

*A research anthology from Nordicom*

# **Public Service Media** **from a Nordic Horizon**

**POLITICS, MARKETS, PROGRAMMING AND USERS**

Edited by Ulla Carlsson



Public Service Media  
from a Nordic Horizon



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Politics, Markets, Programming and Users

Ulla Carlsson (ed.)

NORDICOM

*Nordic Public Service Media Map 2*

## Public Service Media from a Nordic Horizon Politics, Markets, Programming and Users

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The Nordic Ministers of Culture have made globalization as one of their top priorities, unified in the strategy: “Creativity – the Nordic response to globalization”. The aim is to create *a more visible Nordic Region, a more knowledge-based Nordic Region and a more prosperous Nordic Region*. This publication is part of “Creativity – the Nordic response to globalization”.

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# Foreword

The media are among the most powerful societal forces of our time. Whether we study the political, economic, social or cultural sphere, we cannot disregard their relation to the media. Questions concerning the contemporary media landscape in general, and the public service media in particular, are indisputably complex. Media market actors, politicians and researchers are all looking for the answers. This is largely a matter of the struggle between various driving forces, such as market demands, political will and technological advances. This struggle is taking place on several arenas – the national, European, international – in our age of globalization.

The Nordic countries have a tradition of strong support for their public service media and have also developed public service models that are characterized by their relatively small size and small populations. Moreover, the companies have many years' experience of collaboration within the region – particularly with regard to coproduction of programs.

On the contemporary international arena, within organizations such as the UN and UNESCO, there exists a fundamental conviction that public service media – which are neither commercial nor state owned and which are free from political influence – foster well-informed and enlightened citizens and therefore constitute a cornerstone of democratic development.

When models of public service media are discussed, the British BBC often comes to the fore, but there are few countries today that can look to the BBC as a realistic model for development of their own public service media. Instead, well-tested models from “small” countries are sought. This is what makes Nordic Public service media interesting from a global perspective. Given this interest, Nordicom has carried out extensive work in the area of public service media organization, content and audiences in the Nordic countries. The results of these efforts include recent research findings and statistical overviews – all within the frame of what we have chosen to call *A Nordic Public Service Media Map*.

Our aim is to elucidate a framework for public service media in the Nordic region, showing how the concept of public service media is operationalized in terms of the growth of democracy, the public space, media pluralism, cultural diversity, gender and social tolerance. The vitality of any democracy depends on well-informed and knowledgeable citizens who take a critical approach. This is, thus, largely a matter of being a competent citizen. It is the users – the citizenry – that is in focus.

It is our hope that 'A Nordic Public Service Media Map' will make a meaningful contribution to the work being done on the role the media play in democratic societies around the world. At the same time, Nordic media, too, are involved in a learning process, evolving – as always – in response to the changing environments in which they operate.

Nordicom is part of the Nordic knowledge society – the knowing North. It makes the Nordic region visible, especially on the European and global arena. The work done at Nordicom aims to stimulate knowledge development concerning the role and conditions of the media in the era of digitalization and globalization, and to do so from the various Nordic perspectives. The Nordicom project a 'Nordic Public Service Media Map' is being conducted within the framework of the globalization strategy of the Nordic ministers of culture – a strategy called "The Creative North."

The present publication is the second one to emerge from this Nordicom project entitled *Public Service Media from a Nordic Horizon. Politics, Markets, Programming and Users*. The book contains a number of qualified analyses of public service media carried out by Nordic media scholars.

We wish to express our sincere gratitude to everyone who has contributed to this book, and I hope it in turn will contribute useful knowledge about public service media the world over.

Göteborg in February 2013

Ulla Carlsson  
Director  
Nordicom

# What's so Special about Nordic Public Service Media?

An Introduction

Christian S. Nissen

“Why are you Nordic Public Service Broadcasters so special?” an Eastern European colleague asked me sometime in the 1990s after the fall of the communist regimes. Having experienced tight government control in his own country, he could not hide his envy of the Nordic public broadcasters, highlighting liberal regulation and editorial autonomy vis-à-vis the government in spite of the one hundred per cent public funding. The strong market position of the Nordic public broadcasters and their close cooperation were also a source of mystery. “While we Eastern Europeans are desperately trying to get as far away from each other as possible, you Nordic broadcasters are working together and are also taking common stances within the European Broadcasting Union (EBU) as *The Nordic famiglia*, he added with a smile and a slight Sicilian accent, asking for some kind of an explanation of this paradoxical Nordic utopia.

Years later, I was met with parallel, although more worrying concerns when addressing an American audience and describing the media systems in the Nordic countries – the dual model with “state-owned” companies dominating a competitive media market. Given the marginal roles of the US “National Public Radio” (NPR) and PBS television, many of my hosts saw the Nordic model in some respects as a scary legacy of the Cold War and the former Soviet empire. “To me it sounds like you are talking about the North Korean media. Have you never heard of “the open society”, or are the principles of the First Amendment completely unknown where you come from?” said one member of the audience when summing up her concerns.

Both these reactions are quite understandable. The two observers certainly identified some of the characteristic features and yet overlooked other key ingredients of the “Nordic media model”: the unique form of public service broadcasting found in Iceland, Sweden, Norway, Finland and Denmark, which account for little more than 3% of the European population.

Given the diminutive size of the Nordic countries as well as their social and political stability and high level of economic welfare, the Nordic public broadcasting system has also been an enticing source of inspiration for many smaller, less-developed countries on other continents trying to establish their own national media systems. For many years, experienced radio and television journalists and management staff from Nordic public broadcasters have been working as advisors in Asian, African and South American countries, assisting local colleagues in their attempts to cultivate relevant elements of the Nordic Public Service Media (PSM) model in virgin and unfamiliar soil. Although some of this work has had many positive outcomes in specific areas, one can hardly claim that it has resulted in the establishment of sustainable public service media systems broadly in line with the fundamentals of public service in the Nordic countries.

Regardless of whether one considers such attempts relevant or a bit naïve, the Nordic public service model itself seems to be somewhat mysterious. This is the perception not only among those it inspires in less developed countries, or the Eastern European broadcasting manager and the concerned Americans mentioned earlier. It is also difficult to understand for media professionals in the Nordic countries themselves and even more difficult to explain to non-Nordic media professionals. A widely-used shortcut when explaining Nordic PSM is to focus on very broad characteristics such as a unique and shared historical background, very special cultural circumstances and so forth, often combined with a smug, condescending overtone of “don’t even think of implementing this model in less fortunate societies”.

When viewed from this perspective, there is a great need for a book that avoids the piecemeal shortcuts and that has chosen the more arduous route of describing and explaining a wide range of the pieces that make up the Nordic PSM puzzle. Some of the patterns in this puzzle are only applicable to the special Nordic setting, while others may have implications in a broader international context – or have to be revealed or qualified as misconceptions and myths. That’s what the book is about. As an introduction to the Nordic puzzle, some of its key elements can be described quite briefly.

#### *Technically Advanced and Stable Political Systems*

First of all, the five Nordic countries are technologically advanced and affluent countries when measured in GNP per capita. Probably more important, this wealth is more equitably distributed among the citizenry than is the case in most other parts of the world. In return for relatively high taxation, there is free access to education, health and social services – a phenomenon that has often been labeled “the welfare society”. Compared to many other countries, unemployment levels are low even during periodic economic recessions. All in all, the Nordic countries are stable societies.

Stability also characterizes their political systems. Underneath the surface of in-fighting and on-going quarrels between political parties, there is a broad consensus on most basic political issues. This results in a collaborative culture close to the corporative, also in relation to other significant societal stakeholders, such as the labour movement and industry. Because governments are usually coalitions of several political parties and because they seldom last for more than one or two election periods, both the governing parties and the opposition are well aware that they will have to change roles at regular intervals and moderate their policies accordingly.

### *Cultural Homogeneity and High Societal Trust*

Second, the Nordic countries – when viewed individually and collectively – are so culturally homogeneous that foreigners find it difficult to differentiate among them. The role of the family, gender attitudes and employment patterns are very similar. The Nordic national languages – with the exception of Finnish – are so closely related that they are mutually intelligible, making them ‘neighbour’ rather than ‘foreign’ languages.

For more than one hundred years there has been a special Nordic tradition of non-formal public, adult education (“folkeoplysning”) focusing on citizens in society and their cultural heritage. This is in many ways characterized by a societal ethos close to the basic values of public service media formulated by the first BBC director general John Reith. This might also explain the peculiar combination of public trust and lack of respect for formal authority. On the one hand, there is a predominant trust in the role of the state and the public sector in Nordic societies that is accompanied by a high degree of accountability. On the other hand, citizens show a healthy lack of respect for institutional authorities. The Nordics are considered (and consider themselves) citizens in a society rather than mere consumers in a public market, although this attitude may be waning.

Taking into account the homogeneity and small populations of the Nordic nations (all in all some 25 million inhabitants) and their long, common history and close cultural ties, an Indian anthropologist many years ago hit the nail on the head when suggesting that the Nordic region was inhabited by a cultural tribe rather than by ordinary nations.

### *Nordic Public Service Media*

This ultra-short description of the Nordic societies leads in to a brief description of some of the characteristics of their public service media environment. As in many other European countries, the radio services in the Nordic countries were established in the 1920-30s as public monopolies funded with revenue from a licence fee. This was a pragmatic solution to the scarcity of

frequencies and was in line with other public services: post and telegraphy, railroads, hospitals and so forth. From a cultural policy perspective, radio was conceived of as a new educational institution that was a natural complement to the above-mentioned Nordic tradition of adult education. Broadcasting enabled educators to reach out to the most remote and isolated corners of each country.

### *Editorial Autonomy Came Late*

To begin with, little attention was paid to the question of editorial independence from parliament and government. As a matter of fact, the politicians did not only decide on programme policies. On occasions they were involved in micromanaging specific programmes and had a say in staff appointments. In the decades following the Second World War, this control was gradually loosened partly in response to the harrowing experiences with “state radio” in Nazi Germany and the communist countries. Gradually, a BBC-like governmental model evolved that also shared roots with a general Nordic publicist tradition in media businesses, drawing a clear line between the owners of media enterprises and the editorial staff. The current public service media arena in the Nordic countries is characterized by a relatively low degree of political interference in PSM editorial autonomy. At least that is the acknowledged norm. As will be seen later on, it is an ideal that is not always adhered to.

### *Broad Political Support for Public Media*

A further important feature of the Nordic public media environment is the general and broad political support for the PSM ideal, although some disputes of an ideological or tactical nature can be found from time to time concerning the public service remit, obligations and scope. For some of the liberal conservative parties, it is a thorn in the flesh that thirty years after abandoning their monopoly, PSM still have a market position seldom seen in other countries: a radio share of listeners around 50-65% and a share for television of 30-45%. In each of the Nordic countries, PSM portals on the Internet rank among the top in terms of number of visitors.

This position of course has been challenged by commercial media in all of the Nordic countries. As is the case elsewhere in Europe, there is a recurrent debate as to whether, concerning their programming, the public service stations have gone too far in a populist direction to defend their position in the market. When assessed in terms of their news and current affairs output and in areas such as drama production and the highly prioritized children’s programming, the Nordic public broadcasters can be deemed, by international standards, to be unusually faithful to their public service ideals. This is prob-

ably part of the reason why they have such broad support across the political spectrum.

### *Close Cooperation Among the Nordic PSM Companies*

One contributing factor explaining how it is possible for five small countries to maintain strong public service broadcasting is the extraordinarily close cooperation among the Nordic public service organizations. For over fifty years they have exchanged programming and developed and co-produced a broad range of television programmes. Besides sustaining important elements of their common Nordic culture, this cooperation has also offset the disadvantage of the relatively limited funding and helped public media organizations provide a large amount of Nordic produced quality programming.

Nordic cooperation goes far beyond programming. The Nordic director-generals and their staffs meet frequently to coordinate strategies, common initiatives and their stance on policies within the European Broadcasting Union (EBU) and in relation to the EU in Brussels. The dramatic organizational and operational changes resulting from digitalization, which has taken place during the past decades, have evolved along much the same lines in the five countries due to these tight relations and a common understanding of the challenges faced by public media in the Nordic and European arena.

### *Paradise Lost?*

Many readers with experience from other regions might regard this description of the Nordic public media arena as a fairy-tale from some ideal public service wonderland. When analysing PSM up close, however, a number of additional traits and trends should be taken into consideration to get a complete picture.

### *Nordic Public Media have Adjusted to Market Competition*

First, it should be underlined that, in the years following abolition of the monopoly, all of the Nordic PSMs lost market shares and their total market dominance. As mentioned earlier, this change has led to a shift in their programme policies. In all five countries, the issue of whether competition for market shares has led the public media to relinquish some of their cultural and societal ideals has cropped up again and again. Basically the debate on this theme is very much in line with what has taken place in other European countries. It is an issue with no simple solution. On the one hand, why support public media if the programming offered is indistinguishable from that of commercial media companies. On the other hand, there is little “public value” in public media providing content of the highest quality if only a frac-

tion of the public make use of the programmes and content on a regular basis. Generally speaking, market competition has taught – some would probably use the word “forced” – the public media companies to be more open to the demands and needs of the public that provides funding and represents the ideological foundation of public media.

#### *Influence From the International Media Environment*

Second, changes in Nordic PSM are part and parcel of broader, more general developments in the international media market. While in many respects the Nordic media region can be seen and should be understood in a specific Nordic context, change is increasingly the result of developments in the international media market. A considerable proportion of the programming in Nordic television channels, both public and private, is of international (especially Anglo-Saxon) origin. This concerns either programmes and TV series themselves or remakes of well-established international formats. Globalization in the form of satellite and cable transmission and broadband Internet penetration has led to the use of foreign television channels and online services with ever-increasing accumulated market shares. With the priority given to domestic children’s TV programming by governments and parliaments and by the public broadcasters themselves, the fact that young audiences now are the group least loyal to the Nordic channels and watch more foreign, non-Nordic television than domestic programmes is seen as a serious cultural challenge.

#### *International Regulation is Closing in on the Nordic PSM Biotope*

The international influence on Nordic media does not confine itself to content issues. The European Union competition regulation of the television market in general – and public media in particular – has not (yet) led to serious intervention in the Nordic region governing state aid and the controversial issues of the public service remit. But EU regulation, such as the two-step ex ante test (“Public value test” and “The market impact assessment”), combined with increasing pressure from commercial media to narrow the scope of the PSM remit, especially as regards online activities, constitute a potential threat to the future development of the Nordic public service media. While many strict formal directives from Brussels are often transposed into softer Nordic versions, the EU certainly does have a long-term impact on Nordic legislation. In addition, there is a degree of self-regulation on the part of Nordic PSM players who to a certain extent voluntarily align their activities with EU regulation in an attempt to avoid strict national legislation. We – the Nordic peoples – like to regard ourselves as independent, brave-hearted Vikings, but in our heart of hearts we often have to admit that our actions are more like those of pragmatic merchants.



*Editorial Independence is Always at Stake*

Finally the above-mentioned relative absence of direct political interference in the operations and governance of the Nordic public broadcasters needs some qualification. The so-called “arm’s length” principle – securing a certain distance between political authorities and the day-to-day operations of cultural institutions – is a generally appreciated and accepted governance norm in all Nordic countries, also when it comes to public service media. Here the general publicist principle of keeping the owners of media out of the editorial processes is of special importance, because the owner is represented by the state whose activities are often the very target of critical investigative journalism.

The arm’s length principle is easier said than done, especially at times when the battle to influence public opinion is central to all political actors and is fought with well-staffed communication departments and spin doctors both in government and the political parties. Governments – also in the Nordic countries – are tempted to consider the national public service broadcaster as just another part of their arsenal of communication weapons. They find it difficult to accept “a stab in the back” by “their own broadcaster”. All Nordic director generals and their heads of news departments can recall ministers making angry phone calls or having dragged them into a corner during a meeting demanding to be given airtime to correct all manner of perceived misdeeds.

It is, however, very seldom that such episodes are brought out into the open or result in public scandals. From time to time Nordic governments do put their public broadcasters under pressure, but they do not shoot the bearer of bad tidings, as is seen in other less fortunate countries. Neither can the editorial staffs of the Nordic public broadcasters be forced or commanded to align their activities with government policies. However, the threat of sanctions rather than the sanctions themselves is often far more effective and leads to the risk of insidious self-censorship.

The general relationships and dependencies between politics and the media in the Nordic countries are basically the same as elsewhere, albeit somewhat less destructive. The workings of political systems are somewhat more discrete and subtle. Very few members of the public know that while Nordic director-generals are rarely fired at short notice due to disagreements with governments, few of them hold their positions for extended periods or get reappointed for a new term if they are not “in tune” with the government of the day.

This special Nordic way of dealing with such delicate issues is probably due to features like the relative high transparency of the Nordic countries, the maturity of their political culture and their strong civic institutions. These pillars for sustaining healthy democracies were founded and developed in the Nordic countries over a long period, from the late 19<sup>th</sup> to the middle of the 20<sup>th</sup>

century. It is rather ironic that such pillars, praised and envied by many other countries, are now at risk in the post-modern era of the 21<sup>st</sup> century. Regardless of whether this view is overly pessimistic or not, it is still relevant to ask whether lessons can be learned and whether elements from the Nordic public service model can be transferred to other countries.

*Are Elements of the 'Nordic PSM model' Transferable?*

The question of transferability is an issue often asked by media people from other countries seeking advice from Nordic colleagues. It is not easy to give a coherent answer. Take, for instance, the wording of legislation for media regulation. Many other countries have established “independent” regulatory bodies that, on paper, are not so very different from what exists in the Nordic countries. The way in which media regulation operates in the “real world” is, however, quite different. Those aware of this disparity can choose a somewhat “holier-than-thou” attitude and point to the strong position of civil society and the long tradition of transparency in the Nordic countries. Neither of these cultural elements can be easily transferred to other regions. Or one could try to identify specific elements of governance and operational practices that could be adapted and introduced elsewhere by countries looking for ideas for their own reforms. This pragmatic approach might well be the most fruitful, if for no other reason than to demonstrate that alternatives to tried and (dis-)trusted solutions do indeed exist and can serve as an inspiration for reform.

Judge for yourself by reading this book.

# The Challenge of Public Service Broadcasting in the Nordic Countries

Contents and Audiences<sup>1</sup>

Taisto Hujanen, Lennart Weibull & Eva Harrie

Public service broadcasting is an integrated part of the Nordic political democracy. It is closely linked to the democratic traditions of the individual countries. The introduction of both radio and television came later than in most of Europe. Regular radio transmissions in the Nordic countries started first in the mid-1920s and television around 1950 or later. Both for radio and television Denmark was first, although by only about a year. One important reason for the Nordic countries being late was that their politicians wanted to look at experiences from other countries before deciding on their models (Bruhn Jensen 1997, Lyytinen 1996, Syvertsen and Skogerbø 1999, Hadenius 1998, Djerf-Pierre and Weibull 2001). In all countries there was public interest in organizing the new technologies in line with political and cultural traditions. Both radio and television were regarded as parts of the national democratic development, reflecting the traditions of a close relation between politics and the press, the so-called political parallelism (Hallin and Mancini 2004). Whereas the press was divided along party lines, the new public service media were organized along the lines of internal pluralism, i.e. governed by all parties as a collective, and thus they became a contrast to the old party press.

In the early 1960s, the radio monopoly, especially in Denmark and Sweden, was challenged by pirate radio broadcasting from ships, but this was stopped by new legislation. Ten years later, private radio in the form of non-commercial community radio was permitted, in the 1970s, but its format did not attract large audiences and, consequently, it did not become a serious competitor to the national and local public service channels. However, since the middle of the 1980s and early 1990s, private commercial radio too has been licensed. Most new radio channels were formally local, Norway's P4 (an early national commercial channel) launched in 1993 being the exception, but the

predominant tendency was that local stations soon formed, informal, national or semi-national networks.

In the present chapter, we aim to look into the consequences of the introduction of private radio and television for the standing of public service broadcasting. In the research literature, this transformation is often characterized in terms of increased competition in the media market, emphasizing changes in the media economy and media consumption, or in terms of both de- and re-regulation, pointing to ideological changes in media policy. Our focus is on the period 1990-2010. The year 1990 is a relevant starting point, because at that time there was little competition in television and even less in radio. The final year of the period, 2010, is characterized by digitalization of television with increased output of programmes and channels. Starting in the early 1990s, it is also possible to get comparable audience measurements for television, but the figures for radio still are difficult to use for making comparisons (Harrie 2009, 2012). It should be noted, however, that our approach is more institutional than functional.

## The Origin and Principles of Nordic Public Service Broadcasting

When Nordic public service broadcasting was established in the 1920s, the basic idea was that the state should decide only on the organization of radio – and later television, but that it should be organized in a way that guaranteed editorial independence with regard to programming. The principles of programming could be formulated differently, but their essence was that programmes should be characterized by a high cultural and artistic level as well as by reliability, objectivity and impartiality. Moreover, broadcasting should contribute to enlightenment and education. The economy should be based on license fees decided by the parliament or government, and the radio company should have a monopoly.

The formal organization varied somewhat across the five Nordic countries (Bruhn Jensen 1997, Lyytinen 1996, Syvertsen and Skogerbø 1999, Hadenius 1998, Djerf-Pierre and Weibull 2001). In Denmark, radio was organized as a public body, whereas in Sweden it was organized as a private company owned by the newspaper industry. Later the organizational forms changed, but radio and television were normally fused into the same kind of public service model.<sup>2</sup> This meant that all Nordic countries had radio and television companies that had a monopoly on national terrestrial transmissions, were organized as public service companies and funded by license fees (Carlsson et al. 1996). Only in Finland was there a time slot for a commercial programme company within the public TV channel, and an independent commercial TV network was licensed until the mid-1960s (Hujanen and Weibull 2010). Early

public service radio was regarded as a means to enlighten and educate Nordic citizens. Lectures were common and news played a very important role. Music was an important dimension of radio from the beginning, and gradually also entertainment programmes increased. Early television followed the same tradition. It offered serious programming and news mixed with entertainment programmes and American soap operas. In the beginning, television was not broadcast daily; in Sweden, it took until 1961 for daily television to arrive, and Iceland had television-free Thursdays until 1987. Iceland also had a television-free month in July until 1983.

During the 1950s and 1960s, the today's character of public service broadcasting gradually developed. The scope of its content became broader, and the role of both journalistic content and entertainment increased. The public service programming strengthened its independence by increasing its professional profile. The policy was that public service had an important democratic mission, meaning a focus on news, current affairs and culture, but it was thought that a broad content profile was important for its legitimacy as a radio and television service intended for the general public (Djerf-Pierre and Weibull 2001).

Both radio and television were highly popular media from the very start. Limited transmission time and problems of distribution did not hinder the rapid spread of radio in the 1920s and television in the 1960s. By 1970, television began dominating over radio as a taken-for-granted dimension of everyday life for news and entertainment. Radio adapted to the new situation by developing new channels, concentrating on news, culture and music, and while TV took over the evenings, radio found a new prime time in the morning. Soon the audience spent more time listening to radio than it had before the introduction of television. However, in the 1980s, the media landscape changed and the public service model was challenged. Satellite broadcasting via cable gradually undermined the dominance of public service, and by the 1990s, as we shall see, domestic private terrestrial television was also licensed in all Nordic countries and new private companies were established offering mostly entertainment programming.

On the surface, distinguishing between public service and private broadcasting might seem simple, but there are some important points to be considered. First, it is important to state that the present chapter is mainly restricted to the original national public service broadcasters – Danmarks Radio (DR) in Denmark, Yleisradio (YLE) in Finland, Ríkisútvarpið (RÚV) in Iceland, Norsk Rikskringkasting (NRK) in Norway and Sveriges Radio (SR)/Sveriges Television (SVT)/Utbildningsradion (UR) in Sweden – that is we focus on publicly owned organizations whose primary source of revenue is public funding (licence fees or special public service fees/tax).

It should be noted, however, that there are different kinds of public service status or obligations. For instance, Denmark has a mixed public service system

including a range of organizations with different ownership and financing. The largest of these is the state-owned TV 2, which is commercially financed by advertising and starting in 2012 also by pay-tv revenues. Other actors are funded via the licence fee system, such as the regional TV 2 stations, which are independent legal entities, and the nationwide radio channel Radio 24syv (privately owned, launched in November 2011). Other private media can also apply for funding of public service programmes via a special fund.

As a hybrid channel, TV 2 is not included here as a full public service, because it is commercially financed and has been, since its start in 1988, a clear competitor to DR in terms of the television audience (as the newcomer Radio 24syv has become a public service competitor on radio). In Norway, Norwegian TV 2 and two radio channels with nationwide concessions have certain public service obligations, though privately owned and commercially financed, and are not included here as public service.<sup>3</sup>

**Tableau 1.** Public Service TV Channels in the Nordic Countries 2011

Country	Channel <sup>1</sup>	Year established	Content profile
Denmark <sup>2</sup>	DR1	1951	Generalist
	DR2	1996	Generalist
	DR Update	2008	News
	DR Ramasjang	2009	Children
	DR K	2009	Culture
	DR HD	2009	Generalist/Youth
Finland	YLE TV1	1958	Generalist
	YLE TV2	1956/1965	Generalist
	YLE Teema	2001	Culture
	YLE Fem (prev. FST5)	2001	Generalist (in Swedish)
Iceland	RÚV	1966	Generalist
Norway	NRK1	1960	Generalist
	NRK2	1996	Generalist
	NRK3/Super	2007	Children/youth
Sweden	SVT1	1957	Generalist
	SVT2	1969	Generalist
	SVTB <sup>3</sup>	2002	Children
	SVT24 <sup>3</sup>	1999/2002	Reruns and news
	Kunskapskanalen (SVT/UR)	2004	Culture, science

<sup>1</sup> Simulcast only HD-channels not included (YLE, NRK and SVT).

<sup>2</sup> TV 2's main channel (established 1988) and the TV 2 regions (established 1989-1991) have public service status but are not included here. It can of course be debated. For our arguments view the text.

<sup>3</sup> SVTB (06h00-20h00) shares channel with SVT24 (20h00-06h00).

**Note:** Table shows nationwide output. Regional news are broadcast in windows in YLE TV2, NRK1/NRK2 and SVT1/SVT2.

**Sources:** DR, YLE, Statistics Iceland, NRK, SVT, Nordicom-Sweden.

**Tableau 2.** Public Service FM Radio Channels in the Nordic Countries 2011

	Channel <sup>1</sup>	Year established	Content profile	Main target groups <sup>2</sup>
Denmark <sup>3</sup>	DR/P1	1925	Talk radio with news, current affairs, talk shows	
	DR/P2	1951/2001 <sup>4</sup>	Classical music, jazz and culture	
	DR/P3	1963	Entertainment	Young people
	DR/P4 (incl. 11 regional channels)	1960-1982	Mix of national and regional programming	An older (40-60 years) audience
Finland	Yle Radio 1	1926/1990	The arts, science, culture and talk	
	YleX	1990	Popular music, popular culture, new music	Young people
	Yle Radio Suomi (incl. 20 regional windows <sup>5</sup> )	1965/1990	News, current affairs, regional programming, sport and popular music	Mature audiences
	Yle Puhe	2003	Talk radio featuring a collection of talk content and sport events coverage from YLE channels	
	Yle Radio Vega (incl. 5 regional windows <sup>5</sup> )	1961/1997	News, current affairs, culture and music	Swedish-language channel for mature audiences
	Yle Radio X3M	1997	News, current affairs, entertainment, popular music	Swedish-language channel for young people
Iceland	RÚV/Rás 1	1930	Generalist	All age groups
	RÚV/Rás 2	1983	Current affairs/popular culture/pop music	Young adults - middle aged
Norway	NRK/P1 (incl. 16 regional windows)	1933 (regions from 1957)	Regional reports, news, current affairs, music	
	NRK/P2	1984	Cultural radio station with news, debate programmes, analyses, social commentary	
	NRK/P3	1993	Music, comedy/entertainment, news	Young people (15-30 years)
Sweden	SR/P1	1925	Talk radio with news, current affairs and debate. Forum for drama, documentaries, arts, science	20-79 years
	SR/P2	1955	Classical and contemporary music, educational programmes, immigrant and national minority language programmes	20-79 years
	SR/P3	1964	Popular music, news, cultural and social programmes, entertainment	13-35 years
	SR/P4 (incl. 25 regional channels <sup>6</sup> )	1993 (regions 1987-1989)	News, sports, regional programming, music	30-79 years

<sup>1</sup> Principally analogue channels (via FM nets); most are also transmitted digitally (online, DAB, DVB), and some via cable and satellite.

<sup>2</sup> Target groups if and as stated in companies' channel descriptions.

<sup>3</sup> In November 2011 a new nationwide radio channel with public service status, *Radio24syv*, started airing on the fourth FM network (FM4), which was previously used by DR P2. *Radio24syv* is privately owned and has licence fee financing.

<sup>4</sup> DR acquired a fourth nationwide radio frequency, FM4, in 2001 (the former P2-channel shared a frequency with P4). From 1 Nov 2011 P2 shares FM-frequency with P1. P1 broadcasts mornings and during the day, and P2 evenings and nights. Both P1 and P2 are full channels, i.e. with broadcasts 24/7, on DAB and Internet.

<sup>5</sup> YLE transmits regional programming in three languages: 20 windows in Finnish in Yle Radio Suomi, five in Swedish in Radio Vega plus regional broadcasts in Sámi in parts of Lapland (YLE Sámi radio).

<sup>6</sup> SR also broadcasts two local channels in Stockholm (SR Metropoli) and in Malmö (Din Gata 100.6) established in 2007 and 2006, respectively. Mainly targeted to young people.

**Sources:** DR, YLE, Statistics Iceland, NRK, SR.

## Changes in the Broadcasting Landscape

The 1990s was a decade of change for Nordic public service media. In all of the Nordic countries, the radio and television markets were opened up for competition. For the public service channels, the most important goal was to find a strategy to handle the new challenges. Their strategy and profile had to be developed in relation to the commercial competitors.

### *Rapid Expansion of Commercial Television Channels*

The new radio and television competitors were introduced within the span of a decade, from the mid-1980s to the mid-1990s. In Scandinavia, the first competition came from satellite television, where the Swedish TV3 was launched in 1987 and was transmitted in Sweden, Denmark and Norway, broadcasting from the United Kingdom. Formally it did not challenge the public service channels, because it was not a terrestrial channel, but it attracted a substantial audience in cable-/satellite-connected households. However, the new channel influenced the attitude of the general public towards public service television, regarding the older channels as traditional (Djerf-Pierre 1986), thus paving the way for terrestrial commercial channels.

The timing of establishment of the new terrestrial channels differed across the Nordic countries (Hultén 1996). The first new television channel was the Icelandic Stöð2, established already in 1986, and financed by subscriptions and advertisements. In 1987, Kolmostelevisio (TV3) was introduced in Finland as a co-initiative of public and private television, and in 1988 Denmark's state-owned TV 2 – what we have called a semi-public service channel, at the time partly financed by license fees – was founded. Moreover, local commercial television was allowed in Denmark. In Sweden, cable distribution of satellite channels was permitted in 1988. After a tender in 1991, the private channel TV4 was given the right to terrestrial transmissions, starting in early 1992. The development in Norway was very similar. The attraction of the satellite broadcaster TV3 more or less forced national politicians to take quick decisions on commercial terrestrial broadcasting to keep advertising money from flowing abroad. Thus, a concession was given to the private company TV 2 in 1991. In Finland, the public service company YLE had been entitled to offer advertising-funded programme slots for the commercial programming company MTV since the beginning of its television operations. The present mixed structure was confirmed in 1993, when the MTV company was given a concession of its own under the name MTV3, and it was allowed to take over the third television network operated by Kolmostelevisio in 1987. The commercialization continued in 1997 with the introduction of another commercial generalist channel (Nelonen or Channel Four Finland).



**Table 1.** The Five Largest Television Channels by Audience Share in Each Country 1986-2011 (per cent)

	1986		1990		1995		2000		2005		2011	
	Channel	Share (%)	Channel	Share (%)	Channel	Share (%)	Channel	Share (%)	Channel	Share (%)	Channel	Share (%)
Denmark <sup>1</sup>	DR	100	TV 2 DR	47 45	TV 2 DR	42 28	TV 2 DR1	36 29	TV 2 DR1	36 28	TV 2 DR1	27 19
			..	..	Kanal 2	4	DR2 3+	3 3	TV3 3+	5 4	DR2 TV 2 Charlie	4 4
Finland	YLE TV1	(1987)	YLE TV1	33	MTV3	46	MTV3	40	MTV3	33	YLE TV1	23
	YLE TV2	35	MTV1&MTV2 <sup>3</sup>	26	YLE TV1	25	YLE TV1	23	YLE TV1	25	MTV3	22
	MTV1&MTV2 <sup>3</sup>	29	YLE TV2	21	YLE TV2	20	YLE TV2	20	YLE TV2	19	YLE TV2	17
	Kolmostelevisio	4	Kolmostelevisio	13	YLE FST1&2 <sup>4</sup>	2	Nelonen	12	Nelonen	11	Nelonen	9
	YLE FST1&2 <sup>4</sup>	3	YLE FST1&2 <sup>4</sup>	3			Subtv	1	Subtv	4	Sub	6
Iceland <sup>2</sup>	RÚV	..	RÚV	61	RÚV	49	RÚV	42	RÚV	44	RÚV	49
	Stöð 2	..	Stöð 2	39	Stöð 2	47	Stöð 2	36	Stöð 2	34	Stöð 2	35
					Skjár 1		Skjár 1	15	Skjár 1	17	Skjár 1	8
Norway	NRK	100	NRK TV 3 TVNorge	79 6 6	NRK TV 2 TVNorge	43 31 8	NRK1 TV 2 TVNorge	38 32 10	NRK1 TV 2 TVNorge	40 29 11	NRK1 TV 2 TVNorge	32 19 8
					TV3	6	TV3	8	TV3	6	TV3	5
					TV+	1	NRK2	3	NRK2	4	NRK2	5
Sweden	SVT1	57	SVT2	48	TV4	28	TV4	27	TV4	23	SVT1	23
	SVT2	43	SVT1	38	SVT2	26	SVT2	24	SVT1	24	TV4	20
			TV3	6	SVT1	25	SVT1	20	SVT2	14	TV3	7
			TV4 <sup>5</sup>	2	TV3	9	TV3	11	TV3	10	SVT2	7
			Kanal 5	1	Kanal 5	4	Kanal 5	6	Kanal 5	9	Kanal 5	7

*Italics: Public service TV channels*

.. Data not available

<sup>1</sup> TV 2 Denmark's main channel TV 2 has public service obligations.

<sup>2</sup> Audience shares not available until 1990; RÚV's daily reach in 1986 was 98%, in 1988 68%. Stöð 2 (launched in 1988) had 42% daily reach in 1988.

<sup>3</sup> MTV1 & MTV2: MTV's programming on YLE TV1 & TV2.

<sup>4</sup> YLE FST1 & 2: Programming in Swedish on YLE's TV1 & TV2 (YLE FST = Finlands Svenska Television)

<sup>5</sup> TV4 started services in September 1990 (satellite distribution).

**Note:** Different methods have been used, which impairs comparability between countries and years.

**Sources:** DR, TNS Gallup Denmark, Firmpanel and YLE Audience Research, Social Science Institute at University of Iceland (1986, 1995), RÚV, Capacent (2000, 2005, 2011),

NRK, MMI Norway, TNS Gallup Norway (2000-), SR/PUB, IMMS.

When the television landscape began to change in the late 1980s, the national public service channels were operating under somewhat different conditions. In Denmark, Iceland and Norway there was only one public service channel, whereas Finland and Sweden had two channels. In Sweden the public service TV company SVT could focus on television due to the separation of radio and television into different public service companies that took place in 1993. In contrast, the Danish public service broadcaster DR was one company and, furthermore, lost some of its traditional income to the national competitor TV 2, because the latter received a portion of the license fees.

The introduction of commercial terrestrial television in the 1990s was only the first step in changing the television landscape. The expansion of satellite television distributed in cable networks or by individual household subscriptions opened the door for new channels, both national and international, to be received in the Nordic countries. At the same time, the must-carry principle secured the wide distribution of public service channels in the expanding cable networks. The digitalization of television during the first decade of the 21<sup>st</sup> century meant that the number of television channels increased dramatically on satellite and cable platforms, and many of these channels were theme and target-group oriented. With the expansion of satellite and cable platforms, and later on a wider offer of channels distributed on digital terrestrial platforms, people's access to new national as well as international channels, and free as well as paid-for channels gradually increased, implying a situation of tough competition for the national public service channels. The digital development also opened the door to more public service television channels.

In Table 1 we observe the changing structure of the five largest channels in terms of audience. Looking at the situation in 2011, the two leading channels are one public service and one commercial private channel – Denmark being the exception with TV 2, which is a semi-public service channel, although commercially financed. Iceland, Finland and Norway have the highest total share for public service channels (from 49 to 37 per cent). There are some interesting tendencies over the period 1986-2011 across the individual Nordic countries. Shortly after its start, the semi-public channel TV 2 in Denmark became the largest national channel and in 2011 it is still the largest. In Finland and Sweden, the commercial channels MTV3 and TV4 very soon passed the public channels YLE1 and SVT1, respectively, but in 2011 the public channels are back as market leaders, partly because they had changed their content strategies (see below). In Iceland and Norway, however, the public channels have kept their leading position during the whole period, although the gap has narrowed.

### *Changing Channel Profiles*

The new situation required strategic decisions from the public service broadcasters. It was important to develop a public service profile in terms of both

the number of channels and the nature of their content. In Denmark and Norway, with only one public service channel each, the first step was to establish a second one, which was decided in the mid-1990s. The second step was to develop content profiles. In Sweden it was decided to abolish the principle of competition between the two public service channels, making it easier to compete with the commercial channels through the increased coordination between SVT1 and SVT2. The third step was to develop new channels in line with the public service mission. With the exception of Iceland, where RÚV still is the single public service channel, the long-term development of public service television is characterized by the gradual development of a family of channels. Besides the generalist channels, a number of theme and target channels have been developed (for additional reading, see Ytreberg 2002 and Hujanen 2005).

When we look closely at the channel content of all public service companies, it is evident that they have kept their focus on news, current affairs and culture, especially in comparison with most of the new channels. In Denmark, during the period 2000-2010 DR has devoted roughly 50 per cent of its content to these categories, in comparison with about one third in the semi-public service channel TV 2. There is a division of labour between the two DR channels, meaning that covering information and culture in particular is a special mission for DR2 and less so for DR1, where drama and fiction are given somewhat more space. This tendency has been strengthened after 2006. In 2010, DR2 devoted 57 per cent of its content to news, current affairs and information/culture, as compared with 43 per cent in DR1.

The division of labour model is not unique to public service television in Denmark, but more or less present in all of the Nordic countries. In Finland half of the programme time from YLE contains news, current affairs and information and culture. In YLE1 and in its Swedish language transmissions, the portion is over 60 per cent, whereas it is about 30 per cent in YLE2, where children's programming and sports also have a large portion of broadcast time. These profiles have been somewhat strengthened over the years. The biggest commercial channel, MTV3, devotes on average one fourth of its content to news, current affairs and information/culture. This proportion has, however, increased during recent years and was, in 2010, at the same level as YLE2.

For the whole period 2000-2010, there is a tendency for NRK in Norway to offer somewhat less news and information programming, at least in its first channel NRK1 than the main public service channels in the other Nordic countries. Within NRK, its second channel NRK2 put more focus on drama and music for the first part of 2000-2010, whereas NRK1 was very similar to the main public channels in the other Nordic countries. Also later the profiles have changed. In 2007 NRK2 was commissioned to be a news and information channel: in 2010 two thirds of its output fell within these two categories.

**Table 2.** General Content Profile of the Five Largest TV Channels in Each Country 1990–2010

	1993			2000			2010/2011 <sup>1</sup>		
	Channel	Daily reach (%)	News, information, etc. Share (%)	Channel	Daily reach (%)	News, information, etc. Share (%)	Channel	Daily reach (%)	News, information, etc. Share (%)
Denmark	TV 2 <sup>2</sup>	56	30	TV 2 <sup>2</sup>	54	32	TV 2 <sup>2</sup>	50	33
	DR1	54	46	DR1	50	49	DR1	44	43
	TV3	15	5	TV3	19	5	DR2	16	57
Finland				TvDanmark2	14	9	TV3	13	18 <sup>4</sup>
	MTV3	59	22	DR2 (1996)	9	56	3+	10	..
	YLE TV1	53	44	MTV3	67	27	MTV3	53	37
	YLE TV2	46	31	YLE TV1	60	46	YLE TV1	49	62
				YLE TV2	54	37	YLE TV2	45	31
Iceland				Nelonen	40	1.2	Nelonen	36	34
	RÚV	69	23	TVTV1	5	..	Sub	27	22
	Stöð 2	58	14	RÚV	64	19	RÚV <sup>3</sup>	..	24
				Stöð 2	51	16	Stöð 3	..	10
Norway	NRK1	63	34	NRK1	60	39	NRK1	52	40
	TV 2	40	..	TV2	58	28	TV 2	44	21
	TvNorge	22	..	TvNorge	33	..	TvNorge	28	..
	TV3	19	..	TV3	23	..	NRK2	25	68
Sweden				NRK2	18	38	TV3	23	..
	SVT1	58	28	TV4	48	20	SVT1	39	37
	SVT2	43	23	SVT1	47	36	TV4	36	20
	TV4	36	15	SVT2	46	41	SVT2	23	52
	TV3	12	2	TV3	21	3	TV3	17	0
			Kanal 5	15	3	Kanal 5	17	4	

*Italics: Public service TV channels.*

<sup>1</sup> Data not available

<sup>2</sup> Content data 2010, reach 2011.

<sup>3</sup> TV 2 Denmark's main channel TV 2 also has public service obligations.

<sup>4</sup> Reach data not available, ranking here is due to RUV having higher audience share (49%) in 2011 than Stöð 2 (35%).

<sup>5</sup> "Information and Culture" only, which has increased from 3% in year 2000 to 18% in 2010.

**Note:** Different categorizations have been used, which impairs comparability between countries and years.

**Denmark:** News, Current Affairs and debate, information and culture. TV2's regional transmissions are not included.

**Finland:** 1993: News, Current affairs and non-fiction/information; 2000: News, Current affairs, Non-fiction/information. Culture: 2010: News, Current affairs, Non-fiction/information. A reshuffling of categories in 2008 affects comparisons between year 2000 and 2010.

**Iceland:** News, Non-fiction (documentaries and information, religious, arts and culture programmes).

**Norway:** NRK: News, Information, Religion, Culture, Nature and science; TV2: News, Information, Religion, Nature and documentary.

**Sweden:** 1993: News, Non-fiction; 2000 and 2010: News, Current affairs, Culture, Non-fiction. ("Mixed programs": not included.)

**Sources:** TNS Gallup, Denmark, Finnpanel and YLE Audience Research, Ministry of Transport and Communications in Finland, MTV3, Nelonen (Channel Four), Social Science Institute at University of Iceland, Capacent, RÚV, Statistics Iceland, TNS Gallup Norway, NRK, TV2, MMS, SVT/SVT/UR mediebrev 1997-01-23, Swedish Broadcasting Commission/Swedish Broadcasting Authority.

In Sweden, SVT already in 2001 decided on new profiles for its two general channels, SVT1 was to focus more on news and entertainment, and SVT2 more on public affairs and serious drama.

Iceland is a small country with no more than around 300,000 inhabitants and differs from all the other Nordic countries in offering only one public service TV channel. The percentage of news and non-fiction in RÚV-TV is stable at about one fourth, whereas fiction and entertainment stand for between 45 and 50 per cent. The corresponding figures for the biggest commercial TV channel are between 10 and 15 per cent and 55 and 60 per cent, respectively.

Moreover the Nordic public service organizations have launched new channels during the last decade hand in hand with the digitalization of the terrestrial distribution nets. In Denmark, Norway and Sweden channels with special responsibility for children's programmes have been launched, DR Ramasjang in 2009 (starting in 2013 Ramasjang is to be split into two full channels for children 3-6 years and 7-12 years, respectively), NRK 3/Super for children and youth in 2007 and SVTB (Barnkanalen) in 2002. Thus, children's programming was removed from other channels and replaced with other content. In Denmark, Finland and Sweden, other theme channels have been introduced as well. DR's channel for history and culture, DR K, was launched in 2009 as was DR Update (news loop). In Finland YLE Teema was launched in 2001; here, information and education stand for about two thirds of the programme time and the rest is mainly domestic fiction. In Sweden, SVT in co-operation with UR – a public service sister company responsible for producing educational programmes – established a channel for what was called knowledge programming. SVT also started SVT24, which has changed its character over the years, from testing a 24h news channel at the start to today's repeats of popular programmes and news.

The development of Nordic public service television reveals a very professional approach to the increasing competition. All of the Nordic public service companies have focused on offering broad public service programming that balances current affairs, information, culture and other non-fiction with fiction and entertainment. This balance can be observed both within and between the public service channels. It has been said that public service channels have had to gradually adopt the rules of the game of a commercial television system, developing a family of channels with different content profiles and target groups. It seems possible to argue that this division of labour between the two main public channels, where one offers more fiction and entertainment, represents a certain degree of adaptation. However, even such broad public channels normally offer more non-fiction than their commercial counterparts do. Equally important is that they serve as eye-openers to the other public channels, the latter being even more specialized. Moreover, all of the public channels have entered the Internet era by making a large number of programmes and services available online. The public service web sites and play

functions are also among the most visited web sites in every country, which has triggered criticism from newspapers and private television.

When characterizing commercial television, it is important to make a distinction between those of the first generation terrestrial channels and the others. The first private channels designed mainly for terrestrial broadcasting were either a semi-public service like TV 2 in Denmark, publicly regulated like TV4 in Sweden and TV 2 in Norway, or part of a long television tradition like MTV3 in Finland. In these respects, they differed from the early satellite channels, like MTG/Viasat's TV3 in Denmark, Norway and Sweden, or SBS' Danish and Swedish Kanal 5 (Channel 5) and Norwegian TV Norge, which were purely market driven. Content data from the past decade confirm that there still is a clear difference. In Denmark, TV 2 devotes around one third of its content to news, public affairs and the like to be compared with between 10 and 20 per cent in TV3, Kanal 4 and Kanal 5. The Finnish channels MTV3 and Nelonen (Channel Four Finland) also devote one third of their content to news and non-fiction, where especially the former is strong in news and public affairs. In Sweden, about 20 per cent of TV4's contents consist of news and information, current affairs, culture and non-fiction and the corresponding figures for TV3 and Kanal 5 are just a few per cent. The content of the latter is dominated by imported fiction, mainly from the US. In the Norwegian TV 2 around 20 per cent of the programming contains news and information with a declining portion over the last decade. The Finnish channels MTV3 and Nelonen (Channel Four Finland) go in the other direction with about one third news and non-fiction. The big private television companies, like TV 2 in Denmark and Norway and TV4 in Sweden, have gradually developed a "family of channels" – including among others a specific news channel – to cover different target groups.

Looking closely at the figures, it is obvious that especially news but also public affairs are the decisive content categories characterizing the public service channels, and to some extent the first terrestrial commercial channels (TV 2 in Denmark and Norway, MTV3 in Finland and TV4 in Sweden). A specific feature of the public service channels is that they also devote prime time to serious contents. What makes the public channels public is the national perspective. It is also visible in terms of production. In most Nordic countries, the majority of public service programming, public affairs as well as drama, consists of domestic productions. This is also partly true of the first terrestrial commercial channels, but in the other commercial channels the percentage of nationally produced programmes is less than 20 per cent.

Moreover, domestic drama and children's programmes, often too costly for the commercial market, are key public service content categories. It is also worth mentioning the tradition within the Nordic public service broadcasting organizations to support each other financially inside as well as outside the frame of Nordvision, which has resulted in a healthy drama production line in all of the Nordic countries.

*Changing Radio: From Neighbourhood Stations to Commercial Networks*

Radio programming in the Nordic countries was long offered by broadcasting organizations that enjoyed government-authorized monopoly status, although not called public service. Radio in all five countries was synonymous with nationwide broadcasting, that should contribute to enlightenment and education by offering news and lectures, but also present good entertainment. All of the companies were founded in the interval between 1925 and 1933 and for many years they had a single national channel. DR in Denmark, YLE in Finland, and SR in Sweden introduced second and third channels in the 1950s and 1960s; RÚV in Iceland and NRK in Norway followed suit as recently as the 1980s. Today all Nordic public service broadcasters offer a number of nationwide channels including a network of regional services (see Table 3).

*Introducing Private Radio*

The end of the monopoly era and the introduction of privately owned radio meant a fundamental change in the situation of public service radio in the Nordic countries. The new competitive environment of broadcasting started developing through deregulation and re-regulation of the former monopolistic structures. In the 1980s, broadcasting legislation was amended to allow for privately owned local stations. In the beginning, these new stations often represented the spirit of community radio involving citizens' movements and activities (Hujanen 1996). That trend started in Sweden in the late 1970s in the form of neighbourhood radio often operated by local organizations or religious groups, but became important in Denmark and Norway as well, less so in Finland and Iceland.

Although neighbourhood radio was not a success with the audience, it demonstrated that radio could be produced outside the public service sphere. The standards of traditional public service radio were not necessarily the only ones and, consequently, public service radio was forced to re-evaluate and change its production practices and quality culture (Lowe & Alm 1997, Hujanen & Jauert 1998, Ala-Fossi 2005). Further, at least in Sweden and Denmark, neighbourhood radio paved the way for commercial radio, after some stations in the main cities in the late 1980s strongly promoted private radio and showed how it could be done.

Commercial private radio has existed since the middle of the 1980s, except in Sweden where it was allowed first in 1993. Originally the concessions were restricted to a certain local area, but soon national or semi-national networks were developed to attract advertisers. Today commercial radio channels operate on local, near-national and national levels, with single concessions or via networks, the structure differing somewhat from country to country. Non-commercial channels outside the public service organizations, however, are always strictly local, except the Danish case of Radio24syv (established late 2011).

**Table 3.** The Five Radio Channels with the Largest Daily Reach in Each Country 1991, 2000 and 2010

	1991		2000		2010	
	Channel	Reach (%)	Channel or network	Reach (%)	Channel or network	Reach (%)
Denmark	DR/P3 DR/Danmarkskanalen DR/P1 DR/P2	61 14 14 2	DR/P4 DR/P3 DR/P1 The Voice P2 Musik/DR Klassisk	38 32 12 11 10	DR/P4 DR/P3 NOVA FM DR/P1 Radio 100 FM	39 23 10 8 6
Finland <sup>1,2</sup>	YLE3/Radio Suomi (1961/1990) YLE2/Radiomafia (1990) YLE1/Radio 1 (1926/1990) YLE4/Riksradioln (1961) <sup>3</sup>	39 23 18 3	YLE Radio Suomi Radio Nova (1997) YLE Radio 1 Kiss FM (1995) <sup>4</sup>	38 16 12 11	YLE Radio Suomi Radio Nova YLE Radio 1 SBS-Iskelmä (2001) SuomiPOP (2007)	29 15 9 9 8
Iceland	RÚV 2 (1983) RÚV 1 (1930) Bylgjan (1986) <sup>5</sup>	50 37 25	RÚV/Rds 2 Bylgjan RÚV/Rds 1	42 24 31	.. .. ..	.. .. ..
Norway	NRK/P1 (1933) NRK/P2 (1984)	43 27	NRK/P1 P4 (1993) NRK/P3 (1993) NRK/P2	35 23 9 6	NRK/P1 P4 Radio Norge (2004) NRK/P3 NRK/P2	44 27 17 11 8
Sweden	SR/P3 (1964) SR/P4 (1987) <sup>6</sup> SR/P1 (1925) SR/P2 (1955)	58 25 16 3	SR/P4 <sup>6</sup> SR/P3 SR/P1 RIX FM (1993) <sup>7</sup> NRJ/Energy (1993) <sup>7</sup>	37 14 11 9 9	SR/P4 <sup>6</sup> RIX FM <sup>7</sup> SR/P3 SR/P1 Mix Megapol (1993) <sup>7</sup>	31 13 12 12 10

*Italics: Public service radio*

<sup>1</sup> From 2009 onwards the base population is the Finnish- and Swedish-speaking population (excluding the Åland Islands). Until 2008 Finnish-speaking population only.

<sup>2</sup> In 1990 there was a major reorganization of YLE radio channels. The radio reform in summer 1990 entailed the establishment of YLE Radio 1 (Ylen Ykkönen) as a classical music and cultural programming station; Radiomafia as a young people's pop/rock channel; and Radio Suomi (Radio Finland) as a news, regional programmes and popular music channel. The fourth channel - Riksradion - continued as a full service network for the Swedish-speaking audience.

<sup>3</sup> Full service network for the Swedish-speaking audience. Replaced by Radio Vega in 1997.

<sup>4</sup> The Voice since 1997.

<sup>5</sup> Nationwide channel since 1993.

<sup>6</sup> SR/P4 1990-1992 P4 regional radio only (established 1987-1989). In 1993 national transmissions were introduced as P4 Riks. Data since then include both the national (P4 Riks) and regional (P4 Lokal) transmissions.

<sup>7</sup> Network of local stations. The number of affiliated stations varies between the years.

**Note:** Data on five channels where available. Different methods have been used, which impairs comparability between countries and years. Data should be taken as indicators of the trend and level of listening. Data include listening to radio, irrespective of platform.

**Sources:** TNS Gallup Denmark, Finnpanel, RUV, Capacent, NRK/TNS Gallup Norway, TNS Sifo.



Nationwide commercial radio channels were formally introduced at first in 1986 in Iceland, then Norway in 1993, Finland in 1997 and Denmark in 2003. There are also near-national radio networks as well as networks of local channels, which, combined, have near-national coverage. In addition to these, there are still a variety of independent local radio stations, the number of which varies from 1 (Iceland) and 30 (Finland) to somewhere between 100 and 300 in the other Nordic countries. In Sweden, the total number of local stations is even bigger owing to the approximately 900 community radio stations, many of which share transmitters, that continue the neighbourhood radio tradition. All nationwide radio stations and all major networks are owned by large Nordic or international media groups, among which ProSieben/SBS<sup>4</sup> and, to a somewhat lesser extent, MTG stand out as having a strong presence throughout the Nordic region.

### *Radio Channel Profiles*

Since the middle of the 1980s, the introduction of commercial radio has challenged the programming traditions and production practices of public service radio, and resulted in a huge increase in programme output and in the respective segmentation of audiences. As pointed out by Hujanen and Jauert (1998) in their evaluation of these changes, the output of 'new radio' emphasized formats and profiled channels with targeted and fragmented contents instead of the programme thinking of 'old radio', which is based on universalism, pluralism and balance (see also Kempainen 1998). All Nordic public service broadcasters responded to the challenge through a similar channel profilization (completed by 1993), which consisted of three main content categories: (1) an adult-oriented channel with an emphasis on domestic middle-of-the-road music, (2) a channel for talk, culture and (classic) music, and (3) a youth-oriented channel with a great deal of popular music (hits). In addition to music, the first category of channels typically offers both national and regional news and current affairs – a mixture that is most popular in terms of audience shares (see Table 3 above).

The overall contents of public service channels are clearly more talk and information oriented than is the case in the commercial channels. However, except for the Danish DR, music is the dominant content category even in public service channels. Regarding the non-music content, news and current affairs, complemented by public debate, are the main dimensions. Categories like drama, culture and entertainment are also important. Looking at the changes in public service radio from the perspective of competition with private radio, probably the most important decision was the development of channel profiles. Actually, the profiling of the public service channels was in a sense a form of audience segmentation, producing radio for specific target groups instead of doing so for all citizens. However, public service gradually

has developed criteria for what constitutes public service within this model, which is an important reason for its strong position among the audience.

Since the mid-1990s, the Nordic public service broadcasters have also been entitled to develop solutions for digital radio distribution. The Nordic countries were then among the first in Europe to launch DAB, and the national public service companies were assigned the task of being the driving forces in the conversion processes. Today, they all distribute digital parallel transmissions of what they offer via FM frequencies. Moreover, there are also digital-only services via DAB or DVB and the web, mainly in Denmark, Norway and Sweden. Technically DAB is strongest in Denmark and Norway where the DAB networks have been extended to serve 80-100 per cent of the population. In Sweden the DAB network has 35 per cent coverage, while the Finnish YLE closed down its DAB network in 2005 and kept offering digital radio mainly on the web and in DVB-H and a reduced selection in DVB. To date, the social and cultural breakthrough of digital radio has not taken place, and both operators and audiences are waiting for stronger signs of success in the market – and the consequent political decisions. As to contents, digital radio has mainly meant an increase in the variety of music genres. Among the interesting exceptions one could mention the Swedish SR's service to the Finnish-language minority and the Finnish YLE Puhe (YLE Spoken Word), a channel with no music that re-edits talk programming from all of YLE's radio and television channels.

As for the future, in Denmark, Norway and Sweden digital radio is on the agenda today. In autumn 2012 the Danish government agreed on the objective to introduce DAB+ and close down FM radio in 2019, provided the main part of listening has moved to digital radio (*Mediepolitisk aftale 2012-2014*). Norway has already decided to close down the FM network in 2017 on conditions like the range of digital coverage of public service NRK and the share of digital platforms in daily radio listening (<http://stortinget.no/no/Saker-og-publikasjoner/Saker/Sak/?p=49273>). Sweden is still working on its strategy, but is heading in the same direction (SOU 2012:59). All these countries build on the vision of a future in which DAB-related solutions (DAB, DAB+, DMB) are central to the development of digital radio. In these three countries, the public service broadcasters and the commercial sector share an interest in DAB solutions. The fate of community and neighbourhood radio operations is a problem in DAB-related visions for the future, as that kind of technology is costly and too heavy for small-scale radio activity.

According to Ala-Fossi (2012), there is a clear contrast of approach and opinion between Finland and the other Nordic countries concerning expectations for digital radio. In the early phase of digital radio, the public service broadcaster YLE joined the telecommunication company Nokia's efforts to develop a multimedia radio. Since the closure of the DAB network in 2005, YLE and

later also the commercial operators have been waiting for the international breakthrough of digital radio. The Finnish Government's recent action plan for electronic media follows in line and seems to believe more in mobile broadband as the future of digital radio.

## Public Service in Audience Competition

The rapid increase in the number of new channels in both television and radio, not to mention other new digital platforms, did not correspond to an increase in media consumption. It is true that there was a slight increase in reach for television and radio when the first commercial channels started their transmissions, but considering the expansion of the number of TV channels, the increase in viewing time has been limited, and for radio listening time has even dropped in recent years. This meant that the old channels had to compete with the new ones for roughly the same amount of viewing or listening time.

### *Public Service Television Meets Commercial Channels*

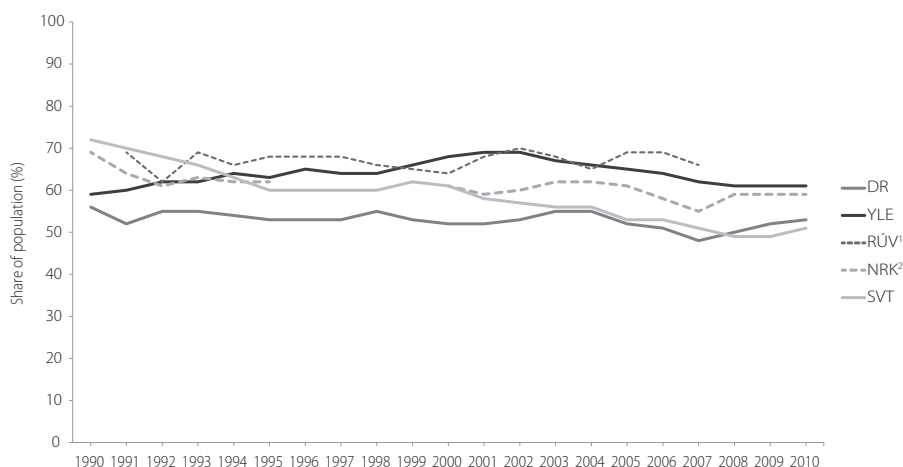
The average daily viewing time in 2010 varied between about three hours or more in Denmark, Finland and Norway and 2 hours and 45 minutes or somewhat less in Sweden and Iceland. In all of the five countries, viewing time has increased, especially after 2006 in Denmark and Sweden. For the other countries the tendency is the same, but changes in measurement methods make the figures somewhat uncertain. But though we see that more time is spent on television, it is normally only between 30 minutes and an hour more than the time spent in 1990, when television was dominated by the public service channels. One reason for the increase in reach as well as in time spent seems to have been that young people were attracted by the new, more entertainment-oriented contents (Nielsen and Halling 2006, cf. *Nordicom-Sveriges Mediebarometer 2011*). This, once again, stresses the increased competition over viewers taking place between the television channels.

In the Nordic countries, television's daily reach has been fairly stable during the past decade. In 2010, the average reach<sup>5</sup> was between 71 and 75 per cent, (Figure 1a) Iceland being the exception with over 80 per cent (2007). The tendency since 1990 has been different. In Finland a small long-term increase can be noticed, whereas there has been a small decline in Sweden. In Denmark, Iceland and Norway we can observe a relatively stable situation, although there may be some major differences between individual years. Looking only at the past five years, we can notice an upward trend for television reach in Denmark – from 70 to 75 per cent, but not in the other countries.

Thus, the rapid increase in the number of television channels after the early 1990s posed a challenge to the dominant position of public service. However, the effects of the new competition differed. If we first look at the daily reach of public service television, there was a small decline during the 1990s, which was true for all Nordic countries. After 2000, the reach has been relatively stable, although there has been a small downward tendency for most of the countries during the decade. The highest reach today can be observed for RÚV in Iceland, YLE in Finland and NRK in Norway with around 60 per cent. The reach is clearly lower for SVT in Sweden and for DR in Denmark, both at around 50 per cent. It can also be noted that the semi-public service channel TV 2 in Denmark has the same reach as the public service DR does.

The declining reach observed is largely due to the changing viewing habits of young adults – approximately the age group between 15 and 30 years. They seem to have found the new channels more attractive, whereas the group over 30 mainly have stayed with the traditional channels. This is also true of the period after 2000. In Sweden, the SVT daily reach in the age group 15-24 fell from 38 to 17 per cent between 2000 and 2010, during the same period and in the same age group YLE in Finland went from 51 to 31 per cent. DR in Denmark and NRK in Norway also lost reach in the age groups, but not of the same size.

**Figure 1a.** Nordic Public Service TV Daily Reach 1990-2010

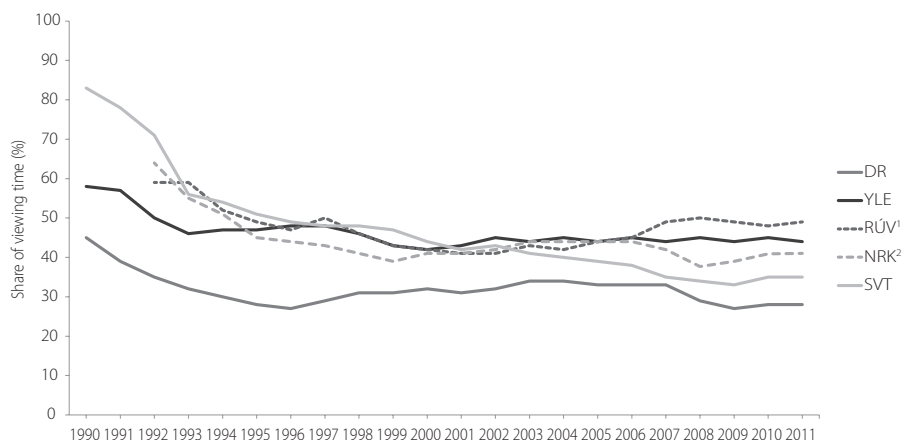


<sup>1</sup> Diary data according to surveys in October (March 2004, June 2007). Data for 2008-2010 not available.

<sup>2</sup> TNS Gallup Norway assumed responsibility for ratings in 2000. The figures are not entirely comparable with previous years due to change of method.

**Note:** TV-meter rating figures, except for Denmark and Norway 1990-1991, Iceland 1990-2007 and Sweden 1990-1992. Timeshift within 7 days included in Finland and Norway in 2008, in Sweden 2010. TV 2/Danmark's main channel TV 2, which has public service obligations, is not included.

**Sources:** TNS Gallup Denmark, Finnpanel and YLE Audience Research, Social Science Institute at University of Iceland (1990-1998), Capacent (1999-2007), RÚV, MMI Norway (-1999), TNS Gallup Norway (2000-), SVT database on public service.

**Figure 1b.** Nordic Public Service TV Audience Shares 1990-2011

<sup>1</sup> Diary data 1990-2007 according to surveys in October (March 2004, June 2007). Electronic measurement (ppm) 2008-2010 with data for week 42.

<sup>2</sup> TNS Gallup Norway assumed responsibility for ratings in 2000. The figures are not entirely comparable with previous years due to change of method.

**Note:** All channels included (SVT theme channels included from 2006 forward). TV-meter rating figures, except for Denmark and Norway 1990-1991, Iceland 1990-2007 and Sweden 1990-1992. Timeshift within 7 days included in Finland and Norway in 2008, in Sweden 2010. TV 2/Danmark's main channel TV 2, which has public service obligations, is not included in the table.

**Sources:** TNS Gallup Denmark, Finnpanel and YLE Audience Research, Social Science Institute at University of Iceland (1990-1998), Capacent (1999-), RUV, MMI Norway (-1999), TNS Gallup Norway (2000-), SVT, MMS.

The second indicator of the strength of Nordic public service television is audience shares. This is a more market-oriented indicator because it encompasses how much of an individual's viewing time is devoted to public service. Here it is much more obvious to what extent the public service channels were hit by a substantial loss in terms of audience share (Figure 1b). Between 1990 and 1993, SVT went from more than 80 per cent of Swedes' viewing time to less than 60 per cent. As a consequence of the establishment of Danish TV 2 in 1988, DR lost its dominant position and had an audience share of 45 per cent in 1990, which was slightly lower than that of TV 2; by 1997 DR's share had even fallen to 27 per cent. In Finland and Norway as well, market shares in the early 1990s fell for the public channels YLE and NRK, respectively. Generally it can be concluded that the number of existing channels played only a minor role to meet the challenge posed by the new channels. Yet the Danish model with a second, semi-public service channel TV 2 was a great challenge to the traditional public service DR. However, DR was able to stabilize its share by launching DR2 and later mainstreaming DR1. When in Iceland the public service channel RÚV-TV managed the situation better, it was most probably related to the relatively lower level of competition in the television market.

Looking at the long-term trends in viewing shares for the public service channels, it seems reasonable to distinguish at least three phases in the devel-

opment of television competition. The first phase is the one already described, from the mid-1980s to the mid-1990s, depending on the country, when public service lost its dominating position. During the course of a decade, audience shares went from more than 90 per cent to about 40 to 50 per cent of the viewing time (except for YLE, which fell from a level of approximately 60 per cent).

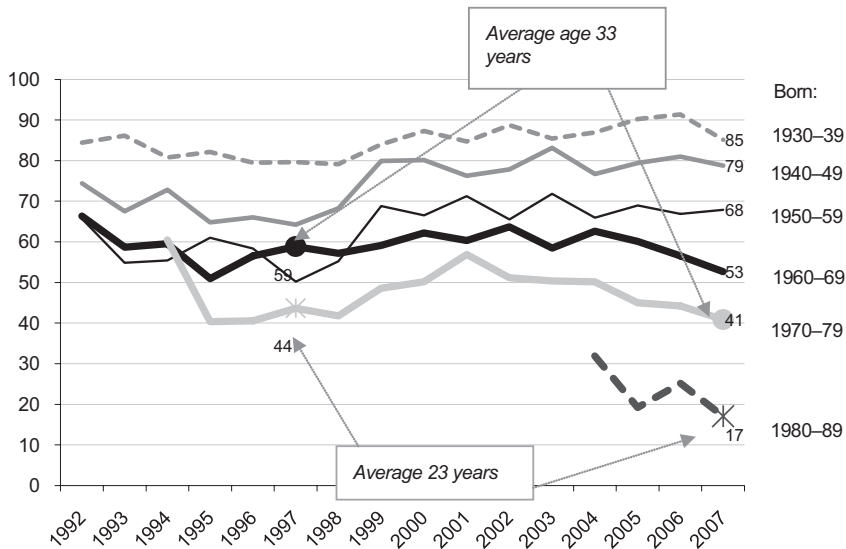
Because the total viewing time during that period was relative stable, the loss in time was substantial. The second phase in television competition goes from the mid-1990s to the early 2000s. That is the time when 'television of plenty' (see Ellis 2002) was born in the Nordic countries, with the consequent increase in competition between operators and in availability of services for individual households. Despite this, however, we can see a stabilization of the market shares for most public channels. During this period, the public channels had about 40 per cent of the viewing time. In most Nordic countries, the decline seems to have stopped, Sweden being an exception in that SVT is still losing viewing shares, whereas DR in Denmark now seems to be regaining some of its early losses.

The third phase in television competition, comprising the past decade, represents a new situation. The public service companies in all of the Nordic countries now have implemented their strategies. Their profiles are more visible than before, and serve to position them in the new media landscape. This new positioning does not concern only the traditional channels, but also a number of new specialized channels. Here we can observe some differences between the individual countries. Public service shares in Finland and Norway show a stable pattern, in Iceland an increase, whereas Denmark has a small decrease. The most notable change has occurred in Sweden, with SVT going from the highest figure in 2000 (44%) to the second lowest in 2011 (35%), only higher than DR (28%). Of course, new strategies are not the sole reason for the minor changes observed. The activities of the commercial competitors are also decisive. The lack of strong competition probably is an important explanation for the relative success of the Icelandic public channel RÚV-TV; in Denmark the problems experienced by both the public DR and the semi-public TV 2 indicate the presence of strong competition. It is important to note that the increasing shares also mean relatively more viewing time, given that viewing time is somewhat longer during this period.

The development can also be considered in another perspective. As has been demonstrated, public service as well as the main commercial competitors have formed channel families. In terms of audience, this means that a loss in rating for the main channels in each group can be balanced by the attraction of the other channels in the group. Here the public service channels, with their strong brands, seem to have been especially successful, which explains the relatively stable audience balance between public service and the increasing number of commercial channels.

Although the three phases pointed out are illustrative of the development of public service channels in the new media landscape, they are clearly a simplification. When we talk about market shares our analysis is based on the average viewer. However, we know that there are great differences in viewing styles and in channel preferences depending on age, gender and family type (Bjur 2009). Using Swedish survey data from 1992 and later, we can observe that the average viewer of public service television is older than that of commercial television (Figure 2). Further, older people watch more television (Nilsson 2008, cf. Bjur 2009). There is also a clear tendency for channel preferences to be dependent on generation. At first the commercial channels did not attract the generations born in the 1930s and 1940s as much as they attracted those born in the 1960s and 1970s – and as the latter grow older, they will be more open to commercial television than the former were at the same age (Nilsson 2005, 2006).

**Figure 2.** Swedish Television Public Service (SVT2) Viewing in Five Age Cohorts 1992-2007



**Note:** Regular viewing means at least five day a week. The lowest number of respondents in one age cohort a single year is 199. The data originate from the Swedish national SOM-survey 1992-2007. The survey is carried out annually to a representative sample of Swedes between 15/16-85 years of age.

**Source:** Nilsson (2008).

One reasonable conclusion is that public television channels must keep a strong profile to attract different segments of the audience. In this respect they seem to have been quite successful by developing channels of different character, combining attractive non-fiction with news, public affairs and information. However, decisive for the profile, and the strength of public service, is the news programming. This is one non-fiction content category for

which public television is strong among young people as well. Because news and public affairs programmes are important for public service as contributor to the social, political and cultural agenda, such programmes mean a dual strength of public service.

It is very important to add that use of the new digital platforms has been very important to revitalizing public service television in the competition with private channels. Although the formal conditions may vary across the individual Nordic countries, the companies have been very active in both promoting and complementing their channels by offering various services. Especially the play function online has turned out to be very attractive, not least among the young.

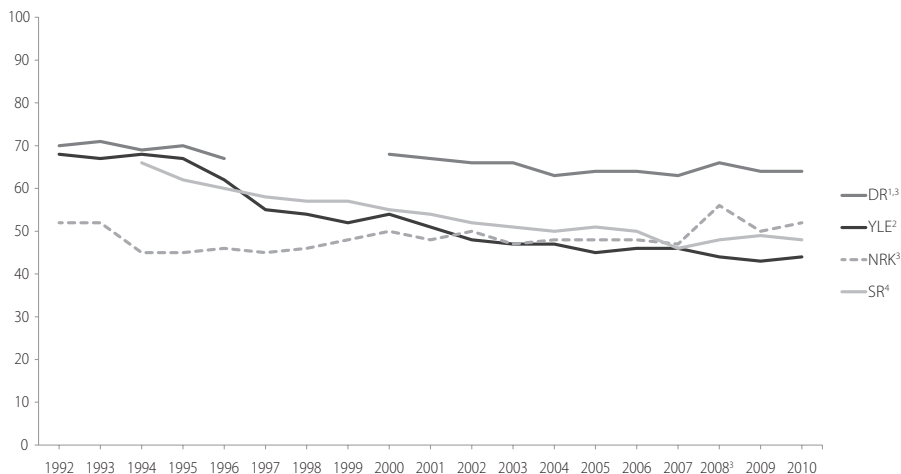
### *Dominance of Public Service Radio*

The social and cultural dominance of television is the main long-term reason why the construction and composition of radio audiences looked so different during the period 1990-2010 as compared to the earlier history of radio. In a summary of research on radio listening in Finland in the 1990s, Erja Ruohomaa (2003: 232) characterizes the distinct features of radio as a medium using three dimensions: mobility, individuality and contextuality. According to her, the first aspect, mobility, has consisted of adaptation to the development of other media, particularly television. As overall figures on the amount of radio listening demonstrate, television did not kill radio. Instead, the radio medium managed to adjust its contents and functions to the process of individualization in modern society, and to make this its main asset in the competition over audiences. This transformation is supported by the contextuality of radio listening, i.e., the way radio becomes integrated into the everyday life situations and lifestyle of its listeners. The structural change of radio – characterized in the literature as concerning deregulation or re-regulation and the new competitive environment of broadcasting – contributed to and accelerated the transformation of the radio medium.

Radio's success in adapting to new conditions of listening is demonstrated by data on the average daily listening time as well as daily reach of radio during the period 1990-2010 (Figure 3a and 3b). Due to differences in methods, it is not possible to make exact comparisons between countries and years<sup>6</sup>, but the data make it possible to identify basic trends and to estimate the level of listening. The most consistent trend is shown by Finland, where the total daily listening time reaches more than 3 hours for the whole 20-year period. Iceland reaches the same high level in 2000. Another consistent case is Norway, where the overall figure for daily listening is lower than in other Nordic countries and reaches to 2 and a half hours in the peak year of 2004. Denmark reaches the level of 3 hours towards the end of the 1990s and then remains there. The three-hour level is typical also in Sweden during the course of the 1990s, but a clear downward trend is visible in the last decade.



**Figure 3a.** Nordic Public Service Radio Daily Reach 1992-2010 (%)



<sup>1</sup> New methods in 1997 and 2008, which impairs comparability.

<sup>2</sup> From 2009 onwards the base population is Finnish- and Swedish-speaking population (excluding the Åland islands). Until 2008 Finnish-speaking population only.

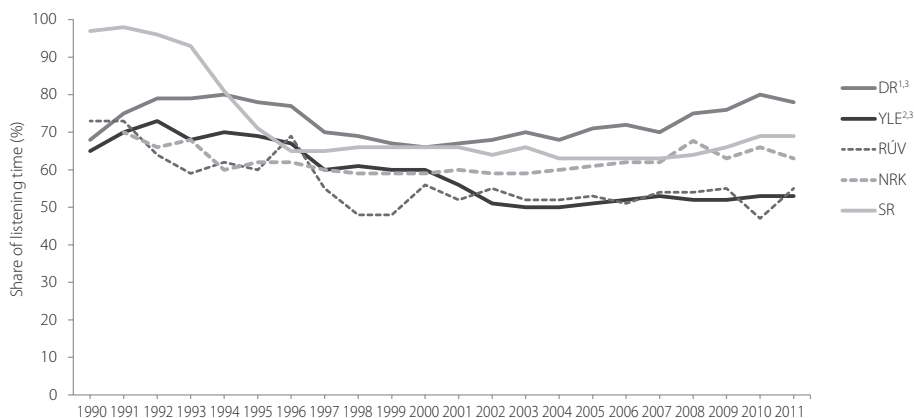
<sup>3</sup> Denmark (DR) and Norway (NRK): new method from 2008 forward (electronic measurement, ppm). Data are not comparable to previous years.

<sup>4</sup> Total SR reach starting in 1993. Previous data do not include regional transmissions.

**Note:** Different methods have been used, which impairs comparability between countries and years. Data should be taken as indicators of the trend and level of listening. Data include listening to radio, irrespective of platform.

**Sources:** DR, TNS Gallup Denmark, Finnpanel & YLE Audience Research, Social Science Institute at University of Iceland (1992-1998), Capacent (1999-), RUV/Statistics Iceland, NRK/ TNS Gallup Norway, TNS Sifo (previously RUAB/Sifo Media).

**Figure 3b.** Nordic Public Service Radio Audience Shares 1990-2011 (%)



<sup>1</sup> New methods in 1997 and 2008, which impairs comparability.

<sup>2</sup> From 2009 onwards the base population is Finnish- and Swedish-speaking population (excluding the Åland islands). Until 2008 Finnish-speaking population only.

<sup>3</sup> Denmark, Iceland and Norway: new method from 2008 forward (electronic measurement, ppm). Data are not comparable to previous years.

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**Sources:** DR, TNS Gallup Denmark, Finnpanel & YLE Audience Research, Social Science Institute at University of Iceland (1990-1998), Capacent (1999-), RUV/Statistics Iceland, NRK/ TNS Gallup Norway, TNS Sifo (previously RUAB/Sifo Media).

The data on daily reach confirm the strength of the radio medium, but once again, different methods of measurement restrict detailed comparison across countries and years. However, the data can be used to show some of the main trends. On average the daily reach of radio is highest in Iceland, but in the late 1990s and early 2000s the figures clearly reach more than 80 per cent in Denmark as well. In Finland and Sweden the daily reach fluctuates around 80 per cent, but the overall figures are somewhat higher in Finland than in Sweden. Towards the end of the twenty-year period, however, the trend is slightly downward in both countries, particularly in Sweden. Similar to daily listening, the daily reach of radio is clearly lower in Norway than the other countries, but the trend is upward towards the end of the period.

Figure 3 also presents the market shares of public service radio during the period 1990-2010, calculated on the basis of daily listening time. The relative importance of public service radio in competition over audiences decreased clearly in the 1990s, but remained continuously on a high level in an international comparison. The fall is from a share of 70 per cent to approximately 50 in Finland and Iceland and from around 90 per cent to between 65 and 70 per cent in Sweden. It seems that towards the end of the period, the share of public service radio remains strongest in Denmark, the latest figure from 2010 being on the level of 80 per cent. In this situation the Danish government has recently forced the public service operator DR to cut out one of its main services, and offered the frequency to a new private channel (Radio-24syv launched in November 2011) as an alternative public service talk radio, financed by the licence fee. The public service market shares are most consistent in Norway, around two thirds of the listening time.

The figures on the daily reach of radio show the continuous relevance of public service. Because of increased competition, however, the figures on reach are clearly lower towards the end of the 1990s; since 2000 the fall is between 10 (Denmark) and 20 (Finland and Sweden) percentage points, except Iceland and Norway where the respective change is less remarkable. Like the share of listening time, the daily reach of public service radio remains highest in Denmark, at 63 per cent in 2007. In Finland, Norway and Sweden, the respective figures seem to end up just below 50 per cent. Finland is the only Nordic country where the daily reach of private (commercial) radio exceeds the public service side, the first time in 2002 and continuously after that.

Age is the most important demographic variable in the comparison of audiences for public service and private (commercial) radio. Already in the early 1990s, it seemed clear that commercial stations attracted and also consciously targeted their services to the audience segment of 20- to 34-year-olds. As Kempainen (1998) pointed out on the basis of data from the middle of the 1990s, that model repeated with some variation in all Nordic countries. Con-

sequently, the listening of public service radio was overrepresented by the audience segment of 50- to 64-year-olds or even older. The later figures, for example from the years 2006/2007, show that the audience for public service radio had become even older, the segments of 60+ or 65+ being the most faithful listeners.

The changes taking place during the latter years illustrate the main challenges to the traditional formats and contents of radio channels. The first is the competition with other music media. It is true that radio is no simple music box as was often said back in the 1920s, but still music is an important part of radio and radio listening. There is probably one explanation for the decrease in radio listening amongst younger people; the fact that they have moved their music listening from radio to other platforms, such as online music services (Wimp, iTunes and similar). Use of the on-demand music streaming service Spotify in its native Sweden is now higher among younger generations than either the public broadcaster Swedish Radio or commercial radio stations. In 2011, more than half (55%) of the 15- to 24-year-olds listened to online music services, including Spotify, and seven out of ten (68%) to an mp3-player on an average day, as compared to the 32 per cent listening to commercial radio and 20 per cent to public service radio on a daily basis (*Nordicom-Sveriges Mediebarometer 2011*). According to an EBU report on Public Radio and New Media Platforms (2011), this kind of development is the reason why radio broadcasters need to grasp the online challenge and offer innovative features to counteract the popularity of these new services. In Sweden, for example, SR offers music channels on the web to meet this competition, as well as material on Spotify.

The second challenge comes from radio itself: digitalization. As has been pointed out, there are different strategies in the individual Nordic countries, but so far only Norway and Denmark have decided on a year (2017 and 2019, respectively) to introduce DAB and close down analogue transmission, given certain conditions, and in Sweden a media commission has proposed similar measures without giving a final FM closure date. However, thus far digital distribution on the web has not been a success and has been reduced. This illustrates the upcoming problems to be faced by public service radio. The problem is that, for an increasing share of younger generations, radio as a medium is no longer recognizable, because they do not access music and other audio contents through traditional radio receivers, be they analogue or digital. For them, radio belongs to a soundscape (Jauert 2012) that is not characterized by channels, but by more or less individualized services offering music and other audio contents that are integrated and connected with broader models and concepts of audio-visual services.

## Nordic Public Service Today: Trust and Evaluation

One could discuss how the figures on content, reach and shares for the Nordic public service channels should be interpreted in terms of audience appreciation. On one hand, it is obvious that, over the years, public service television has lost audience shares, and the average is now down to below 40 per cent. On the other hand, the reach is relatively high, meaning that most of the audience regularly uses public service. Public service radio has a strong position in the radio market both in terms of reach and shares. In this concluding section, some perspectives on the role of public service will be highlighted, mainly based on in-depth surveys made in Sweden.

### *The Trust in Public Service*

Having a strong share of the audience is not necessarily equivalent to perceived quality. Choice of radio or television channel and time spent depend on the type of programming. The fact that the average Nordic listener devotes almost two hours a day to radio does not mean that active listening is taking place, but more using music as a background. To find out what the audience regards as quality, it is important to include other measures (Gustafsson and Weibull 1995). One such measure is trust. Trust connotes confidence and reliability. To trust a radio or television channel means that it offers content that you can rely on. In practice, earning trust is closely related to how news and current affairs are reported (Arvidson 1980).

Trust seems to be a reasonable measure to evaluate the perceived importance of different media channels in the Nordic context. Also many studies have been carried out on trust in the media (Elliot 1997). In Sweden, the general public has been asked about their trust in all of the main media in an annual survey since 1999 (cf. Weibull 2009, 2010, 2011). Respondents have been asked to evaluate the individual media on a five-point scale, from high trust to low trust. Looking at the trust in television and radio channels, it is evident that public service channels are more trusted than are commercial channels by the general public. The Swedish public service television SVT is rated as trustworthy by almost 80 per cent of the population, compared with around 55 per cent for the largest commercial channel, TV4, and less than 20 per cent for the second largest commercial channel TV3 (Table 4). The pattern is the same for radio, where the public service SR is rated on the same level as SVT and the two commercial radio networks on the same level as TV3 (Weibull 2012).

Comparable figures from Finland show that 74 per cent have a strong trust in the public service company YLE. Asked about the perceived importance of YLE in Finnish society, 47 per cent of Finns regard it as very important and 39 per cent as rather important. The percentage responding 'very important'

is significantly higher among the group of older people – 54 per cent. Further, in 2011 the news from the public service YLE was regarded as very reliable by 87 per cent of the population, as compared with 71 per cent for news from the commercial channel MTV3 (YLE 2012).

In Denmark, 88 per cent of the population consider the existence of DR as a public service broadcaster to be very important to society and 80 per cent report that it is very important for themselves and their family (*DR public service redegørelse 2011*). The difference probably reflects the fact that news and public affairs are considered important for society but less so for family life.

In Sweden, we can also observe high stability in reported trust; there are almost no differences between 2010 and 2011 for the traditional media. For the longer period starting in 1999, the differences are also very small (Weibull 2009). There is a tendency for the gap between the public service channel SVT and the commercial TV4 to increase, mainly because the latter has lost somewhat in trust, whereas the former has kept its position in the eyes of the public.

**Table 4.** Trust in Radio, TV and Web Pages in Sweden 2010-2011 (%)

	High trust among the general public (%)		High trust among users (%)	
	2010	2011	2010	2011
<b>Television</b>				
Public service SVT	78	78	82	83
Commercial channel TV4	55	57	59	60
Commercial channel TV3	18	19	23	23
<b>Radio</b>				
Public service SR	73	73	82	82
Commercial radio Mix Megapol	11	12	20	20
Commercial radio RIX FM	12	14	21	23
<b>Web sites</b>				
Public service SVT	37	44	71	68
Public service SR	30	42	68	69
Commercial TV TV4	20	30	44	48

**Note:** The results are based on answers on a five-point-scale from 'very high confidence' to 'very low confidence'. The percentages for the general public also include the alternative 'no opinion'. The sample consists of 3,000 randomly selected persons living in Sweden aged 15-85. Response rate was 57%.

**Source:** The annual SOM survey 2010 and 2011.

While the Swedish figures on trust presented thus far are based on all citizens, including those who use the channels less regularly, we have also comparable figures based on users who regard themselves as able to evaluate media performance. As could be expected, these trust figures are higher. This is true for all channels: people who are in touch with the media trust them more. However, the distance between public service channels and commercial channels is still roughly the same. A more detailed analysis reveals some interesting tendencies. The first that there is a higher correlation between trust and use

for commercial radio and television channels than for the public service channels. The second observation is that even non-users of public service channels report fairly high trust in these channels, which means that even young adults who mainly use commercial channels place their main trust in public service. This is especially obvious as regards public service radio (Weibull 2007).

One important reason for the strong position of public service – radio as well as television – seems to be the role of the news. Channels with a news and current affairs profile are more trusted. This is also one of the reasons for the difference in trust between the commercial channels TV3 and TV4, where the latter, originally a semi-public channel, has a stronger position in the general public (Weibull 2009). According to a Finnish survey, about 70 per cent or more of the Finnish population perceive the channels of the public service company YLE as very professional and reliable. Another YLE characteristic that at least 50 per cent agreed upon was that the channels are attractive, pluralistic and show respect for the individual (YLE 2012).

News from public service channels is also generally more trusted. This is obvious when studying how their websites are evaluated. The SVT's website is rated substantially higher than that of TV4 by the general public as well as users. This applies to both 2010 and 2011.

It is very reasonable to interpret the strong position of the public service channels as being related to the trust people have in news and public affairs programming. This is part of the Nordic media tradition, which is characterized by strong media coverage of news and current affairs, beginning with the educational and enlightenment profile of early radio, which was later also incorporated into television. The background, however, is found already in the political parallelism of the printed press in the late 19th century (Hallin and Mancini 2004). As shown by James Curran and colleagues (2009), the Nordic countries Denmark and Finland differ from Britain and the United States in terms of the positive association between news consumption and political knowledge. A panel study of Swedish citizens during the 2002 election campaign confirms these results. It showed that the level of political knowledge increased among regular viewers of public service television, whereas it decreased among the regular viewers of TV3 (Pettersson et al. 2006).

### *The Standing of Public Service*

One important conclusion of our observations is that public service seems to have been important to the Nordic civic culture. Even though the audience shares of public service have declined, they are still relatively high, and the position of public service in news and current affairs reporting is strong. The question for the future is how strong it will remain.

One reason for the strength of public service thus far has been that the national public service has been backed by politicians from a broad political spectrum. However, there is an upcoming discussion in most Nordic countries regarding the nature of public service television. Leading representatives of the commercial TV channels have criticized the concept of broad public service. They have argued that broad public service means unfair competition and creates problem for the commercial channels, not least through public service companies' activities on the web. The issue has also been raised in the political debate. In Sweden, the conservative party has argued in line with the commercial channels, whereas the social democratic party has taken the opposite position.

In a recent study, the Swedish citizens were also asked about their attitudes towards public service. They were presented different scenarios for the future. One of these was to put a restriction on SVT to focus on 'narrow' programmes to end the competition with commercial channels, another scenario was to let SVT stay as it is today and a third to place all major sports events, like the Olympic Games, on SVT (Table 5). The general result is that the general public greatly support keeping SVT as it is today, although a fairly large percentage had no opinion. Almost half of the public want SVT to go on as it is today, and two thirds thought that all major sports events should be broadcast by SVT. Only a tenth were in favour of a narrow public service channel (Weibull 2012).

**Table 5.** Opinions on Proposals on the Future of Swedish Public Service Television SVT 2011 (%)

Proposals	Opinion on the proposals						Total
	Very good	Fairly good	Neither good nor bad	Fairly bad	Very bad	No opinion	
Let SVT broadcast only narrow programs not to compete with commercial channels	4	6	15	20	33	22	100
Big sport events like Olympic Games and world championships should always be broadcasted on SVT	48	18	9	3	5	17	100
Keep today's profile of SVT	19	30	23	4	4	20	100

**Note:** The sample consists of 3,000 randomly selected persons living in Sweden aged 16-85. Response rate was 57%.

**Source:** The annual SOM survey 2011.

Even if the results show support for public service television, there are some specific points to observe. The most important is the fact that many respondents do not have an opinion. If we consider the scenario of a narrow public service, almost 40 per cent are undecided – 22 per cent have no opinion and

15 per cent say neither one nor the other. For the scenario of keeping public service as it is, the percentage undecided is over 40 per cent. Such figures show that public service is less well anchored than could be expected based on the studies of trust in public service.

To get the full picture, it is important to see whether there are any underlying dimensions or whether the results only reflect the fact that public service has not been seen as a political issue. The interesting question is whether it is possible to find a party political dimension in the attitudes, meaning that respondents leaning towards the conservative party would be more likely to be in favour of a narrow public service, whereas respondents leaning towards the social democrats would be more in favour of today's model. It is true that the analyses show a small tendency in this direction, but it is not statistically significant and also almost 50 per cent of those leaning towards the conservative party want to keep the public service as it is, only about 10 per cent wanting to make it more narrow (Weibull 2012).

The observation is confirmed by an analysis of trust in public service among citizens with different party preferences. Also here we can see no correlation. Social democratic sympathizers do not trust public service channels more than conservative sympathizers do, and conservatives do not prefer commercial channels more than social democrats do.

Even if the data do not seem to indicate any political gap in opinions on public service, this does not mean that the situation could not change if the issue were strongly politicized. However, thus far the public service tradition seems to be very strong in all of the Nordic countries.

## Conclusions

The point of departure for our overview on the development of Nordic broadcasting since the 1990s was what the introduction of private radio and television meant for the standing of public service, with its long tradition in the Nordic countries. Our main conclusion is that public service has maintained its position well. It is true that public service audience shares have declined, but there seems to have been some increased stability in more recent years. Another weakness is that public service has had some difficulties attracting younger generations of viewers. Looking at the character of the public service channels in relation to the private, the former have maintained their stronger profile in news, current affairs and culture. Moreover, the Nordic public service channels enjoy a very high level of trust among the general public.

To understand this development, it is important to keep in mind the strength Nordic public service radio and television derive from the democratic tradition. Despite the fact that public service has been organized somewhat



differently in the individual Nordic countries, the national radio and television channels are a decisive part of the national media systems. Public service radio and television play a key role in the construction of civic competences, not only in the form of news and current affairs reporting, but also in combination with broad programming in other areas, such as children's programming or domestic drama series.

The public service model for radio and television reflects the development of political democracy. Its roots can be found in the idea of educating and enlightening the population. This meant focusing on lectures and news in combination with music. Later on, current affairs programmes increased, and television entailed more public debate programming but also more entertainment (Djerf-Pierre and Weibull 2001). The traditional public service monopoly model was a reflection of the collective national experience.

The challenge to public service – posed by global economic forces offering new channels focused on drama series, game shows and entertainment – meant that a declining portion of radio and television time would come to be devoted to the public service channels, especially among young adults. Our conclusion, however, is that if we wish to understand Nordic public service, we must see also the more complex parts of the picture. The declining audience shares for public service radio and TV during the 1990s have stabilized and in some cases even increased. Further, and more importantly, we can observe that public service companies in the Nordic countries have been successful on new technical platforms. It has been generally accepted that public service radio as well as television have developed their web services. Finally, people's perceptions of public service media – concerning programming as well as principles – are very positive, also among the young. The latter observation also largely reflects the important role played by the public service media in the Nordic political democracy.

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## Notes

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- 2 For an overview of earlier research on Nordic public service radio and television, see Carlsson et al. (1996).
- 3 Swedish TV4 originally had a similar semi-public status, but is regarded as a private channel. On the other hand, until 1993 the Finnish private television company MTV had broadcasted within the public service channels of Yleisradio (YLE) when it was granted a channel of its own.

- 4 The ProSiebenSat1. Group later sold SBS Nordic to Discovery Communications ([http://sbsmediagroup.se/wp-content/uploads/2012/12/1212\\_PM\\_P7S1\\_Nordics\\_en.pdf](http://sbsmediagroup.se/wp-content/uploads/2012/12/1212_PM_P7S1_Nordics_en.pdf))
- 5 Note that there are different age definitions of the television population in the Nordic countries. The audience in Denmark is defined as 3+ years of age, in Finland 10+, in Iceland 12-80, in Norway 12+ and in Sweden 3+. The definition of daily reach differs as well. In Denmark and Sweden it means at least 5 minutes consecutive viewing, in Norway and Finland one minute.
- 6 Including the change to electronic measurement (ppm) in Denmark, Iceland and Norway from 2008 forward.

# Current Challenges to Public Service Broadcasting in the Nordic Countries

Anker Brink Lund & Gregory Ferrell Lowe

In the present article, we assess the importance of public service broadcasting [PSB] for the Nordic region, i.e. Denmark, Finland, Iceland, Norway, and Sweden, where all countries are characterized by small market populations with distinctive language communities. Our focus is on three roles these institutions variously play in the production and distribution of media products: market corrective, market locomotive and market leader.

In our view, it is not reasonable to expect the private commercial sector to provide many of the programmes and services that PSB provides, because the dynamics and priorities governing the two sectors are fundamentally different, although the technology and operational requirements are not. We interrogate contemporary criticism characterizing PSB operators as a source of market distortion, arguing that although there must be limits for reasons both ethical (fairness) and practical (limited resources), and to encourage opportunities for renewed industry profitability, PSB continues to play a vital role in offsetting the liabilities of market failure in the provision of public goods. Addressing the question of how to decide what contents and services have legitimacy as public goods, and what should therefore be protected and rejected, hinges on the role of PSB as a distinctive provider of programmes and services that qualify as ‘merit goods’.

## Socio-historical Background

We emphasize four characteristics of the socio-historic context in the early 20<sup>th</sup> century to account for the construction of the public service approach to broadcasting. The first is how the term “public service”, coined in Victorian England, may be understood and translated into a non-British context (Lund 2005). The phrase described the infrastructure of modernization. Defined as “public goods”, being of general, common interest, these were utilities that

initially included water supply, sewage disposal and road systems, and later electricity and electronic media. The scale of investment required to build such infrastructure to a degree that would guarantee equitable access was enormous, and the potential benefits were intended to be universal (Scannell 1996). Thus, the notion of *natural monopolies* legitimated the conferment of limited ownership and operation for utilities of a general economic and social interest (Doyle 2002). Oversight of the companies and institutions that were mandated to build and deliver these services was entrusted to parliaments, agencies, councils and similar bodies representing the public's interest. These were not markets because there was little or no competition, and costs were covered by some combination of state subsidy and household fees. It was obvious, then, that public goods should be organized on a non-profit basis. Moreover, it was understood that those who benefitted ought to pay for them through some form of tax receipt (Calabrese & Sparks 2004).

This accounts for three important dimensions relative to our theme. One was the equation of “public service” with “broadcasting”, as articulated by John Reith (1924), the first Director-General of the BBC. He argued that radio should be for the Common Good, and therefore situated in the public sphere. The “brute force of monopoly” was necessary to pay for nationwide construction and legitimated by potential value for the nation as a whole. The British Government would retain “unity of control”, but oversight should be delegated to an “independent authority”. Thus, the BBC would be a public trust, but its content would not be subject to state interference. As a public good, it was also important that cultural expression and information be free from dependence on advertisers. The third important dimension was the creation of the license fee mechanism to finance radio broadcasting. Each household that purchased a radio receiver would be required to pay an annual fee for its use, just as they paid fees for the use of mains electricity and water utilities. This construct was later variously adapted in the Nordic countries. We note that the ‘brute force’ sensibility was also popular in the USA, although there an oligopoly ran the show. David Sarnoff, CEO of Radio Corporation of America, also believed that broadcasters had a public service responsibility (Lewis 1991).

The second socio-historic factor can be dealt with more briefly. There were already path dependency preferences when radio broadcasting was developing in the 1920s. It seemed natural to adopt the form of organization that already governed telegraphy and telephony. Most of Europe considered these to be modern components of a national infrastructure, as was also the case in the USA. When television came in the 1950s, it was similarly situated in structures and according to path dependencies that characterized radio (Boman et al. 1981; Roppen 2004).

Moving to the third factor, after the initial period in the First World War when radio was largely confined to military use, the medium was developed

as a social technology from the early 1920s through the late 1930s. In this period there was growing instability, with the rise of fascism in the West and communism in the East. Most governments thought it wise to keep a tight rein on radio, although with differing priorities (Hujanen & Lowe 2003). These were partly driven by the potential of broadcasting to improve society and partly by fears of its potential for propaganda. This was the era of the Direct Effects model of mass media (McQuail 2010). There were simultaneous desires to mandate broadcasting to achieve positive externalities and to guard against negative externalities. Systemic constraints were created on the basis of the ‘arm’s length’ principle; neither the state nor the private sector should have direct influence on content. It is only since the 1980s that broadcasting has been viewed as benign, and therefore deregulated.

The fourth factor hinges on concerns that the pursuit of material profit is not altogether suited to providing for society’s broader needs. Not a few still think that broadcasting for profit has potentially objectionable effects keyed to manipulation of perception. Advertising has been viewed with varying degrees of suspicion, recently extending to practices in marketing and branding (Schroeder & Salzer-Möring 2006; McChesney 1990).

In sum, the public service approach to broadcasting is located in this complex terrain. In technical terms, it denotes a family of administrative models for ensuring and governing the distribution of broadcast content as public goods with meritorious potential, and with the potential for social harm as well (Hoskins et al. 2004). Lest one think this a quaint notion today, it is useful to remember that radio propaganda fuelled genocide in Rwanda in the early 1990s. The heart of PSB is an ethos privileging social responsibility in the media. The remit typically includes a variety of tasks considered instrumental to the well-being and continuing development of society (Lowe 2010; Thomass 2010). The spirit of broadcasting as a social technology sought to embrace, and then to embody, the nation as a whole (Jauert & Lowe 2005). As a result, broadcasting was explicitly intended to serve distinctive national interests in the respective domestic languages “for the improvement of knowledge, taste, and manners,” as Reith put it.

Today, PSB is an ‘institution’ in two senses, and these are increasingly in contradiction (Lowe 2010). PSB is an institution in the sense of being an *organization* situated in the public sector, one akin to the church or a public school. It is also an institution in terms that speak to an ethos representing a value system, in the same way that we speak of marriage or private property as an institution. In this sense it is an *orientation*. A problem that has become increasingly evident is the tendency for the organization’s self-interests and competitive designs to trump its ethos. How well this fee-financed service lives up to its historic ideals has become a topic of heated debate in the Nordic countries. But this is not as new as one might think. In fact it has been a fea-

ture of debate since radio began in the 1920s. What's new is the grounds of the criticism. The institution's delivery of licence-financed services has lately been accused of "distorting the market" by creating an "uneven playing field" that supposedly puts the private commercial sector at an inherent comparative disadvantage. The market, it is argued, can provide all necessary services on a commercial basis. What is not commercially viable is by practical definition unneeded, and thus the entire PSB system is an anachronistic, inefficient, expensive relic. This is essentially the position taken by the Association of Commercial Television in Europe (ACT) and, increasingly although not primarily, by the European Newspaper Publisher's Association (ENPA).

### Complexity in Balanced Media Systems

Our principal focus is on challenges to PSB arising from the interplay of traditional and online media (Roppen, Lund & Nord 2010), and because of the new media rivalry with the commercial sector that is increasingly broad in sweep (Andersen 2005). This has not always been the case. For example, Mainos Television [MTV] in Finland had generally good relations in its duopoly with YLE from 1957 until 1993 (Endén 1996). The same was true in the UK, where Independent Television [ITV] and the BBC had a generally congenial duopoly from 1957 until 1982 (Collins 2010). Although there was competition for viewers and over policy, the relationship was more co-operative than not. This changed as new commercial operators were licensed after the 1989 *Television without Frontiers* directive came into force. Despite increasingly sharp competition with radio and television operators, the newspaper industry was more cordial because broadcasting wasn't a direct competitor for them. This changed in the past decade as companies in all media sectors and industries invested in online media, and as newspaper companies bought or built TV channels (Flink 2011). Since 2008, an already fraying relationship has been exacerbated by the consequences of the economic recession.

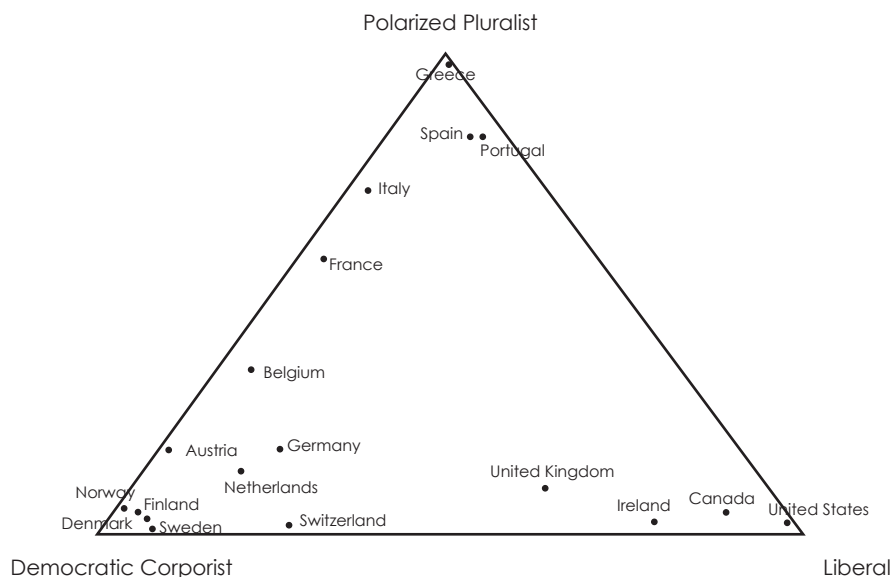
A key concept here is 'multimediality' which, strictly speaking, means "several media". European PSB has been 'multimedial' since the 1950s with the introduction of television – or at least 'bimedial'. In the literature, however, multimediality denotes hybrid combinations of text, graphics, still images, data, sound, animations and moving pictures that together, via computer processing and telecommunication delivery, comprise integrated digital media environments (Jensen 2004: 4:19f). PSB companies have adapted to the growing complexity of media platforms, and developed mission statements to validate efforts to develop a robust online presence. A good foundation for understanding can be found in documents produced by the Digital Strategy Group in the first half of the 2000s, now available in the online archives of the European Broadcasting Union.



Generally speaking, the formulation advances a 'platform-neutral' approach premised on ensuring that already-paid-for broadcast contents, as well as new online services, are available to the public however they prefer to access or receive them (see also the 2006 Council of Europe report written by Christian S. Nissen). Most national governments in Europe have encouraged PSB companies to develop services in the digital domain, although the scale, scope and financing have varied. This drive to become public service media companies is partly a technical feat, partly a political phenomenon, and partly an economic complication (see Lowe & Bardoel 2007 for a comprehensive overview). All of that is evident in new procedures intended to ensure that any fresh initiative will only be condoned if it 1) contributes to the fulfilment of PSB goals and 2) is fair for commercial competitors in the market. This approach emerged in Great Britain as applied to the BBC, where it is called the 'public value test' [PVT]. It is being adopted in many countries today. Since 2009, ZDF and ARD have been forced to abandon portions of their online service portfolios in consequence of successful attacks from commercial broadcasters and their lobbies that have resulted in an agreement to subject these public media companies to a German version of PVT, called the three-step test (Radoslovov & Thomass 2010). Discussions are underway in Norway and Belgium to craft something similar, and indeed more broadly. The European Commission's 2009 Communication on state aid encourages such developments (EC 2009).

Clearly the challenges are not primarily technical. As a general frame of reference, we borrow the ideal type proposed by Daniel C. Hallin and Paolo Mancini (2004) to characterize Nordic societies as *democratic corporative media systems*, and in contrast to liberal and polarized types. Their typology originates in studies about trends in media development and regulatory regimes. Corporatist systems are organized as a "partnership between social organisations and the state" and are evident in the Nordic countries' political traditions. PSB in this region endeavours to strike a functional balance between the demands of the market and the needs of civil society. Thus, media systems in the Nordic region strongly favour "a common culture and a common public sphere" (Hallin & Mancini 2004: 143).

In this region, control of the media as systems is no longer primarily in the hands of political parties (in contrast to polarized systems in much of southern Europe). Historically, politicians exercised stronger and more direct control over PSB in the Nordic countries, but a strong market orientation took hold in the 1980s with the advent of deregulation. That is not to say that striking a balance between the two primary sectors comprising the dual system is not a top priority, however. It certainly is. It is to say that a robust, healthy dual system is considered essential for meeting the broadest range of needs in the respective societies. At issue has mainly been how that balance can best be achieved – and maintained (Nordahl-Svendsen 2010).

**Figure 1.** Three Models of Media Systems

**Source:** Hallin & Mancini 2004: 70.

Hallin and Mancini formulated a thesis suggesting that media policy is generally converging towards the liberal orientation, highly characteristic of the USA. This has fuelled policy concern in Europe about increasing uniformity and an increasingly predominate market-sensitivity determining the content of media output overall. In recent years, however, research indicates that Nordic media systems have not moved unequivocally towards this presumed liberal convergence (Lund, Nord & Roppen 2009), but that the development is more a matter of adaptation than of outright adoption.

## New Challenges – Old Organizational Structures

A recent volume investigates distinctions between television broadcasting in smaller and bigger countries, and concludes that bigger countries, e.g. the USA, UK and Germany, are not appropriate 'models' for how smaller countries should – or even can – do things (Lowe & Nissen 2011). The researchers assessed factors including political and cultural context, the influence of neighbouring states, population size, economic resources, majority and minority relations, the role of language, and the dynamics of international trade in formats as well as cross-national ownership of media properties. Analyses of economic and structural criteria conducted by Robert G. Picard (2011) about

TV systems as a whole, and by Christian Berg (2011) about PSB as a sector, are especially important because they empirically demonstrate that small media markets face unique challenges that must be accommodated if policy is to be both fair and useful.

PSB in small media markets costs proportionately more per capita because there are fewer people to share the costs. Moreover, countries with large populations often enjoy secondary markets for their media goods, especially when English, Spanish or Russian is the mother tongue. The costs for production and consumption at home can be offset to a significant extent, sometimes profitably, through sales abroad. Moreover, media in big countries capture audiences in their smaller neighbouring countries, where many speak the bigger country's language, especially along the borders, e.g. Canada and the USA, Germany and Austria, Ireland and Britain. This further extends the 'domestic market' for large countries. Of course cultural identification is important with regard to the prospects for exportation, and this is also relatively limited for media producers in Denmark (5.5 million), Finland (5.3 million), Iceland (311 thousand), Norway (4.7 million) and Sweden (9 million). Under such circumstances, competitive original production can only be sustained if a sufficiently strong base for collective financing affords the possibility of synergies and innovation (Lund & Berg 2009). The universe of potential viewers determines the volume of economic resources available not only to pay for the hourly costs of production, but also potential profit margins for the commercial sector.

A characteristic common to the Nordic countries (and a peculiarity by international comparison) is that PSB channels have retained their position as market leaders in these systems even after deregulation, and despite increases in private sector competition (Carlsson & Harrie 2010). The strength of PSB market positions cannot be reduced to a question of supply and demand. It is also a question of a political willingness to sanction PSB as a property of media systems that deserves resourcing and adequate safeguards to produce and compete. This is precisely why PSB must legitimate its special status by producing and distributing *merit goods*, assuming as well that commercial mechanisms are unable to produce a sufficiently varied menu of media content that qualify as merit goods (Lund 2005). This is especially likely in small niche markets, inasmuch as imported material is far less expensive than domestic production. Christian S. Nissen, former Director-General of DR (The Danish Broadcasting Corporation), gave a useful illustration. During his tenure, the cost to produce one hour of domestic drama was approximately \$550,000, roughly forty times the price to import an episode of a popular American drama series – about \$14,000 (Lowe et al. 2010: 33). Given the comparative realities, it is understandable that small states intervene to exert a beneficial influence on domestic consumption by financing merit goods. In this we find that PSB is harnessed to correct market failure.

But of course there are risks. One side effect of intervention is the tendency to institutionalize monopoly, or to deter new competitors and existing companies from undertaking innovative product development (Ewertsson & Hultkrantz 2004). Viewed in the light of ideals relating to the free play of the market, government-underwritten PSB, like cartels, distort the market. The challenges to PSB arising out of competition on multimedia markets are not primarily a question of whether PSB channels have an impact on private players. They do, of course; that was precisely their *raison d'être* in the minds of the policy makers who created them. The challenges lie in determining which kinds of impact are beneficial for a system as a whole, and which kinds are detrimental. Here, again, the issue of balance is the crux of the matter.

In the late 1980s, acting through his investment firm Modern Times Group, Jan Stenbeck changed the media landscape in the Nordic countries by founding companies like Viasat, TV3 and Metro International. Stenbeck once likened the conditions prevailing in media markets to a game of “Rock-Paper-Scissors”<sup>1</sup> (Andersson 2002), where rock beats scissors, scissors beats paper, and paper beats rock:

Nationally based media capital (rock) has never ruled alone. Commercial interests have regularly been trumped by political regulation (paper), and on occasion, global technological development (scissors) has overpowered national regulation – as when Stenbeck himself introduced satellite television channels into the Nordic countries in defiance of national media policies. But no technology can develop without risk capital. So, in practice rock and paper (in the form of political economy) continue to exert considerable influence over both innovation and media competition.

## Challenges Relating to Distribution

We shall discuss the current PSB challenges in relation to production, distribution and management. In most cases it would be logical to begin with production. But because so much of the foundation for regulation and heritage is keyed to distribution (Dahl 1999; Engblom & Wormbs 2007; Lund 1976), we think it better to begin there.

The principal reason for establishing broadcasting monopolies in the Nordic countries had to do with complications in distribution. First, the frequency spectrum was limited when radio relied on MW frequencies, and again when VHF television arrived. Second, the physical distribution of signals was handled by monopoly telecommunications agencies, which explicitly abstained from all responsibility for content (Skovmand 1975: 44). The fruits of a monopoly position later facilitated opportunities for PSB companies to shift resources from platforms where competition was weak to directly confront commercial

players where it was hot. Thus, in the Nordic countries, PSB plays a dual role as a corrective to market failure, but is also a primary source of innovation and competition in the national language, most recently in new media and services. Here, PSB acts like a market locomotive for driving development of the media sector and its services as a whole.

In the establishment phase of new distribution technologies, PSB plays a legitimate role as an innovator and developer, and is often supported by the commercial sector because they are taking the big risks necessary to determine whether there is a market in the first place. But as markets develop, the reaction changes. Challengers become greater in number and more aggressive in their attacks. The dramatic growth in comparatively new distribution systems provides the greatest opportunities for profits. In this connection, it is important to differentiate between three stages of development: risk-venture R&D, normal operations and, sooner or later, the decommissioning phase (Rogers 2002).

In the first phase, PSB can function as a locomotive. However, when successful this very often results in the second phase, in which PSB companies are market leaders, which aggravates claims (legitimate or otherwise) that they are becoming a distortive presence. The third phase is trickier, as few PSB companies seem keen to withdraw from much of anything by choice, and thus decommissioning is most often (so far) a result of commercial industries gaining support from political governors to limit PSB presence and performance in various areas (e.g., popular genres of content such as sports and entertainment, kinds of online services that offer commercial opportunity, operating just as robustly on the Internet, etc.). In all three phases, however, the operational importance hinges on the degree to which PSB factually functions as a market corrective, i.e. an antidote to market failure (Tunstall 1977 & 2007).

PSB's potential to be a market leader is evident in the increasingly pointed protests newspaper companies have raised. They claim that PSB market dominance stifles commercial opportunities (e.g., ACT and ENPA). The economic counter-argument (van Cuilenburg 1999) is that only well-consolidated players are able to offer a broad range of mainstream and targeted programming and services to offset the perils of 'cultural discount': Cheap imports lower domestic diversity and have less utility and value-added properties than original productions. In small-language countries, especially innovation and original production are impossible without organizations that can cross-subsidize innovative development within a larger operating budget. And without such institutions, countries with small languages can mainly afford imports and local-language imitations of imported concepts.

Both sides certainly have a point. But we think it is important to contextualize the issue in broader terms. PSB distribution is crucial to the development of new media platforms – particularly in the development phase. Without a

threshold amount of subsidization and cross-financing, it is impossible for small nations to develop and mature their domestic markets in either technology infrastructure or content provision. In return, PSB development projects pave the way for commercial players because risks are reduced after the initial investments have been made. If PSB were not pro-active in technological development, the pace of development in small countries would be much slower. Given the pace of development in media technology and competition, this must be detrimental to the interests of citizens in small-language countries, and as importantly to some domestic private media actors in these countries as well.

Some argue that once an innovative technology has entered the routine operational phase, licence-financed PSB loses the right to use the platform to distribute programmes and services – at least to the extent that this happens in competition with commercial players. Against this line of reasoning one may argue that to maintain its legitimacy and provide an all-round output of essential supply, PSB institutions must be present on those distribution platforms their paying publics prefer. Lacking such opportunity, it is impossible to serve their corrective function, particularly in areas that commercial media find unattractive. And this is a volatile arena that is difficult to predict. In the past, children's TV has been relatively profitable, and still is for some firms, but in recent years in the UK, for example, the regulatory agency, Ofcom, has published quite a bit about the British commercial public service providers (C4, Five and ITV), indicating that it is not profitable enough to provide children's programming and regional services (Thickett 2010). At the same time there is mounting pressure to top-slice the license fee, and has required the BBC to make deep cuts in their budget (savings of about 750 million pounds from 3.6 billion), possibly shut down radio and TV channels, and a variety of websites (*Cuts at the BBC* 2011).

In the routine operational phase, one should be careful to distinguish between potential and factual market distortion. Studies of competition and cooperation (Dimmick 2003) show that external diversity (in the form of many players and numerous media owners) does not necessarily provide internal diversity (a wide variety of output). For the sake of diversity, therefore, it would be quite unfortunate if PSB institutions were hindered in their role as a corrective mechanism for market failures, ultimately relegated to a marginal position that is the practical result of succumbing to demands that they confine their activities to genres of content and kinds of services that only appeal to narrow niches, often 'elitist' in complexion, and otherwise of little to no current commercial worth. That is the practical import of curtailing broader definitions of the public service remit. In this connection, we claim that the domestic commercial sector is hurting their own financial interests because it is not possible for them to replace the role that PSB plays without significant

costs that will create more stress on already shrinking margins. At the same time, the loss of PSB as a co-opetitor for the capitalization of innovation would be lost, and thus an incubator for developing the market.

### Challenges Relating to Production

PSB as the exclusive domain for production has never been justifiable on technical grounds, but only through political and economic arguments. When television became the responsibility of the same organizations that provided radio services, it was because policy-makers were convinced there were not sufficient revenues, either from licence fees or advertising, to support robust competition among producers without seriously impacting other vital niche producers, especially the daily press (Lund 2005). As a consequence, responsibility for television production was assigned to the PSB monopolies without much controversy. Finland is an exception, because commercial television was introduced there in 1957 to offset the costs. One must be careful not to overgeneralize.

Digitization has lowered the cost of distributing broadcasting signals significantly, but it has not cut the costs of original production. The policy objectives seeking free media competition in Europe bode ill for original production in small-language areas. The regulatory regime is being standardized, and there is an unwillingness to take into account different situations. Some call for a more detailed definition of PSB (Mortensen 2007) to assess national media policies in relation to the 'proportionality' principle. According to this principle, the amount of financial support accorded by the state to PSB must be proportional to fulfil those functions PSB has been specifically charged to perform (i.e., stipulated in the remit), and no more. In consequence, there has been heavy pressure to specify the remit for PSB in detail and for performance assessment to be under the supervision of an 'impartial' authority (doubtful because representatives of commercial companies are often board members today), which in turn may require even more detailed public service charters in the member states.

As we have implied, European Union regulation takes the form of standards. Regulatory authorities in all the Nordic countries seem set to require, for example, some variant of PVT, as discussed earlier. But if applied too strictly, the test will have the unfortunate side effect of shifting regulatory attention from public service institutions as multimedia entities towards a conception of PSB as distributors of specific content and services. It also is likely to have the unintended consequence of slowing development and bureaucratizing decision-making, at significantly higher costs as well.

Why this is being pushed is not surprising, however. The surest way for the private commercial sector to grow market shares and increase margins is to



roll back the incumbent. That is not necessarily cheap or fast, but it is cheaper and faster than developing entirely new products and services for markets that are not yet clear or well founded. To achieve this, the commercial lobbies have been exerting pressure on multiple fronts: to narrow the media that PSB can be involved in, to narrow the genres that PSB can produce, to broaden access to license-fee revenues, to raise requirements for out-sourcing production, to secure bigger subsidies for themselves at the expense of PSB firms, to slow development by increasing the burdens required to secure ‘approval’ to try new things, to ensure their own members have a place at the table where decisions are being made about what PSB can and cannot do, and with the newspaper lobbies and publishers now increasingly on board – to manage a campaign of editorial opinion and reportage that is highly critical of the whole concept of PSB so as to affect public disenchantment and pressurize political will. This was thematic in the RIPE@2010 conference in London, and is the focus of the fifth Reader in the series, *Regaining the Initiative for Public Service Media* (Lowe & Steemers 2012).

Since 1990, we have witnessed a radical increase in the productivity of PSB institutions when measured in terms of hours of broadcast service per person employed in production. Analyses of digital production (Krumsvik 2009; Küng 2007; Lund, Nord & Roppen 2009) do not yet permit definite conclusions as to the financial importance as commercial business models are still pending. Based on current development, however, we predict a situation of partnership and cross-promotion, combinations of competition and peaceful coexistence where a variety of media producers establish more or less lucrative positions in converging media systems.

## Challenges Relating to Media Management

In this situation, it is crucial that PSB managers be able to balance the drive for innovation and journalistic legitimacy with respect for non-subsidized competitors’ production. As it is certain that budgets for PSB companies won’t be increased significantly in the years ahead, and more likely that budgets will be cut given the lingering damage caused by the broader economic recession, these companies will again be doing more with less. The saving grace that makes this possible in the case of such firms in the Nordic region is that most (Iceland excepted) are not-for-profit organizations. They can allocate their resources to perform merited services without needing to generate any commercial margin. Ironically, perhaps, some commercial media players are unhappy about that. It seems that, in their view, PSB should not be involved in anything with commercial potential, since the non-profit status conveys advantages they lack. The self-serving interests underlying such one-sided argumentation should be evident.



Strategic media management in a multimedia setting requires more than taking advantage of commercial niche positions in an efficient manner (Dimmick 2003; van Cuilenburg 1999). It also requires taking proactive measures to play a formative role in shaping future developments (Dyke 2004; Nissen 2007), including thorny issues relating to royalties that complicate and sometimes thwart production and distribution opportunities offered by media convergence and attendant synergies.

PSB organizations in the Nordic countries differ somewhat with respect to how they are managed (Nordahl-Svendsen 2004). These differences are marginal, however, compared to a shared tradition of negotiation that is essential for steering these companies to satisfy both market considerations and principles of editorial integrity. In all five Nordic countries, independent public service broadcasting is undertaken according to an arm's length principle, whereby the powers of the state refrain from intervening in the operations of the organization. Be that as it may, a veritable thicket of regulatory bodies has grown up around PSB in recent years – created, ironically enough, in the name of de-regulation and liberalization.

There are, however, distinct differences in practice between the formal steering organs in the Nordic countries, despite shared traditions (Lund 2005). Steering is neither a question of pure market forces calling the shots, where financial criteria rule, nor of a planned economy agreed upon by majority rule. Instead, steering takes place through a combination of market conditions, longstanding traditions keyed to the preservation of press freedoms, and political compromise (Jørgensen et al. 2008). The Nordic countries have relatively long traditions of parliamentary oversight of mass media in their service role, as economic markets in a dual system framework, and with regard to domestic cultural policy in supplementing self-regulation. Particularly news and current events programmes are monitored for fairness and usefulness. Thus, PSB is piloted from within by a nominated executive management and from without by competing elites, users and regulators.

Competition authorities have become more assertive in recent years. In their de jure regulatory universe, there is little room for complex distinctions or nuanced approaches to regulating media markets. The legacy of previous national regulatory regimes does not necessarily strengthen PSB organizations' ability to compete in markets of the future, as these are taking shape (Rambøll Management 2008). Newspapers, radio and television in the Nordic countries are outgrowths of a historical tradition characterized by the ideals of democratic corporatism, a tradition that is unlike traditions in other European countries. Given increasingly interventionist EU policy in the media sector, PSB institutions will be able to preserve their relative autonomy only if they manage to adapt to transnational precepts. What is perhaps not grasped very well or completely is that achieving such adaptation requires these institutions

to be more than market failure correctives; they must sometimes function as market leaders and as innovation locomotives in the domestic and regional context. Although we certainly agree, as earlier indicated, that PSB companies face difficult decisions concerning what they will decommission in the third stage of their development, this is not to say these decisions can fairly, usefully or appropriately be premised on conditions elsewhere.

Of course we are not saying that everything is different and unique in the Nordic region. But enough is both different and unique to legitimate doubts about the trends we have been discussing – the drive for standardization in regulatory frameworks, market operations, organizational complexion, etc. The point is to highlight the importance of striking the most beneficial balance in each context.

### The Political Challenge: Maintaining a Viable Balance

Challenges relating to production, distribution and management pose many new demands. PSB companies in the Nordic region are walking a tightrope that is increasingly without a safety line. The range and complexity of demands we have discussed here account for why and how nationally based media producers find themselves caught in a field of tension between deference to the state, the market, and civil society. Market-based critics of PSB are demanding some return to ‘purity’ of form and content in the sector (e.g. Aitken 2007; Borg 1994). They claim that PSB has over-reached and is causing much harm for market-oriented interests. Although quite a few politicians seem to agree, at least at the supranational level within the EC, most also agree that any purely government-operated radio and television sector will have undesirable consequences for democracy.

Recently, several European countries have abolished the traditional public service licence fee, replacing it with funding from general tax receipts, i.e. out of the annual state budget. Even some of the Nordic countries are taking this route, including Iceland and Finland – perhaps with worrying consequences. There have been severe cutbacks in terms of provisions for original programming, as the state budget is in trouble and cuts are being made more or less everywhere. To date, Denmark, Norway and Sweden continue to rely on the conventional licence fee system, although with some interesting differences in relation to politically dictated and market-oriented alternatives. As we will come to soon regarding Finland, it is important to observe that what has so far been characteristic might not remain characteristic.

Sweden appears to be a clear-cut example of the conventional system. There are currently public broadcasting companies that rely on license fee funding there: Sveriges Television AB (*Sveriges Television AB*, abbreviated

SVT), Sveriges Radio AB (*Förvaltningsstiftelsen för Sveriges Radio AB*, abbreviated SR) and Sveriges Utbildningsradio AB (abbreviated UR). All three are 100% funded by a licence fee levied on households. No advertising is permitted on any of these public service channels.

The Norwegian approach is mixed, as is also the case for Denmark. The Norwegian system is comprised of one public service broadcasting company funded entirely by a licence fee (NRK) and several private commercial channels that are funded mainly by advertising, but with mandated public service obligations (Radio Norge, P4 and TV2 Norway). Thus the PSB operator has the conventional arrangement, but the system as a whole features a blend of public service obligations and market characteristics. Taken together, these four companies are construed as public service broadcasters (*allmennkringkastere*).

In Denmark, developments have been several steps farther removed from the conventional approach and have moved quite a bit towards a market-based PSB system. DR (radio and television) has been financed by a licence fee since the late 1920s, but has had to share the revenues with Danish TV2 since 1989 – although after 2004 only with the regional channels. In 2002, the Danish government introduced a system that was inspired by the approach taken in New Zealand. Contestable funding derived from licence fee revenues is available for commercial television to apply for. Beginning in 2011, this was extended to radio and as of 1 November a private 24-hour talk radio channel has been funded from this pool. Denmark illustrates a hybrid approach that combines the conventional system with an increasingly market-oriented PSB model.

In Finland, the public broadcasting company, YLE (*Oy Yleisradio Ab*), has so far been fully financed by a license fee charged to households with a television receiver. Advertising is not permitted, and there are no commercially financed private sector companies with explicit mandates to fulfil public service functions. Moreover, thus far no other broadcaster has been able to contest any portion of the license fee revenues that finances this PSB operator (which provides extensive radio services, as well, and has a variety of online services that are popular). But the future will be different. A brief overview to explain the change will be useful. A work group was set up by Parliament in 2008 (the Lintilä Committee) to consider, in part, the future funding of YLE. The committee's 2009 report proposed the *TV licence fee* be changed to a *Media licence fee* that would have lowered the annual cost for households but added a new category of payment by businesses. This was hotly contested by the newspaper industry and became a political problem. As a result the decision was shelved at the time, but will be taken up again in the near future. In the interim the newspaper industry, in particular, was keen to advocate funding from the general state budget, meaning that the license fee should be

ended. That was agreed in late 2011, with some revision in summer 2012, and will be implemented in 2013 (for the best overview of the process and results see Ala-Fossi 2012). Finally, we should note that the Finnish approach has not been as conventional throughout its history as this overview might suggest, however. Until 1993, YLE received about 20% of its annual revenues from fees charged to the first commercial TV operator (MTV) in Finland (established in 1957). Until that time MTV did not have its own channel and was required to pay for using YLE's channels to transmit commercial programming.

### Maintaining the Balance

The situation we have described indicates that the financing of public service media is in flux. The evidence would suggest a period of fermentation that is likely to bring significant changes that will inherently reposition PSB at some new crossroad in relations between the state, the market and civil society. Critics of PSB are demanding a return to an idealized 'purity' of form and content in the sector, claiming that PSB has over-reached with damaging effects on media markets (i.e. market distortion). Although quite a few politicians agree with the critics, most decision-makers still support the licence fee system and its political principle of arm's length governance, and not only from government intervention but also from commercial influences in media as markets. This has largely been a matter of consensus as a necessary means of balancing the commercial business interests with the interests of democracy and culture (e.g. Syvertsen 2004; Søndergaard 1995).

In the Nordic countries, representatives of civil society, i.e. listener associations, cultural luminaries and so forth, have been politically nominated to oversight boards, regarded as a necessary buffer between PSB organizations and the authorities that fund them. In recent years, however, this antidote to the club mentality has been replaced by elected officials and board members drafted from media industries and their wider professional associations. Meanwhile the powers of the state, by means of so-called public service charters, have increasingly impacted day-to-day operations. Media research suggests a somewhat different triangle, one defined by social vectors where PSB must maintain a precarious balance between addressing their audiences in various roles – as licence-fee payers, as consumers and as citizens, respectively.

Public discussion of PSB revolves around a dualism of the market and the state as a polar opposition. Many lose sight of the fact that PSB was created neither to serve the public as consumers nor licence-fee payers, but rather and explicitly to serve as a public good for civil society as a whole (Kops 2007). This is the fundamental point, actually, and in practice this has long meant that PSB contents and services must privilege aspects of social identity that are

primarily linked to the varying needs of citizens. Especially in countries that are small and with unique languages, neither purely governmental nor purely commercial systems can provide all the kinds of services that are in the public interest, and sources of revenue certainly have an effect on what counts as the public good (Lowe & Nissen 2011).

In an era when digitization and the Internet seem to open the door to virtually infinite transmission capacity, it might be tempting to think policy-makers ought to return all media to civil society along the lines of “neighbourhood radio” and “grassroots television”. There is a heritage in this, as well, in the Nordic region. But in fact most media have never been produced and distributed on this basis. And today’s increasingly complex societies need a diverse media system that features both private and public players that may be competing here and co-operating there, with the balance continually re-established as conditions change. Most have accepted that PSB institutions were created for important socio-cultural reasons, not only to manage a shortage of frequencies. Arguments associated with PSB as a publicly financed producer of quality programming, independent of both market and government, still confer legitimacy.

There is less unanimity, however, when it comes to deciding how the public service sector should go about maintaining this balance in practice. Future sources of financing will probably need to be more diverse, involving various combinations of licence fees, direct and/or indirect subsidy, sponsorship, product placement, subscription, windowing strategies, and spot advertising. In a situation of multimedia, platform-transcending competition, PSB has essentially three courses of action by which to establish legitimacy in its interaction with the state, the market and civil society:

- A. Commercializing
- B. Purifying
- C. Diversifying

Public service broadcasters jokingly dub *commercializing* “suicide for fear of dying”. None of the PSB companies in the Nordic countries has landed in this extreme yet, although they are regularly accused of “pandering to the audience”, of attaching too much importance to audience share, and of aspiring to market leadership in areas that should be left to commercial actors. Especially TV2 in Denmark and TV 2 in Norway have been criticized for straying too far from politically sanctioned merit goods. Furthermore, it is remarkable that Norway’s NRK has experimented with both advertising on its website and paid programming through its subsidiary, Aktium, with no apparent damage to the company’s public service credentials.

In this light, one ought to begin making a clearer distinction between non-commercial and non-profit. Although it has often been said, nearly as an article of faith, that PSB is non-commercial, this has become increasingly inaccurate. BBC Worldwide is a wholly owned commercial subsidiary of the BBC and generates significant revenues. In the 2009/2010 fiscal year, BBC Worldwide generated profits of £145 million on total sales generating £1.7 billion (Financial Results 2009/10). Although the margin is not spectacular (about 8.5%), and is down compared to pre-recession rates, it is certainly respectable and obviously important for BBC coffers – especially in today’s strained environment. Other PSB companies have also been involved in various commercial activities, including advertising sales at NRK, as mentioned. It is less useful to consider PSB as a non-commercial undertaking, but it is accurate to say that it remains a non-profit institution.

The larger, deeper problem lies in potential problems associated with becoming more commercial in orientation. Here we find four threats of particular importance to the future legitimacy of PSB:

- (1) There is the threat of either dilution or confusion in defining and pursuing objectives. Commercial logic makes sense by referencing everything to the pursuit of profits. People are consumers. Social arenas are markets. Competition is desirable in principle if actually often resented in practice. Much in this logic is out of line with the PSB ethos. Pursuing the logic must cause confusion in various respects, and dilution of the legitimating principles as well. Forays into commercial activity breed resentment and resistance from for-profit media. But that’s not all:
- (2) Even when commercial activities are not pursued, the tendency to frame issues in those terms consigns the grounds of argumentation to the home field advantage of the ‘opposing team’.
- (3) Commercial practices and parlance play a role in blurring perceptions of differentiation between sectors in the public mind, fertilizing crucial questions about what the public is supporting, why it is worth the price, and muddying the PSB brand.
- (4) Growth in commercial revenues will almost certainly result in co-related reductions in non-commercial revenues, such as the amount of the license fee. PSB will end up in the same boat as commercial companies in their total dependence on general economic conditions and the vagaries of the advertising market. So commercializing is certainly an issue of keen importance in many respects. Although some involvement in commercial activities may be necessary, PSB must proceed here with extreme caution.

*Purifying*, the second approach to the challenges related here has been described as “heroic marginalization”. The idea here is that PSB ought to take the high ground by resisting populism and maintaining its steely resolve to provide traditional services of clear public service identity, whatever the outcome, even if that means becoming marginalized in the long run. This strategy may reflect a desire to turn the clock back to the monopoly era when PSB could hold its banner high without worrying about fluctuations and the harsh verdict of market demand – back to a more ‘innocent age’, so to speak. This sentiment would appear to be present to some extent, at least, in Swedish public service radio and television. The fact that radio and television are organized in separate companies has weakened Swedish PSB on the newer web-based platforms. Calls for a similar puristic turn on the part of DR and NRK have been raised in political quarters in Denmark and Norway. Although we certainly encourage clarifying one’s ethos and remaining true to its essential principles, death for glory seems quite ill-advised.

The third course – *diversifying* – has largely characterized PSB organizations in all five Nordic countries, and is certainly the most important aspect for the future of PSB. Despite complicated relations in this era of increasing convergence, which now pits every media industry against all the others in the online environment, there has been a general consensus that PSB production and services are needed for a range of particular interests that are unlikely to be adequately fulfilled in a purely commercialized system. This is especially the case with regard to enabling domestic markets to grow in the face of powerful international influences, the need for scale to build new infrastructure (which is of course expensive), and to guarantee large proportion original programming and services in domestic languages. Maintaining the balance between media services that carry commercially viable versus unviable content, and the complex relations between commercial and non-commercial providers (which are in many ways competitive but in others co-operative), is understood to be a matter of crucial importance for the vitality of civil society. This underscores the importance of establishing clear priorities for each country’s media system and determining the remit for each sector. Although we doubt many in the commercial sector will be especially delighted to hear this, it is essential for ensuring the variety and constellation of actors needed to achieve the complexity of services desired by the society.

Achieving and maintaining diversification in such small market countries require both innovation and an interventionist approach. PSB must live and grow in concert with developments in the wider civil society that is the focus of its operational concern, and certainly also the basis for its legitimacy. Change and instability in the context challenge all operators to have an active and obvious presence everywhere the public is going to be. This further implies that PSB must be concerned with far more than the more common



emphasis on audience maximization. The complexity and challenges inherent in today's operational environment (political, economic, social, technological and cultural) demand robust development in the competence of media management. And given the scarcity of resources, this also inherently requires the courage to terminate activities better left to commercial players.

In sum, our assessment is this: If PSB companies strive too hard for breadth, they risk being perceived as commercial and may lose their legitimacy. If they aim to be too narrow, however, they will be marginalized and lose their legitimacy for that reason. If PSB companies are quick to experiment with new technologies, they risk putting scarce resources on the wrong horse, which may have repercussions on their core operations. If they wait-and-see too long and enter any given area later than their competitors, they may be accused of copying their rivals. In short, there are no secure routes out of this minefield. This field must be navigated with care in many respects, with boldness in others, and always with a sense of fairness. But above all, the challenge is to produce and distribute an all-round service of appropriate, distinctive quality for the domestic populations of each host country, and for all those platforms that the population finds relevant to its own 'interest, convenience and necessity'. That phrase, which characterized U.S. public broadcasting policy for decades (1927 until the Reagan 1980s), is especially appropriate. But it is important to note that achieving this is not only about domestic productions, much less in-house productions; it is always about programmes and services that live up to the designation *merit goods* – irrespective of whether they are delivered by a company playing the role of market locomotive, market corrective or market leader.

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### Note

- 1 A hand-game often used to make decisions, like drawing straws, flipping a coin, etc. See <http://en.wikipedia.org/wiki/Rock-paper-scissors> for details.



# The Arm's Length Principle in Nordic Public Broadcasting Regulation

Hallvard Moe & Ole J. Mjøs

Public broadcasting systems in the Nordic countries have a lot in common. Historically, they began with publicly owned radio institutions set up in the 1920s and 1930s as publicly funded monopolies, followed by the launch of television in the 1950s and 1960, within the same model. Since then, both radio and television programming have shared characteristics based on a common public service ethos, but they have also actually been similar in form and content following substantial exchanges and cooperation across borders. One decade into the new millennium, public broadcasting continues to enjoy success in all the Nordic countries; the old institutions remain strong, perceived to retain a high level of legitimacy and journalistic integrity. Last but not least, there are some commonalities on the level of policy and regulation, which are often perceived as desirable or as the basis for the success story. Most crucial is the institutional autonomy, often referred to with the ideal of “the arm's length principle”. But how does this principle translate into the actual regulation of Nordic public broadcasters?

In a situation where the future of public service broadcasting is high on the media policy agenda not only in Europe (Lowe (ed.) 2010), but also globally (e.g. Banerjee and Seneviratne (eds) 2006), we need to move beyond overarching labels or off-hand references to such key ideals as the arm's length principle. If we want to contribute to the development of sound media policy, we cannot risk ignoring substantial differences between the Nordic countries, such as deviations from this principle and important current and related developments. With that in mind, this chapter looks more closely at the actual implementation of Nordic public broadcasting policy by assessing and operationalizing the arm's length principle along three dimensions: independence in *the running*, *the supervision*, and *the funding* of the public broadcasters<sup>1</sup>. We use the Norwegian Norsk rikskringkasting (NRK), the Danish Danmarks Radio (DR), the Finnish Yleisradio Oy (YLE), and the Swedish public service media triumvirate Sveriges Television (SVT), Sveriges Radio (SR) and Sver-

iges Utbildningsradio (UR), the educational broadcasting company, as cases, describing developments up until mid-2011. Our aim is to highlight the differences between the countries, digressions from the norm, and relevance of these practices for non-Nordic contexts.

## Media System Models and the Arm's Length Principle

The relations between the political system and the media can be modelled in different ways according to different criteria<sup>2</sup>. *Four Theories of the Press* (Siebert et al. 1956) is perhaps the most well known – and discredited – model (see Nordenstreng 2006 for a recent critique). The contribution from Gerard Vowe (1999; also Esping-Andersen 1995, 26-27) is more recent. He takes the idealized and recurring themes of freedom, equality, and security from political philosophies, and employs them as labels for media policy to emphasize their importance for a state's political culture. Liberal political systems, like the American, Australian, and British, primarily emphasize a policy of freedom. An orientation towards equality is most evident in social democratic systems – such as in the Nordic countries. Security – a policy focused on protecting more or less fragile existing social structures against inner and outer threats – historically has its deepest roots in states with a tradition of corporatism, like Austria and Germany.

Daniel C. Hallin and Paolo Mancini suggest a different trichotomy. They construct three models (Hallin and Mancini 2004, 89ff): the “North Atlantic or liberal model” (attributed to the US, the UK, Canada and Ireland) has a media system characterized by strong development of the press, limited political parallelism, non-institutionalized journalistic professionalism, and weak state intervention<sup>3</sup>. The “Mediterranean or polarized pluralistic model” (represented by Southern European countries and France) describes a media system with late and incomplete development of the press, weak professionalization, strong elements of political parallelism, and a strong position for the state. Comprising the Nordic countries (Iceland excluded), Germany, the Netherlands, Austria, Belgium and Switzerland, the “North/Central European democratic corporatist model” is characterized by early development of the press, a shift away from political pluralism towards neutral commercial press, strong institutionalized professionalism, and strong state intervention.

Such models attempt to explain the broader perspective. Consequently, in grouping together nations, they may neglect the more fine-grained differences. Hallin and Mancini's (2004, 30-32) description of ways to organize public broadcasting is a case in point<sup>4</sup>. The Nordic countries “could probably be said to tend more [than Germany] in the direction of the professional model”, according to which the running of public service broadcasting is left to pro-

professionals in order to avoid political involvement (Hallin and Mancini 2004, 167). Hallin and Mancini do acknowledge differences between the Nordic countries. They also stress that the British case better fits into a “professional model” (Hallin and Mancini 2004, 169). Our point is that although broad categorizations of relations between the media and political systems may help sort potential cases for comparative studies, the actual analyses require attention to the specific dimensions relevant to the questions at hand.

This is the rationale for digging deeper into the specificities of public broadcasting policy and regulations in the Nordic countries – to scrutinize the extent of professionalism in the different national models. Such an endeavour can be structured around the metaphor of “the arm’s length principle”.

“Arm’s length’ is a public policy principle applied in law, politics and economics in most Western societies” (Hillman-Chartrand and McCaughey 1989, 43). In a broad sense, the principle is “implicit in the constitutional separation of powers between the judiciary, executive and legislative branches of government” (Hillman-Chartrand and McCaughey 1989, 43, also Mangset 2009, 274). As such, it can be argued that the arm’s length principle is applied in relations between government and the media in democratic countries in general, as for instance formulated in constitutional freedom of speech paragraphs (Hillman-Chartrand and McCaughey 1989, 44). In a narrower sense, the principle is often linked to cultural policy, where a system for funding was established after WWII in many countries (Mangset 2009, 276). In these set-ups, the governmental branch, for instance a Ministry of Culture, is “facilitative not executive, so influence is exercised through setting broad policy and audit guidelines”, while “non-departmental public bodies operate and implement policy” (Taylor 1997, 449-451). In effect, then, the arm’s length principle entails outsourcing of both the decisions and the contracting of a service, such as cultural activities.

Laid out in this manner, the principle might appear uncontroversial. However, this is not the case, as illustrated by, for instance, cultural policy in France. Here, an active government agency tends to intervene in cultural life by prioritizing tasks, distributing funding and initiating projects (e.g., Andraut and Dressayre 1987). This is mirrored in public broadcasting regulations, where historically political interests have also reached within the organization of the public broadcasters – much in line with the “Mediterranean or polarized pluralistic model”, as described above (Hallin & Mancini 2004, 106).

The very existence of a public broadcaster, then, does not tell us much about whether or not, or how, the arm’s length principle is employed<sup>5</sup>. Fundamentally, the principle rests on tradition and the character of the political system in question. In this way, one can see the state of public broadcasting in the Nordic region as dependent on a more or less implicit culture or set of practices related to the ideal of arm’s length distance between political powers

and the media institutions. Nevertheless, the expression of the principle can be found in actual regulations. The interesting question, then, is how this ideal is translated into practice in different settings. We now turn to look at the public broadcasters in the Nordic region, focusing on differences between them, deviations from the ideal and recent relevant developments.

### Three Dimensions of the Arm's Length Principle in Nordic Public Broadcasting Regulation

To discuss the specificities of the implementation of the arm's length principle, we concentrate here on three key dimensions: the running, supervision and funding of the public broadcasters. In what follows, we describe how the four countries' set-ups relate to these dimensions, and then offer some comparative insights. Our focus is on the situation by 2011. However, this field is anything but static. Therefore, to underline the dynamics in translating the arm's length principle in practice, we illustrate the discussion with historical examples throughout.

#### *Running the Public Broadcasters*

The broadcaster's organization of administration and editorial decision-making is a first obvious aspect relevant to assessing the distance to executive and legislative powers. It is perhaps the most visible dimension of the arm's length principle: without institutional independence in the daily running of a media corporation, the journalistic output risks being labelled propaganda. The broadcasters in the Nordic countries differ regarding this dimension.

In Norway, NRK is a state-owned limited company, given the task of public service broadcasting in the Broadcasting Act. As the representative for the owner, the Minister of Culture alone acts as the General Assembly. The Minister appoints the Executive Board. The board in turn hires the Director-General, who is both administratively and editorially in charge.

Like NRK, Danish DR is a state-owned limited company, and its task is also given in national law: The Radio and Television Broadcasting Act. The Act states that DR shall be managed by a Board with "supreme executive authority". The Board appoints the Director General as well as the general management of DR (The Radio and Television Broadcasting Act 2010).

As in Norway, the Minister of Culture represents the owners of DR. The Minister also formally appoints the board members. But in contrast to the Norwegian case, the Parliament nominates the majority (six) of the members. The Minister only nominates three, while DR staff nominate the last two. The members of the Board represent a variety of professions and knowledge from



the media and culture sector, management and business (The Radio and Television Broadcasting Act 2010). The NRK does have a Broadcasting Council with members picked by Parliament and the government. But this Council merely has an advisory function, typically raising programme-related issues on behalf of listeners and viewers (NRK 2008b).

The Finnish broadcaster, YLE, is also a state-owned limited company. While the Ministry of Culture handles the owner-role in Norway and Denmark, an Administrative Council represents the owner in the Finnish case. YLE's operations are based on an Act on YLE (Laki Yleisradio Oy:stä/ Lag om Rundradion Ab).<sup>6</sup> The Administrative Council is YLE's highest decision-making body. Its 21 members are appointed by the Finnish Parliament, and represent a diversity of professions and fields including science, art, culture, business and economy, as well as different spheres of society and both the Swedish and Finnish languages (Lag om Rundradion Ab 2011b). The Act on YLE states that the Council is responsible for appointing the external Board of YLE, as well as major changes to the institution – either reductions or expansion of operations, and organizational changes. Furthermore, the Council decides YLE's budget and oversees that the broadcaster fulfils its public service obligations as stated in the Act (Rundradion Ab 2011c). The external Board, introduced in 2006, appoints the VD and General Director (IRIS, 2006; Lag om Rundradion Ab 2011d).

Sweden has chosen a slightly different way of organizing its public media organizations. The Swedish public television broadcaster, Sveriges Television Ab (SVT), is a limited company owned by a public foundation, *Förvaltningsstiftelsen*. In addition to SVT, the foundation owns the public radio, Sveriges Radio Ab (SR), and the educational broadcasting company, Sveriges Utbildningsradio AB (UR). While the Government chooses the members of the board of the foundation after consulting the parliamentary parties, the foundation selects members of the board of the three public service media companies (Hadenius et al. 2011, 185, 192). SVT underlines the arm's length principle further by pointing to its programming, which “is subject to the provisions of the Radio Act, to terms set out in the charter between SVT and the state as well as internal programming guidelines. The charter guarantees SVT's independency of all pressure groups, political, commercial or otherwise” (SVT 2011a). The Act and the Charter will be dealt with below.

All of the four national cases show how the running of the public broadcasters facilitates formal independence from state actors. Nevertheless, the procedures in all cases do deviate from the pure ideal of the arm's length principle.

The Finnish case seems, at first sight, to have implemented the principle in practice by dividing the work between the Administrative Council and the external Board. Still, there are some peculiarities worth mentioning in this case. Although the members of the Administrative Council of YLE represent

professions and expertise such as science, art, culture, business and economy – a set-up initially similar to the German model – by 2011, as many as 12 of the 21 the members, including the Chair and Vice Chair, were in fact Members of Parliament. Such direct links between YLE and the legislative assembly certainly raise questions as to the arm's length principle. Still, while the Council is the highest decision-making body of YLE, an important point in regards to the arm's length principle (similar to DR) is that members of the external Board can neither be members of the Administrative Council nor members of the senior management of YLE (IRIS 2006). Although YLE is, one might argue, under political control as the majority of the 21 members of the Administrative Council (the highest decision-making body of YLE) are Members of Parliament, the introduction of an external Board of YLE in 2006 represents an attempt to create longer arms.

In Norway, the set up of NRK as a limited company, with an Executive Board overseeing the daily activity of its General Director, signals a “professional model” of public broadcasting regulations. The lack of a broadcasting council with authorities involved in running the organization adds to this impression. However, the practice through which the Minister of Culture acts as a one-person General Assembly representing the Norwegian public seems to be at odds with the ideal. It clearly brings the executive branch of government close to the broadcaster, as illustrated, for instance, by the fact that the minister appoints board members. The same issue is also valid as a critique of the Danish set up. One way around this problem – a way to increase the arm's length – could be to introduce an additional layer between the executive board and the executive branch of government. The BBC Trust is such a construction: The Queen appoints the members of the BBC Trust following advice from the Department for Culture, Media and Sport. The BBC Trust, in turn, appoints the Executive Board of the BBC and the Director General (BBC 2011a, 2011b; Department of for Culture, Media and Sport 2006). In this specific instance, then, the Danish and Norwegian models, it could be argued, are missing a layer in the running of the public broadcaster.

When putting forward such a point, we need to be aware of developments over time. For instance, up until 1986 the Danish model included a Broadcasting Council that counted active politicians among its members, in some ways comparable to the German councils (e.g., Svendsen 2011). This open, political forum has since been replaced by a more closed and professional board. Fundamentally representing different models of running a public broadcaster, both set-ups have their pro and cons, but the current organization of the running of DR – the Board – seems to be more in line with the arm's length principle.

Similarly, it is important to acknowledge the historical developments in the Swedish case. Here, the foundation as ownership-model was introduced in the 1990s, and replaced the former organizational structure. Initially there

were three foundations, one for each of the public service media companies, SVT, SR and UR, but these were merged into one foundation, *Förvaltningsstiftelsen*, in 1997. The establishment of one foundation was considered a good way to protect the integrity and independence of the Swedish public service media (Hadenius et al. 2010: 185, 192).

While such formal measures are the fundament for independence in the everyday running of public broadcasters, we should not ignore the actual ways in which these measures are carried out, that is, how they are used. Appointments of General Directors are a case in point. In Norway, all Director Generals of NRK were appointed by the Government until 2001, and all of them had an affiliation with the Labour party. John Bernander, the first Director General of NRK to be appointed by the Board in 2001, was affiliated with the Conservative Party. Similarly, when Lauri Kivinen replaced Mikal Jugner as Head of YLE, he was the first director in 40 years not from the Social Democratic Party. It was the Board of Directors of YLE, and not the Administrative Council of YLE, that made this decision (Helsingin Sanomat 2010a). Such examples also remind us that not so long ago, the running of these broadcasters was under much more direct political control. In the Norwegian case, the role of the government, represented by the Ministry of Culture, is further complicated when we look at the level of supervision.

### *Supervising the Public Broadcasters*

A second dimension relevant to an evaluation of the arm's length principle concerns audits, assessments and public scrutiny. The ways in which a detailed and more or less continuous supervision of public broadcasters is carried out have become increasingly important in recent years (e.g. Jakubowicz 2003), as they can clearly affect the autonomy of the institutions<sup>7</sup>.

In Norway, the Media Authority has been the regulatory body for all media since 2005. It is an administrative body under the Ministry of Culture. Formally, the Authority receives a letter of allotment each year from the Ministry, defining the aims, strategic areas and economic framework of the Authority's activities. The Ministry also functions as administrative appeal body for decisions made by the Authority. Among its tasks is making sure all broadcasters adhere to the Norwegian Broadcasting Act. In addition, the Authority undertakes a yearly assessment of the public service broadcasters – NRK included. Based on programme data and an overview of services submitted by the broadcasters, the report assesses whether or not offers have been in line with the public service remits. NRK's remit is now laid down in a document, a "Manifesto", passed by Parliament in 2007. The Authority's public service report is submitted to the Ministry, and thus far, no public service broadcaster has ever been sanctioned for failing to deliver the expected programme quotas. From May

2010, the Authority is also in charge of a Norwegian ex ante test of new NRK services, partly modelled after the British public value test (Moe 2010).

Two recent developments in the supervision of NRK are worth emphasizing. First, following considerable criticism and a long-awaited revision, the Ministry in 2011 granted the Authority greater independence in the field of broadcasting (Kampanje 2011). In practice, the Ministry will no longer act as appeal body in questions pertaining to the Broadcasting Act. Second, the ex ante test of new NRK services introduces a new actor in the regulation of public broadcasting in Norway. The Norwegian Competition Authority will undertake a so-called market impact test as part of the ex ante procedures. This is not only the first time the Competition Authority will take part in actual assessments of NRK – but also the first time competition law will be directly introduced into public broadcasting regulations in the country (see Lilleborge 2011).

The Radio and Television Board is the independent media regulatory authority in Denmark. The Board, previously part of the former Danish Agency for Media, became part of the larger Danish Agency of Libraries and Media following a 2008 merger. The Danish Agency of Libraries and Media belong under the Ministry of Culture. The Radio and Television Board's form and tasks are stipulated in the Danish Radio and Television Act. The Board is responsible for overseeing how private and public broadcasters fulfil their legal obligations (Radio and Television Board 2009). Decisions made by the Board cannot be appealed to the Ministry of Culture.

The assessment of the Danish public broadcaster, DR, is fundamentally based on the so-called Media Agreement. This is a policy plan laid down by the Government and passed by Parliament every four years. The Media Agreement has direct consequences in a number of ways. For instance, the most recent Agreement disallows DR to launch new radio and television channels (Media agreement 2011-2014). The agreement further forms the basis for a more specific Public Service Contract, also negotiated every four years. This negotiation is a non-transparent process – according to the then Minister of Culture, Stig Møller; “a constructive dialogue between DR and the media policy spokespersons” of the parties behind the new Media Agreement (Danish Agency for Libraries and Media 2011)

Since January 2007, DR is also obliged to test new services to measure how they contribute to DR's overall public service mission in the form of an ex ante assessment. Until late 2010, this test was in practice done by DR itself, with the Radio and Television Board overseeing and publishing the reports. Following a revision, a new regime is now in place that includes an assessment of the market impact of planned new DR services. Under this new regime, the Radio and Television Board has a much more substantial role in conducting the actual testing (Media Agreement 2011-2014, 2010). The test consists of a public hearing and, in contrast to the Norwegian case, an evaluation by an independent consultancy on the new service's impact on the market (Svendsen 2011).

The Swedish Broadcasting Authority, under the Department of Culture, was established in 2010. It replaced the former Radio and Television Authority and the Swedish Broadcasting Commission (The Swedish Broadcasting Authority 2011). The members of the Commission are chosen by the Government, and the Commission is financed by a licence fee. The principles of the Commission have not changed despite the reorganization. Similar to the Danish Radio and Television Board, the Swedish commission's task is still to assess the extent to which programme production and individual programmes produced by the public media corporations (SVT, SR and UR) are in line with the provisions stated in the Radio and Television Act and in their charters (*sändningstillstånd*). Each of the three public service media corporations has its own charter (Hadenius et al. 2011, 186). For example, since 1956 the charter between the people of Sweden and the Government on public service television states what areas SVT is to produce programming in, but not how, as this is up to SVT to decide (SVT 2011b). The charter for SVT is developed in the following way; the Government (Ministry of Culture) selects a committee to write a draft of it. This draft is then subject to a hearing within the Swedish media sector, including SVT. The responses are then evaluated by the Department of Culture, and then a proposal is submitted to – and discussed in – the Parliament, which makes a decision (SVT 2011b).

The Swedish Broadcast Commission, then, serves both as a tool for the authorities for assessing the public service media companies, and also as a body to which members of the public may submit complaints regarding the television and radio programming produced by the companies (Hadenius et al. 2011, 189).

The Finnish Communications Regulatory Authority, part of the Ministry of Transport and Communication, monitors radio and television stations, ensuring that they operate in line with decisions on advertising and sponsoring as well as with YLE's public service obligations – as stated in the Act on YLE (Lag om Rundradion Ab). The Act also states that YLE shall deliver a public service report each year to the Authority on how the broadcaster has fulfilled its mission the previous year. Then, the Authority issues a statement on the report received from YLE to the Government. In addition, the Administrative Council of YLE must submit a report to the Finnish Parliament bi-annually on the implementation of the public service mission during the past two years (Lag om Rundradion Ab 2011e).

As in the other Nordic countries, the Administrative Council of YLE decided, in 2010, to implement an ex ante test for new substantial services. It is in the first instance the Board of Directors of YLE that requests a test of any planned service, but the initiative may also come from the Administrative Council of YLE, as well as any person residing in Finland or engaged in/running a business in Finland (YLE 2011). The Administrative Council handles the test itself

– including an assessment of the proposed service's impact on the commercial market, where the Authority seeks assistance from external experts.

Taken together, the arrangements of the assessment and supervision of the public broadcasters in the four countries all come across as elaborate and removed from any direct influence by the executive powers and Parliament, as witnessed by the establishment of regulatory bodies. The yearly reporting and assessment of activities, found in all cases, also mean that the performance of the public broadcaster is a point routinely put on the political agenda.

However, there are some interesting differences between the cases. The status and autonomy of the regulatory bodies differ, with the Finnish being the most clearly independent one, and the Norwegian having just recently earned a position where the Ministry of Culture is no longer the appeal body on issues of broadcasting policy. Again, this underlines how dynamic the field of regulation is, with change in this case signalling a greater distance between leaders and the broadcaster. A further difference relates to how the public service remits are formulated and revised. In Norway, the NRK "Manifesto" is not meant to be regularly revised – in stark contrast to the Swedish charters and the Danish Public Service Contract, which is re-negotiated with the ruling parties as frequently as every four years. In comparison, the BBC Charter, which lays out the British organization's remit, is rewritten only every ten years. In this instance, the Danish model may risk less stable conditions, and an easier entry point for political pressures. In Finland, YLE's activity is based on the public service mission stated and defined in the Act on YLE. While the Act may be changed in Finnish Parliament, YLE does not have to negotiate every four years with the authorities, as the Danish public service broadcaster is obliged to.

An important detail concerning the Danish case is the fact that while the negotiation of DR's public service contract is a closed, non-public process, the newly introduced *ex ante* test describes an open, transparent procedure (Svendsen 2011). Here, one could argue, the introduction of a novel, controversial form of public broadcasting regulations – the judgement of a planned service partly made on the basis of market impact – introduces an improvement in the actual policy process. And once again, beyond the general introduction of an *ex ante* test in all countries, we find national peculiarities. A case in point is the employment of the Competition Authority in Norway, as opposed to the use of external experts in Finland and Denmark, when the economic aspects of a planned public service are assessed.

In sum, the supervision of public broadcasting in the Nordic countries does maintain a clear distance between the institutions and political powers. And the aspects described here might actually signal a development that increases the arm's length. The flip side of this development is, however, increasingly elaborate, time-consuming and expensive procedures.

### *Funding the Public Broadcasters*

The funding arrangements of the public broadcaster represent the third dimension in our assessment of the implementation of the arm's length principle. Across our case countries, the licence fee on television sets earmarked to pay for public broadcasters has been held to represent a key part of the bulwark against undue intervention from the outside. But not only is this fee challenged in light of technological developments, we also need to look at the actual solidity of the arrangement.

The licence fee funding of NRK is anchored in the Broadcasting Act. Every year, Parliament sets the level of the fee, and routinely increases it somewhat. The fee was 1715 Norwegian kroner in 2001, and has gradually been increased to 2477 Norwegian kroner by 2011 (NRHF 2011). NRK is in charge of the actual collection of these funds, and the institution is also the sole recipient of them. Being a peculiar construct, the licence fee is frequently subject to discussion. Such is also the case for Norway: the Social Democratic party defends the current arrangement, but the Liberal and liberalist parties are now formally working for the abolishment of the licence fee. While the liberalist party FrP argue for the commercialization of NRK through privatization and advertising, the Conservative and Liberal parties consider direct funding of NRK through the state budget to be the preferred solution. Despite such statements, the licence fee still seems safe as the way to organize public funding of NRK. No substantial debate threatening its existence has taken place in recent years, neither in the Norwegian Parliament nor in the country's media. And, importantly, while the possibility of turning the fee, which now only targets TV owners, into a general fee for all audiovisual receivers has been aired, the idea has not gotten any traction in Norwegian politics (see Moe 2012).

As in Norway, the Swedish licence fee is anchored in the Radio and Television Act and the size of the fee is set by the Parliament. However, in contrast to Norway, in Sweden the size of the fee is also stated in this Act (Radio and Television Act 2010). Already in 1925, the licence fee funding arrangement was one of the key principles of publicly regulated radio in Sweden. By the mid-1930s there were around 1.5 million licencees, and in 1971 the licence fee for both radio and television was combined into one fee (Hadenius et al. 2011: 92-94). However, the fee has not increased annually, and it has not followed the national price trend. The fee remained unchanged between the end of the 1960s and mid-1970s, and today's fee of 2076 Swedish kroner has remained unchanged since 2009 (Hadenius et al. 2011: 202; Lag om finansiering av radio och TV i allmänhetens tjänst 1989: 42/2010).

Today, just short of 60 per cent of the fee funds Sveriges Television (SVT) and above 35 per cent finances Sveriges Radio (SR). Sveriges Utbildningsradio (UR), the educational broadcasting company, receives approximately 5 per



cent of the total licence fee. Every Swedish household “that owns, rents or borrows a television receiver” is obliged to pay the radio and TV licence fee. However, the definition of a “television receiver” extends beyond the traditional television set, and includes a number of devices capable of receiving and viewing television transmissions and distribution: video recorders and video cameras with channel selectors as well as computers with television cards that enables them to receive television signals (Radiotjänst 2011). The Swedish licence fee is subject to debate, but the key issue is not whether or not to abolish public funding, but whether the money should come in the form of a licence fee or a tax (Hadenius et al. 2011, 203).

In Denmark, the licence fee is anchored in the Radio and Television Broadcasting Act (2010). The Danish licence fee is set by Parliament for a four-year period. DR receives the majority of the fee – 70 per cent in 2008, since TV 2, the second publicly owned Danish television broadcaster, is primarily financed by advertising (DR 2011a). In 2007, the Parliament introduced a media licence that replaced the television licence fee. The media licence fee is supposed to reflect wider changes within the media sector and in media use by including hardware such as DVD recorders, computers with Internet access, and mobile telephones and other electronic devices that may function as receivers of television or radio programming. (A radio licence covers only radios (DR 2011b)). However, the size of the media licence fee and its scope is decided by the Danish Parliament every four years – as part of the wider Media Agreement. The fee is collected by DR Licens – part of the Danish public service broadcaster’s administration.

While the obligations of YLE are defined in the Act on YLE, the television fee is stated in the Act on the State Television and Radio Fund. The purpose of the State Television and Radio Fund is to finance YLE, the costs of collecting the licence fee, as well as to promote television and radio operations. The Government decides on an annual basis how the assets of the Fund are to be distributed. According to the Act on the State Television Radio Fund, then, it is the Government that determines the size of the television fee to be paid for the use of television sets. When deciding on the fee, the Government takes into account YLE’s ability to accomplish its public service mission (as stated in the Act on YLE), the competition and general financial development (Act on the State Television and Radio Fund 2007).

It is the Finnish Communications Regulation Authority that collects the television licence for the State’s Television and Radio Fund. The television licence is paid by everyone able to receive YLE’s television channels (Viestintävirasto 2011).

While the Danish Parliament replaced the television fee with a media licence fee, a similar attempt failed in Finland. A Parliament working group, with the support of the Minister of Communication, Suvi Lindén, of the liberal



conservative National Coalition Party proposed a YLE fee to be paid by all Finns, not just by households, and regardless of whether or not they have a television set. This new fee would also cover the use of YLE's programming and services via personal computers. However, Lindén decided to withdraw the proposal, after the opposition party, the Social Democrats, decided not to support the government in this matter (Helsingin Sanomat 2009, 2010a, 2010b; see Ala-Fossi and Hujanen 2010 for further discussion).

The issue of funding, the third dimension of our assessment of the arm's length principle, is clearly the object of turmoil and change – even more so than the two previously discussed dimensions: the running and supervision of Nordic public broadcasters. While the licence fee has been in place for almost a century as a defining characteristic of public broadcasters in this region, its actual size as well as set-up are repeatedly debated. The question of whether or not to expand the fee to include reception equipment apart from television sets is but the latest of these debates. As such, the dimension of funding is well suited as an illustration of the dynamic nature of the regulation of public broadcasting, and the changing, and in some instances vulnerable, status of the arm's length arrangements.

The differences in national customs in regards to the funding arrangements of the licence fee also have an impact on the position and survival of the fee. In Norway, the level of the licence fee is set yearly as a separate discussion in Parliament. In this way, it is subject to attention, also in the press. A tradition of not reducing the fee has developed, and a sudden cut would surely be noticed. If the licence fee were less visible – say, one among many posts in the National Budget – it would arguably be far easier to make cuts in the fee. In Denmark, although the licence fee is anchored in the Danish Radio and Television Act, the size and aspects of its scope are decided by the Media Agreement and the following Public Service Contract – negotiated between the Government and other political parties. In Finland, the licence fee arrangement is also anchored in legislation in the Act on YLE, but the amount and aspects of the scope of the fee are also subject to fierce political debate. Similarly, the size of the license fee in Sweden is also subject to political debate. This shows how the financial situation of these Nordic public broadcasters is less secure and predictable, and to a greater extent subject to political influence, than one might perhaps assume at the outset.

## Conclusion

While the Nordic public broadcasters share historical commonalities, structural similarities and societal roles, the presence of these institutions in this part of the world gives no indication of how the arm's length principle is

actually implemented across the region. The examination of the way in which Danish, Norwegian, Swedish and Finnish public broadcasters are run, supervised and funded reveals differences between the countries in how this principle is applied in practice, and how the various arrangements correspond to and deviate from the ideal. Importantly, the examination also reminds us that all three dimensions are dynamic in the sense that the arrangements can change quite rapidly.

The examination also shows how general models of media systems need to be supplemented with closer looks at specific set-ups to grasp the small, but important, differences between national cases. That said, several of the measures introduced over recent years, as described here, do indeed seem to fit a more professional model in the set-up of public broadcasting, as identified by Hallin and Mancini (2004).

The running and supervision of public service broadcasting in the Nordic countries are characterized, although in different ways and to varying degrees, by a separation between the institutions and the political powers. Still, the development of the arm's length principle through various measures comes at a considerable cost in terms of both time and financial resources. Perhaps the most striking example of deviation from the ideal of the arm's length principle is the vulnerability of the funding of public broadcasters. Despite being anchored in national broadcasting law, the debates, negotiations and decisions show how susceptible the size of the licence fee, and to a certain extent its use, is to political power. Here, the fundament, that is, the more or less implicit aspects of traditions and political cultures, comes into focus. While the actual arrangements might come across as vulnerable in theory, how easily they can be toppled in practice still depends on perceptions of and the weight ascribed to the traditions, the culture, of public broadcasting.

Furthermore, we also need to keep in mind that no system actually fits the ideal of the arm's length principle in the regulation of public broadcasting. In the UK, the country often thought to come closest to this ideal, there is more or less constant dispute over the set-up and autonomy of the BBC. All three dimensions discussed above have been subject to debate recently. The status of the BBC Trust is a case in point in regards to the running of the broadcaster. The Trust was set up as a new level in the control of the public broadcaster in 2007, independent of the board and management, to represent the interest of the licence fee payers, but it has been under attack recently, especially by the Conservative party now in power (e.g., Guardian 2009). The dimension of supervision of the BBC is also subject to fierce debate. Beyond the controversies around the establishment, duties and practices of communication regulator Ofcom (Smith 2006), autumn 2010 saw the National Audit Office for the first time gaining access to fully examine BBC finances (BBC 2010a). The third dimension, the funding of public broadcasters, is also highly relevant to cur-

rent discussions on the BBC. A 2010 controversial non-transparent negotiation with the new Government in the period between Charter renewal processes saw the BBC agree to take on £300 mill of extra costs, and also freeze the licence fee level for the next six years (BBC 2010b).

Clearly, then, the independence of public broadcasting is a matter of constant controversy that needs to be scrutinized and defended. This is not least important in an era when the relations between political powers and significant actors on the international media stage – news providers like Al-Jazeera being a prime example – can be described as at best invisible arms, and at worst as at zero arm's length. What this tells us is that we can use ideals like the arm's length principle as a guide when assessing the regulation of media institutions, but that we also need updated empirical insights.

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### Notes

- Two clarifications of terms are called for. First, we use "public broadcasting" in a restricted sense related to specific publicly owned organizations like DR, SVT, SR, UR, NRK, and YLE. Such institutions we concurrently label public broadcasters. "Public service broadcasting", then, we use as a wider term, encompassing a range of organizational forms and institutional practices, also those of private and commercially funded actors. Second, our use of "broadcasting" to describe the public service arrangements is not meant to ignore the ongoing processes with transferring such arrangements to other media platforms, which are key issues for media policy.
- The following paragraphs build on Moe (2009).
- Political parallelism describes the strength and nature of the links between political parties and the media, or more generally reflection of political divisions in the media (Hallin and Mancini 2004, 21).
- For critiques of the model in relation to the Norwegian media system in general, see Rolland (2008). For a discussion linked to Norwegian press history, see Høyer (2010).

- 5 For relevant, more recent examples, see studies of emerging public service institutions in Central and Eastern Europe, e.g. Mungiu-Pippidi (2003) and Jakubowicz (2004).
- 6 In Finnish, YLE is short for Yleisradio Oy, and the Act on YLE is Laki Yleisradio Oy:stä. In Swedish, YLE is called Rundradion, and the Act on YLE is Lag om Rundradion.
- 7 We limit the present discussion to national contexts. The supranational level has gained a stronger position in the supervision of public broadcasters over the past two decades, with the European Commission's role as a prime example. However, the actual implementation of new assessment procedures – such as the so-called public value tests – are undertaken on the national level, with substantially different outcomes (e.g., Moe 2008; Donders and Pauwels 2010).

# Public Service Financing in the Nordic Countries

Lars-Åke Engblom

The public service broadcasting (PSB) systems in the Nordic countries are funded by their audiences, and audience funding is considered fundamental in all five Nordic countries. Audience funding goes back to when radio was introduced, and all Nordic countries adopted the compulsory license fee pioneered by the UK and the BBC. Later, when television was introduced, license fees were also used, augmented with commercials in Finland and Iceland.

License fees have provided the PSB companies in the Nordic countries with good financial stability, allowing them to plan their operations, programmes, and investments in the long term. They have also been politically accepted. All leading political parties, from the left to the right, have until recently regarded this as the best possible system for funding PSB. This has, of course, been of great value to the public service broadcasters.

Traditionally, the license fee has been connected to ownership of a radio or TV receiver, but technology development has radically changed the conditions. Today it is possible to receive radio and TV programmes in many ways that do not involve a traditional radio or TV. There have also been changes in the financing systems in some of the Nordic countries. In Iceland, the household-based fee was replaced with an individual tax in 2009, intended for the PSB broadcaster RÚV (Ríkisútvarpið). In December of 2011, the Finnish Parliament decided to introduce an individual-based mandatory media fee to fund YLE (the Finnish Public Service Broadcasting Company), starting in 2013. In Sweden, a government-appointed committee proposed a similar change in September of 2012. The committee's recommendation was to replace the license fees with a tax beginning in 2014, but the government has postponed the proposal for at least a year.

However, there is consensus in all Nordic countries that even in the future, public service programmes will be paid for by everyone who can enjoy them. What is mainly being discussed is how this fee will be collected.

This article will describe how the funding systems in the Nordic countries are constructed and how they work in practice, as well as proposals for changing the system.

## For and Against Licenses

A key question in media politics is who should finance the media companies. Media scholar Denis McQuail said: “the contents of the media always reflect the interests of those who finance them” (McQuail 2000:198). This rationale has been the main justification for license-fee-funded public-service broadcasting. A broadcaster that is funded directly by the public will presumably broadcast content that serves audience interests above all other considerations. This is in contrast to advertising-funded broadcasting, whereby programmes are actually just a means to generate audiences that are packaged and sold to advertisers. It is claimed that license-fee-funded PSB affords greater freedom to air controversial and challenging programmes that might offend advertisers or not appeal to the desired audiences (Norbäck 2011:133). Such reasoning is a key component of the argument legitimizing the license-fee regime.

The main criticisms of license fees are that they give public service companies unfair advantages (a stable and guaranteed revenue stream), that they stifle investment and economic growth, and that they force some people to pay for media content they do not watch or listen to. Critics also argue that some people who should pay license fees refuse to do so without being caught (McKenzie 2005:294).

These arguments have also been referred to in the Scandinavian debate. For example, the rate of fee-dodging was pointed out as one of the main reasons for the change proposed in Sweden in 2012.

## Stable System

However, it has not been seriously considered to fund public service in any other way than through licenses or universal mandatory pay systems (like the media tax that has been introduced in Iceland and Finland). The traditional or modified license system has survived all shifts between social democratic and liberal/conservative regimes or other political constellations. A government bill presented by the centre-right Swedish government in the Autumn of 2009 declared the following non-controversial principles:

“The way of financing public service radio and TV is of great importance for the possibility to preserve an original and independent activity of high quality. It is also important that the model of financing enjoy a high degree of acceptance by the public, achieved partly through getting good value for the money, and partly through the fact that the economic burden will be shared



in solidarity by all who enjoy the service” (Radio och tv i allmänhetens tjänst 2010-2013. 2009:20).

The PSB companies in all the Nordic countries have also been careful to maintain a strong connection to their paying audience. They have arranged many special events to gather feedback and ideas from their audience, and have effected several campaigns to emphasize the journalistic integrity and editorial autonomy of PSB.

Public support from the audience is a prerequisite for political support for a public financing system. In Sweden, the public service radio company SR (Sveriges Radio) and the public service TV company SVT (Sveriges Television) have in recent years been the most trustworthy organizations in all of society (MedieAkademien/TNS SifoAB 2011). It is not likely that politicians would needlessly change the conditions for such popular institutions.

### Restricted Mixing

A central principle in Denmark, Norway, and Sweden has been not to mix different financing forms; the PSB companies in these countries have been almost completely licensed-financed. Even YLE in Finland and RÚV in Iceland have been mostly financed by license fees. In Iceland (with a population of 320,000), advertising has provided complementary revenue, but the majority – about two-thirds – of RÚV’s revenue has come from license fees (and today the “RÚV tax”). In Finland, beginning with the introduction of television in 1957 YLE received part of its revenue from its commercial partner Mainos-TV (MTV, “Advertising TV”) as payment for MTV airtime on YLE channels. This practice of collecting payments from commercial TV broadcasters continued after MTV received its own channel in 1993 and even after another commercial TV channel, Nelonen (“The Fourth Channel”) was introduced in 1997. The system was phased out in connection with the introduction of digital terrestrial TV (Ala-Fossi: 38). Between 2007 and 2012, YLE was only funded by license fees.

In all countries some sponsorship is allowed for PSB, mostly in connection with international sporting events or Eurovision transmissions. These extra revenues have been criticized by the commercial broadcasters – and passionately defended by the PSB companies – even though they amount to just a few per cent of the revenue of the companies. SVT’s extra revenue (mainly co-productions, sales of technical services, programme sales, and sponsoring) amounted to 6% of overall revenue, or 254 million SEK in 2011, of which 25 million was sponsorship (SVT’s public service-redovisning 2011:81).

The commercial radio and television companies in the Nordic countries are financed mainly by advertising and pay-TV subscriptions. Supplementary revenues are generated through sponsoring and product placement. No PSB company is allowed to – or claims to – obtain revenue from advertising, pay TV, or product placement (except, since the beginning, RÚV in Iceland).

According to several committees and scholars, this clear division between the license-funded and the commercial systems has contributed to a more stable economic situation for public service in the Nordic countries than that seen in other countries. Media scholar Karl Erik Gustafsson asserted that there has been an automatic adjustment between viewers', programme producers' and advertisers' interests through the competition between fully license-financed and fully advertisement-financed TV companies (SOU 2005:2:166).

## Current Models

In 2013 the traditional license-fee system is used in Denmark, Norway and Sweden. Until 2012 this was also the case in Finland. The system still works roughly along the lines of the original intent when it was first introduced in the 1920s. Despite the common principles, there are some differences. The system is a bit different in autonomous regions of the Faroe Islands and Åland. Table 1 presents an overview.

**Table 1.** PSB – Funding Systems in the Nordic Countries, 2013

	Denmark	Finland	Iceland	Norway	Sweden
<i>Way of financing</i>	License fees	Progressive tax	Fixed tax	License fees	License fees
<i>Fee/tax/year (€ rate 5.11.2012)</i>	2,352 DKK (315 €)	50-140 €	18,800 ISK (115 €)	2,580 NOK (350 €)	2,076 SEK (241 €)
<i>Fee/tax paid by</i>	Household	Individual	Individual	Household	Household
<i>Exceptions/reductions</i>	50% reduced fee for some pensioners	People with income lower than 7,813 € excepted	People with income lower than 1,425,218 ISK (8,782 €) and pensioners (over 70 years) excepted	-	-
<i>Amount determined by</i>	Parliament	Government	Minister of Culture	Parliament	Parliament
<i>Fee/tax collected by</i>	PSB	State	State	PSB	PSB
<i>Fee/tax distributed to</i>	State (to be forwarded to PSB and private broadcasters)	State (to be forwarded to PSB)	State (to be forwarded to PSB)	PSB	State (to be forwarded to PSB)
<i>Free dodgers (est)</i>	5%	-	-	9%	12%

*Norway: The Purest System*

The purest license system exists in Norway. The Norwegian Parliament has decided that the broadcasting license fee will be collected and passed, without any intermediaries, to the public broadcaster NRK (Norsk Rikskringkasting). The television license fee is a mandatory public fee that everyone who owns a TV receiver must pay. The license must be paid regardless of what kind of television set you have and what channels you watch. “TV receivers” include TVs, DVD players and video recorders with tuners, satellite receivers, decoders, PCs with TV cards/ tuners, and the like. For 2012, Parliament set the license fee at 2,580 NOK per year. NRK’s licensing department constantly checks licenses throughout the country. It is estimated that approximately 91% of eligible households actually pay the fee (Berg & Lund 2012:13).

The Norwegian debate on PSB financing has been low-key. Media scholar Halvard Moe claims that the fundamental financing of the public service institution NRK remains largely uncontroversial. Since the liberalization of the Norwegian broadcasting sector in the 1990s, a long line of political decisions have favoured NRK in the sense that the institution has been allowed to modernize and transform into a “multimedia house”. According to Moe, Norwegian commercial media and their interest groups have lagged behind their European counterparts when it comes to disputing NRK privileges (Moe: 56,59,62).

In the Norwegian Parliament, one party wants commercial funding and two want to turn NRK into part of the overall state budget. However, in the past ten years there has been no substantial parliamentary debate on alternatives to the licensee fee. The coalition government in office since 2005 – Labour, Socialist Left and the Centre party – still favours the license fee (Moe: 62).

The most controversial issue in Norway has been NRK’s right to sell ads on its websites (in contrast to DR, RÚV, SVT and YLE), which was introduced in 2000. The ad-funded private television provider TV 2 criticized this arrangement as it gave NRK an unfair advantage in attracting advertisers, but Parliament confirmed it as late as in 2007. It was abolished in 2010, but not through a political decision; it was NRK itself that decided to end this practice. It provided NRK with 1-2€ million per year, compared with 572€ million from license fees in 2010. It was simply not an important economic matter (Moe: 60).

## Denmark: A Unique Mix

In Denmark, part of the license fee is allocated to other programme producers than the PSB company DR (Danmarks Radio). The regional programmes on the state-owned commercial channel TV 2/Danmark are financed by the license. In 2007 a “public service pool” was established, from which commer-

cial channels can apply for funding for documentaries and drama productions. The pool is financed by the license fees and administered by the Danish Film Institute. Since 2011, even a national talk radio (24syv) is fully license-funded. In this way, Denmark represents a rather unique combination of a conventional PSB model with a marked market orientation (Berg & Lund: 19, 20). The greatest part of the license fee, however, still goes to DR. The collection of the license fee is still handled by DR Licens, part of DR's administration. Denmark has the highest proportion of license payers, about 95% of the TV audience (Lund 2009: 36).

The Danish license, called Media License, covers appliances such as TV sets, radios, video or DVD recorders, computers with Internet access, and mobile phones and similar electronic devices that also work as a TV or radio receiver. The license costs 2,352 DKK a year, and covers all appliances in the household including its car, boat, and summer residence. Pensioners on old-age pension, with a personal allowance rate of 100%, can apply for a concessionary license at 50% of the full license fee. Students do not get a concession.

For a long time, Danish media policy was based on broad agreement, but the consensus was broken in 2001 when the new conservative/liberal government wanted to privatize state-owned TV 2. This channel was Denmark's second largest TV channel, financed by both licenses and ads. TV 2 lost its license revenue (except for regional programming) in preparation for the planned privatization, but partly due to EU litigation; these plans were abandoned in 2012.

Market interests (commercial media companies) have had a greater impact on broadcast policy in Denmark than in the other Nordic countries. The periodically updated media settlements (the latest were in 2006, 2010 and 2012), however, have been established in relative political consensus. In the wider media arena, DR's license fees have been questioned indirectly by newspaper companies and private media businesses because they have facilitated DR's development of new media platforms. Faced with this criticism, DR has limited parts of its initiatives on new platforms (Nord 2011: 50).

## Sweden: Rising License Payments

In Sweden, the number of license payers has steadily increased in recent years: between 2009 and 2011, 60,000 paying households were added. A good example of the general acceptance of the system was seen in 2006, when the newly appointed conservative culture minister Cecilia Stegö Chiló was forced to leave her post because she had not paid the TV license fee for many years. Some other ministers also got in trouble for the same reason. After the publicity caused by these affairs the number of license payers began to increase,

after having been fairly constant since 2002. It is likely that a series of award-winning humour-based campaigns from the fee-collection agency Radiotjänst also contributed to the rise.

According to Radiotjänst the rate of fee-dodging is still high – over 12% among the households that are obliged to pay. Radiotjänst is owned by the PSB companies, and collects the license fees and forwards the funds to a state-owned “radio-and TV fund” from which the three PSB companies then get their grants. The radio and TV license fee is 2,076 SEK per year (2012). Every household and company that owns, rents or borrows a TV receiver has to pay the fee. The term “TV receiver” is defined in a similar way as in Norway and Denmark, including TV sets, digital TV selectors, computers with a TV card making it possible to receive TV signals, video recorders with a channel selector, video cameras with a channel selector, and DVD players with a channel selector.

### Iceland: Fixed Tax

In Iceland, a state tax system came into force on January 1, 2009, with a yearly individual tax replacing the previous license fees paid by households and companies. The broadcasting tax is paid by everyone from 18 to 69 years of age who earns at least 1,425,218 million ISK (about 8,800 €) per year. Senior citizens, who used to pay a reduced license, are now exempt from the broadcasting tax. In 2012, the tax amounted to 18,800 ISK (115€) per person per year. Businesses and companies pay the same amount as individuals. Iceland has thus implemented a “fixed tax” at the same level for everyone (except those exempt due to age or income).

The intention was that the tax would provide RÚV with the same level of funding as before, but at the same time as the broadcasting tax was enacted Iceland was hit with a grave economic crisis. It was not long before the Finance Minister proposed that a part of the broadcasting tax go to the general state budget. In 2010, RÚV received 2.96 billion ISK of the 3.5 billion the tax had yielded; the state kept almost 15% (Bjarni Guðmundsson 2011). On the other hand, in 2009 the earmark tax was not sufficient, and the state had to pay 400 million ISK extra to RÚV (Elfa Yr Gylfadóttir 2010). All this has created a very unclear situation for RÚV, which has to operate on lower resources than before and has become more dependent on the state. On the other hand, the unpopular license control system has disappeared, which saves 60-80 million ISK per year.

The tax financing of RÚV was established as part of new broadcasting legislation in 2007. It was pushed through Parliament by a conservative/centre government, while the leftist opposition tried to delay it with long filibuster

speeches. The new law also transformed RÚV into a state company, which according to the government would make the company more independent from the state. The opposition, however, claimed that it would rather facilitate a future privatization of RÚV (Gylfadóttir 2010).

The private broadcasters in Iceland also have tried to restrict RÚV's revenues from advertising and sponsorship. In 2008 a parliamentary group was appointed to present a proposal in this direction, but it was not possible to reach a political agreement. Still, the government presented a proposal to limit the sponsorship that RÚV could obtain, but the proposal was dropped following concerted criticism from sport organizations, film associations, and advertising agencies (Gylfadóttir 2010).

### The New Finnish Model

Finland is adopting a completely new system in 2013 – a special YLE tax to fund YLE. The new system is an income-based, personal, and earmarked tax. Those with an income lower than 7,813 € per year are exempt, and those with an income over 21,875 € per year will pay the maximum annual tax of 140 € per person. In between, the YLE tax will vary between 50 € and 140 € per year. A two-tiered system has been set up for businesses, which will pay 317 € or 634 € in YLE tax depending on their turnover. In 2013, the financing for YLE's public service broadcasting is set to be 500 million €, including taxes. The sum will be reviewed each year to correspond to the index-based annual rise in the cost level (MINTC 2011).

The preparation of the Finnish reform started in February 2008, almost four years before its implementation. Working out a solution was not an easy process. In April 2009, a parliamentary group proposed that the license fee be replaced by a household-based media charge. The proposal suggested that all households had to pay this charge, regardless of whether or not there was a TV receiver in the house. In return, the charge would be slightly lower than the existing license fee. This mandatory charge was motivated by the fact that, in practice, YLE programmes reach all Finnish citizens via TV or radio, or even the Internet by being downloaded to computers and mobile phones (MINTC 2009).

In October 2009, the government stated that the new charge would be put into force in 2012. However, the Finnish newspaper industry and their spokespeople launched a coordinated campaign and sparked a fierce public debate opposing the proposal. Despite the fact that all parliamentary groups supported the media charge, it was publicly opposed by most of the political youth organizations (Ali-Fossi: 34). In March 2010, in a surprising move Minister of Communication Suvi Lindén (conservative) withdrew the proposal. She

referred to lacking parliamentary support for the change, and to the problems concerning how to compensate the poorest households for the compulsory fee ([www.svenska.yle.fi.nyheter](http://www.svenska.yle.fi.nyheter) 17.3. 2010). At the same time, she prepared public opinion for a change to budget financing (*Hufvudstadsbladet* 6.4 2010). This option was also seriously considered by practically all political parties, including the Social Democrats currently holding the key minister position through Krista Kiuri (Ala Fossi: 33). The process started over, and in December 2011 all parliamentary groups finally reached agreement on the new funding system and on YLE's guidance and supervision.

The license funding system was shaken in 2007 when the switchover to digital television was completed, and with the simultaneous increase of the license fee. Tens of thousands of TV viewers were so disappointed with how the transformation to digital TV had been managed that they refused to pay their license fees, and many of these have not returned as license payers. A total of 1.9 million people paid the license in 2011, about 130,000 fewer than eight years earlier (Ala-Fossi: 38). The protests in Finland were not directed at the programme content, but rather at the practical implementation of a technological change. It was a way for many people to express their disapproval of the institutions responsible for media and TV affairs.

This crisis gave rise to the parliamentary activity that finally led to the YLE tax of 2013. It was not the first time there was a large decrease in license payers in Finland; in the late 1970s they dropped overnight from 2.2 million to 1.4 million, when the radio license was abolished and every license owner had to pay the more expensive TV fee. Socioeconomic trends in the 1980s and most of the 1990s were quite favourable for license-fee funding. The number of paid TV licenses reached its all time high (2.02 million) in 2003. Since that year, the number of households with a TV license has been decreasing while the total number of households has been increasing. The gap was particularly enlarged after the digitalization of TV (Ala-Fossi: 38,48).

### Socially Obsolete Fee?

It seems that public opinion in Finland has been more open to changes in the license fee or technological system than elsewhere in the Nordic countries. In an analysis, media scholar Marko Ala-Fossi opposes the common argument that the traditional TV license has become obsolete due to the technological development. His view is rather that the problems are mostly due to a decreasing social acceptance of the TV license fee, which is part of a growing dominance of a neoliberal media paradigm:

“Changing attitudes, the growth of a ‘pay-for-service’ culture in general and, especially, the rise of pay-TV after the introduction of digital TV, are dilut-

ing the social acceptance of the TV-fee. Many people do not understand any longer why they should pay a tax-like fee for the device if they are already paying for customized content. They have been alienated from the concept of public service” (Ala-Fossi: 43, 44).

### “Voluntary” Fee

A form of “voluntary” broadcasting fee is also practiced in the Nordic countries, in Åland, an autonomous region of Finland consisting of an archipelago in the Baltic Sea between Finland and Sweden. All households with a TV receiver are to pay a license fee, but if they do not, no fines are imposed. The license frequency in Åland is 60-65% (nyan.ax 13.01. 2011). In 2011, the regional government tried to introduce a new system with the intention that all households should pay a yearly public-service fee for all content offered by different distribution channels. The proposal stated that the Post Office – which collects the fee – would send a bill to all homes. Then it was up to each household to prove why it should be exempt. The proposal is dormant, however, since Åland changed government in the Autumn of 2011 (Lundberg 2011, Ehn 2012).

In the Faroe Islands, an autonomous region of Denmark, such a compulsory media charge already exists. Those who wish to be exempt from the charge must document the reasons, for example if they have neither a TV receiver nor an Internet connection (Hansen 2011). The license fee is 3,625 DKK a year, and covers two-thirds of the public service costs in the region. One-third comes from advertising and games.

### Alternative Models

For a long time, both PSB companies and politicians have been in favour of the license system. It has given the PSB companies a secure economic foundation, insensitive to business cycles and the state of public finances. It has been considered to provide the most independence for PSB in relation to both political and commercial interests, and has also provided a close relationship between the PSB companies and their audiences. Still, in Iceland and Finland the license-fee system has been replaced with a tax and in Sweden a similar change is being discussed. As of 2012 no official plans had yet been presented in Denmark and Norway to abandon the traditional model, which in these countries seems to be stronger than elsewhere.

If Denmark, Norway, and Sweden were to replace the license fee, tax financing (in any form) would be the most likely replacement. Nothing indicates that the Nordic PSB companies will be financed by commercials; not even



partially. Scandinavian politicians and most other stakeholders have rejected any kind of mixed financing. All politicians of note, and the PSB companies themselves, reject funding through appropriations in the state budget, as this would result in an undesired “state-TV” system.

At first glance, a tax-TV system seems rather simple to introduce. In practice, however, there are many difficult details that need to be addressed:

- How to protect the PSB tax collections from becoming part of the general public treasury?
- Will the tax be based on households or individuals?
- If it is an individual tax – will it be fixed (as in Iceland) or progressive (as in Finland)?
- How to set the lower and upper bounds of the tax?
- Will any groups be exempt from the tax or treated specially?
- Will all tax revenue go to the PSB companies, or will other channels also be funded (as in Denmark)?

### Icelandic Experiences

Iceland is the only Nordic country with (a brief) experience of a tax system. As mentioned before, the Finance Minister diverted part of the tax intended for RÚV to the public treasury during the country’s grave economic crisis. RÚV thus received much less funding than was planned for and was forced to enact considerable savings, including laying off more than 20% of its staff.

Based on this experience, the (since 2009 social democratic/left-green) government is planning to change the law. In the Autumn of 2012, Minister of Culture Katrin Jakobsdóttir proposed an amendment to the RÚV act guaranteeing that RÚV would get its money in the same way as before 2009. This means that all revenues from the RÚV tax will be reserved for RÚV; the Finance Minister will no longer be able to divert or repurpose them for other uses. According to the proposal, RÚV will receive a fixed sum every month (Frumvarp till laga om Ríkisutvarpíð: 2012-2013, Gylfadóttir 2012).

Iceland has been presented as a cautionary example by those who oppose budget financing of public service. However, the change was made at the worst possible point in time. RÚV, like all Icelandic institutions, was forced to contribute to the economic recovery of the nation. It is difficult to foresee today what the long-term consequences of the shift to tax financing will be. It will also be interesting to compare Iceland with Finland, especially since Iceland has chosen a fixed-tax system and Finland a progressive one.

## The Proposed New Swedish System

In September 2012, a Swedish government-appointed committee proposed the replacement of the current license fee – which is linked to households and possession of a TV receiver – with an individual radio and TV license fee calculated on the basis of taxable earned income.

The fee would be linked to the price base amount and a ceiling set for the maximum fee. In contrast to the present system, companies and other legal entities would not be required to pay the fee. The fees would be collected by the Swedish Tax Agency, and be placed in an interest-bearing account with the Swedish National Debt Office.

Three other models were examined (and rejected) in the report: a household-based fee, a fee linked to property ownership, and funding through appropriations in the general budget. The committee found that the shortcomings of the current funding and collection model are so clear that they warranted a change of model:

“There is no longer a link between possessing a certain piece of technical equipment and using a certain service. People may choose to only watch channels other than those offered by SVT on a television set and yet still be forced to pay the license fee. They may also choose to only watch channels other than those offered by SVT on a television set and therefore not be obliged to pay. Moreover, those who only use SR’s programming are not obliged to pay the license fee. Furthermore, the rate of fee-dodging is high – over 12 per cent among those households that are obliged to pay. This means an annual loss of almost SEK 1 billion that could have gone to the broadcasters or been used to reduce the fee for those who do pay” (Summary, SOU 2012:59:8).

The committee also claimed that the proposed model is more fair than the present one as those with lower incomes, or no income, will pay a lower fee or no fee, and single-adult households and single parents will generally pay a lower fee than households with two or more adults.

The committee noted that the proposal was a partial deviation from the current principles of how central government revenues should be managed. It argued that the instrument of government does offer this possibility and “believes that public service broadcasting is an area in which such a deviation is justified, given its special position” (Summary, SOU 2012: 59:9).

However, the Swedish government seems to be hesitant to give PSB such an exceptional position. According to news reports, the Finance Minister did not accept the tax-collecting construction and the proposal was postponed for at least a year. The Ministry of Culture has been asked to perform a “deep dive analysis” and come back with more information before any decision can be made. Until further notice, the present model will still be in place when the next license period begins on 1 January 2014 (Göteborgs-Posten 23.10. 2012).

Thus, the debate in Sweden will continue and will probably be intensified before the final decision in Parliament. This was the first time a public-service committee in Sweden – and there have been many over the years – proposed a change to the financing model. Tax financing similar to the 2012 proposal, was already discussed in a committee report in 1965 with almost the same arguments as 47 years later..

## Conclusion

The public funding system is still very strong in the Nordic countries. In Denmark, Norway and Sweden the traditional license system is in use at the beginning of 2013. Until 2012 this was the case also in Finland. There is consensus across the political spectrum that everyone who can receive PSB programmes should pay for them. The application of a mostly pure TV license system has contributed to a more stable economic situation for public service than in many other countries.

But even though the PSB funding system is strong and supported by political consensus today, this article points out that it has begun to fall apart in some respects. Above all, the countries are going to choose different ways of arranging the collection of the fee/tax. The reactions to the new proposal in Sweden, earlier proposals in Finland, and Icelandic experiences, demonstrate that PSB financing can be complicated and politically controversial even in the Nordic countries. Moreover, there are strong interests both within and outside the media business that want to influence both the method of financing and the size of the PSB funding.

Irrespective of which technical funding system is preferred, PSB will probably continue to be financed by mandatory fees in all Nordic countries, at least in the short run. The long-term survival of the system depends on whether the PSB companies succeed in retaining their strong confidence and trustworthiness among the people and politicians.

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# Nordvision

## the Power of Sharing

### The TV and Media Partnership

Henrik Hartmann

All over the world, public broadcasters find themselves under severe pressure and, not least, budgetary constraints. They have to produce more content on multiple platforms at the same, or even less, cost. Meanwhile, they are expected to maintain their “public service” distinction. There are no signs that the pressure will abate in the foreseeable future; rather on the contrary. Steadily increasing demands call for radically different forms of international collaboration between public service broadcasters.

Ever since its modest beginnings in 1959 Nordvision has been a cornerstone of collaboration among public service television companies throughout the Nordic region – that is, Denmark, Finland, Iceland, Norway and Sweden. Nordvision is more vital, more comprehensive today than ever before.

How five small television companies in the far north managed to achieve this, how the collaboration works, what may be learned from it, and the challenges Nordvision faces in the future are the subject of this article by Nordvision’s Secretary General, Henrik Hartmann.

## Fundamentals

Nordvision works to strengthen public service television and media in the region through co-production, program exchanges and regular sharing of information and experience. Intertwined cultures and history, closely related languages and similar social institutions and demographics are some of the factors behind the strength of this collaboration. Professionals at all levels are able to share their experiences and knowledge freely within the Nordvision family – because they meet one another as colleagues, not competitors.

### *History*

The collaboration was formalized in 1959 through an agreement between DR (Denmark), NRK (Norway), SVT (Sweden) and YLE (Finland). RUV (Iceland) joined Nordvision in 1966. Today, Sweden is represented by SVT and UR (Educational Broadcasting) as an associate partner.

From the start the goal has been dually to strengthen the Nordic cultural identity and to offer Nordic audiences quality public service programming. For over fifty years Nordvision has supplied a great number of programs that have contributed to a sense of Nordic community. I dare say that Nordic collaboration in television and media content is one of the best and most successful examples of Nordic cooperation in the cultural sector.

### *Current Objectives*

In addition to strengthening the sense of community in the region, Nordvision should also create added value for the participating companies. The companies cooperate in order to achieve more and better public service programming at lower cost. Over the past five years they have also undertaken to improve the efficiency of the collaboration through, for example, optimizing program exchanges and working to heighten the quality and relevance of co-productions.

## Cooperation in Program Exchange

Nordvision collaboration stands on three legs: co-production, program exchanges and sharing knowledge and experience. The companies co-produce programs in virtually all the public service genres: TV fiction, children's programs, science, educational programs, factual programs, cultural programs and investigative journalism. Co-productions are partly financed by the companies themselves and partly by revenue from distribution of the channels in the region. Thus, revenue from transborder viewing is returned to finance new Nordic program series via the Nordvision Fund.

The companies exchange programs and news coverage that they believe will interest viewers in the respective countries. The number of program exchanges has risen sharply over the past decade, from about 500 programs per annum to over 2,700.

Sharing of information and experience is another important ingredient in the collaboration. Professionals of all kinds – management, producers, engineers – benefit greatly from discussing challenges and solutions in everything from corporate strategy, program development, scheduling and copyright.

*Whatever We Have, We Share*

Nordvision program exchanges have undergone an explosive expansion in recent years. Most of the participating companies distribute programming over more channels than previously, which makes it both possible and necessary to transmit more programming produced in the Nordic region. Together, the five Nordvision partners – DR, NRK, SVT, RUV and YLE – have 17 television channels at their disposal.

Nordvision collaboration is based on the principle, “what we have, we share”. That is, the Nordic public service channels make a concerted effort to offer their public service colleagues most of the programs they own rights to, either via program exchanges or co-production. The respective companies select the programs they feel will interest viewers in one or more of the other four countries and put them on offer.

*Digitization a Valuable Tool*

Digitized program archives and production processes allow all those involved in production and scheduling in the five companies to collaborate much more closely. The companies have an internal digital distribution system, Nordif2, that can transmit a considerable volume of programs in broadcast quality quickly and efficiently.

Nordif2 communicates with the partners’ content management systems. Thousands of programs are distributed over Nordif2 each year. The system has minimized the cost of analogue distribution and allows “instant” transmission of news coverage between news desks. It can also be used for screenings at any time and anywhere in the system.

Nordif2 is not an archives. All program files and metadata – program descriptions and supplementary documentation (music titles, credits, scripts, photos and so forth) are erased after a certain period of time. All metadata that has been submitted to Nordif2 is automatically downloaded into another database, the Nordvision archives, which is searchable and accessible to all participating companies. A new digital distribution system (Nordif3) which can handle HD programmes will be implemented in 2013.

*The Nordvision Archives*

The archives hold basic information about all the programs that have been exchanged or co-produced in the Nordic region since 2000. The database is a valuable tool for all those involved in program exchanges and scheduling. Since the latter part of 2010, video copies of the programs are also included.

### *Steady Flows Between Companies*

2011 saw more than 2,627 exchanges of Nordic programs and episodes between Nordvision partners via the digital distribution system. Program exchanges alone amount to more than 1,250 hours of air time on Nordic public service channels.

The statistics show that, on average, each program offered is accepted by two other companies. Thus, the exposure (air time) of each program is tripled thanks to the system. Non-fiction genres make up the lion's share of programs exchanged. Many children's programs and educational programs are also exchanged.

### Co-productions in all the Major Public Service Genres

A survey of all the programs that have been co-produced or co-financed reveals the breadth of Nordvision collaboration. They encompass five principal categories of public service programming: children's programs, fiction, factual / culture programmes, education and investigative journalism.

<b>Nordvision Co-productions 2011, by genre</b>	
Children	506
Drama	236
Factual programs	126
Educational	140
Investigative journalism	19
<b>Total</b>	<b>1,027 programs</b>

Most of the collaboration takes place between the corresponding program units in the respective companies. They share of their experiences in program production, programming strategies and new ideas; new projects are 'pitched' and planned. Meetings are attended by executives and those responsible for program commissioning and / or others with a mandate to take decisions.

### *Real Children on Camera*

Nordic collaboration in the area of children's programs has a long tradition. It is an important area, and the programs are very popular. The following factors may be some of the keys to its success:

The Nordic cultures have a similar approach to children and childhood per se. The focus rests on young people's own reality, and programs are about



real children. Linguistic and cultural affinities are an important competitive advantage over international products from, for example, Disney and Cartoon Network. What is more, it is relatively easy to produce national versions of Nordic children's programs using words children easily relate to. Consequently, the Nordic public service companies exchange a good number of children's programs.

There is also a long tradition of collaboration on concrete program content. Producers of children's programming have engaged in co-productions for many years now. This is true, not least, of so-called collections, where each country produces one or more segments in dramatic or documentary series.

Three of the companies – DR, NRK and SVT – have launched their own children's channels in recent years. As a consequence, the need for Nordic children's fiction, collaboration and exchanges of children's programming may be expected to grow in the years to come.

#### *Nordic TV Fiction Travels Remarkably Well*

Many successful dramatic series and single productions are the fruit of Nordic collaboration. Of all the Nordic productions, TV fiction is probably the genre that attracts most viewers. National frontiers are transcended more and more, as producers look for talent both on camera and behind. The companies' production units increasingly count the region as their home market – not only in broadcasting – and they do not hesitate to cross Nordic borders to find the talent and skills they need.

For some years now, most Nordvision companies have a designated a weekly slot for Nordic television drama, thereby rendering the collaboration in drama production a regular feature of the channels' program line-ups. Collaboration is also a necessity if small public service companies are to be able to afford quality fiction production. Most Nordic TV fiction is produced with financial contributions from one or more Nordic sister companies.

Nordic TV fiction is enormously popular throughout most of the Nordic region. On average drama from neighboring countries in the region has audience shares on the order of 35 per cent.

#### *Educational TV in New Ways*

Whereas “educational television” is a classic focus for public service and has a long tradition in the Nordic countries, the content of educational programs has changed considerably. Today, educational programs span over a broad range of subjects, from classical “school TV” programs for use in language learning and the natural sciences to documentaries and series on people in various life situations, with titles like “When old age takes its toll”, “The Nordic male”, “The perfect divorce”, and on to adult education like learn-to-read campaigns

for dyslectics. There is also a new emphasis on web-based services. All the Nordic public service companies have school portals that address both teachers' and students' needs.

There is also a long tradition of Nordic collaboration in educational broadcasting, including joint Nordic editorial groups in the areas of concept development and production. Numerous programs have been produced by teams of colleagues from all the Nordic educational TV units.

*Factual Programs – Lifestyle, Science, the Arts, Investigative Journalism ...*

Public service channels in the Nordic countries carry many hours of factual programming, a good share of which are programs exchanged within the framework of Nordvision. In addition, there are many co-productions: historical documentaries, cultural programs and biographical portraits, among others.

Co-production takes many forms: sharing of reportage, interviews, archive material that is “re-packaged” in new programs for national distribution; “collections”, where, for example, three partners each produce a couple of segments in series; and pure co-productions having a distinct principal producer. Most recently, the companies have invested in joint projects to develop program concepts and formats.

*Investigative Documentaries – Few, but Important*

Investigative journalism in the Nordic countries cooperate in research, work together to develop ideas and share the results. Besides the stimulus that collaboration represents per se, program content also benefits from the international perspective. More and more issues have international roots and consequences, which examples from several countries can better describe.

At their regular meetings members of the group exchange ideas and methods and discuss ethical issues (e.g., protecting the identity of sources, use of hidden cameras, evaluation of sources) that have arisen since their last meeting. Cross-border projects share research, sources, recorded material or actual co-production. Recent topics include surrogate mothers, motorcycle gangs' criminality, and the gangsterism that lurks behind organized begging in Nordic capitals.

Each country has a dedicated slot for investigative journalism, and Nordic programs are incorporated into the national host program supplemented with national confrontative interviews and, occasionally, studio debates. The group may produce less programs than others, but the production process is also more time-consuming. Many of the programs have had a strong impact when aired in prime time.

## Lessons Learned

The great advantage of Nordic television and media collaboration is that the sum is significantly greater than its parts. Each participating company experiences definite added value: they gain access to more programs and can pool their resources to undertake major productions and develop program ideas.

For a small public service company operating in a small language, collaboration affords opportunities to, together with like-minded partners, generate and share knowledge and ideas relating to corporate strategy, engineering/technology, content and journalism.

Nordvision collaboration is imbued with a readiness to share information, insights and ideas. Most of those involved in the collaboration get a lot out of discussing their experiences with colleagues in other countries. Some say they feel closer to their Nordic colleagues than to colleagues in their own company, since they share the same specialties and face the same challenges.

One thing that has emerged from the collaboration to date is the importance of a decentralized structure. Obviously, the collaboration has to have the approval and understanding of top management, but concrete results are achieved by the program groups – and in the program exchange network. These are at the heart of Nordvision collaboration. Program groups often have members that are personally dedicated to the collaboration and are eager to share their knowledge as well as program content. Perhaps the prime advantage of decentralized collaboration is that the groups, unfettered by bureaucracy, work relatively quickly and produce results.

### *Nordic Financing Enhances Production Values*

Collaboration affords several practical advantages, as well. When several companies co-produce and finance a series, it allows the production team to do more research, spend more time on shooting and more time on editing – all of which results in a better product.

### *Nordic Co-production Can Open Doors*

When you represent a small television company in the far north it is often to advantage to be able to point out to public figures or stars you wish to interview, etc., that the program will be aired throughout the Nordic region, to a potential 25 million viewers. It often is a convincing argument to point out that this is an opportunity to reach five national audiences with a single interview, instead of having to do two, three or five.

### *The Whole Region as Home Market*

Taken individually, Nordic markets are extremely small by international standards. Therefore, it is to advantage in several respects to identify the whole region as our home market. That is, to produce programs and series having universal utility. Nordic TV fiction is a good case in point, but the same applies to juvenile fiction, investigative documentaries – in fact, to most genres.

### *International Coverage*

Few topics are strictly “national” these days. Events that take place in distant places can have impacts on our local communities. The planet has become smaller; we want and need both to know what is happening in the world. It makes sense to co-produce and exchange programs that give us that kind of information and to share the costs of acquiring it.

### *Similarities and Contrasts in the Region*

Nordic collaboration – of all kinds – often involves comparisons and contrasts. Comparing ourselves with others in the region is beneficial in many ways. When we describe the similarities and differences between us and our neighbors, we have an opportunity to see ourselves in the mirror and get some perspective on our ways of doing things. We see our strengths and weaknesses. In short, others’ example can help us do a better job. Collaboration fosters understanding of our neighbors, but, equally important, it helps us “see ourselves”.

### *Developmental Projects*

The idea behind Nordvision is that collaboration will yield a concrete value added: more and better programs at less cost. But there is also the idea that contact with creative partners will inspire innovation and new ways of thinking. The steadily increasing competition we face in the media sector calls for a focus on development. For that reason, Nordvision has its own Research & Development Fund to support Nordic developmental projects. The fund makes it possible for each company to spend less money on more projects – which in the long term saves money.

### *Clear Terms and Good Communication*

Last but not least, the lesson learned is that not all our collaboration is successful. Experience shows that the clearer the terms, the project descriptions and guidelines, the better the outcome. An open and good communication is absolutely essential.

## To Strengthen Nordic Collaboration in Years to Come

As noted earlier, the degree of Nordic collaboration is very high. In 2010 Nordvision once again broke all previous records, and 2011 was the third best year ever measured in terms of programmes. And looking ahead digitization opens new possibilities for further expansion. Both access to sister companies' archives, program information and the capacity to exchange content from the web and new media will most likely grow.

Co-production and program exchanges will remain the core of Nordvision collaboration, but better overview, common metadata standards and improved accessibility will be in focus in the next few years. It will be easier to find and use content from the partnership members. Not least, the wealth of content in our archives will (hopefully) be more accessible.

Nordvision is an important resource for strengthening public service broadcasting in all the region. A pragmatic platform for Nordic cooperation in TV and media content, the partnership makes a significant contribution to the cultural life of each country.

By making available a selection programs judged to be of interest to each national audience, the companies offer viewers throughout the region relevant information and inspiring experiences – in the original languages.

“Norden” as a concept most likely has a much stronger presence in banquet speeches and political agreements than in people's everyday lives. But the more than fifty years of Nordic cooperation under Nordvision's auspices have given the people of the region at least some idea of our common heritage, stimulating our curiosity about each other – and our sense of community.

## The Challenges Ahead – Global Public Service Media Cooperation

Media development is no longer a national matter, and competition in the media sector has never been greater. The major commercial media houses collaborate as a matter of course – on an international, even global, scale. In fact, the major media houses have become “major” global – and highly influential – actors precisely because they have merged, fused and collaborated.

On the one hand, media today are characterized by increasingly commercial and tabloid-like content, to an extent that sometimes poses a threat to cultural diversity. On the other hand, thanks to digitization, a vast amount of content has become widely accessible, free of charge. Never before has so much valuable knowledge and media content been available, just for the asking. This poses a challenge to traditional public service media and commercial media alike. Sharing of media content via internet is only just beginning.

I am convinced that Public Service Media will not survive unless we can look beyond our borders and start collaborating more widely across national frontiers. We have to become much better at sharing our history, culture and television content – at the lowest possible cost. Without international cooperation public service media around the world will most likely find it even harder to keep pace with our commercial competitors in years to come.

Our need of unique, better, less costly – and more – public service content is growing exponentially. All kinds of social and creative networks are doing it already: sharing content, developing content together and passing it on to others. Public service media have to come out of our isolation and start doing it, too!

At the same time we will find it ever more difficult to maintain our distinction in the vast array of television channels unless we start collaborating across borders, perhaps even globally. We need to rethink our vision of public service, develop new ideas that are adapted to new realities, yet remain true to our ideals of diversity and independence. Global public service media collaboration may be one of the paths toward more unique and less costly public service content.

**Nordvision 2011 in numbers**

3.654 programmes in total (1.772 hours TV)  
1.027 co-production programmes (505 hours TV)  
2.627 exchanged programmes (1.267 hours TV)  
144 new co-production proposals  
152 co-productions in production  
63 completed co-productions  
1000 news items exchanged  
74 co-production projects received Nordvision Fund support  
26 projects received development support from the Nordvision Fund

# PSB Serving Children

## Past, Present, and Future

Gunn Sara Enli & Elisabeth Staksrud

One of the key and explicit target groups of public service broadcasting has been children in general and small children in particular. As we have entered a new realm of online broadcasting services, this article takes an historical tour looking at how PSB has served children in the past, present – and if it should continue to do so in the future. Based on a historical analysis of Nordic public service broadcasting for children, including the development from radio and television to contemporary online services, the article demonstrates how the Reithian remit to “educate, inform and entertain” is carried into online services.

The article argues that online services should be regarded as a continuation of the classic PSB values, rather than a phenomenon contradictory to the radio and TV services. Albeit easily viewed as an historic pillar throughout, the attention of PSB values in children’s programming has in fact shifted throughout history. Specifically, the emphasis on education has gradually been replaced by entertainment (Bakøy 2002; Blunder & Biltereyst 1995; Hake 2006; Messenger Davies & Thornham 2007). In the Nordic countries, this development has taken place from the late 1980s and onwards.

In addition to the shift of emphasis, the introduction of digital services from the late 1990s add further core values, with ‘participation’ and ‘interactivity’ being obvious components of the experience, they also become central to the production (Enli 2008). Even though children’s programming has a long-running tradition of encouraging audience participation such as submitting drawings and creative writing, the participatory aspect is by its very nature extended and refined in multi-platform broadcast formats and online services.

The gradual development towards increased emphasis on entertaining, activating and including children is related to phenomena such as commercialisation, digitalisation, and globalisation. This chapter will therefore also investigate what characterises the Nordic approach to these societal developments the last 60 years, and to what degree the introduction of online services reduces the uniqueness of the Nordic PSB model.

## A History of Nordic PSB for Children

In this historic section, we will paint a broad picture of key changes in Nordic PSB for children from the introduction of television in the Nordic countries from the late 1950s until the present online phase (from the 2000s onwards). Although we will look at the Norwegian state broadcaster NRK in particular in this historical discussion, the same mode of development is also seen in Swedish SVT, Danish DR, Icelandic RUV and Finish YLE, and the historical phases described below is relevant for understanding the approach to PSB for children in the Nordic countries as a whole.

### *1960-1980: The Phase of Pedagogy and Experimentation*

When television was introduced in the Nordic countries, it was with a high degree of skepticism, particularly a fear against Americanisation and the reduced autonomy of national culture dominated the political debate (Enli et. al. 2010). Within this debate, children were regarded as a particularly vulnerable audience group, and the aim to protect them against unwanted influences and to educate them to become enlightened citizens and to include them in national cultural heritage was an important task for the Nordic public broadcasting institutions.

In Norway, the reluctance towards television was significant, but the decision to include the responsibility for the new audiovisual medium television within the institutional frame of the Norwegian public service broadcaster NRK, placated most critical voices. NRK had served children through their radio service since 1933, was viewed as a responsible institution, and a guarantee for serious and educational programming for children. Based of their track record from radio programming such as *Barnetimen* (“Children’s hour”), which is among the longest running radio programmes in the world, dating back to 1933 and still aired on NRK Radio (Halse & Østbye 2003, p. 54), the NRK was trusted to turn Tv into a tool for learning and education, rather than passive time-passing and entertainment. Together with the radio program, every year from 1953 to the early 2000s, NRK published the book *Barnetimeboka*, which was a collection of children’s drawings and writings. This way of activating the child listeners and encouraging creative activity in relation to radio use, exemplifies the responsible, educational, and pedagogic approach to children’s TV in Nordic PSB.

By this, television was established within the framework of the radio monopoly and the PSB ethos for children’s programming was transferred from radio to TV. The *Barne-TV* show (“Children’s TV”), which has been on the air in Norway since the introduction of television in 1960 (Hake 2006, p. 26), was for example created from an ethos similar to the radio programme *Barnetimen*.



In this early phase of children's television, the educational ethos was strong, and both radio and television programmes for children were produced with assistance from professional teachers and experts on child psychology. The hosts addressed their viewers directly and with a pedagogic style: through singing, play and storytelling the shows aimed at encouraging learning. The TV programmes were generally inspired by preschool pedagogy, for example, one of the longest-running children's programmes in the 1970s, entitled *Lekestue* ("Playroom"), used a formula where learning and enlightenment were key elements. Although the programme was not originally Nordic, it was in fact imported from the UK, based on the BBC format *Playschool*, it was highly compatible with the Nordic PSB ethos and embraced by Norwegian programme makers. The characteristic feature of the *Playschool/Lekestue* format is a strong child-centred approach, seeing children as active, schema-driven viewers, rather than (just) as passive recipients (Martin 1993, p. 114). As such, from the beginning, children were seen as an active audience, and invited to engage in educational activities with an entertaining touch.

In parallel to the pedagogic direction in children's TV, a more artistic and experimental direction developed from the late 1960s onwards. A typical example in which the artistic aims had replaced the pedagogic ideals was the Norwegian children's programme *Pompel og Pilt* (1969), which is half-jokingly said to have scared a generation of children. The surreal puppet show about two repairmen defied most pedagogical as well as logical criteria, and as argued by Bakøy (2002), the programme stands as an anti-pedagogic symbol protesting the dominance of teachers in the Department for Children's Productions in the NRK. The idea was to give the children contemporary art and experimental programming rather than well-tested educational programming. Seen in retrospect, this protest against the modern enlightenment ideal was an early signal that children's programming was to develop within a new set of frameworks, ideals and values, led not least by the introduction of commercial broadcasting, and internationalisation of the TV industry.

#### *1980-2000: The Phase of Entertainment and Commercialisation*

At the beginning of the new decade, the Nordic PSB institutions were no longer alone in the market of children's TV. The national public broadcasters had been the (state) authorised providers of children's programming, but with the de-regulation of the TV market, their monopoly, also in the market for children's programming, ended. This happened in the Nordic countries as well as in neighbouring areas such as the UK. What implications did this deregulation have for the PSB ethos of serving children in the Nordic PSB institutions?

First and foremost, the Nordic public service broadcasters increasingly adjusted their children's programming to suit a multi-channel environment by including more entertaining formats. Still, this was not done without a continuation of the PSB values, also within the framework of programmes with a broad and popular appeal.

This change is well illustrated by that while the Nordic broadcasters had turned down an offer to adapt the US series *Sesame Street* in the 1970s because of their aim to protect the Nordic PSB ethos, the same institutions had become more pragmatic in the age of deregulation. When the NRK in 1991 did buy the format rights, they produced the children's series *Sesam stasjon* with an enormous success. The series served the PSB institution both as a source of legitimacy by its emphasis on learning, as well as being well received among the audience segment, and thus securing loyal audiences and attracting a high number of viewers in a competitive media market. Although entertaining, *Sesam stasjon* included pedagogic elements, with an emphasis on teaching children letters, numbers, and social skills (Hake 2006). Increased competition from commercial channels made Nordic public broadcasters search for programming that combined the PSB ethos of learning and education with entertainment and audience appeal. As a result, infotainment was a dominant tendency in children's programming.

The PSB approach to children's programming in this the deregulation phase was to represent an *alternative* to the commercial broadcasters. What did the channels financed by advertising rather than the PSB license fee represent in comparison to the public service's children's programming? What did the commercial broadcasters offer children as a target group?

The most significant difference between children's programming in PSB and with commercial networks is that the latter prioritised entertaining, low-cost, and imported productions before educational, expensive, and original productions. The commercial networks that entered the Nordic TV market during the 1980s and 1990s typically aired imported cartoons rather than domestic drama productions. Moreover, the PSB channel hosts who provided a pedagogic and institutionally authorised introduction to each cartoon were replaced by a flow of program elements, leaving the child audiences more alone with their interpretations of the fragmented service.

Highly popular among children and young people, imported Japanese shows such as *Pokémon*, *Digimon* and *Beyblade* were heavily criticised in the Nordic countries, in particular because they were claimed to be 'infomercials', advertising products such as electronic games, toys or trading cards. In contrast to this commercialisation, the public service broadcasters stayed fairly loyal to the PSB ethos by producing original content with an added value for Nordic children. The commercial channels only in a limited degree prioritized high-budget production for children, partly due to a weaker business

model precisely because of the ban against advertising directed at children. This also explains the scheduling of children's programming in the commercial channels in this phase, which was mostly the (weekend) morning slots, and excluded from prime time. The role of the PSB channels as providers of national children's culture and thus promoters of national language and identity thus became even more obvious with the emergence of commercial TV channels.

### *2000-2010: The Phase of Globalisation and Niche Channels*

After a phase of commercialisation and competition with national commercial broadcasters, in which the national PSB institutions had remained superior in the market for children's television in terms of both ratings and legitimacy, the turn of the millennium represented new challenges for the Nordic public broadcasters. The new challenges came under the brand names *Disney Channel*, *Nickelodeon* and *Cartoon Network*, and with them came competition of a global size and fiscal calibre which had until then been unknown in the Nordic market for children's TV. For the Nordic PSB institutions the threat from these global enterprises represented a new set of rules, as they were suddenly challenged in an area they had previously dominated. Accordingly, the broadcasters were attacked in their heartland, as the children's programming has been an area in which the PSB channels fulfilled their role as compensating 'market failure' because the commercial channels did not provide children's programming in prime time.

Within a fairly short time span, Nordic public service channels were challenged by niche channels, which served children with programming not only during primetime but also throughout the entire schedule. *Disney Channel*, which soon became the strongest player in the Nordic market for children's TV apart from the national PSB channels, was launched in the Scandinavian countries in 2003.

The concerns for protecting national culture and language from global influences and in particular Americanisation had been a key rationale behind PSB institutions since the early phase of television in the Nordic region. This urge to protect national culture through children's television was again a hot topic on the public agenda.

The new competition came from global enterprises that made the national markets in Sweden, Norway, Finland, Denmark and Iceland seemed small and unable to compete with the behemoths such as the *Disney Channel*. What chances did the Nordic PSB institutions have when competing with these global giants?

Since the early 2000s, serious concerns about the new competition from global children's channels had spread among executives and senior manage-

ment in the Nordic public service broadcasters. As a result, the public service broadcasters in Sweden (SVT), Norway (NRK), Finland (YLE) and Denmark (DR) contemplated launching a common Nordic children's channel (Enli et al. 2010, p. 116). The plan was that the broadcasters in the Nordic region should collaborate through the already existing company *Nordmagi AS*, which would be empowered to produce and distribute children's programming in an attempt to "strike back at the competition from the global media companies Disney and AOL Time Warner", as commented by former director of *Nordmagi*, Annika Bjørnstad (Propaganda 2001, authors' translation; NRK.no (2001).

This plan for a Nordic TV channel for children was based on the tradition for exchange of programming and co-productions, which had developed between the Nordic countries since the launch of *Nordvisjonen* in 1959, as an organisation for aiding the collaboration between the Nordic PSB institutions. The collaboration has resulted in a high number of drama productions, news productions and entertainment shows, but one of the most important areas of collaboration has been children's programming. A typical model for collaboration in this area has been a cost-sharing and/or creative partnerships, and has particularly involved the production of drama shows for children (Enli et al. 2010).

Although the Nordic collaboration seemed like a sufficient strategy for answering the commercial treat, the national public broadcasters did not manage to coordinate their strategies for the launch. There were several reasons for the cancelled plans for a Nordic children channel, including economic and technological as well as national language and cultural. Sweden was the first among the Nordic countries to launch a niche channel for children, and when the PSB institution SVT expanded their channel portfolio with *Barnkanalen* in December 2002, only ten months after the BBC launched the children's channels *CBBC* and *CBeebies* (D'Arma et al. 2009; Enli, accepted).

The Norwegian children's channel *NRK Super* was not launched before the Norwegian digital terrestrial network was implemented in 2007, five years after the Swedish niche channel for children was launched. In addition to such differences in technological development, another obstacle for the planned Nordic children's channel was, despite the Nordic region's common heritage and very long history of cooperation and cultural exchange, the cultural differences between the countries, including the language peculiarities, which had made it complicated to join forces on projects larger than singular productions.

As with the introduction of television in the Nordic region, the launch of national children's channels was controversial. First, a key argument against the launch of PSB niche channels was that children should not be served with TV programming 24/7 as this might reduce their level of physical activity and

outdoor play. To what degree could the PSB channels legitimate that they promoted a more passive lifestyle for children and encouraged them to watch TV rather than playing football with friends or climbing trees?

To counter this criticism, the Nordic broadcasters developed a *rhetoric of participation*, which includes a high frequency of ‘buzzwords’ such as ‘active children’, ‘engagement’, and ‘interactive’. In its strategy documents, the Swedish broadcaster SVT underlined who the TV productions will activate and involve children: “The children’s channel promises to turn the entire Swedish nation into editorial members of *Barnekanalen*. The channel bus will visit schools and playgrounds nationwide”(SVT 2003, p. 4). A second strategy has been a *rhetoric of education and enlightenment*, in which the public broadcasters emphasise the classic PSB ideal of educational programming. The online presentation of the Swedish PSB children’s channel underlines the aim to: “... take advantage of children’s hunger for learning” (Authors’ translation. SVT.se 2012)<sup>1</sup>.

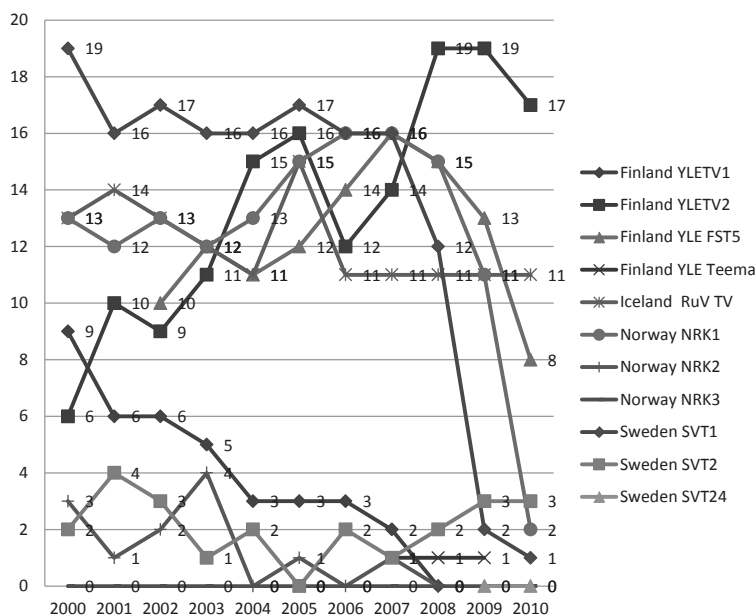
A vocalized argument against the strategy to compete with global players such as *Disney Channel* was that the competition for child audiences by PSB niche channels involves a need for popular programming with a lower budget than original drama series, and thus imported productions from global producers such as *Disney* becomes attractive content for the public broadcasters. This criticism illustrates the dilemma of defining the PSB remit in the age of commercialisation, digitalisation, and globalisation. The aim to compete with the *Disney Channel* without airing Disney programming seemed impossible (Enli, accepted). But rather than replacing the Disney Channel, the Nordic PSB niche channels managed to become *alternatives* to the global players, and thus reduced the interantional impact on local culture and dominance among the child audiences.

As an alternative to *Disney Channel*, the Norwegian PSB niche channel for children, *NRK Super*, became a success in the audience market, and has since its launch considerably reduced the market share of *Disney Channel* in the Norwegian market (D’Arma et al 2009; Enli, accepted).

As an alternative to both national and international commercial channels, the Nordic PSB channels have the advantage of being commercial-free. This point is made explicit by the broadcasters in their strategy documents, such as the following example quote from Swedish SVT: “We can guarantee one thing: You will never see programmes intended for grown-ups. And there are no commercials” (Authors’ translation. SVT.se 2012)<sup>2</sup>. This shows that the PSB value of being commercial-free is promoted as a competitive advantage for the public broadcasters in the global marketplace. Moreover, the need to specify that no programmes intended for adults will be aired in the children channels points to a niche logic which is remarkable in light of the PSB tradition of serving their public through generalist channels. In contrast, the rise of niche

channels for children has resulted in a lack of children's programming on the generalist channels. A general trend across the Nordic countries was that children's programmes were removed from the main channel's schedule from 2008 onwards, when the digital terrestrial network reached enough viewers to make it legitimate to serve the children exclusively through the niche channels. Looking at the programming of children's programmes vs. specific channels in 2010 (Figure 1), it is clear that children's programmes are only available on a few channels, typically niche channels like NRK Super (Norway) and SVTB (Sweden).

**Figure 1.** Public Service Television Broadcasting for Children in Nordic Countries 2000-2010\*



\*Figure generated from numbers as reported by NORDICOM in Harrie (2012). Corresponding numbers from Denmark not available. Please note that SVTB (Sweden's children channel) reports also sending feature films (62%) and other information (1%), while NRK Super (Norway) is a separate channel, but only transmits during daytime/early evening, sharing transmission with NRK3.

We have so far seen that the PSB institutions have expanded their approach to child audiences. TV services were included in the PSB remit, and seen as a natural extension of the radio services. To what degree are online services a similar new extension of the PSB remit? To what degree are online services compatible with the core values of PSB?

The historical development of PSB radio and TV services for children has involved a change from enlightenment and education to entertainment and participation, and the Reithian values have thus gone through a process of gradual transformation. Still, even in the context of global competition and niche logic, the PSB channels aim to represent a distinct alternative to commercial players. To what degree are their opportunities for the PSB institution to serve as an alternative to commercial players in the online market for children services?

*After the Noughties — Serving Children Online*

Today, all the Nordic PSB channels have expanded their scope of services from TV and radio to also include online platforms (Moe 2008). These typically take the form of “children’s pages” or children’s sections, offering a combination of TV-on-demand, child-friendly news, programme updates, and “games and fun” (see Illustration 1-5). Market considerations aside, there are good reasons why PSB services should not only be present on the digital arena, but also provide more online services than they do today.

The extensively online lives of Nordic children have been thoroughly documented, along with the affordances of this activity (see, e.g., Carlsson 2010; Findahl 2010; Staksrud 2011b). The understanding that the development of digital skills is key to fostering democratic participation and access to information has led to national digital curriculums placing digital skills on par with reading, writing and an understanding of mathematics.

A key element in facilitating digital participation for children is the availability and distribution of relevant, positive and age-appropriate content and services. There is also ample evidence of the relationship between use, skills and well-developed coping strategies for children online (Livingstone, Haddon & Görzig 2012). Thus, the more positive content there is, the more development of digital skills and efficient coping strategies will take place, and with less risk of harm.

Traditionally, supplying high-quality age-appropriate media content for entertainment, information and education has been one of the responsibilities of PSB. Does this responsibility also pertain to online services? Should it? These questions are currently at the centre of the PSB debate, and scholars have suggested changing ‘public service broadcasting’ into ‘public service media’ in order to grasp recent changes resulting from tendencies such as digitalisation and convergence (Lowe & Bardoel 2007; Moe 2007). Traditional rationales for PSB in the Nordic region such as diversity, quality, democracy, public debate, and moral protection of minors are in a process of re-definition and renewal in the digital age (Enli 2008; Syvertsen 2004).



Illustration 1.

NRKsuper.no (Norway)

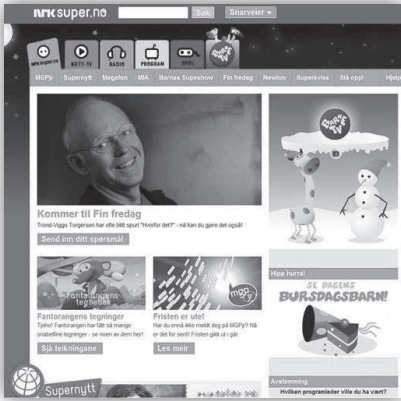


Illustration 2.

SVT (Sweden) online section for children

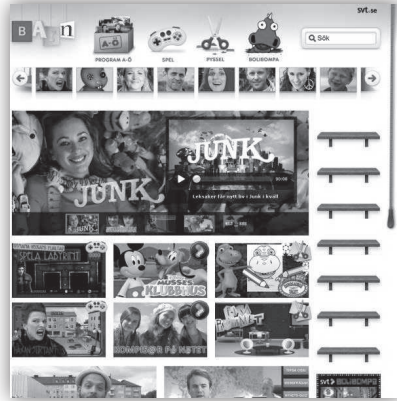


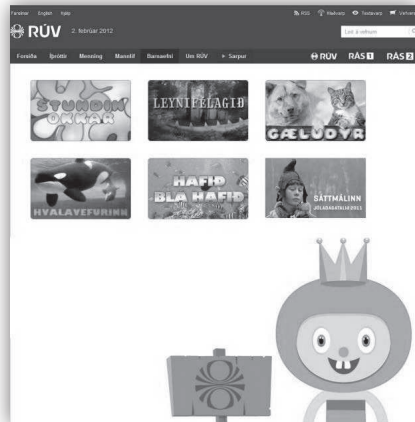
Illustration 3.

DR.dk Ramasjang pages (Denmark)



Illustration 4.

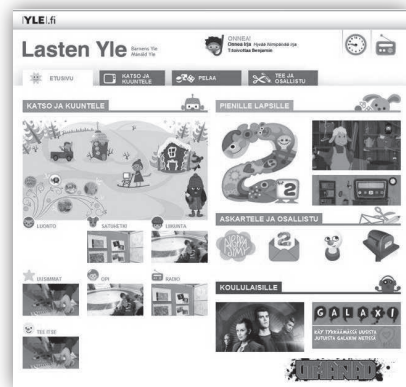
RUVchildren pages (Iceland)





**Illustration 5.**

Lasten YLE (Finland)



Given the wide-ranging user patterns of Nordic children in terms of Internet access, time spent online and number of services used, one might think that availability by definition is secured. Conversely, findings from the comprehensive EU Kids Online survey clearly show that young children in general, and Nordic children in particular, are dissatisfied with the levels of online provision available to them. In a comparative study called EU Kids Online, it was found that only 24% of Norwegian children, 32% of Swedish children, 40% of Finnish children and 47% of Danish children believed it to be “very true” that “there are lots of things on the Internet that are good for children my age” (Livingstone et al. 2011, p. 35, see also [www.eukidsonline.net](http://www.eukidsonline.net)).

While the Nordic PSB channels today offer digital services for children, there is no comprehensive strategy and output aimed at increasing democratic participation and digital education for this target group. In Norway these results are mirrored in NRK’s own research on user habits (2010), where 79% of the population in 2010 thought no one provided or did not know who provided the best online content for children, while 15% answered [nrk.no](http://nrk.no). Using the public service rationale, there are good reasons why the Nordic PSB channels should not only offer online services for children, but also *expand* these services.

One can also observe a new-found public role. In some European countries, public TV stations have been identified as a major funder of research on children and their use of new media, countries such as Germany (23% of all such studies funded by Public TV), Belgium (9%) and the UK (6%) (Haddon & Stald 2008, p. 48).

What are the consequences if PSB services do not fully engage in the digital realm, leaving the field open to other players, in particular commercial stakeholders? Perhaps this is not a problem in practice. Children's competences as digital users and as consumers might be sufficient to deal with the issues at hand. Several studies have shown the commercial power and influence of (young) children and how youth culture is crucial to the political economy (Buckingham 2011; Ekström & Tufte 2007; Wasko 2008).

But for such power to be exploited there is a need for proficiency. Thus, the concept of individual *competence* becomes critical, particularly *media literacy* (Staksrud 2011a, p. 175). The previously discussed classic PSB remit of aiming to "educate, inform and entertain" encompasses media literacy. (Livingstone et al. 2011, p. 5). Children have been, and are often, seen as not being able to defend themselves from various forms of peril, such as potential media harm. State regulation and legislation have been the answer to this, the state guaranteeing protection for those in need who cannot provide this for themselves (Staksrud 2011a). Under the Nordic welfare state model, there has been deep-rooted acceptance of the idea that children are the responsibility of the state (Castles & Pierson 2000; Ladd-Taylor 1994; Leira 1993; Pedersen 1993). Thus, both the issue of children and online affordances and the issue of online risk raise general questions as to the current obligations of the state and the prescriptive tools at hand. PSB *is* such a tool.

In addition, commercial services are not universal services provided by default to all citizens. One of the key features of the current Nordic welfare state model is precisely the high degree of equality and universalism (Greve 2007). Research from the EU Kids Online project has found that there is an urgent need for more positive online services for children from small language communities – such as the Nordic ones (Livingstone et al. 2011, p. 9). Ensuring cultural and linguistic plurality is key to actual participatory rights, also regarding online services. The Nordic model for children's broadcasting is a democratic model, aimed at ensuring universal services to all children. This mirrors the principles of the UN Convention on the Rights of the Child (United Nations 1989).

Summing up, we note how the PSB children's channels differ from the commercial children's channels in several respects: Firstly, the emphasis on *national culture and original productions* is not catered for by the commercial multi-national companies. Individually, the Nordic countries represent small language territories, but through collaborations, the PSB institutions become strong players in the Nordic region and manage to deliver content that both attracts large audiences and represents an alternative to global niche channels. Secondly, the PSB children's channels support *democracy and the public sphere* by providing opportunities for children to partake in the public debate, and to exchange views on current affairs. One of the most successful pro-

grammes at Norwegian *NRK Super* is the daily news programme for children called *SuperNytt*. The main aim of this news programme is to provide children with national and foreign news stories, tailor-made for a young audience, in order to make even complicated news stories accessible and interesting for child audiences. Thirdly, the PSB children's channels are not exclusively TV channels, but rather *a multi-platform concept*, including TV, radio and the Internet.

Consequently, in the current media landscape, the PSB model has its merits, and there are good reasons — in particular the need for good quality, universally provided online content for children from small language communities — for national PSB channels to expand their engagement into the online realm as well. In other words, as far as children are concerned, future Public Service Broadcasting are legitimate in focusing less on the *Broadcast*, and more on the *Public* and *the Service*.

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### Notes

- 1 Original text: "Att ta vara på barns hunger efter att lära sig saker"
- 2 Original text: "Men en sak du kan vara helt säker på: du kommer aldrig att trilla in i ett extrainsatt Rapport, eller något annat program som I första hand riktar sig till vuxna. Och du slipper reklamen")

# Discourses on Cultural Diversity in Public Service Media in the Nordic Region

## A Focus on Ethnic Minority Groups

Ingegerd Rydin

The formation of the public service broadcasting companies (PSBs) in the Nordic countries has rested on values that are intimately associated with the ideals of the modern Western nation state, and the welfare state in particular. The PSBs have all played significant roles in the nation-building projects, creating a sense of “imagined community” (Anderson 1983) and implying a common public sphere, social cohesion and unity. These ideals are still persistent, and are with different emphasis enshrined in policy documents from the various PSBs in the Nordic region. Hence, the PSBs have a long tradition of being in the service of “all people”. At the very beginning, the concept of “all people” meant two categories: children and adults. Eventually, special commitments were also set up to cater to groups with special needs, for example ethnic and linguistic minority groups.

However, in today’s media-saturated society, with increased access to different media (e.g. minority, transnational, national and local media), claims are being raised that democracy may be under threat and that a multicultural civil society tends to be fragmented into “media ghettos” (Bailey 2007). Not least, the introduction of the Internet has challenged the idea of a common public sphere, as well as the importance of a common ground for participation and citizenship in a specific society. Instead, one can distinguish a discourse around these issues through the introduction of notions like transnational citizenship and cosmopolitan citizenship. For example, Fraser (2003) has questioned the idea of a common public sphere as societies are stratified and are hosting groups who are not recognized within the dominant paradigm of the official public sphere, such as migrants and minorities. She suggests the idea of “subaltern” public spheres alongside the dominant paradigm, especially as spaces for disadvantaged groups. And here, the Internet has come up as an arena for creating new and alternative spaces for communication.

Recent research and policy documents are presented with the purpose of illuminating discourses within the PSBs in the Nordic countries regarding the complex issue of cultural diversity concerning ethnic minority groups. The main questions are:

What are the policies, i.e. how are they described? How have policies been implemented into programming and journalism? And how do citizens belonging to minorities respond to policies and programming?

One crucial issue is the tension between the concept and idea of “national culture” and that of “cultural diversity”, and how these two concepts can come together. Levels of policy, production and reception are covered by using sources from mainly Sweden with frequent looks into and comparisons with sources concerning Denmark, Finland and Norway.

### Background: Ethnic and Multicultural Patterns in the Nordic Region

As compared to many other countries, in modern times the populations in the Nordic countries have been regarded as quite homogeneous in terms of ethnic groups. Aside from official indigenous minorities, such as the Sámis (see below for more detailed descriptions of these groups) who live in the northern parts of Finland, Norway and Sweden, there was comparatively little immigration during the first half of the 1900s. In the case of Sweden, labour migration from southern Europe started in the 1950s. Much of the migration in the region actually takes place between the Nordic countries. A free labour market, closely related languages and favourable rules for studying elsewhere in the region make it easy for Nordic citizens to move between the countries ([www.norden.com](http://www.norden.com)). In the 1990s, the migration pattern in all Nordic countries shifted and the number of foreign citizens increased throughout the region as a result of displacement caused by, for example, political upheaval and war. Today, the Nordic countries represent much more cultural diversity in terms of ethnic groups than before, but differently in each respective country ([www.norden.com](http://www.norden.com)). When penetrating below the surface of policies and politics regarding migrants and minorities, these countries represent quite diverse patterns of migration.

A brief look into the migration demographics of Denmark, Finland, Norway and Sweden shows that Sweden has the highest proportion of immigrants, with 13% of the population having been born in another country. In Denmark and Norway this percentage is around 8%, and in Finland it is 4%. In Denmark the five largest groups of *foreign-born residents* at present are from Turkey, Iraq, Germany, Poland and Lebanon. In Finland the largest groups are from

the former Soviet Union, Estonia, Sweden, Russia and Somalia. In Norway the five largest groups are from Poland, Sweden, Pakistan, Somalia and Iraq. In Sweden the five largest groups are from Finland, the former Yugoslavia, Iraq, Iran and Poland<sup>1</sup>.

It is against this background of populations, informed by a deepening pluralism and cultural diversity, that recent policies of PSBs in the Nordic countries have to be seen.

## National Culture and Cultural Diversity The Policy of PSB in a Nordic Context

As PSB has emanated from the idea of maintaining a common national culture and a common public sphere, one has to sort out whether this idea is compatible with the idea of serving multicultural needs and providing cultural diversity. In theory, this would be possible. Programming could serve the needs of all, including minorities, and at the same time maintain a dialogue between various groups. But in reality it rather seems that all companies are struggling for survival and the buzzword seems to be “protecting the national” as an argument for legitimacy. All companies are retreating in their market shares. In a study by Larsen (2010) comparing the discourses among employees at NRK (Norwegian Public Broadcasting) and SVT (Swedish Television) concerning the public service mission, it was obvious that the national culture should be protected, but the rhetoric between these companies was different. In Sweden, “the national” is perceived as threatened by interests from the competition of the surrounding commercial media landscape, and therefore the mission of PBS is to protect the national culture, defined as being different to the commercial culture. In Norway, on the other hand, one stresses the importance of protecting the Norwegian language. In Larsen’s interview with the CEO of NRK, he declared that high quality is a key factor for the survival of NRK, relating quality to the use of the Norwegian language: “NRK’s simple way to see the future is that we are the quality deliverer of Norwegian-based, Norwegian-language content, on all platforms in the future” (Larsen, 2010).

The strategy document of YLE (Yleisradio) in Finland (2010) declares that the company should “strengthen democracy and Finnish culture” and that “YLE safeguards the vitality of Finnish culture, the languages of Finland, and civil society”. But YLE also stresses its role in serving “special groups and minorities, with greater prominence given to multiculturalism”. Thus, they emphasize both the ‘national’ and the ‘multicultural’.

SVT’s official mission is that “public service has the ability to unite the country and makes it possible to build bridges between people of different backgrounds and allow them to share common experiences and insights” (SVT



2011, p. 28). So rather than talking so much about a common national culture, SVT stress the idea of common public sphere, which is somewhat more broad and pluralistic. The above-mentioned scenario, if it comes true, may be a challenge for public service companies with the mission of being “media for all people”, or as the slogan of Swedish television (SVT) goes, “*Om alla. För alla*” (About all. For all) says. SVT has children and young people, disabled people and linguistic and national minorities especially in mind, for whom the company has a special mission (SVT 2011, p. 33). They also have the ambition to “reflect the whole country” (*spegla hela landet*) (p 44-45). The general claim is that there are places in society where you should be addressed as a “citizen” rather than as a “consumer” (p. 33). Here, they accentuate that their mission is different to that of commercial media. Also, their output should reflect those cultures and languages that are represented in Sweden, especially the national official minority languages Sámi, Finnish, Meänkieli and Romani chib, as well as sign language broadcasting. Similar missions hold for NRK (Norway) and YLE (Finland), while Denmark has taken a somewhat different position. In the latest public service agreement for Danish Radio (DR), it is stated that Danish language and culture should be strengthened. It is also stated that DR should emphasize its role as “initiative taker and conveyor of the Christian heritage”. Generally, the programming should cover “all genres in the production of art and culture and provide programmes which reflect the diversity of cultural interests in Danish society” (DR’s public service contract for the period 2011-2014). The statement that the “Christian heritage” should be considered is different to the other Nordic countries, and has led to debate and reactions. Swedish Television CEO Eva Hamilton responded to this new policy by DR, saying that she is “distressed, because I consider the mission of public service companies to be to expand the world, not to reduce it” ([www.dagen.se](http://www.dagen.se)). The Danish formulation is different and very specific, as the policy also touches upon religious matters. It is not farfetched to believe that this is has to do with the debate concerning threats from the Muslim world that has flourished in Denmark in recent years (the debate on the Mohammed cartoons; see Eide, Kunelius and Phillips, 2008, below).

### Cultural Diversity in Programming What does the ‘Mirror’ Look Like?

The policy regarding cultural diversity has changed over the years in all Nordic countries. For Sweden the trend is, except for a special mission concerning the *national minorities*, who are provided special niche programmes on television and radio, that other minorities are not specifically addressed on SVT but only on radio and UR (an educational television channel). The strategy is



about the same in Finland and Norway, whereas YLE (Finland) has output for some of the national minorities (Sámis, Romani, Russians and Swedes) and Norway for Sámis. DR does not broadcast for national minorities on television. For comparative reasons, the figures for broadcasting on television are presented in the table below:

**Table 1.** Television broadcasting in minority languages, hours per year (2010)

	Sámi	Finnish	Swedish	Finnish/Meänkieli	Romani chib
NRK	223	–	–	–	–
SVT	90	239	–	11	8
YLE	122	–	3420	–	–

**Source:** *Public Service Media in the Nordic Countries. Facts & Figures, Map 1/2012, Nordicom.*

Somewhat updated figures for Sweden from 2011 indicate that programmes for the national minorities represent slightly more than 1% of the output on SVT. Programmes in Finnish are most frequent, and the number of broadcasting hours has gradually increased from 2007 to 2011. Programmes in the Sámi language have also increased to some extent. On radio (SR), on the other hand, the output for the national minorities (in 2011) is as much as 8-9% of the whole output (SOU 2012:59). A look into actual current output in Finland shows that they offer programmes on radio and television for the national minorities Romani, Russians, Sámis and Swedes. However, the output is more varied in the Sámi language. News and other programmes on television in Sámi are often produced and distributed in co-operation with Sweden and Norway. Children's programmes are also broadcast (YLE Strategy 2012).

In Sweden, minorities from the Balkan countries used to have their “own” programmes on television, but this is no longer the case (Andersson 2000). On the radio, however, programmes aimed at migrant groups (8 languages/ethnic groups) have actually increased, from 2,669 hours in 2007 to 4,680 hours in 2011. For example, programmes in the Arabic language have more than doubled during this time period (SOU 2012:59). In other words, the trend has been that the radio takes over more of the specific programmes aimed at minorities.

This policy should also be seen against the background of a different migration pattern, with minority groups representing about 200 cultures and languages, as well as against changes in the media landscape as a whole. Instead of focusing on particular groups of minorities, the policy changed towards “multicultural” programmes for both minorities and the majority, with a kind of bridge-building programme as a niche. Seen from a historical perspective, the following has happened: Sweden froze the first immigrant-specific pro-

gramme in the Nordic countries – *Mosaik* – in 2004 (Hultén and Horsti 2011). And about 15 years ago (1998) the children’s programme *Språka*, aimed at children of Turkish, Greek and Serbo-Croatian backgrounds, was shut down without an official reason (Rydin 2000). In Norway, NRK to some extent still protects the idea of cultural diversity in terms of niche programming. For some years they have produced a multicultural programme called *Migrapolis*, which is broadcast on a regular basis and discusses issues of relevance to migrants living in Norway. It is broadcast on both radio and television (there is even a Web version). In Finland, the programme *Basaari* was closed down in 2008. Danish Television, on the other hand, has never had an immigrant-specific slot (Hultén and Horsti 2011). Occasionally multicultural series debating ethnic minority issues are broadcast, such as *Halal-tv*, produced by SVT and broadcast in 2008. The idea originally came from the Netherlands, where the series was highly appreciated. *Halal-tv* discussed issues of integration, identity politics, group rights, etc. (Hultén 2009; Hultén and Horsti 2011). The Swedish version, however, came to be controversial and was severely criticized. Among other things, SVT was blamed for supporting orthodox Muslim values, thus violating the provisions of impartiality. But in Finland, where YLE aired this Swedish version a year later, it did not lead to debate. In Sweden it was indicated, among other things, that the idea of minorities’ criticism of a country’s majority population was a sensitive issue, which upset the Swedish audience. It illustrated how “Muslim beliefs and values came into tension with Swedish secular attitudes, the result being that divide and disagreement were displayed instead of dialogue and understanding” (Hultén and Horsti 2011: 24-31).

One conclusion is that these policies of mainstreaming the output alongside a strengthening and “protection of the national” are measures taken to maintain legitimacy in the future. Still, most also adhere to the need for cultural diversity or multiculturalism in the output. However, the discourses of these two sides of the coin are more or less balanced in the different countries. In general, one can see an overweight of arguments in favour of the national as a safeguard of national interests, such as the national language and national culture and, in the case of Denmark, an addition with an emphasis on “Christian heritage”.

Therefore, in the competitive context of today’s media landscape there is a danger that the issue of cultural diversity will wind up in the shadow of or even be deliberately counteracted by the regular output. Some companies, for example SVT, suggest other platforms or media for fulfilling previous obligations, such as the Internet mobile services. But as will be seen below, the most common strategy is to proceed with an inclusive policy in terms of recruiting journalists, presenters of programmes, etc. In SVT’s policy document *Om alla*. För *alla* they state: “We should, in different ways, encourage and support people who normally not would turn their interest to SVT to apply for a job”

(p. 33). And the same argument is used at YLE, whose goal is to recruit more people from different ethnic and language groups, and that minority programmes should be an integrated part of normal programme planning rather than a separate minority strategy (YLE Strategy 2012).

In the recent Swedish public service report (SOU 2012: 59), the experts are somewhat critical of the accomplishment of “mirroring” the country in their analysis of broadcasting for minorities, especially regarding television. They state that in Sweden today we have great knowledge of, for example, diversity, equality and discrimination within authorities, organizations and companies. It is important that this knowledge be utilized in public service activities. Their conclusion is as follows:

We believe that broadcasters should actively and consciously work towards a greater breadth of a reflection of diversity in Sweden and work against discrimination. We [...] suggest that the next broadcasting mandate clearly live up to the requirement of reflecting the whole population of Sweden and also focus on variation in the form of diversity, regardless of personal and group-rate diversity that exists in Sweden (our translation).

### The Production – Journalism and Journalists

More than ten years ago, Christensen (2001) studied the question of cultural diversity within public service through interviews with managers at SVT. He asked them to reflect on the importance and value of minority programmes. An interesting finding was that they perceived that minority programmes were used as trademarks of public service. But instead of ideological considerations, this programming was a result of requirements connected to official regulations and policies. In other words, such programmes were more a compulsory ‘must’ than part of branding public service.

A more recent study with a similar purpose, conducted by Horsti and Hultén (2011), was based on ten interviews with respondents in managerial positions at different levels and within different divisions at the two companies YLE and SVT. The main conclusion from this study was that the current developments in public service broadcasting represent a more general social shift from multicultural policies to more vague cultural diversity policies:

The ‘serve all’ argument prevails, but its interpretation also has a commercial flavour. PSBs adhere to equal treatment of all people, regardless of ethnicity, faith, gender or disability, and these values should be made visible in public service programming. Furthermore, in Sweden it is quite clear that adhering to these basic values is not only seen as

the morally right thing to do, but also as beneficial to the company in economic terms. In Finland the basic idea within its PSB is to envision multicultural policies as democratic requirements set by the law. The management expects to fulfil these requirements through mainstreaming 'cultural diversity'. Particularly through displaying 'difference' on screen. The managers at YLE tend to believe that previous multicultural 'mission' policies ghettoized minorities. However, as minorities are not yet perceived as relevant audiences in Finland, unlike in Sweden, economic principles are not likely to compensate for the retreat from multicultural policies. (p. 222-223)

Overall, market logics become more and more important. "service for all" implies reaching as many viewers as possible, including minorities. And both companies have replaced their multicultural policies, aiming at providing specific service to minority groups, with integrationist policies designed to mainstream cultural diversity. The PSBs' policy of recognition has merged with the recognition of their commercial values. Even if multiculturalism had certain limitations, it recognized the rights of minorities, including their right to self-representation (Horsti and Hultén 2011: 223).

A study by Camauër (2011), focusing on news policies concerning cultural diversity and based on interviews with a sample of "white Swedish journalists" working within selected Swedish broadcast media as well as the major national newspapers, confirms the conclusions by Horsti and Hultén. In the newsroom cultural diversity is considered important; not only for democratic concerns but also for market concerns. This position is held among both public service employees and those in the private sector. Both concerns are a matter of survival. But as one respondent declares: "...But it is clear that the latter arguments [market arguments] have no doubt become more current in the past few years" (p. 47). Another respondent points out that managers, because they are "all-white, all-Swedish", do not understand how important it would be to reach immigrants from a commercial point of view. Immigrants are a market segment in its own right. Camauër's conclusion from this study is that diversity has a price, which media companies are not always ready to pay. Economic constraints and priority shifts due to market considerations seem to hamper a consistent implementation of diversity policies.

However, involving minorities in journalism and production requires sensitive consideration. Eide's (2011) interviews with journalists and programme workers with immigrant backgrounds show that they:

..navigate in a space of in-between-ness allotted to them, a space where they sometimes feel at home and able to take care of group interests, but often feel as if a straitjacket confines them to a position

of being excluded from the (maybe banal) normalcy of the Norwegian nation to which they belong (Eide 2011: 85).

Although the study is not confined to these persons' appearance in public service media but rather media in general, including the print press, the conclusions are thought-provoking for journalism in general. Among other things, Eide's study highlights issues of inclusion, exclusion and ethnification. Many actors perceive their role as ethnified. They appear because their perspective is needed; they are "particular". The optimistic side of allowing minorities to be visible in the media as, for example, experts on minority issues is that they can contribute to diversity and show their Norwegian-ness. As Eide says, such allowance of the media scene "may serve the purpose of widening the concept of nationhood away from the banal" (p. 86).

In order to come to terms with the situation of "whiteness" within the media industry, regarding not only staff but also topics of programmes, Horsti and Hultén suggest that PSBs should redefine their goals in response to the pluralistic citizenry of contemporary society. As most public service broadcasters have difficulties maintaining their audiences, they should develop strategies to attract minority audiences (cf. Camauër above).

Concrete measures were taken in 2007 for journalistic work with the cultural diversity issue, when the EBU developed a Toolkit for TV professionals in order to create a kind of handbook for practical work. A group called the Intercultural and Diversity Group was formed:

"The toolkit, based on public service broadcasting values, brings together the experiences of TV professionals from all over Europe who meet regularly to exchange views, develop joint activities and coproduce programmes in the framework of the European Broadcasting Union's Intercultural and Diversity Group".

The toolkit is structured as follows: a DVD which gathers real news clips from across Europe – including the new Member States – and illustrates the difficulties encountered when reporting on minorities. The toolkit also consists of a series of studies which address the practicalities of implementing diversity policies within broadcasting organisations and includes examples of good practice activities, case studies, recommendations on training, recruitment and progress evaluations etc. ([www.ebu.ch](http://www.ebu.ch)).

The Toolkit has been translated into various languages, including those in the Nordic area, in order to be a handy instrument for professional training. It can be ordered for free or downloaded from the Internet, and can be used for all

types of categories working in the media industry or students who plan to work there. The Toolkit also has the potential to serve as a guide and a starting point for discussion and an increased awareness of how cultural diversity can be implemented in programming.

Other initiatives include awarding prizes such as the Prix Europa Iris, the European multicultural media prize, which has been awarded to SVT several times (Hultén and Horsti, 2011). Another example is the *Mangfold* prize, founded by the Norwegian Government and awarded to NRK for their project *FleRe*, aiming at broadening the recruitment of co-workers representing a variety of cultural backgrounds ([www.nrk.no](http://www.nrk.no)).

Finally, a step towards promoting greater cultural diversity has been taken by the project Zebra, in which three Swedish public service companies (SVT, SRF and UR), in collaboration with the Department of Media Studies (JMK) at Stockholm University and thanks to funding from the Social Fund/EU, have actively worked to focus on issues of diversity among its employees. Among other things, workshops, courses and recruitment have been on the agenda. ([www.spl.nu](http://www.spl.nu)).

## Representation of Migrants in the Media

The discovery of migrant groups being diversified both in social practices and culture has challenged previous essentialist representations, but seems simultaneously to have intensified media focus on differences between a presumed majority and certain social practices existing within minority groups (Eide and Nikunen 2011 p. 2).

Although a number of studies show how migrants and minorities are represented in the media, few have a particular focus on the public service media or, for example, compare public service and commercial media. In other words, we know little about how cultural diversity is implemented in the public service output.

A number of studies have focussed on the portrayal of minorities and people with migrant backgrounds, especially how they are portrayed in newspapers and on television news. These studies have revealed a picture of negative connotations such as problems, deviance and conflict. It has also been noted that people with migrant backgrounds are underrepresented in the media, and when they are given a mediated space, portrayals of migrants have often provided a deceptive picture. A review article by Brune from 2008 confirms these findings, but most of the studies referred to are relatively old, some being based on data collected more than ten years ago. The situation might have changed, as the issue of media portrayals of migrants has been debated a great deal among researchers and journalists.

Speaking of the media output in more general terms, Brune (2004) and Hultén (2006) have contributed to this field of study with dissertations focusing on Swedish newspapers. Hultén found that news coverage of immigration and ethnical relations has increased considerably, but that the topic of "problem orientation" remains. This tendency has been somewhat similar in Norway and Finland as well. In Finnish news media during the same period, one can find a focus on more administrative issues concerning immigration. This could be explained by the fact that Finland has a shorter history of migration than other Nordic countries (Horsti, 2008). These findings are also in line with studies reported by Brune regarding how news media in Sweden represented migrant issues in the 1990s (2008). The reporting had a focus on "waves" of immigration and "invasions" of asylum seekers (p. 338). A review by Christiansen (2004) presents several Danish studies that confirm this generally negative picture. Some of these studies show that Danish media represent immigrants as being excluded from the national "we", indicating that ethnic minorities are not accorded full citizenship. Such negative and problem-oriented representations of immigrants in the national news in Denmark may, according to Christiansen, lead to increased tensions between ethnic minorities and the majority population. She holds that national media seem to contribute to further marginalization, rather than compensate for it, and finds no real sign of change. (For a comprehensive review of early Nordic research from the 1980s and onwards, see the article by Horsti from 2008.) Even in more recent studies, this picture of Danish media is confirmed. In 2012, a content analysis of news stories (eight newspapers and two TV channels) showed that immigrants were represented in 5% of the sources quoted in the country's news coverage, although they make up about 10% of the population. Rather than asking questions about matters such as taxes or education, the journalists asked immigrants to comment on crime, social benefits, immigration or forced marriage (The Copenhagen Post, 2012).

Few studies, except an early one by Löwander from 1998, have dealt with representations of migrants in public service media in particular. In general, previous research on the representation of minorities has mainly focussed on print media. So, for example, the controversial issue and debate around the publication of the "Mohammed cartoons" in *Jyllandsposten* has mostly been studied from the point of journalism in print media (Eide, Kunelius and Phillips, 2008). Interestingly, in this publication a wide variety of national and local newspapers worldwide were chosen for analysis, whereas televised news was in the periphery and the role played by public service media was not at all discussed. In other words, how was this "media event" spread to the wider public? This question is relevant, as only television news on mainstream channels such as public service (nationally) or transnational channels such as Al-Jazeera (internationally) can reach a wider audience.



In a limited but recent study by Andreassen (2011), a comparison between public service and commercial media is made. She asserts the idea that media plays a role in the process of “social cohesion” in a society. Her hypothesis, from the presentation of a number of examples, is that commercial television may be more inclusive in terms of staffing their programmes with people characterized by ethnic diversity as compared to public service television, e.g. the commercial entertainment programme *The X Factor* (the Danish version of a talent show originating in the UK). This example, she claims, can be seen as a sign of a new multicultural policy and builds on the idea that Danish society is “multiracial and multicultural” (p. 164). Entertainment programmes, according to Andreassen, seem to be more open-minded than news programming. For example, in Denmark a programme presenter of Palestinian decent wearing a veil evokes public debate and protests. Andreassen suggests that news media present spaces that are more closed, representing middle-class values, formal education and traditional knowledge. She points out that the genre of entertainment, such as music and dance shows, is more inclusive to people of colour than other types of programmes by tradition in Western media culture, whereas quiz shows such as Jeopardy are more geared towards a celebration of participants with “fingertip knowledge” (p. 178).

### Migrants’ Voices – Reception and Views on Media Portrayals

Another relevant issue is how media texts are actually interpreted by their audience. A review by Gray (1999) on international audience research, focusing on media readings, indicated a lack of studies concerning ethnicity and race, and she criticized this research for its *whiteness*. However, the field has expanded and ethnic minorities’ relations to the media have come to be of great interest within media and cultural studies (e.g., Gillespie 1995; Hargreaves and Mahdjoub 1997; Barker 1999; Qureshi and Moores 1999; Cottle 2000; de Bruin 2001; King and Wood 2001; Tufte 2003; Madianou 2005; Peeters and d’Haenens 2005; Sjöberg 2006; De Leeuw and Rydin 2007).

Unfortunately, there are still very few comprehensive studies on media uses and practices among migrants within the Nordic countries. One exception is a qualitative study by Rydin and Sjöberg (e.g. 2007; Sjöberg and Rydin 2011), and I will here present some findings from this project, entitled “Media practices in the new country”<sup>2</sup>. The project aimed to highlight the role and utilization of the media in families (mainly with children aged 12-16 years) with immigrant backgrounds representing a wide range of ethnic groups. In all, 75 persons, parents and children, were interviewed in-depth once or twice. The focus was on all kinds of media use. Normally, the informants did not distinguish between public service media and commercial media. They also often talked about media in general terms or Swedish media. However, even if not



explicitly stated, “television news” often referred to news broadcasts on public service channels such as SVT or Channel 4 (which also has a public service mission). In other words, they referred to *Rapport* (SVT), *Aktuellt* (SVT) or *Nyheterna* (Channel 4), i.e. the news on the major public service channels. And in some interviews certain TV programmes were discussed explicitly and could therefore be identified as commercial or public service. Extracts from these discussions will be specifically highlighted in this article. Some conversations, often generated by the informants themselves, concerned the issue of media’s portrayals of minorities and migrants.

### Immigrants – A Generalized Category

According to the informants in the Rydin and Sjöberg (2008) study, media and television in particular influence not only how migrants look at themselves, Swedish society and Swedes, but also how Swedish people perceive migrants. One problem is that the label “immigrant” may evoke negative connotations about all migrants.

Brune (2008: 349) states that these generalizations take place through various routines among journalists which “[...] together give shape to a kind of ‘comprehensible immigrant’, an intellectual construction that lives a life of its own beside real people and circumstances” (our translation). The term “immigrant” is increasingly being called into question, and it has been stressed that media companies, authorities, politicians, researchers, etc., must move beyond this concept and instead place issues like racism, discrimination, ethnic relations and citizenship on the agenda (see, e.g., Brune 2008; Darvishpour and Westin 2008). “In the concept of immigrant, as it has come to be used in Sweden, social exclusion is built in. In one sense, being an immigrant means being non-Swedish; in a deeper sense, it means being nobody” (our translation) (Darvishpour and Westin 2008: 16). In the talks about the media’s portrayal of immigrants, the term was reflected upon and the informants were asked what it takes to not be labelled as an immigrant:

I want to say well when we watched TV, news about somebody for some crime or something they say “okay, he’s an immigrant” or well or but many of them, they’re born here, maybe they have an immigrant background say grandma or grandpa, doesn’t matter. They came 30, 40 years ago here in Sweden like, many are born here so why do they say “immigrants do this or immigrants don’t do that” if they’re born here, they’re citizens and everything but just because they have different names or something so well maybe I react this way because I think that if somebody is born in a country and is a citizen then he belongs to that country, not a foreigner or. (Woman)

In this excerpt the informant refers specifically to the TV news, which most likely means news on SVT or TV4 (Channel 4). The informant puts her finger on the stereotypical use of the word immigrant. Especially Arab families emphasized their dissatisfaction with Swedish media and had thought extensively about these issues. This critical awareness is not surprising, as it was also these families who talked a great deal about racism and how Muslims are discriminated against on a daily basis. There is, in other words, an evident link between the amount of experienced or conceivable racism/discrimination in Swedish society and the type of interpretation made when using Swedish media (cf. Al-Ghabban, 2007). Relating to Hall's research on various reading positions (1980), we can see examples here of so-called oppositional reading, whereby the "reader" dismisses the dominating ideology, which according to Hall is always inscribed in a media text and constitutes the sender's intentional reading.

### Muslims are "The Others"

Some families also talked about how the racism in Swedish society is found in the media, especially creating an image of Muslims as a homogenous group with only negative features. Western media, they claimed, express the present, dominant American (cultural, political) imperialism in society. The power of the media is strong, as the families felt that the media have contributed to an anti-Muslim and xenophobic discourse in which all Muslims are seen as terrorists since September 11. The families' line of argument can be related to van Dijk's research (1988) on how news as discourse reproduces existing and dominant structures and concepts in society, thus maintaining a "we-them" discourse. That media generalize and treat all immigrants the same was also mentioned by the children. "Yes, for instance the news, they say like 'all the black children' you know, 'aren't good for the school, blah, blah, blah'" (14-year-old girl).

Swedish media were also blamed for disfavoursing people with immigrant backgrounds and for news on criminality often being connected with immigrants. Statements were also made about journalists' eagerness to find something sensational and the fact that, owing to their lack of knowledge of how things really are, a biased and discriminatory image of immigrants is given. In the interviews it was mentioned how the discourse "we and them" marks the media content, which in turn leads to triviality, generalization and othering. The informants made clear that there is a lack of knowledge among journalists (and Swedes in general) about, for instance, Islam and actual living conditions among Muslim families.

## Poverty, Violence and Moral Values

Besides the fact that the “Swedish media”, as well as their readers and viewers, generalize and perceive immigrants as a homogenous group, the informants talked about how the media give incorrect and negative portrayals of the reality in, for example, the Middle East and Africa, which in turn affects Swedish people. During the interviews, it was stressed how images from the informants’ homelands only present poverty and misery. For example, informants could be “tired” of the Swedish media, which only show ugly and repulsive pictures from their homeland. The pictures are often stereotypical, demonstrating a primitive way of life, such as showing “a donkey” and “a poor man sitting on the street”. Other pictures have the camera lens directed at, for example, starving children.

Another topic among the adult informants was the Western way of living (its norms and values) shown on Swedish television, which did not provide their children with a good role model. “Basic to the formation of values is that people tend to hold on to the familiar, to an already given environment and type of life they are used to. Values are one part of personal identity” (our translation) (Daun 1994: 29). These talks about the way of living exemplify what Alasuutari (1999b: 98) has come to call ethical realism, whereby media content is evaluated according to the extent to which it provides proper ethical models of life.

Even if it was critical voices that dominated the interviews, there were also discussions about the positive aspects of Swedish media compared to media in the informants’ homelands. Swedish media content was considered to be less violent, which of course is related to the often violent situation in the homeland, something the parents saw as a problem for their children. The violence in the media resulted in an ambivalent relation to the decision of whether or not to watch news from the homeland. Words such as “stressful”, “are forced to”, “difficult decision”, “must watch” were expressed to describe this ambivalence.

## Transnational News: Al-Jazeera

Even if freedom of expression in Sweden was highly valued among the informants, they did not always trust Swedish media, as seen above. And moreover, they did not find enough information about their homelands in the local Swedish media. In order to be familiar with events in their former homelands, informants with origins in the Middle East chose transnational satellite channels such as *Al-Jazeera* and *Al-Arabiya*, which they highly trusted. *Al-Jazeera* was regarded as giving the true image of reality and it was considered that the people portrayed on the channel shared the same religion and nationality, but

some also took a critical stand on these types of channels. Irrespective of the experienced reliability, the informants all agreed about the need to make use of different types of media, including Swedish, national and international, as well as media from the homeland.

In a European study of “media and citizenship”, interviews with Arabic-speaking people in Stockholm, Camauër (2010) also confirmed the high credibility of *Al-Jazeera* especially when it comes to reports on what is happening outside Sweden. That *Al-Jazeera* has a special position on the news landscape is seen in talks about how the channel, since its start in 1996, plays a crucial role in criticizing and scrutinizing established social, cultural and political actors and institutions, not only in the Arab countries but also worldwide (cf. El-Nawawy and Iskandar 2002; Lamloum 2006). *Al-Jazeera*'s success among its audience can mainly be explained by its coverage of the conflict between Palestine and Israel, the war in Afghanistan and the war against terrorism (Lamloum, 2006:30). Among the informants in the Rydin and Sjöberg (e.g. 2008) study, the fact that the channel reports directly from a specific country and that comments are made by ordinary people on the street was seen as evidence of the channel's great reliability. Reliability is a key factor in whether or not viewers will identify with media content (Auter, Arafa and Al-Jaber, 2005). Once again, the possibility to identify with the content, news readers and journalists was stressed; it is important to feel familiarity, to feel sympathy, to find out what is happening with friends and relatives.

Despite critical voices describing Swedish media coverage, the informants also discussed how Swedish television could be improved so as to encourage participation and involvement in society and increase an understanding of the multicultural among both “Swedes” and people with immigrant backgrounds.

### Programmes For, About and With Immigrants

The phrase “wise TV channels” was uttered by one of the informants in the Rydin and Sjöberg (2008) study. It summarizes the wish of both young and adult informants that Swedish media, especially television, contained more topics and dealt with questions that engage people with immigrant backgrounds and that shed light on their situation. They also felt that more immigrants should take part in various programmes. Similar discussions were presented by Beckman (2003) and Sandström (2005). Madiano (2005) used the expression “symbolic exclusion” to signify how majority media handle the issue of cultural diversity. Some informants explicitly mentioned that Swedish public service media neglected this issue.

Media research has long emphasized the need for national media to reflect the multicultural nature of society, and that people with immigrant back-

grounds should be not only media users but also media producers (Sreberny, 2005: 447; Olausson 2006). This can be achieved not only by directing specific programmes at people with an immigrant background, but also by increasing the knowledge and understanding of today's multicultural Sweden among the entire population. In the Rydin and Sjöberg (2008) study, one illustrative example of this problem is a father who pointed out that there is great danger associated with the fact that immigrants do not get enough information during elections due to their lack of language skills. He had observed that some migrants had not distinguished between the Sweden Democrats (an extreme right-wing party) and the Social Democrats (a labour party) when they were voting. Although there is a need for more targeted programmes in Swedish television, this may also be problematic. According to the informants, the division between Swedish and immigrant programmes could serve to strengthen existing segregation in society. Programmes must instead have more multicultural features and be directed at a wider audience. Some informants felt there should be programmes involving both migrants and native Swedes in order to provide good examples of integration.

### Identity, Identification and Belonging

The need for identification and belonging was a common thread in the interviews in the Rydin and Sjöberg (2008) study. The informants expressed that viewers' own personal experiences in the new country should be reflected more in programmes, and that Swedish television would be more appealing if more people with immigrant backgrounds participated in the programmes. This involve not only series, news and soaps, but also films and music programmes like *Idol*, where immigrants are actually represented sometimes. The ability to recognize places and current societal issues is also a decisive factor, which was seen in discussions of how the informants enjoyed watching documentaries from their homeland on Swedish television.

To use Hall's expression (Hall 1980: 130), a lack of equivalence is seen in the communicative exchange in relation to a specific content and its lack of meaningfulness to the "reader". Media research has especially examined the importance of soaps among viewers by constituting frames of meaning for everyday life, such as personal relations and family life (cf. Buckingham 1996; Silverstone 1994; Sjöberg, 2002).

#### *Kniven i hjärtat (The knife in the heart) – A Public Service Production*

A drama series, called *Kniven i hjärtat*, produced for SVT was mentioned in the Rydin and Sjöberg (2008) study as an example of a programme that led to recognition and emotional involvement. It was perceived as a realistic por-

trayal of the harsh life in the suburbs. The series was broadcast one or two years before the project was carried out, but came up during the interviews with some informants as it evoked vivid memories. The story was based on a manuscript by Peter Birro, a Swedish writer of Italian descent, and was directed by Agneta Fagerström-Olsson. Even though the series seemed to portray a brutal reality, with gang crimes and so on, it was appreciated; informants could recognize problems they themselves had perceived. So, rather than rejecting such problems, they found it important that television really exhibited how tough life can be for these youngsters. This example indicates the importance of identification. Nikunen (2011) conducted a textual analysis of this series. She highlighted the sense of social realism in the series, i.e. the suburban “ghetto” setting and the trustworthy portrayal of migrant youngsters living there. She also conducted a reception study, which showed that migrant youngsters living in Finland found the series appealing. The series also contained humorous and musical elements, which contributed to its attractiveness. According to Nikunen *Kniven i hjärtat* is an accented drama, to use Hamid Nacify’s expression (Nacify 2001), a series that touches upon the very essence of diasporic life in the suburban “ghetto”. As a contrasting example, one can mention Maasilta’s (2011) study of a Finnish soap on YLE called *Mogadishu avenue*. This comedy series, which was also aimed at portraying migrant life (in Finland), was on the other hand not received positively by her interviewees in focus groups, as they found that they were not properly or realistically represented, whereas the series seemed to satisfy the needs of the Finnish prime-time television viewers. Migrant minorities are often very sensitive about how they are represented in the media, and finding the proper tone and nuances when choosing the comedy genre is a challenge.

Finally, a European study on “media and citizenship”, Camauër (e.g. 2010; 2011) among Arab-speaking citizens living in Sweden indicated that “participants expressed their sense of belonging to a range of imagined communities – their countries of origin, Sweden and an Arabic transnational community.” A sense of belonging to the country of origin was widely shared across all groups, but appeared to be less so among the youngest participants.

### The Bright side – Being Informed about Swedish Society and the Need for Minority Media

One objective of the study by Rydin and Sjöberg (2008) was to examine whether the media could at all be conceived as a tool for participation in everyday life, i.e. an informal educational aspect of citizenry. And here, public service media could play a central role.

Although most adults had some formal language training, such as “Swedish for immigrants” (SFI) and “Swedish as second language”, there was a group of mainly women who had learnt Swedish on their own. They mentioned the role of the media in this, especially television and radio. These women, because of family circumstances such as pregnancy and child care, felt they had become more isolated from the Swedish society compared to their husbands. A woman from Lebanon described how she learnt Swedish from television, especially when she had access to subtitles in Swedish. This woman was sick-listed, and felt isolated since she had very little contact with Swedes and Swedish society. For her, television was a link to the world outside her domestic space of home. But also, it helped her to not forget her language skills as her children mastered Swedish better than the parents’ mother tongue, Arabic.

On the one hand, Sweden was appreciated by the families in the study for being a democracy; it is a country where they feel socially and economically safe. Some informants stressed that since they were excluded from society and the media, especially television could be a substitute for real-life contact with Swedish society; especially during the initial period of residence when the informants often also lived segregated from the majority culture. Several types of TV programmes were mentioned for learning Swedish and for becoming acquainted with Swedish society. These could be everything from foreign soaps to movies with Swedish subtitles to national news programs like *Rapport*, *Aktuellt* and *TV4 Nyheterna* as well as documentaries and talk shows. Children’s programmes (Swedish as well as international) were particularly mentioned as an educational tool when they had arrived in Sweden. It could involve listening to the speech of a programme, but also reading subtitles.

Camauër’s (e.g. 2010; 2011) study supported these findings. She claimed that Swedish media constituted an important form of participation, i.e. for providing information on what is currently happening, for giving an orientation into the Swedish system, and for supporting the process of language learning. Swedish media are important “to learn the basics” and “not isolating yourself and would be left behind”...“It is important [to watch Swedish channels] because we live in this country, we must understand what is going on in this country” (p. 18). “When I go to vote not knowing about this party and that party, how would I know if I do not listen to the discussion and debate between them, what is he saying, what can he give, where does he stand and such. So this is how we benefit from it.”

The Rydin and Sjöberg project (e.g. Sjöberg and Rydin, 2011) presented several examples of how media were used for learning the new language upon arrival to Sweden, or for that matter not forgetting the new language when one’s life situation changed because of maternity leave or being sick-listed. We have also seen that these informants’ preferences are not restricted to nationally produced media content but rather reflect the Americanization



of mainstream media in terms of various soaps, series and movies that are broadcast on a daily basis.

In general, besides television, radio and newspapers were also mentioned as ways to stay informed about national (Swedish) news. As for the former, it could be everything from discussion programmes and news in easy Swedish to informative and news programmes aimed at migrants in their mother tongue.

One radio programme mentioned was 'Call P1' (*Ring P1*) on Swedish Radio (SR, a public service company). This is an example of informal political discussions (cf. Dahlgren 2003) about various societal matters, with more or less ordinary people telephone in to express their opinions, sometimes related to issues of relevance to migrants such as the political situation in their former home countries. Negotiations of norms and values are also elaborated, as the phone calls often discuss moral standards and codes.

There were informants who mastered Swedish quite well and therefore used local newspapers and the daily tabloids (e.g. *Aftonbladet* and *Expressen*). Dailies like *Metro* were also mentioned in positive terms, because their articles are generally brief and very readable, and they are free of charge. People appreciate summaries of the most important news that are presented in easy language. For those parents with little knowledge of Swedish, their children appeared to be important resources for translating the news to their parents; otherwise, they had to turn to newscasts from their homeland in order to gain more understanding. Thus, it was not a matter of ignoring Swedish news but rather of struggling in various ways to learn about news in one's surroundings. A girl said that, like many other children, she automatically translated from television for her mother, when the mother watched the news (e.g. *Rapport* on SVT) and the daughter sat next to her, playing games on the computer and listening with half an ear to the news. For the children it seemed natural to translate for their parents. In this way the children had good insight into their parents' viewing habits, not least regarding various national and international broadcasts.

In the discussion on media as a link to Swedish society, the need for minority media was advocated by the adult informants. Camauër (2003: 69) defines these media as "[...] an overall concept for designing the media produced by, addressed to, and/or a special interest for, ethnic minorities". Within this definition are variations concerning issues such as media producer (commercial or public service producers as well as NGOs) as well as language, genre and content (e.g. entertaining-informative, about the homeland-new country or international). For a review of minority media and minority politics in Sweden, see Camauër (2005). In the Rydin and Sjöberg project, a woman from Greece spoke warmly about the Greek programme *Simera* (Today) that was broadcast on Swedish television when she arrived in Sweden at the end of the 1960s.



The programme was broadcast every Saturday and became something to look forward to: “Everybody waited for it”, she said. Everything was discussed on this programme, from simple things like shopping to information from public authorities. A radio programme called *Pejvak* seemed to have a somewhat similar function. It was mentioned by an informant with Kurdish background, who claimed that many Kurds were still not familiar with it and would like to see an improved marketing of it. He said that public service media should provide important societal information to people with no understanding of Swedish, for example current laws or news from the Board of Migration.

### But the Dark Side...

Turning our attention to how the informants in the project informed themselves about Swedish society, we can once again rely on Dahlgren’s (2003: 157) analytical framework, in which he brings up the importance of knowledge and competences, stating that “[...] people must have access to reliable reports, portrayals, analyses, discussions, debates and so forth about current affairs”. Thus, Dahlgren emphasizes the importance of reliability, which is related to trust and truth. However, as we know, the media do not always present reliable information.

News reporting was not always considered objective, and critical voices were heard about how the Swedish media, not least television, portray migrants and their home countries in a biased way. These misrepresented media images might have negative implications on how the surrounding society is perceived in terms of, for instance, antidemocratic values (unequal, intolerant, etc.), which may create a feeling of alienation rather than affinity, which is necessary to be part of a shared civic commonality. In other words, claims about the importance of using national media in the process of integration forget that the images portrayed might be looked at with a critical eye rather than being embraced with enthusiasm.

The metaphor of television as a window to the world has frequently been elaborated on by media scholars, e.g. Morley (1999), and exemplifies how direct experiences are extended and fused with mediated and indirect experiences (cf. Giddens 1991, Thompson 1995, Sjöberg 2002). This “window” embraces everything from news and discussion programmes to soaps and drama series. Television, for example, especially public service channels, is considered to play an important role in building national self-images and conveying “cultural images” (Alasuutari 1999) such as a society’s symbols (e.g. the colours of flag, the welfare state, the national anthem) for maintaining the concept of a nation. These cultural images may also sometimes have nationalistic overtones, which is of special interest in this case as the media can contribute to alienation if

they present an overly ethnocentric image of the host country. In some genres more than others, values related to national identities are fostered, for example sports, where nations fight against nations (Cronin and Mayall 1998) and news (Östman 2009), not to mention war movies, a genre elaborated on in Michael Billig's analysis of "banal nationalism" (1995). It is the Swedish imaginations of the "homeland" that is portrayed on television, in the news and in drama series, but also of the "other", the non-Swede. Thus, viewers get a picture of the official image of Sweden and Swedes through television. On the other hand, according to some researchers this type of image is becoming less powerful in the construction of nationality and national identity, due to the increased amount of global import (Bakøy 2006b).

### Use of Public Service vs. Commercial Media

Unfortunately, there is little research illuminating the use of public service media as compared to commercial media among migrants and minorities. There are, for example, methodological problems connected to large-scale audience ratings due to language problems and a high decline in respondents within the migrant group. This was stressed in an official investigation from Sweden (SOU 2005:1), which tried to map media use among immigrants. Available data have to be interpreted with care. Results indicate, however, that news on Swedish television is used to about the same extent among migrants and minorities on the one hand and the majority population on the other. In Finland, a survey from 2008 indicated that migrant television viewers seemed to prefer commercial channels to public service channels on YLE. The same study revealed that migrants seemed to prefer news broadcasts and globally distributed American serials, while fiction productions of domestic (Finnish) origin were hardly ever viewed. The authors of this study drew the conclusion that drama serials and soaps are too "Finnish" and cannot offer models for identification (Maasilta 2011).

In the Rydin and Sjöberg (2008) study, none of the informants said they never watched Swedish television, and in the conversations they pointed out the importance of staying updated on Swedish national news, e.g. *Rapport*, *Aktuellt*, *TV4 Nyheterna*, as well as local news. Furthermore, teletext was mentioned as a service for navigating among the news. Here, the informants were offered brief news about the most important courses of events that could be read at their own pace, often with the help of a dictionary. The importance of teletext in migrants' attempts to gain more information about national news is also seen in other studies, for example Bakøy (2006a).

## Public Service in the Future One among Others for Cultural Diversity

Public service broadcasters seem to be retreating worldwide. They feel challenged by a duality of fragmentation and segmentation, along with factors of globalization and synchronism. They are struggling with market pressures to attract large audiences and to legitimize their license fees on the one hand, and serve all populations and fulfil governmental and legal requirements on the other (Horsti and Hultén, 2011:21 referring to Westberg). In their examination of how public broadcasters in Finland and Sweden have perceived and implemented cultural diversity policies, Horsti and Hultén (2011) found that these issues had hardly been empirically studied in the Nordic countries previously. Relying on, among other things, analyses by Katharine Sarikakis, they claim that at the turn of the century one could see a more general discursive shift in Europe regarding the concept of “social cohesion”, a concept they find vague and problematic; it is related to changing notions of citizenship. In the same vein, one could distinguish a shift in the media landscape towards increased commercial interests in the media market as well as competition between national and global distributors of media. For example, the emphasis on “the national” as a strategy to meet the competition from the commercial global output may have implications for the diversity policy and perhaps undermine the needs of special groups, such as niche programmes. In their in-depth study of cultural diversity policy at SVT and YLE, Horsti and Hultén (2011) found that both companies have shifted from multiculturalist policies to more vague policies of mainstreaming cultural diversity.

One reason for a shift away from multiculturalism was, for example, the events related to the Mohammed cartoons, which were particularly important in a Nordic context as the debate started in Denmark (cf. Eide, 2008). It became clear that this part of Northern Europe was also involved in this “crisis of multiculturalism”. Special needs would no longer be addressed. Instead, demands for integration began to appear (Horsti and Hultén, 2011: 214). As a sign of this trend, SVT have implemented a routine for counting how often persons with non-ethnic Swedish origin appear in programmes on a daily basis in order to keep track of the diversity issue (SVT, *Public service-redovisning* 2011). Such “counting” is an indication of all-encompassing integrative efforts as the main policy, whereas special programmes focusing on minority issues are declining in the output. Another trend is moving beyond the transmission model towards the multimedia, digitized environment. The 2011 *SVT Public service-redovisning* mentioned the web series the *Ana Gina show*, a series containing jokes about the concepts of “Swedes” and “immigrants”, religious concepts such as “Islam”, and “Swedish culture”.

A crucial question is whether minorities and migrants prefer mainstream outputs in their new homeland, public service as well as commercial output, or whether they prefer to be connected to their former homeland or their fellow citizens from the former homeland living in Diaspora through primarily transnational media such as satellite television or the Internet. The answer is that both national and transnational media were important, according to the Swedish project "Media practices in the new country". The media appeared to be important tools for getting connected to this new culture and for a feeling of affinity. But it also became apparent that the Internet as well as transnational television played a major role in most migrant families' lives already at the beginning of the new millennium (e.g. Rydin and Sjöberg, 2008). The study was initiated when Web 2.0 had just been introduced, and it was surprising how quickly this new Internet service must have been implemented. More or less all informants used the Internet on a regular basis, for example various links for information to stay updated on their former home countries, such as Web sites, newspapers, television, online radio, etc. They also used chat rooms and forums to discuss of private matters as well as political issues, etc., with fellow countrymen in Diaspora. Both adults and children emphasized the importance of the Internet in their everyday life. Only a few women in the study declared a certain reluctance concerning computers. Nordic research in general confirms this description; see Eide and Nikunen (2011), for a collection of recent research on media practices among migrant populations in Denmark, Finland, Norway and Sweden. These findings are fundamental for gaining a better understanding of how diasporic groups negotiate both their 'diasporic identity' in terms of old and new belongings as well as their capacity for political organization and participation; that is, empowerment and recognition in the private and public spheres. The access to on-line communities, forums, etc., makes this issue of crucial importance.

A general conclusion from international research is that various media fulfil different functions and thus complement, rather than replace, each other. Furthermore, minority audiences desire far more mixed representation and blended usage (Hargreaves and Mahdjoub 1997; Georgiou, 2005; Madianou, 2005; Peeters and d'Haenens, 2005; Sreberny, 2005; Al-Ghabban, 2007). In order to explain the complex relation between different media and their production, distribution and consumption, Adoni (1985) distinguished between functional equivalence and functional differentiation of the media. The more similar the functions being fulfilled by, for example, two media, the greater the possibility that one of them will be displaced. The opposite is seen when media have (partly) different functions for the user and thereby complement each other.

Finally, returning to the Swedish study on media practices, vivid narrations were presented of how informants with origins in other cultures than the

Swedish one were struggling in their private sphere with learning the majority culture's language by means of the media. These efforts are to be interpreted as a need to develop a sense of belonging to the same social and political entities as the majority population. This idea goes back to a time when television had an important mission in promoting national citizenship (e.g. Hartley 1999). In the early days of television, the company's relation to its audience was based on the idea of a common identity and towards a unified cultural citizenship. However, recent policies of public service missions, especially in the light of access to Web-based services, rely on the idea of audience difference, promoting a kind of "do-it-yourself" citizenship, particularly if stressing "the national" defined as a cultural heritage gains increased importance. Interpretations of "the national" might not always imply an inclusive policy, but rather an emphasis on a common national heritage, as the Danish PSB advocates, which clearly excludes new citizens with origins in other countries. So even if we can see how mainstream all-encompassing media are used and have significance, the alternative channels for information, entertainment and participation are equally or more important, which supports the idea of multiple public spheres, incorporating local, national and transnational affiliations. What will be decisive for choice in this blend of offerings from the media market is the individual media user's sense of inclusion, expressed in trust, identification and belonging.

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*Notes*

- 1 Wikipedia: Demographics Denmark, demographics Sweden, demographics Finland, demographics Norway. Note: Figures for Sweden from 2010, figures for Finland from 2011, figures from Norway from 2012.\* Sweden at present (2012) also receives large numbers of refugees from Syria because of the civil war there.
- 2 The project was funded by the Swedish Research Council 2004-2006.



# Nordic Public Service Broadcasting and European Union Regulation

Henrik Selin

Public service broadcasting in the Nordic countries has long and in many ways similar traditions. In the early days of the 1920's Finland, Denmark, Norway, Iceland and Sweden, like most European countries chose to organise radio broadcasting in the form of national monopolies, after British example, where public organisations were given the right to broadcast and where operations were financed through some form of public money.

Even though there is no such thing as a “Nordic model” for public broadcasting, there are important similarities between the Nordic countries' systems. They all build predominantly on publicly owned companies performing the public service independently from the state and other special interests in society. Nordic public broadcasters also share the same funding model with the license fee as the principal source of income. Only in Iceland does the main public broadcaster also have additional income from advertising. The Nordic media markets are also good examples of fairly balanced media systems where private commercial, public service and community media together perform the functions of a responsible and accountable “media ecology”. The Nordic public broadcasters also have a long-standing cooperation in programme production, through the so-called *Nordvision*.

For a long time broadcasting was an internal concern for each country. But in the last three decades the media sector has been heavily influenced by events on a larger scale. In the 1980's technical developments made it impossible for national governments to restrict broadcasting to certain players only. Public broadcasters had of course had competitors in other media sectors also in the past, but in the late 1980's satellite technology allowed for private competition in television and within only a few years most European countries had satellite channels directed at its audiences, with far-reaching implications for the media landscape. All over Europe this development initiated a dismantling of the old broadcasting monopolies held by public operators. During the last two decades, technical developments have accelerated and the

media landscape has gone through fundamental changes, affecting old and new players alike.

The Nordic public broadcasters still remain important players on their respective markets. Even though their audience shares have fallen far below where they once were, their relative shares remain high. For television, most public channels are still market leaders, with shares of viewing time varying from 30 percent in Denmark to 50 percent in Iceland. Also on the Internet, Nordic public broadcasters' websites are among the top ranked sites in each country.

The increased interdependence between public service broadcasters and the rest of the media landscape has of course influenced national media policy over the last decades. But it has also had wider effects on European level with the European Union (EU) in the 1980's starting to harmonise rules for broadcasting and for electronic communications with the purpose of promoting competition and contributing to a level playing field in the sectors concerned.<sup>1</sup>

In a globalised world national media and policy are of course influenced by developments also in other parts of the world. Trade policy, Telecommunications and Communications policy are examples of areas where international organisations like the World Trade Organisation (WTO), the International Telecommunications Union (ITU) and UNESCO play important roles in shaping the regulatory and policy related framework.

This article will look into the many ways in which EU regulation influences national media policy. Specific attention will be given to EU State aid policy, which is of particular importance for public broadcasters. In the wake of de-monopolisation of European media markets, many commercial operators have alleged that public broadcasters distort competition. The article ends with some reflections on how EU state aid control has in fact helped clarifying that the Nordic model for public service broadcasting is likely to be among the most secure in Europe, from the perspective of possible interference from the EU.

## The Impact of EU Regulation on National Media Policy

Culture and Media policy are areas where the EU has limited powers. Here, EU competence is normally described as *complementary* to the competences of Member States, with no or very limited ambitions for regulatory harmonisation. Other similar examples are education, youth and social policy. Instead of EU wide legislation, other forms of softer regulation is used, such as Recommendations and Council Conclusions or Resolutions. There are a few examples of legislation also in these fields<sup>2</sup>, but importantly national policies for the culture and media sectors are often highly influenced by regulation also in other sectors where decisions are taken at EU level.

Figure 1 illustrates some of the areas where regulation and other activities on EU level affect national media policy. Those who are interested in the framework of media policy in a European context will therefore do well in following developments also in these sectors.

**Figure 1.** Influence on the Media from Regulation in Different EU Policy Sectors

Type of regulation	Responsible Body		
	EU Commission	EU Council	EU Parliament
• Media Distribution	DG INFSO	Telecom Working Party	ITRE
• Audiovisual Media Content	DG INFSO/EAC	Audiovisual Working Party	CULT
• Copyright	DG MARKT	Copyright Working Party	JURI
• State Aid	DG COMP	n.a.	n.a.

Other relevant policy areas: Internal Market, Trade, Culture, Consumer Affairs, Health, Legal Affairs, Value-Added Tax etc.

The concept of *EU media policy* is traditionally used to describe only a part of this picture, relating only to the regulation of *media content*. But there is reason to highlight four sectors where EU regulation is particularly relevant for media policy. When considered together, these sectors give a more coherent and complex picture of how EU policy affects the media. These sectors are *media distribution*, *media content*, *copyright* and *EU state aid regulation*. Some characteristics of regulation in these areas are described further below.

Besides these four areas, the list can be made long of decisions and regulation also in other sectors which affect the media. For example, EU harmonised rules on *value-added tax* restrict Member States' possibilities to decide which parts of the culture and media sector should enjoy the benefits of reduced tax rates. Regulation concerning the *protection of personal data and data storage* play an important role on the Internet and to a large extent affects journalistic and editorial working methods. In the *health, consumer and environment areas*, EU directives on for example labelling of consumer goods can impact on how commercial messages in the media must be formulated. Further examples include the *EU regulatory environment for businesses and enterprises*, which impact on national legislation.

Figure 1 also suggests that all types of regulation are the responsibility of different services and officials in the EU Commission, the European Parliament and in the Council where Member States negotiate their positions. The same is of course true also within Member States where different ministries with different traditions and perspectives deal with regulation affecting the function of media in society. It is far from unimportant to know which institution is responsible for a certain regulation in order to understand the perspective which is being applied. Are media policy-related considerations such as freedom of speech and information, pluralism and quality considered as most important? Or are economic, market and competition-based considerations given more prominence?

With the purpose of monitoring how regulatory developments in various sectors affect the media sector in Europe, the EU Commission maintains an inventory of all relevant current and planned policy initiatives within the EU. An excerpt from this useful inventory produced within a framework called *Media Task Force* is provided in figure 2.<sup>3</sup>

**Figure 2.** Media Task Force – An Overview of EU Initiatives Affecting the Media

**European Commission**  
**Media Task Force**  
**INVENTORY OF MEASURES AFFECTING THE MEDIA**  
**July 2012**

**Categories of policies:**  
1) [Audiovisual and media policies](#), 2) [Electronic Communications policy](#), 3) [Digital agenda](#) 4) [Research](#), 5) [Other policy files with potential media impact](#), 6) [Reference](#)  
The inventory only covers Commission files i.e not own initiative measures in other institutions.

**Sectors – sub sectors affected:** Audiovisual – TV, film/cinema; TV & radio broadcasting; Publishing – Printed & on-line press, Printed & on-line periodicals, Books, Directories, Learned journals, Music

**Commission Services (DGs):**  
If you know which service handles the policy initiative that interests you, click on it to go straight to the relevant section of the inventory. NB not all DGs are listed currently, given that some do not have initiatives that are relevant.

Competition DG	<a href="#">COMP</a>	Internal Market DG	<a href="#">MARKT</a>
Education and Culture DG	<a href="#">EAC</a>	Justice DG	<a href="#">JUST</a>
Communication Networks, Content and Technology DG	<a href="#">CONNECT</a>	Communication DG	<a href="#">COMM</a>
Employment, Social Affairs - Equal Opportunities	<a href="#">EMPL</a>	Research DG	<a href="#">RTD</a>
Enterprise DG	<a href="#">ENTR</a>	Secretariat-General	<a href="#">SG</a>
Environment DG	<a href="#">ENV</a>	Energy	<a href="#">ENERGY</a>
Home affairs DG	<a href="#">HOME</a>	Taxation and Customs Union DG	<a href="#">TAXUD</a>
Health and Consumer Affairs DG	<a href="#">SANCO</a>	Trade	<a href="#">TRADE</a>

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## Media Distribution

EU regulation of *media distribution* is mainly made up of the legislation on electronic communication, which in the last decades has been used to harmonise measures in Member States aiming at promoting competition on Europe's telecom markets, most of which were previously national monopolies. This leg-

isolation concerns both the infrastructure with its communications networks and some basic aspects on the services offered. Examples of market players concerned are telecommunications operators, Internet Service Providers, mobile telephony operators and broadcasters. Increased competition and strengthened consumer rights are the two main guiding principles of this legislation package, which was revised during 2007-2009.<sup>4</sup> The new revised rules include further steps to promote functioning markets with better services and lower prices. A European agency is established with the task to promote unified application of EU rules and to coordinate and push the work of Member States to identify and deal with flawed competition. Players with significant market influence can be imposed conditions, for example on access and pricing.

One issue which will be subject to widespread discussion in Brussels also in the future is the issue of Radio Spectrum. Allocation of radio frequencies is regulated on international level and the role of the EU has traditionally been modest. But there are strong forces who wish to see more of European coordination and harmonisation in order to promote technological and economic development in the telecoms sector, often with a focus on the expansion of wireless broadband. The *European Radio Spectrum Policy Programme* was agreed by the Council and the European Parliament in March 2012. The programme deals mainly with long term strategic issues concerning spectrum policy and general principles for managing spectrum in the internal market. It also concerns the question how to strike a balance between the telecom sector's needs for frequencies for the development of mobile services on the one hand and the traditional broadcasting sector's need for frequencies for the development of new services on the other. Public service broadcasters have traditionally argued strongly in favour of a balance between public and market interests and have pointed out that the broadcasting sector plays an important role in helping to deliver on media pluralism, universal access and quality content on digital platforms.

## Media Content

EU regulation of *media content* mainly consists of the *Audiovisual Media Services Directive*, AVMS (former *TV Directive*, adopted in 1987).<sup>5</sup> This directive aims to promote a competitive European market for audiovisual content, facilitate the development of cross-border services and promote European diversity. It contains provisions on jurisdiction over broadcasts and other audiovisual services as well as minimum rules for the content of such services.

The new revised directive (2007) extends the previous scope from traditional broadcasting to also include on-demand services. *Audiovisual media services* is defined by differentiating between *linear services*, which refer to

services within traditional broadcasting, Internet and mobile telephony that viewers receive passively – and *non-linear services*, which are services that viewers themselves demand to receive (e.g. video on-demand). All audiovisual services are included in the scope of the directive regardless of how they are distributed, firstly because linear services are extended to cover all distribution platforms, and secondly because also non-linear services are covered by the directive's minimum rules.

It is interesting to note that this widening of the scope of the directive also extends the number and types of media organisations that are affected by the regulation. For example, the daily press is now included in the scope of the directive insofar as newspapers provide audiovisual media services (television-like services on their web pages). Also other, perhaps less obvious operators, such as business companies who for marketing reasons have television-like services on their web pages, can be included. This is probably a less known fact to many organisations both within and outside the media sector and it will therefore have to be clearly communicated by national regulators. At the same time it is important to note that the directive establishes a difference in the degree of regulation between linear services (stricter rules on for example commercial advertisements and protection of minors, because of the impact of the medium) and non-linear services (minimum rules).

Other types of regulation at EU level that can be included under the heading of media content are addressed through soft legislation in the form of recommendations to Member States, one on the *Protection of minors, human dignity and the right to reply* and one on *The European film heritage*.<sup>6</sup> Additionally, there are more long term initiatives such as *media literacy* and *media pluralism*. Media literacy is promoted as an important skill for active citizenship including access to, understanding of and critical approach to all aspects of the media. In the case of media pluralism, the Commission has decided not to propose legislation but rather to promote transparency and information about the media landscape in Europe. An independent study has developed indicators to be used for measuring the level of media pluralism in Member States. EU audiovisual policy also includes the *MEDIA 2007* Programme which aims at strengthening the European audiovisual sector through financial support for pre- and post production, marketing and distribution of European film and television. A new version of this programme, *Creative Europe 2014-2020*, replacing the current MEDIA and Culture programmes, is being negotiated by the Council and by the European Parliament.

It is worth noting that the EU does not deal specifically with all types of media. Sound Radio is not part of the scope of the AVMS directive and the economic support given through the MEDIA programme focuses exclusively on audiovisual media, mainly film and to some extent television. Additionally, EU media legislation is not based on formal regulation of fundamental rights



such as freedom of information and expression. This became clear with the EU Commission's reaction to strongly criticised amendments to the Hungarian media legislation in early 2011. After having analysed the proposed legislation in Hungary from a strict EU law perspective, the Commission in February 2011 came to the conclusion that parts of the legislation needed to be amended, basically those parts related to the AVMS directive. The Hungarian government agreed to make these amendments.<sup>7</sup>

Many critics, however, say that the amendments that have been made as a result of the EU Commission's analysis are too limited in relation to the problem, which is not only about Member States' duties in relation to the AVMS directive, but which goes deeper and concerns more fundamental issues such as freedom of speech and freedom of information – areas where EU regulation is not formally binding. The European Parliament recently voted on a resolution on the subject, with exceptional criticism towards what remains of the Hungarian media legislation.<sup>8</sup> The Parliament also strongly criticises the Commission, which it believes has made a too narrow analysis of the problem. The Parliament points to problems also in other Member States such as Bulgaria, Romania, Czech Republic, Estonia and Italy and requests the Commission to propose EU legislation on the protection of media freedom, media pluralism and media independence, with the purpose of “addressing the deficiencies of EU legislation in the media sector”. In October 2011 the Commission decided to appoint a High Level Group to “provide recommendations for the respect, protection, support and promotion of media freedom and pluralism in Europe”.<sup>9</sup> In a related move, the Commission recently initiated a Centre for Media Policy and Media Freedom at the European University Institute in Florence. The institute will carry out research and develop responses to the concerns around these issues.<sup>10</sup> These initiatives can be seen as a reply to the criticism mentioned above.

The AVMS directive has now been transposed into Member States' legislation. An important feature of the transposition process is that each Member State can decide to apply stricter rules than the directive's minimum rules, as long as this is not contrary to the principles of EU law. One example is Sweden's stricter rules for commercial advertising including the prohibition of commercial messages aimed at children under the age of 12.

## Copyright in the Information Society

Copyright is well harmonised in Europe, in line with international standards in the field. This regulation is normally not controversial, but there are two circumstances where the EU Commission has seen reasons to act and where there are still important differences between Member States. These differences

concern firstly how copyright rules are *enforced*, particularly in the digital world, and secondly how rights are *practically managed*. The first of these issues touches upon one of the most heavily debated and complex issues in the digital world, namely how to tackle different forms of illegal use and piracy on digital platforms. An important piece of legislation in question is the so-called *IPRED Directive (Intellectual Property Enforcement Directive)*.<sup>11</sup> The second issue is about different systems in Member States for the management and sales of rights. Many describe the online rights market in Europe as being too fragmented, thereby limiting the development of cross-border digital services. One example often cited by the EU Commission is that online music down-loads are four times as common in the USA compared to the EU. The reason for this difference is reported to be related to the fact that real cross-border online platforms in the EU are hindered because rights need to be cleared through different systems in 27 different markets.

The Commission has clearly stated that if the digital economy is to develop there has to be better access to creative content on different digital platforms in Europe. The Commission has promised several concrete actions in the near future to stimulate better access to European content in the digital economy. In May 2011 the Commission published a strategic document analysing challenges in all fields of intellectual property rights including an outline of its coming proposals for further European harmonisation in these fields.<sup>12</sup>

A directive on *Orphan Works*, i.e. works with unknown rights holders or rights holders which are difficult to locate, is currently under way. This directive is expected to simplify the digitisation of libraries and archives, including the large hidden archives of European public service broadcasters. A second directive, proposed in July 2012, on *Collective Management of Rights*, is expected to facilitate cross-border sales of rights (focusing on music) and to increase the transparency of national rights management organisations.<sup>13</sup> The Commission has also promised further measures to tackle online piracy and in July 2011 it published a *Green Paper on Distribution of Audiovisual Content Online* focusing on video on-demand and cross-border television services.<sup>14</sup> These and other policy measures for the copyright sector can be expected to gain large attention and lead to widespread discussions in the coming years both in the business and on political level.

## EU State Aid Regulation – Market vs Public Interest

The objective of EU state aid control is to ensure that government interventions do not distort competition and trade in the EU. The regulation affects the media in all Member States, not least the issue of how the rules should be applied in relation to public service broadcasting and to other forms of public

support to the media sector. In some cases EU competition rules have also come into play concerning media ownership and media concentration. The Commission is the EU watchdog for competition and state aid policy with the power to monitor and where necessary block anticompetitive agreements, abuses of dominant positions, mergers and acquisitions and government support.

The position of the EU Commission on public service broadcasting from a state aid perspective has undergone important changes during the last 20 years. When the old broadcasting monopolies came to an end in the 1980's the Commission started receiving complaints on alleged unfair competition from commercial media operators. At that time there was great uncertainty as to how such complaints would be treated. Many feared that the Commission, with its strong market-oriented agenda, would restrict Member States' right to decide the remit of public service broadcasters. This fear was viewed against the background of the Commission in the 1980's and 1990's pushing for liberalization and de-regulation of the media sector.<sup>15</sup> Some even thought that the EU would go as far as to set limits to the types of programming that could be considered legitimate for public service broadcasters.

Even today, it is a common and widely spread opinion that EU state aid control threatens the legitimacy of public service broadcasting and challenges the right of Member States to decide their remits. It is also widely felt that the EU Commission and the European Court of Justice act based on a poor understanding of the specific nature of the media sector in general and of the specific role of public service broadcasting in particular.

However, this is not necessarily the case. A recent analysis of EU state aid control of public service broadcasting provides the argument that, on the contrary, this process has in many ways been valuable for national policy in that it has acknowledged the importance of public service broadcasting in each society and that it has even contributed to the necessary transfer from public service *broadcasting* to public service *media*, by acknowledging the legitimacy of public broadcasters to also be present on new digital media platforms.<sup>16</sup>

Even though implementation of state aid policy is not a matter for the Council of Ministers, Member States reacted very strongly to early ideas from the EU Commission in the 1990's to restrict the role of public service broadcasting. With the so-called *Amsterdam Protocol*, Member States in 1997 decided to include in the EU Treaty a text which clarifies the unique position of public service broadcasting in Europe and its importance for the democratic, social and cultural needs of each society. It also clarifies that it is the competence of Member States to decide on the definition, organisation and financing of the public service remit.

In 2001 the Commission published its first set of guidelines on how EU state aid rules will be applied in relation to public broadcasting.<sup>17</sup> The guidelines

set a number of criteria to be fulfilled for the formulation of national public service remits. The criteria, which build on established court precedents also from other sectors, mainly focus on procedural issues and clarity and transparency in *how* the remits should be determined. The question of *what* public service broadcasting should be or not be, is left to Member States to decide, in line with the Amsterdam Protocol. And, importantly, the guidelines clarify that it is legitimate for public broadcasters to provide a *wide range of programming*, for *the whole audience* and on *all distribution platforms*.

The new revised guidelines from 2009 tighten some of the criteria, particularly by introducing the notion of so-called *public value tests* (after British model).<sup>18</sup> The idea is that each Member State shall consider, by means of a prior evaluation procedure based on open public consultation, whether significant new services by public service broadcasters meet the public values defined in the public service remit, with due account taken to their potential market influence. But the fundamental principle that the Member States decide the content of the public service remit, its organisation and its financing remains unchanged.

The analysis mentioned above also shows that, although there are elements in the Commission's treatment of cases, particularly in the early years that are indeed worthy of criticism, the treatment as such has in fact been fairly balanced when it comes to considering the special role of public broadcasting.<sup>19</sup> Firstly, the Commission's decisions have developed in a way which clearly steps away from interfering with Member States' right to decide the remits of public service broadcasters. It is true that the Commission expects Member States to formulate the remit as *clearly* as possible, but this principle is in practice flexible and the Commission can normally only challenge a definition when a Member State is funding services that are unquestionably commercial rather than public in nature ("manifest errors"). Secondly, even though the *ex ante* type of control used in public value tests is questionable from the perspective of independence of public broadcasters, it is reasonable that the added value of all activities of public broadcasters can be demonstrated and motivated. And, importantly, such tests will be designed and carried out, not by the Commission, but by each Member State within the specific context of each national situation.

Looking at the complaints and the cases that have been up for decision by the Commission and the European Court of Justice, it also seems clear that not all Member States nor all public broadcasters face the same problems in relation to state aid regulation. All public broadcasters are of course affecting competition in the respective media markets, but it is clear that those public broadcasters who have a *mixed funding scheme* including public money as well as advertising income will have more difficulties in responding to allegations of cross-subsidisation and unjustified compensation. For these public

broadcasters, who are competing with commercial players not only for audiences and programming but also for revenues, the scrutiny of the Commission and the Court of Justice will be more firm, for example in calling for a clear separation of accounts between public service and commercial activities and by requiring more precise cost calculations. The outcome of complaints processes will also be more difficult to predict for public broadcasters in Member States which in this way have multi-layered competition problems.

There are similar guidelines from the Commission also for the treatment of state aid to *Film production* in Member States, which have proven to be valuable tools for the formulation of national support measures.<sup>20</sup> But there are no published guidelines for state aid to other media sectors, such as the daily press, which makes it more difficult to follow and understand the EU Commission's position in such matters. This became clear when the Swedish press subsidy system was investigated during 2006-2009. The outcome of the process was that the system was considered to be compatible with EU rules only after parts of it had been changed and measures had been introduced to increase clarity and transparency in the system.

## EU2020 and the Digital Agenda

With the purpose of leading the way to a “smart, sustainable and inclusive” Europe, the EU Commission in 2010 published a strategy for the coming ten years, *Europe 2020*. The strategy was endorsed in June 2010 by Member States in the European Council, and has now been followed by seven thematic “Flagship initiatives” where the Commission presents its analysis on important challenges for the EU and its Member States.<sup>21</sup> A novelty in this strategy compared to its predecessor the “Lisbon Agenda”, is that it also includes ambitious quantitative targets and a large number of concrete policy initiatives from the Commission aimed at stimulating development and facilitating reforms in the Member States.

One of these flagship initiatives is the *Digital Agenda*, a good example of the cross-sector character of media policy.<sup>22</sup> It can be read as a policy declaration for the digital economy with the Commission's analysis of the main obstacles for development and proposals for action to address the challenges. The Agenda includes 101 proposals for action in order to improve the functioning of the digital economy. These proposals will have a wide impact on EU and national media policy in the coming years, including full implementation of the telecoms package, investments in broadband for all, simplified e-commerce, standardisation, increased investments in research and development, promotion of European creative content on digital platforms including concrete proposals in the copyright area, and measures to strengthen citizens' trust in the Internet as a market place.

As for other parts of the Europe 2020 strategy, Member States are expected to deliver nationally across all these areas in order to stimulate the digital economy. Member States have generally responded positively to the Digital Agenda, many have welcomed in particular its cross-sector focus. For follow-up and discussions on future measures, the Commission arranges an annual Digital Forum, to which representatives from Member States and the sectors concerned are invited.

## Reflections

This chapter has pointed to the many ways in which national media sectors and policies are influenced by regulation on EU level and to some important similarities between Nordic public service broadcasters. The EU Digital Agenda illustrates how EU regulation will continue to affect national media policy and legislation also in the years to come. For public service broadcasters the main arena for debate has been EU state aid rules which are applied whenever complaints are brought to the EU Commission by competitors at national level and which play an important role in shaping national public service remits.

An overall impression is that although EU state aid control does mean outside involvement in Member States' policies, an established practice has developed where the Commission and the Court of Justice have in fact been able to take due consideration to the special role that public service broadcasting plays for each society. And even though the EU sometimes tends to put the needs of the market before the public interest, the guidelines for Member States to follow in this field are in fact in many ways helpful. Most criteria are about increased clarity, transparency and independent scrutiny and they build on a wish to stimulate national debate about public service broadcasters' role in today's multimedia world. These elements can often be seen as improvements to national policy and most probably add to rather than undermine the legitimacy of public broadcasters. One can even argue that the control process as such has helped the transition of public service broadcasters from its traditional focus on broadcasting into new media platforms, thereby transforming them from public broadcasters to modern public service media organisations.

It is also important to underline that it is not the EU that defines the remit of public broadcasters, it is Member States that do so. In fact, it is not only a right but also a responsibility for national politicians to define the mandate of their public broadcasters, and to do so in a way which considers the impact on the rest of the media market in each society. If this is done properly and with full transparency, it can in fact function as a guarantee towards unwanted EU interference and time-consuming complaints from other market players.

The so-called public value tests are a particularly sensitive issue because of the ex ante control of broadcasters that such tests de facto implies. Depending on how they are constructed, such tests could seriously restrain public broadcasters from innovation and from finding new ways of meeting the interests of the public. It is therefore important that national regulators can devise tests which fully respect the independence of public broadcasters while at the same time allows them room for manoeuvre on the media scene. Most likely however, it should not pose a problem for most governments to accept “new significant services” as long as they can be demonstrated to fall within the scope of the public service remit and that they do not in themselves require additional funding.

At the end of the day it would seem that the most secure public service broadcasting systems, from the perspective of potential interference from state aid complaints, would be the ones characterised by a high degree of independence from both the state and from other interests in society. This is specifically the case if there is no funding or other dependency from commercial interests. Indeed, EU state aid control is likely to be less strict for public broadcasters with only public funding, and more severe when applied to those public broadcasters which are competing for the same advertising revenues as their private competitors. Other important characteristics for healthy public service systems are a high degree of openness and transparency, clear public service remits and as wide political and public support as possible.

All the above characteristics would in fact well describe public service broadcasters in the Nordic countries, in particular those who are owned and run as independent public companies, financed exclusively through license fees or other forms of public money. In the light of experiences from EU state aid control so far, it seems unlikely that the EU Commission or the European Court of Justice would decide to limit the operations of public broadcasters with these characteristics.

In this context it is relevant to speak of a Nordic model for public service broadcasting, functioning alongside commercial and community media in a *multimedia ecology*, for the benefit of a strong audiovisual production, cultural diversity and identity, social cohesion, media literacy and media pluralism. And publicly funded media has a stronger potential to function as a counterforce against the increasing commercialisation of the media in general. The Nordic example has also shown the benefits of close cooperation between public broadcasters in small states, both on content production and on policy matters. Such cooperation is likely to be a good recipe also for the future, providing inspiration as well as coordination on important common challenges in national and international forums.

Finally, perhaps a word of caution is in place, mainly since EU state aid control is not based on hard legislation but on Commission and Court practice.

There is always a risk that such practice is dependent on the overall climate in society and on the personal opinion of Commissioners and officials in EU institutions. It is therefore important to continue to keep a close look at developments in this field, with a view to register any changes in the balance between the market and the public interest.

### Notes

- 1 The *Television Without Frontiers Directive* was adopted in 1989 and the first phase of Community policy focused at establishing common technical development for electronic communications began in 1984.
- 2 The most important exception to this rule is the Audiovisual Media Services Directive.
- 3 [http://ec.europa.eu/information\\_society/media\\_taskforce/doc/grid\\_inventory.pdf](http://ec.europa.eu/information_society/media_taskforce/doc/grid_inventory.pdf)
- 4 [http://ec.europa.eu/information\\_society/policy/ecommm/index\\_en.htm](http://ec.europa.eu/information_society/policy/ecommm/index_en.htm)
- 5 [http://ec.europa.eu/avpolicy/reg/tvwf/index\\_en.htm](http://ec.europa.eu/avpolicy/reg/tvwf/index_en.htm)
- 6 [http://ec.europa.eu/avpolicy/index\\_en.htm](http://ec.europa.eu/avpolicy/index_en.htm)
- 7 <http://europa.eu/rapid/pressReleasesAction.do?reference=MEMO/11/89>
- 8 <http://www.europarl.europa.eu/en/pressroom/content/20110310IPR15259/html/>
- 9 <http://europa.eu/rapid/pressReleasesAction.do?reference=IP/11/1173&format=HTML&aged=0&language=EN&guiLanguage=en>
- 10 <http://europa.eu/rapid/pressReleasesAction.do?reference=IP/11/1307&type=HTML>
- 11 <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2004:195:0016:0025:SV:PDF>
- 12 [http://ec.europa.eu/commission\\_2010-2014/barnier/headlines/news/2011/05/20110524\\_en.htm](http://ec.europa.eu/commission_2010-2014/barnier/headlines/news/2011/05/20110524_en.htm)
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## A Nordic Public Service Media Map

### *A Nordic Public Service Media Map*

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### *Public Service Media from a Nordic Horizon. Politics, Markets. Programming and Users*

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The Nordic countries have a tradition of strong support for their public service media and have also developed public service models that are characterized by their relatively small size and small populations. Moreover, the companies have many years' experience of collaboration within the region – particularly with regard to coproduction of programs.

On the contemporary international arena, within organizations such as the UN and UNESCO, there exists a fundamental conviction that public service media – which are neither commercial nor state owned and which are free from political influence – foster well-informed and enlightened citizens and therefore constitute a cornerstone of democratic development.

Given this interest, Nordicom has carried out extensive work in the area of public service media in the Nordic region – all within the frame of what we have chosen to call *A Nordic Public Service Media Map*. The aim of this project is to elucidate a framework for public service media – showing how the concept of public service media is operationalized in terms of the growth of democracy, the public space, media pluralism, cultural diversity, gender and social tolerance. The results of these efforts include recent research findings and statistical overviews.

The present publication is the second one from this Nordicom project entitled *Public Service Media from a Nordic Horizon. Politics, Markets, Programming and Users. A research anthology from Nordicom*. The book contains a number of qualified analyses of public service media carried out by Nordic media scholars.

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