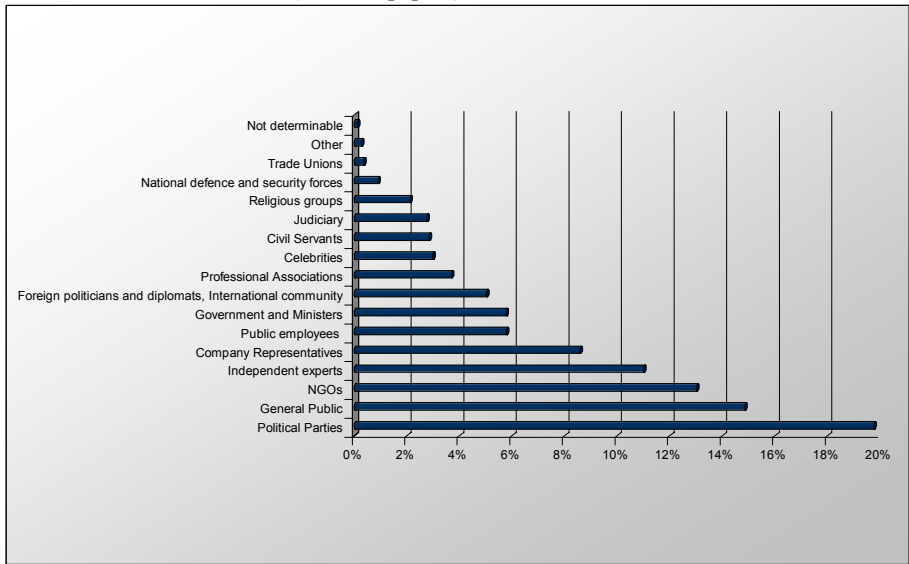
News is largely nationally based in UK newspapers and domestic news accounts for nearly 80 per cent of all content. International news is the second most prominent and includes news about international organisations such as the UN. Following the news coverage in television news about North America is also one of the most covered areas, though the region only accounts for under 4 per cent of total content.

Chart 5.34: Geographic range of news coverage in tabloids and broadsheets



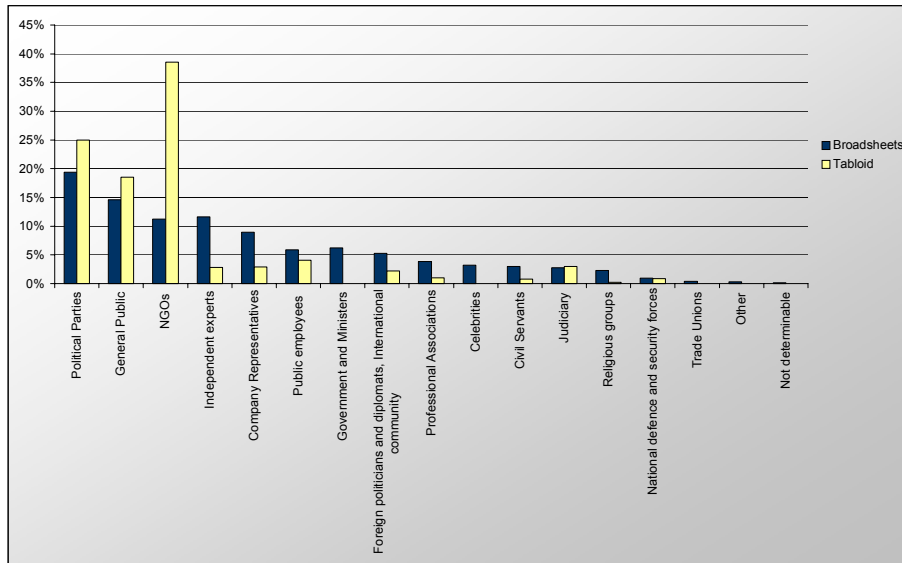
The dominance of domestic news increases in the tabloids and the Sun only has 6 per cent of news that is non domestic and the Mirror even less with 4 per cent. The UK newspaper with the largest international coverage is the Guardian (36 per cent international news) followed by the Times (31 per cent) and the Telegraph (25 per cent).

Chart 5.35: Access of actors (all news papers)



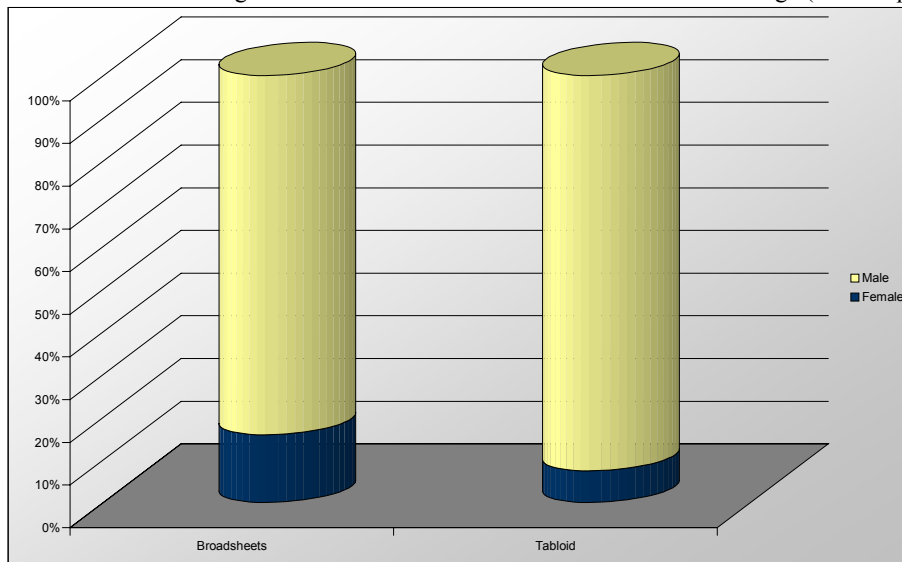
Political parties are the largest single group to have access to the UK press with nearly 20 per cent of direct access given to members of political parties. This group is followed by the general public and then NGOs and independent experts.

Chart 5.36: Direct access in tabloids and broadsheets



The tabloid newspapers tend to rely on quotes from NGOs, political parties and the general public. In contrast, the broadsheets draw upon a wider range of stakeholders from across a stakeholder spectrum.

Chart 5.37: Balance in gender between actors in direct access to news coverage (all newspapers)



The broadsheets also tend to draw upon females more for direct quotes, though there remains an imbalance between male and female. Only 16 per cent of direct quotations are from females in the broadsheets whereas in the tabloids this drops to 7.5 per cent.

APPENDIX

REGULATORY FRAMEWORK FOR CONTENT DIVERSITY

Croatia

Content obligations

All broadcasters are obliged by law (Article 9, Law on Electronic media) to contribute to national and cultural identity, the promotion of cultural creativity, the culture of public dialogue, the development of education, science and art as well as a range of other social and cultural objectives. Spectrum licences are awarded for national and regional levels and applicants must include information about programme content and are awarded on the basis of the programme proposal, together with an assessment of the economic and technical viability of the proposal. The programme proposal must specify the share of information, entertainment, cultural and other forms of programming that the applicant intends to broadcast as well as information about the planned share of in-house productions and domestic and European programming. The programme proposal becomes part of the licensing contract once it has been awarded. The television market was only liberalised at the national level in 2000 and today there are two commercial licences granted to Nova TV and RTL TV. Local and regional channels started broadcasting in the mid 1990s, but today 14 local and regional channels have less than 10 per cent of total national audiences. RTL has seen remarkable growth in this period in terms of market share.

Table 6.1: Television audience share 2004

<i>Channel</i>	<i>Percentage share</i>
HTV 1	31%
RTL Televizija	30%
HTV 2	17%
Nova TV	13%
Other (local television, satellite & cable)	9%
Total	100%

Source: AGB Puls, Privredni Vjesnik, 23 May 2005, p. 5. /May-December 2004

The Media Law (2004, and 2003) also includes the obligation placed on the state to promote and protect media diversity, and envisages state funds for this purpose, which will be distributed according to a separate regulation and following a public call for state aid (article 5). No systematic information is publicly available yet on the implementation of this clause.

HRT

Fifty five per cent of HRT programmes should be produced in the Croatian language, while at least 50 per cent of the remaining programmes must be in one of the European languages or a European production. Without reference to specific quotas, the Law obliges HTV to produce and/or broadcast programmes for national minorities that are exempt from the Croatian language quota. HTV is also obliged to broadcast information, education, entertainment and documentaries though no specific quotas are established for these areas of programming.

Commercial broadcasters

Commercial broadcasters are obliged by law to provide news and information as well as content that is important for the exercise of human and political rights. This includes the creation of independent public opinion, the rule of law and the development of civil society, promotion of cultural heritage and participation in cultural life, international understanding and democratic freedoms. They also have to promote the equality of man and women as well as promote understanding for the members of the national minorities (Article 12 Law on Electronic Media). National commercial broadcasters have to air at least 30 minutes of information programmes daily, of which there should be at least one news

programme no shorter than 20 minutes (Article 22 Law on Electronic Media). Twenty per cent of daily programmes must be in house productions, out of which 60 per cent must be aired during prime time. A minimum of 55 per cent of programmes have to be in the Croatian language (Article 27), and 51 per cent of imported programs should be European audiovisual works (Article 29). There are no other obligations placed on commercial television broadcasters in terms of positive programming obligations, except for those stipulated in the licence contract.⁹

Funding of the HRT

The public service channels, HRT1 and HRT2 are both financed by a licence fee, which remains the main source of their funding. The channels are also allowed to carry nine minutes of advertising per hour to supplement the licence fee. In 2002 the licence fee represented approximately 57 per cent of total revenues received by HRT, with 36 per cent from advertising revenues and the remaining 7 per cent derived from other sources. The level of the licence fee is fixed in the Law on Croatian Radio and Television as 1.5 per cent of the average net monthly salary in Croatia (in 2005 the monthly licence fee was €8.50). The total revenues of HRT in 2004 amounted to €186 mill with the licence fee contributing 60 per cent of this amount.

Newspapers

There are no positive regulations placed on newspapers. There is also a strong regional press sector relative to the overall market. Key national titles are set out in the table below.

Table 6.2: Newspaper circulation, March 2005

Title	Circulation	Market Share 2004
Večernji list	135000	35.62%
Jutarnji list	114000	30.08%
Slobodna Dalmacija	43000	11.35%
Novi list	29000	7.65%
Sportske Novosti	19000	5.01%
Glas Slavonije	13000	3.43%
Glas Istre	12000	3.17%
Vjesnik	7000	1.85%
Dnevnik	5000	1.32%
Zadarski List	2000	0.53%
Total	379000	100.00%

Note: Based on estimates. Source: World Press Trends, 2005

Italy

All terrestrial broadcasters in Italy are subjected to a number of statutory public service obligations, including some positive programming requirements. The degree of public service obligations varies according to the nature of the individual broadcaster. RAI, the public broadcaster, faces the most stringent requirements, followed by the other national commercial broadcasters. The general programme principles governing broadcasting are laid down in the “Single Chart for Radio and Television Broadcasting” (hereinafter the Chart), consolidating and coordinating current broadcasting legislation. The Chart was enacted as a legislative decree in July 2005. Under the Section General Principles, it affirms the principles of political and cultural pluralism, of objectivity and impartiality in news reporting and diversity in programming, which, together, provide the normative rationale for content regulation in broadcasting.

⁹ Since 2004 RTL and CME, own both national commercial channel franchises. The daily press sector also has a significant share of foreign ownership, with strong shares of WAZ and Styria.

Table 6.3: Italy broadcasters' audience share (%)

Channel	1991	1996	2001	2003	2004
RAI1	21.6%	23.2%	23.8%	23.6%	23.0%
RAI2	18.9%	14.8%	13.5%	12.2%	12.2%
RAI3	8.9%	9.9%	9.6%	9.4%	9.1%
Total RAI	49.4%	47.9%	46.9%	45.2%	44.3%
Canale5	16.3%	21.3%	23.6%	23.0%	22.5%
Italia1	11.1%	11.9%	10.3%	11.9%	11.6%
Rete4	10.6%	9.1%	9.4%	9.0%	9.0%
Total Mediaset	38.1%	42.3%	43.3%	43.9%	43.0%
Other	12.5%	9.8%	9.8%	11.0%	12.8%
Total	100%	100%	100%	100%	100%

Source: Auditel 2005

Content obligations

RAI

Pursuant to Article 45 (1) of the Chart, “the general public broadcasting service licence is granted to a public limited company, which operates on the basis of a national service contract, which is stipulated with the Ministry of Communications, and regional and provincial service contracts, as with the autonomous provinces of Trento and Bolzano, which lay down the rights and obligations of the licensee. These contracts are renewed every three years.”

The remit and programme obligations of the public broadcasting service are defined in the Chart and, more extensively, in the national service contract. Article 7(4) of the Chart stipulates that the public broadcasting service licensee is required to fulfil, as part of its overall programme schedule, additional public service broadcasting duties and obligations (i.e. additional to those already provided by the law for all broadcasters) in order to promote “instruction, civil conscience, social progress, and the Italian language and culture, safeguarding national identity and guaranteeing socially useful services.”

A list of general requirements follows under Article 45 (2). With particular reference to programme obligations, RAI is required under the law to guarantee inter alia:

- an adequate number of radio and television programmes devoted to education, information, training, promotion of culture, promoting as far as possible theatrical, cinematographic, television, and musical works, including works in the original language, which are recognised as being of great artistic or value or highly innovative. These programmes must be shown in all time slots, including prime time, and on all television and radio programme schedules according to the principle of proportionality;
- access to programming for parties and groups represented in Parliament and in regional assemblies and councils, organisations associated with local authorities, national trade unions, religious denominations, political movements, political and cultural bodies and associations, legally recognised national associations of the cooperative movement, social welfare associations entered in the national and regional registers, ethnic and language groups and such other groups of substantial social interest as may request access;
- broadcast of children's programmes in appropriate hours, bearing in mind the needs and sensibilities of early childhood and adolescence.

As already mentioned, more detailed programming requirements for RAI are established under the national service contract, including some quantitative thresholds (e.g. children's programming and programming for the disabled). The current contract expired at the end of 2005. The Chart (Article

45(4)) prescribes that before the end of each three-year period, a joint resolution adopted by the Communications Guarantee Authority and the Minister for Communications sets guidelines for the renewal of the contract, and any new general public broadcasting service obligations, bearing in mind market developments, technological progress, and national and local cultural needs.

Commercial broadcasters

General programming guidelines for terrestrial broadcasters are found in primary legislation. Pursuant to Article 4(1) of the Chart, broadcasting regulation guarantees non-discriminatory access by viewers to a wide mix of news information and content offered by a plurality of local and national broadcasters. As far as news is concerned, Article 7 of the Chart defines information provided on radio and television by subjects authorised to provide content at national or local levels on terrestrial frequencies as a service of general interest to be carried out in accordance with a number of general principles, which include:

- truthful presentation of facts and events;
- ban on sponsorship of news broadcasts;
- an obligation to provide daily television and radio news broadcasts;
- equal and impartial access to news programmes and electoral and political broadcasts by all political subjects;
- a ban on techniques surreptitiously manipulating news content.

National regulation also provides for a number of additional positive programme requirements (not related with news provision) that terrestrial broadcasters are required to fulfil as part of their overall programme schedule, in particular in the area of children's programming.

Production obligations

The only production obligations applying to television broadcasters are those derived from European community rules. In accordance with these, Article 6 of the Chart prescribes "television content providers" to promote "the development and the promotion of European audiovisual productions [...]" and reserve most national transmission time to European works, which includes the time set aside for sports events, television game shows, news, advertising, debates and teleshopping." Dispensation from this rule may be authorised, on application, by the Communications Guarantee Authority.

Funding of RAI

The licence fee represents approximately 60 per cent of RAI's total revenues (€ 2.8bn in 2004). Commercial earnings cover the remaining 40 per cent. The level of the licence fee is set by the Government. Pursuant to Article 47(3) of the Chart, by the end of November each year, the Minister for Communications issues a decree establishing the cost of the licence fee for the following year, as of 1st January, bearing in mind the expenses that the public service licensee is expected to incur in fulfilling the specific general public broadcasting service obligations for the year in question, as can be deduced from the previous balance sheet, the rate of inflation, and the needs of technological development.

The licence fee for a colour television household was €99.6 in 2005, a fee of slightly over €8 per month, much lower than the Western European average. The Ministry of Communications has recently decided not to grant RAI any increase in the level of the licence fee for the year 2006. The level of the licence fee has remained fixed since 2004. The widespread phenomenon of licence fee evasion among Italian television households further weakens the public funding regime of the Italian public broadcaster. Most of RAI's commercial earnings derive from advertising. Article 45(5) of the Communications Act 2004 authorises RAI to pursue commercial activities, provided that they are not detrimental to its public service remit.

Newspapers

Apart from legal issues such as defamation and right of reply, the press sector is essentially free of any constraints or positive regulatory measures.

Table 6.4: Press circulation: the top-10 newspapers by daily average circulation (2003-2005)

Title	2003	2004	2005**	Main Shareholder	Market share 2004
Corriere della Sera	680,976	678,833	672,525	RCS	11.8%
La Repubblica	625,008	625,599	620,169	L'Espresso	10.9%
Gazzetta dello Sport*	408,046	406,731	389,884	RCS	7.1%
Sole 24 Ore	393,967	373,801	350,431	Confindustria	6.5%
La Stampa	364,599	344,813	322,652	FIAT	6.0%
Il Messaggero	251,252	240,774	237,490	Caltagirone	4.2%
Corriere dello Sport*	271,732	237,754	236,061	Amedeo	4.1%
Il Giornale	214,403	208,451	205,161	P. Berlusconi Fin.	3.6%
Il Resto del Carlino	179,451	176,446	173,039	Monrif	3.1%
La Nazione	144,824	144,927	141,152	Monrif	2.5%
Total 10 titles	3,534,258	3,438,129	3,348,564		59.9%
Other	2,191,990	2,301,289	n.a		40.1%
Total	5,726,248	5,739,418	n.a		100%

Source: FIEG for total figures; Ads/Prima Comunicazione for figures on individual titles

Note: (*) excluding sales on Monday; (**) figures refer to the 12 months from September 2004-August 2005

The market is less concentrated than many other European countries and there is a diverse range of owners in the Italian newspaper industry.

Norway

Regulatory obligations

Broadcasting in Norway is regulated by the Broadcasting Act, which defines the general framework of obligations for both local and national broadcasters. This framework includes *inter alia* rules for the protection of minors, restriction on advertising, requirements for European content, national language and basic editorial principles. These basic editorial principles state that broadcasters who are issued a licence shall conduct their programme activities in accordance with the principles of freedom of expression and editorial independence.

Broadcasters who are issued a licence should act entirely independently of the owners as well as other interest groups. This requires schedules to have a broad range of themes and genres, reflected both in the composition of programme categories and in the composition within the individual programme category. Programmes should also contribute to the strengthening of the Norwegian language, identity and culture.

National television

NRK is the main public service broadcaster and has, according to the Broadcasting Act, a right to broadcast. Overall, public service provision should ensure a broad range of programmes characterised by high quality and diversity based on the principle of freedom of information and expression and basic democratic values. This includes objectivity, an analytical approach, editorial independence and impartiality. The second major broadcaster, TV 2 is a commercially funded public service broadcaster

that also has programme obligations established in the Broadcasting Act in a similar manner as NRK does.

The other major broadcasters are TV Norge, which is in effect a national broadcaster, but is nominally a local television network and finally TV 3, which is based in the UK and is as a result outside Norwegian jurisdiction and outside the regulatory framework.

Table 6.5: Television channels market share

Channel	Percentage share
NRK1	41%
TV 2	30%
TV Norge	10%
TV 3	6%
Other	13%
Total	100%

Source: Norwegian Media Authority 2005

Funding

The public service channels of NRK are financed by a licence fee, which remains the main source of funding. This fee is €245 per year. The remaining channels are commercially funded mainly by advertising revenue.

Newspapers

There are no content obligations placed on newspapers, aside from the restrictions of the Penal Code (hate speech, defamation etc). Most newspapers adhere to the ethical standards of Redaktørplakaten and FPU - self-regulatory institutions administered by industry itself. There is a strong regional press market in Norway that is reflected in the low relative market shares of the national titles.

Table 6.6: Circulation of the three biggest national newspapers

Titles	Circulation	Percentage share
VG	397,000	12.1%
Dagbladet	199,000	6.4%
Dagens Næringsliv	70,515	2.3%

Source: Norwegian Media Authority 2005

United Kingdom

All the terrestrial commercial broadcasters in the UK have public service broadcasting obligations that contain the principle of diversity in programming, and are regulated within a framework that obliges them to supply a service that is governed by a set of programme principles and guidelines that are required by law. As part of their contractual conditions, therefore, the free-to-air broadcasters are all regulated according to principles that aim to ensure a high quality mix of programming that reflects the needs and tastes of a diverse audience. The Communications Act 2003 (section 264) provides a general definition of the mandates of all of the generalist television channels. Free to air broadcasters in the UK, taken as a whole, should provide:

- a wide range of programming for viewers covering the interests and needs of different communities
- a balanced and impartial programme service
- high general standards and quality programming.

The requirement to provide a public service is applied differently to each broadcaster; there are degrees of public service obligations, with the BBC having the most responsibility as the main public broadcaster, followed by Channel 4. ITV and Channel Five have fewer obligations, covering regional productions and minimum programme requirements that include current affairs and news.

Table 6.7: UK broadcasters' audience share 1981-2004 (%)

Channel	1981	1986	1991	1996	2001	2003	2004
BBC1	39	37	34	33.5	26.9	25.6	24.7%
BBC2	12	11	10	11.5	11.1	10.9	10%
ITV	49	44	42	35.1	26.7	23.7	22.8%
Channel 4	-	8	10	10.7	10	9.7	9.7%
Channel Five	-	-	-	-	5	6.3	6.6%
Others	-	-	4	9.2	20.3	23.6	26.2%

Source: BARB 2005

Content obligations

BBC

Section 7, subsection (a) of the Royal Charter establishing the BBC states that the Governors should set and monitor a set of “clear objectives and promises for the Corporation’s services, programmes and other activities and monitor how far the Corporation has attained such objectives and met its pledges to its audiences”. In terms of the services that the BBC should provide, the Charter states that the objectives of the Corporation are essentially to entertain, inform and educate.

At the start of every financial year the BBC Governors set out the Corporation’s objectives for the coming year together with programme commitments. The framework that the BBC has developed to assess its own performance, and therefore its compliance with the Charter, encompasses both qualitative and quantitative measures. These measures cover a number of what the BBC calls Key Performance Indicators that are employed to aid the assessment and evaluation of the BBC’s overall performance. They include:

- breaking new ground in format, subject matter and talent
- leading viewers and listeners from accessible to more challenging programming
- reports on individual services by independent Advice Panels
- views at public meetings
- range of genres in peak time and across the day
- range of communities, regions and nations served and reflected in programming and content
- the provision of genres or programme formats which the commercial sector ignores or marginalizes.

These general tools employed to monitor the BBC’s performance as a whole include a set of wider measures that the BBC utilises to ensure that its service meets the needs and interests of the British audience.

Thresholds are not set for the percentage of genres to be broadcast on the BBC’s television services though the management board is responsible for ensuring that the schedule contains a mixed range of programmes. However, the Board of Governors must agree to accept the detailed budget submitted by the management, which includes a detailed account of revenues allocated to specific genres.

Commercial broadcasters

Content obligations for commercially funded broadcasters are set out in Section 265 (3) of the Communications Act 2003, which states the remit for Channel 3 and Channel 4 as “the provision of a range of high quality programming.”

Channel 3

A basic television service characterised by a mix of different programmes is required as a contractual condition for the Channel 3 licensees, which ensures that they provide a minimum range of programmes. These thresholds are supplemented with indicative targets for a wider range of programme genres.

Channel Five

Channel Five’s programme obligations are similar in certain respects to Channel 3. Its licence stipulates that the broadcaster must provide a television service that is characterised by a diversity of programmes. Under its legal requirements, Channel Five is obliged to provide a minimum of programmes in four areas: news, current affairs, religious programmes, and programming for children.

Channel 4

Channel 4’s remit is unique as it was established to provide for segments of the audience whose tastes and needs are not catered for in the services provided by the other UK broadcasters. Under Section 265, paragraph 3, of the Communications Act 2003, Channel 4 is required to provide high quality and diverse programming which, in particular:

- (a) demonstrates innovation, experiment and creativity in the form and content of programmes;
- (b) appeals to the tastes and interests of a culturally diverse society;
- (c) makes a significant contribution to meeting the need for the licensed public service channels to include programmes of an educational nature and other programmes of educative value; and
- (d) exhibits a distinctive character.

The channel has in past years reformed its multicultural programming strategies in order to cater for a wider audience. This has meant that it has moved away from providing niche programmes for minority groups towards a more generalist approach that seeks to represent groups in society within more mainstream programming. It also has additional requirements to provide schools programmes and minimum thresholds for certain kinds of programmes. In 2003/2004 these were a minimum of seven hours of education, four hours of news, four hours of current affairs, three hours of multicultural and one hour of religious programming per week, as well as 330 hours per year of schools programming.

Production obligations

The regulation of programme production for UK broadcasters is centred on two areas: investment both in original national and independent production, and compliance with the requirement in the Television without Frontiers Directive to transmit a majority of European works. Ofcom also has the power to ensure that the regulatory regime requires broadcasters to produce and distribute an “appropriate proportion” of original programming, to ensure each channel’s output remains of a high quality. Ofcom has the power to impose a more detailed framework at its discretion, in consultation with the relevant broadcasters under a co-regulatory framework.

Funding of the BBC

The Government sets the level of the licence fee. The current fee for a colour television household is €180.21 as of April 2004, a fee of a little under €16.40 per month in line with the current Agreement

with the BBC. The level of the licence fee is linked to the Retail Price Index¹⁰ (RPI) and marked, according to the agreement between the Government and the BBC, at 1.5 per cent above the rate of inflation as measured by the RPI. Under the current Agreement the BBC has also been obliged to undertake cost savings and develop additional revenues throughout the present funding agreement (2000/01-2006/07) of €1.64 billion. There are concessions to the full rate of the licence fee of 50 per cent for blind people and the 75 and above age group are granted a waiver. In 2003 the BBC received €543.61 million from the Department for Work and Pensions to cover the costs of these groups of viewers. A further €252.46 million is generated by commercial ventures BBC Worldwide Ltd. and BBC Resources Ltd.

Newspapers

There are no content obligations placed on newspapers in line with international practice. Apart from legal issues such as defamation and the self regulatory code of the Press Complaints Commission the press sector is essentially free of any constraints or positive regulatory measures.

Table 6.8: National press circulation share (Net sales) October 2002-2005

Title	October 2002	October 2003	October 2005	Owner	Group Market share 2005
Sun	3,612,258	3,458,269	3,224,427	News Corporation	32.6%
Daily Mirror	2,095,125	1,943,382	1,684,660	Trinity Mirror	17.8%
Daily Star	856,691	908,037	820,028	Northern & Shell	6.8%
Daily Record	531,344	503,668	454,247	Trinity Mirror	See above
Daily Mail	2,249,751	2,359,074	2,350,694	Associated Newspapers	19.5
Daily Express	929,877	885,721	810,827	Express Newspapers	6.7%
Daily Telegraph	922,069	890,274	901,667	Telegraph Group	7.4%
The Times	637,453	588,860	703,492	News Corporation	See above
Financial Times	422,749	412,781	419,249	Pearson	3.5%
Guardian	388,538	375,494	403,297	Scott Trust	3.3%
Independent	184,309	198,177	267,037	Independent News & Media	2.2%
Total	12,830,164	12,523,737	12,039,625	Decrease 2002-2005 of 790,539 net sales (6.2%)	99.8%

Source: ABC 2005

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¹⁰ The Retail Price Index is the method used by the Government to measure inflation and is based on a system that monitors fluctuation of high street prices of a range of products.