



European  
University  
Institute



**CMPF**  
Centre for Media Pluralism and Media Freedom

ROBERT  
SCHUMAN  
CENTRE FOR  
ADVANCED  
STUDIES



# Monitoring Media Pluralism in Europe: Application of the Media Pluralism Monitor 2017 in the European Union, FYROM, Serbia & Turkey

## 2018 Policy Report

Authors: Elda Brogi, Iva Nenadic, Pier Luigi Parcu and  
Mario Viola de Azevedo Cunha



© 2018, European University Institute

The Authors thank Lucien Steinberg (CMPF) for the info-graphics, Lisa Ginsborg and Alina Ostling (former CMPF research associates) for collaborating in the data collection for the Basic Protection area and Social Inclusiveness, respectively. The Authors wish to thank the MPM Country Teams who carried out the data collection for each country. Once again, their work and passion were essential for the success of the project.

This text may be downloaded only for personal research purposes. Any additional reproduction for other purposes, whether in hard copies or electronically, requires the consent of the European University Institute. If cited or quoted, reference should be made to the full name of the author(s), editor(s), the title, the year and the publisher.

Views expressed in this publication reflect the opinion of individual authors and not those of the European University Institute or the European Commission.

Note: the MPM2017 data collection covers the period January 1, 2017 to December 31, 2017

# TABLE OF CONTENTS

Executive Summary	1	Conclusions	64
1. Analysis	8	2. Methodology	72
1.1 Analysis of Basic Protection	8	2.1 The research design	72
Protection of freedom of expression	12	2.2 Research and fine-tuning of the variables	73
Protection of the right to information	17	2.3 MPM2017 structure and calibration	74
Journalistic profession, standards and protection	19	2.4 MPM2017 aggregation method	75
Independence and effectiveness of the media authority	23	2.5 Data collection	76
Universal reach of traditional media and access to the Internet	26	2.5.1 The questionnaire	76
2.5.2 Local team leaders			77
1.2 Analysis of Market Plurality area	28	2.5.3 The group of experts	78
Transparency of media ownership	30	2.5.4 Online pluralism indicators	79
Horizontal concentration of media ownership	32	2.5.5 User guide and online platform	80
Cross-media concentration of ownership and competition enforcement	36	Bibliography	81
Commercial and owner influence over editorial content	37	Annexe 1.	85
Media viability	39		
1.3 Analysis of Political Independence area	41		
Political independence of media	44		
Editorial autonomy	47		
Media and democratic electoral process	49		
State regulation of resources and support to media sector	51		
Independence of PSM governance and funding	53		
1.4 Analysis of Social Inclusiveness area	55		
Access to media for minorities	57		
Access to media for local/regional communities and community media	60		
Access to media for people with disabilities	62		
Access to media for women	65		
Media literacy	67		

# EXECUTIVE SUMMARY

2017 was marred by the assassination, in Malta, of the investigative journalist Daphne Caruana Galizia, an event which represented the darkest hour for media freedom and media pluralism in the European Union since the 2015 Charlie Hebdo massacre in France. This crime has profoundly shaken Europe and has had an impact on its image as a bastion of human rights and democratic values.

Publishers continued to face significant economic pressures, and 2017 confirmed the decline in the revenues of the press sector and of many local and community newspapers across Europe, a worldwide trend signalling continued job losses in the sector and the lower viability of the media business as organisations struggle to find sustainable business models in the face of digital transformation.

The spread of online disinformation and hate speech, including concerns about their impact on elections and referenda in 2016, represented major areas of debate during 2017. States, international institutions, and private enterprises have discussed or adopted measures – both legislative and non-legislative – to address these phenomena, and several of these measures have, in turn, raised concerns about their impact on the freedom of expression and respect for the rule of law.

Due to the aforementioned concerns with regard to the economic difficulties faced by publishers, as well as online hate speech and disinformation, 2017 was noteworthy for an increased interest in the analysis of the influence of major online platforms in both public debate and public opinion. Queries over accountability, transparency and the overall effect on democracy in relation to the digital platforms have escalated. In 2017, several stakeholders expressed concerns about such platforms' use of machine learning and algorithms in personalising news feeds, as well as their use of the end-users' data for targeted advertising purposes.

In recent years, the European Commission has taken steps to tackle the spread of illegal content, hate speech and disinformation online. In 2016, some IT platforms committed themselves to the EC's initiative for a Code of Conduct relating to the countering of online hate speech. Measures include reviewing flagged content and the removal or disabling of such content as is found to be illegal or in violation of the Code, within 24 hours. The agreement with the Commission also foresees a reporting and transparency obligation on the part of the online platforms in relation to the implementation of the Code.

Another EC initiative involved the setting up of a high-level group of experts to advise on policy initiatives in order to counter fake news and the spread of disinformation online. The HLEG was announced in 2017, and it was established in January, 2018.<sup>1</sup>

---

This report presents the results and the methodology of the 2017 implementation of the Media Pluralism Monitor (MPM) in the EU-28 countries and in Former Yugoslav Republic of Macedonia (FYRoM), Serbia and Turkey (MPM2017). The MPM is a tool developed by the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute to assess the risks to media pluralism in a given country<sup>2</sup>. The MPM project is co-funded by the European Union<sup>3</sup>.

The MPM focuses its analysis on news and current affairs. Different news media are covered: legacy media (print, radio and audiovisual), with their online editions; native digital media (and, to some extent, search engines and social media in the context of market plurality). The MPM further considers different types of media: public service, commercial, and non-profit community media.

1 The outcome of the work of the Group is a report designed to call for a review of best practices in the light of democratic fundamental principles, and to develop adequate policy responses. <https://ec.europa.eu/digital-single-market/en/news/final-report-high-level-expert-group-fake-news-and-online-disinformation>.

2 Prior to the 2017 implementation, the tool was implemented in 2016 and tested through two pilot-projects, which were co-funded by the European Union in 2014 and 2015. These two pilot-test implementations were built on the prototype of the MPM that was designed in the 2009 Independent Study on Indicators of Media Pluralism in the Member States – Towards a Risk-Based Approach carried out by KU Leuven, JIBS, CEU, Ernst & Young, and a team of national experts ([http://ec.europa.eu/information\\_society/media\\_taskforce/doc/pluralism/pfr\\_report.pdf](http://ec.europa.eu/information_society/media_taskforce/doc/pluralism/pfr_report.pdf)).

3 Prior to the 2017 implementation, the tool was tested through two pilot-projects that were co-funded by the European Union in 2014 and 2015 (CMPF 2015; CMPF 2016) and that were applied in EU-28 and Montenegro and Turkey in 2016 (CMPF 2017). The two pilot-test implementations built on the prototype of the MPM that was designed in the 2009 Independent Study on Indicators for Media Pluralism in the Member States – *Towards a Risk-Based Approach* carried out by KU Leuven, JIBS, CEU, Ernst & Young, and a team of national experts (KU Leuven, 2009).

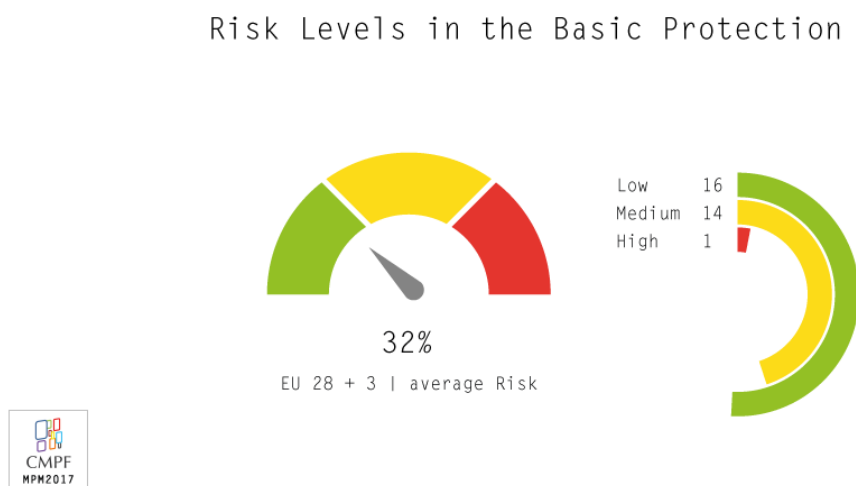
The Monitor assesses the risks to media pluralism based on a set of twenty indicators that cover a broad notion of media pluralism that encompasses political, cultural, geographical, structural and content related dimensions<sup>4</sup>. The risks for media pluralism are measured in four different areas: Basic Protection, Market Plurality, Political Independence and Social Inclusiveness. The indicators cover legal, economic and socio-political questions.

National experts, composing the MPM network of local teams, provided the data to assess the levels of risk at the country level, and drafted the country reports, while the CMPF supervised and guaranteed the quality and consistency of the data collection and assessed the levels of risk. The CMPF team also directly implemented the MPM in Italy and Malta.

The assessment of the risks to media pluralism in a given country by the MPM does not necessarily represent an effective lack of pluralism in a given context. The results, the data collected and the analysis provide useful information for policymakers - both at the national and EU levels - researchers, and civil society, to better understand the threats to media pluralism in different media contexts and to plan relevant media policy or advocacy measures, where needed. The results of the MPM implementation are presented according to three categories of risk: low, medium and high. The subsequent paragraphs provide a short description and the main results per area.

The analysis of the MPM2017 data shows that one area scores an average low risk - although close to medium risk - (Basic Protection, 32%), while the other three areas score an average medium risk (Market Plurality, 53%; Political Independence, 46%; Social Inclusiveness, 54%). The most prevalent sources of risk detected relate to incomplete information - or lack of information - on media ownership; the concentration of ownership; political and commercial pressure on editorial content, including through the non transparent distribution of state advertising; the lack of public service media governance's independence and funding; inadequate access to media for minorities; and gender inequality in media management and content production. In addition, the risks for media pluralism and media freedom in the Basic protection area result from growing threats to both the physical and digital safety of journalists; and a lack of protection for whistle-blowers.

Figure 1 - Basic Protection Area



In the **Basic Protection area**, the MPM assesses the fundamental factors which must be in place in a plural and democratic society, namely, the existence and effectiveness of the implementation of regulatory mechanisms in order to safeguard the freedom of expression and the right to seek, receive and impart information; the status of journalists in each country; the independence and effectiveness of the media authority; the universal reach of traditional media and access to the Internet.

In MPM2017 most of the countries analysed score low risk when it comes to the Basic Protection area: 16 of 31 countries are assessed as having low risk (namely, Austria, Belgium, Czech Republic, Cyprus, Denmark, Estonia, France, Finland, Germany, Ireland, Lithuania, Luxembourg, the Netherlands, Slovakia, Sweden, United Kingdom); 14 are assessed as having medium risk (Bulgaria, Croatia, FYRoM, Greece, Hungary, Italy, Latvia, Malta, Poland, Portugal, Romania, Spain, Serbia, Slovenia) - with 4 countries moving from low to medium risk (Italy, Malta, Portugal, Slovenia) and 2 countries from medium risk to low risk (Austria, Luxembourg) - a decrease if compared to MPM2016, where 18 out of 30 coun-

4 Commission staff working document - Media pluralism in the Member States of the European Union /\* SEC/2007/0032 \*/ , <https://publications.europa.eu/en/publication-detail/-/publication/4c7c6eb5-fb51-40f4-9125-33ef824e685b/language-en>

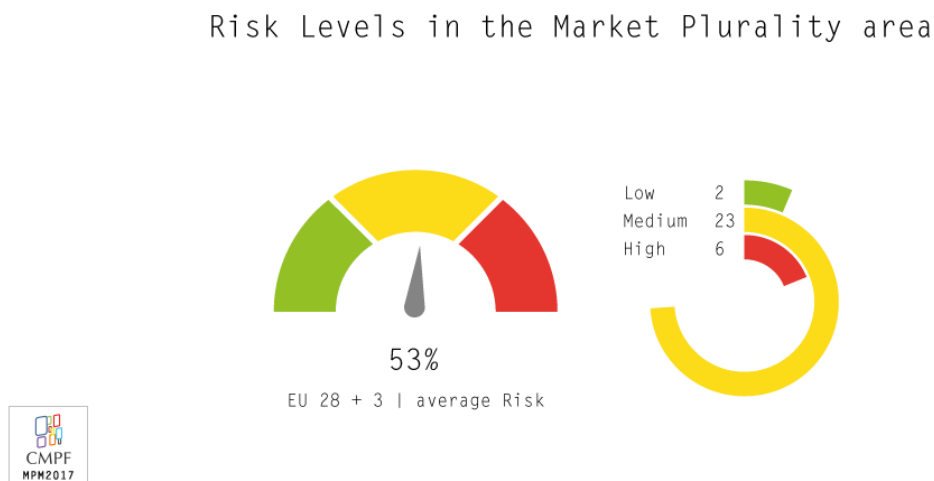
tries were assessed at low risk. Turkey, as in MPM2016, is the only country that scores high risk in this very fundamental area. The average score for the area of Basic protection is 32%, a percentage that is very close to the threshold denoting medium risk. The higher average score, in comparison to MPM2016 (28%) shows a deterioration in the basic conditions required for media pluralism. Particular concerns are raised for Poland as regards criminal defamation. In this country, the protection of public officials continues to be supported by the use of Criminal Code procedures against journalistic criticism. It must be noted that the 32% average risk is also partly due to the introduction of a few new variables in the analysis of the indicators (i.e., the assessment on whistle-blower protection in the indicator on the Right to information) and to the higher standards that are used to assess the risks to broadband coverage and access to the Internet. In particular, the protection of whistle-blowers was found to be at risk in most of the countries analysed (24 countries scored either medium or high risk for this sub-indicator, including Luxembourg, which, in 2017, was facing court cases against the whistle-blowers in the so called LuxLeaks affair).

Regrettably, 2017 was marked by the assassination of the blogger and investigative journalist Daphne Caruana Galizia in Malta. MPM2016 had already referred to certain legal threats, namely defamation cases, which were accompanied by the freezing of her bank accounts, which Daphne Caruana Galizia was facing, and the risks to media pluralism in her country (Nenadic, 2017). Most of the risk-increasing factors in the MPM2017 for Malta are linked to the assassination of Ms Caruana Galizia and the deficiencies in the protection of journalists and whistle-blowers in the country, something which her assassination starkly exposed.

As a general trend, the MPM2017 depicts an alarming situation for journalists and other media actors in most of the countries assessed, including Greece, Hungary, Italy, Malta, Romania and Turkey: the working conditions of journalists have deteriorated, and journalists are facing all kinds of threats (physical, online and other) that are directed at them by citizens, politicians and organised crime. The MPM2017 results point to the fact that several Member States may be neglecting their obligations, according to the standards on the safety of journalists from the Council of Europe, imposing on states the positive obligation of guaranteeing an enabling environment for journalists to permit them to carry out their job without fear.

Turkey scores a high risk for all the indicators in the Basic Protection area. After the attempted coup in 2016, the country continued to experience serious threats to freedom of expression and media pluralism, due to the high number of journalists and intellectuals that are detained, both as a pre-trial measure, or as the result of a judgment that does not comply with the basics of the rule of law.

Figure 2 - Market Plurality Area



In the **Market Plurality** area, the MPM assesses the risks to media pluralism that are linked to a lack of transparency and the concentration of media ownership, commercial and owners’ influence over editorial content, and the economic conditions in which the media operate (media viability).

The average score for the area of Market Plurality is 53%, which is slightly higher than it was in the MPM2016 (49%), partly due to the changes in some variables, especially in the indicator Transparency of media ownership, and a more detailed assessment of the indicator on Media viability.

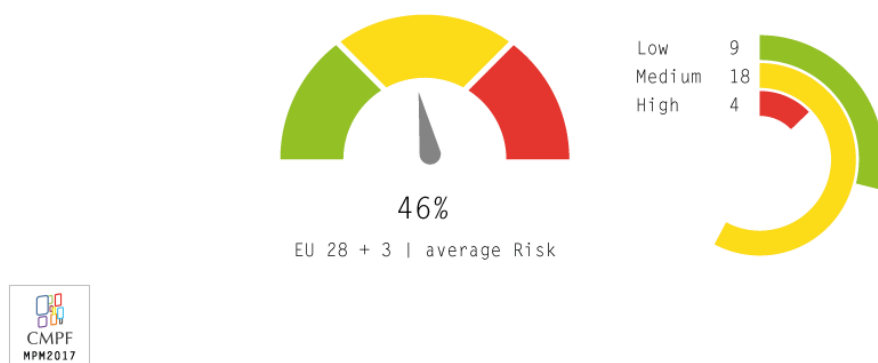
As in MPM2016, in 2017 the majority of countries in this area score a medium risk (23 of 31), 6 countries score a high risk (Bulgaria, Czech Republic, Estonia, Finland, Poland, and Romania), and only 2 countries show a low risk result: France and Germany.

Market Plurality has the second highest average risk among the areas of the Monitor, just 1 percent behind the Social Inclusiveness area. Media ownership concentration (horizontal) is one of the two indicators of the MPM2017 that overall performs worse (66%), with no country scoring a low risk in this regard, as in MPM2016. Commercial and owner influence over editorial content continues to be an issue of concern for most EU countries and for the three EU candidates under consideration, although it has registered a small decrease in terms of risk if compared to MPM2016.

The result of the indicators in MPM2017 confirms that market concentration is a source of medium or high risk for media pluralism in all of the EU countries, without exception. The economic difficulties of different traditional media outlets, which are illustrated by several indicators, especially horizontal and cross-media concentration and media viability, suggest that media concentration is a phenomenon that is unlikely to recede in the future. In particular, as different types of media will continue to merge in an attempt to survive economically in the face of reduced resources, a possible decline in market plurality remains an ubiquitous element of risk for the MPM project to monitor and investigate in the EU countries.

Figure 3 - Political Independence area

### Risk Levels in the Political Independence area



**Political Independence** is assessed using indicators that evaluate the extent of the politicisation of the media system, media organizations, newsrooms, media reporting and the public service media.

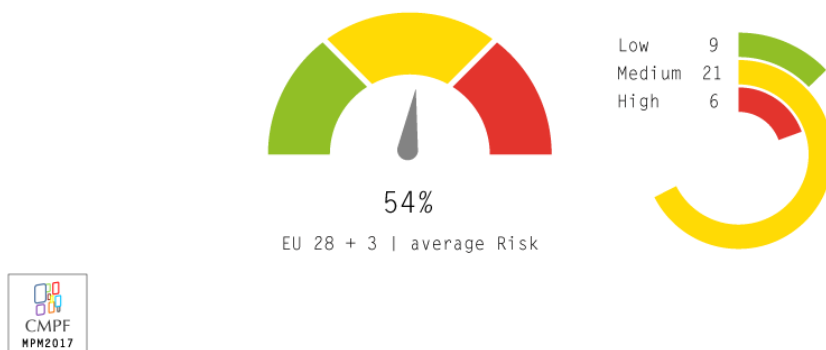
The year 2017 brought no major changes in the results of the MPM in the area of Political Independence. The vast majority of the countries examined continue to score a medium risk (18), 9 are at low risk (Belgium, Denmark, Estonia, France, Germany, the Netherlands, Portugal, Sweden, and the United Kingdom), and 4 are found to be at high risk from political interference: Turkey and three EU member states, namely, Hungary, Poland and Slovenia.

Turkey is the only country that scores high risks for all five indicators in this area, and the lack of political independence is of highest concern there. The candidate countries Serbia and FYRoM score, respectively, a high and medium risk overall, although the independence of the public service media in FYRoM also results in a high risk score.

Overall, for all 31 countries examined, most risks in the area of Political Independence relate to a general lack of political independence of the media, and this results either from the non-existence of regulations to prevent conflicts of interest, or from their poor implementation, as well as from other indirect means of political control over the media, including state advertising. Public service media, especially in Central and Eastern Europe, are at risk of government interference through the appointment of politically dependent management. Moreover, editorial autonomy in most countries is not well protected, either by regulation or by self-regulation.

Figure 4 - Social Inclusiveness area

## Risk Levels in the Social Inclusiveness



The **Social Inclusiveness** area considers access to the media by various social and cultural groups, such as minorities, local/regional communities, people with disabilities, and women. In addition, the Monitor considers media literacy as a precondition for using media effectively, and examines media literacy contexts, as well as the digital skills of the population.

On average, the area of Social Inclusiveness scores the highest risk (54%) among the four areas, but it is still in a medium risk band. Two thirds of the countries (21) score a medium risk, 6 countries (Bulgaria, Cyprus, FYRoM, Greece, Luxembourg, and Turkey) score a high risk, and 4 countries (Denmark, France, the Netherlands, and Sweden) are at low risk.

The highest scoring indicator in this area, and the only one within the MPM2017 that results in the high risk band, is access to media for women. Only two countries score a low risk on this indicator - Denmark and Sweden. In almost half of the countries (15) women are either not represented on PSM management boards, or their share is 29% or lower. The results are even more worrisome at the top executive positions: in 22 of the 31 countries these posts are occupied by men only.

Access to media for minorities also continues to be an area of concern. In the majority of countries (17), minorities seem not to have adequate access to airtime, which results in a high risk score. This re-confirms the results of the MPM2016 and suggests that no progress on this matter was made during 2017.

These results, to a large extent, confirm the trends that were highlighted in MPM2016. Overall, in comparison to MPM2016, the average risk level scores per area have been rising, with the exception of the Political Independence area, where there is no difference to MPM2016 (the risk level remained at 46%). This general shift to higher scores is partially due to the changes in the research methodology for a limited number of indicators, especially in the Social Inclusiveness area (see Part 2 of this Report), but, mostly, to the effective deterioration of some legal and socio-political conditions for freedom of expression and media freedom in the countries analysed.

It should be pointed out that the MPM2017 data collection covers the period January 1, 2017, to December 31, 2017 and does not, therefore, include the murders of the Slovak investigative journalist Ján Kuciak and his partner Marina Kušnírova. This was a terrible crime and an unacceptable threat to media freedom that occurred in Slovakia in February, 2018. At the time of his murder Kuciak was investigating connections between Slovak politicians and Italian organised crime.



# INTRODUCTION

Freedom of expression, independent journalism and media freedom and pluralism constitute the foundations of any democratic society, since they are considered to be prerequisites that guarantee that individuals have access to a variety of information and may form their opinions by taking into account the different perspectives and views which allow them to effectively participate in public discourse as informed citizens. Article 11 of the European Union's Charter of Fundamental Rights lays down that the freedom and pluralism of the media shall be respected. The protection and promotion of pluralism and the freedom of the media are essential in guaranteeing a democratic environment for all EU citizens, for the legitimacy of the Union as a whole, and for the health of democracies.

In 2017, the Centre for Media Pluralism and Media Freedom carried out the second EU-wide implementation of the Media Pluralism Monitor (MPM). The 2017 MPM implementation also covers three candidate countries, for a total of 31 countries (EU-28, the Former Yugoslav Republic of Macedonia (FYRoM), Serbia and Turkey). The CMPF decided to cover Turkey for the second consecutive year with the purpose of monitoring the situation in a country that has recently been facing a dramatic crackdown on media freedom. Further, the CMPF extended the research to two new candidate countries, Serbia and the Former Yugoslav Republic of Macedonia, as recent events there have highlighted that freedom of expression and media freedom and pluralism are facing particular challenges in the current political climate, as was also mentioned by the relevant EC Progress Reports on these two countries.

The research design of the Monitor is based on a tested tool<sup>5</sup> including a sophisticated questionnaire that was filled in following a common and rigorous methodology that was utilised by national country teams made up of experts in media pluralism and media freedom. A second group of experts, including national stakeholders and experts in the area, conducted a review of the selected answers that require a qualitative type of measurement and/or that lack measurable and easily verifiable data. In order to ensure the comparability of the answers and the consistency of their quality, the CMPF centrally monitored the data collection and raised questions in cases where inconsistent or incomplete answers were provided by the country teams. This central control activity proved to be essential in a cross-national study of this size and type.

The MPM assesses the risks to media pluralism by considering four areas of risk:

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

All of which take into account the data that are grouped in 20 indicators.

---

5 See the MPM pilot tests in 2014 and 2015 and the 2016 implementation in EU-28 and two candidate countries <http://cmpf.eu.eu/media-pluralism-monitor/>

Basic Protection	Market Plurality	Political Independence	Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political independence of media		Access to media for minorities
Protection of right to information	Media ownership concentration (horizontal)	Editorial autonomy		Access to media for local/regional communities and for community media
Journalistic profession, standards and protection	Cross-media concentration of ownership and competition enforcement	Media and democratic electoral process		Access to media for people with disabilities
Independence and effectiveness of the media authority	Commercial & owner influence over editorial content	State regulation of resources and support for the media sector		Access to media for women
Universal reach of traditional media and access to the Internet	Media viability	Independence of PSM governance and funding		Media literacy

It must be acknowledged that, for the 2017 exercise, CMPF has modified the composition of some indicators, in order to deepen the analysis of certain topics and to further improve the quality of the questionnaire, taking into account the greater role played by the online dimension in media pluralism, and to collect data on issues that are increasingly important for the detection of risks to media pluralism in the new online environment. In particular, therefore, for indicators under the Social Inclusiveness area, the results are not fully comparable with MPM2016 (see below 2.2 Research and fine-tuning of the variables).

Moreover, it must be noted that the MPM is not a ranking instrument but a scientific tool, comprising many dimensions of risk analysis that are related to the pluralism of the media in a country, and it can provide indications that are of relevance to policy choices. Its results must be read in the specific context of the country analysed. Each indicator is the result of the assessment of numerous variables and sub-indicators and, in many cases, the granular data at the level of variables and sub-indicators explain and provide a more nuanced analysis and explanation of the assessment for a specific indicator. We invite the reader to consult the narrative country reports for more detail.

The focus of the MPM is not solely on the detection of the deficiencies of a country-specific media environment: it also provides an analysis of the structural conditions of the media system in a given constitutional, economic and socio-political context. The rationale behind the Media Pluralism Monitor is the identification of concrete indicators to objectively assess the levels of risks for media pluralism in a given country. “Risk assessment” is taken to mean “a systematic analytical process based on predetermined risk criteria, professional judgment and experience to determine the probability that an adverse condition will occur”<sup>6</sup>. This analysis is, then, balanced against the available data that constitute a form of “reality check,” thereby allowing an assessment of the situation for a given country with regard to both the conditions that are conducive to either more or less pluralism, and the actual situation on the ground of each country (Brogi and Parcu, 2018). This approach differentiates MPM from other indices and ranking instruments, which privilege events that, in a specific time frame and in a country context, have affected journalists and other media actors<sup>7</sup>.

The MPM2017 data collection covers the period January 1, 2017, to December 31, 2017, which means that this assessment does not cover the murders of the Slovak investigative journalist Ján Kuciak and of his partner Marina Kušnírova, which occurred in Slovakia in February, 2018.

6 Commission staff working document - Media pluralism in the Member States of the European Union /\* SEC/2007/0032 \*/, 16.12.2007. Available at <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52007SC0032&from=EN>

7 For instance, the index of Reporters without Borders gives relevance and weight to the data on abuses on journalists and media actors, reflected in the final score and ranking position.

# 1. ANALYSIS

## 1.1 ANALYSIS OF BASIC PROTECTION

The indicators that fall under the area of Basic Protection are designed to describe and measure the elements that are essential conditions for a pluralistic and democratic society. The first and fundamental component of the area is the level of ‘Protection of freedom of expression’, a very basic prerequisite for any functioning democracy. Freedom of expression is necessary for individual dignity and fulfilment and “constitutes [an] essential foundation for democracy, rule of law, peace, stability, sustainable inclusive development and participation in public affairs”<sup>8</sup> Along with freedom of expression, and stemming from it, the right to access information is another fundamental ingredient of democracy. It is of the utmost importance that the effective transparency of public administrations is guaranteed and that information which is in the public interest can be circulated to feed the political debate and, in the end, democracy. Whether it is important that freedom of expression and freedom of information are effectively safeguarded, a free and plural media environment must rely also on free journalism. This means that access to the journalistic profession should be open, that journalists should be able to obtain decent working conditions and should be able to work without constraints. An “enabling environment”<sup>9</sup> allowing journalists and other media actors to freely express themselves without fear, even when their opinions are contrary to those held by the authorities or by a significant section of public opinion, should be guaranteed by member states. The MPM therefore considers the safety of journalists, both physical and digital, as a parameter through which to assess whether the basic conditions for a plural media environment are fulfilled. The impartiality and independence of the institutions that oversee the media market are other basic elements for a plural media environment. The independence of media authorities is of paramount importance when implementing media specific regulation and media policy, as the shape of the market has a direct impact on market plurality. Finally, the Basic Protection area includes an assessment of the universal reach of traditional media and access to the Internet. These are conditions that contribute to the assessment of whether citizens have, or at least potentially have, access to a wide variety of content. The indicators aim to capture risks in relation to specific legal standards, by measuring both the existence of legislation in a given area and its implementation. In addition to this, the Monitor assesses what the effective socio-political conditions are that practically affect the specific area of investigation.

Summarising, the five indicators under Basic Protection are:

- Protection of freedom of expression
- Protection of right to information
- Journalistic profession, standards and protection
- Independence and effectiveness of the media authority
- Universal reach of traditional media and access to the Internet

In 2017, 16 countries scored a low risk in the area of Basic Protection, namely, Austria, Belgium, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Ireland, Lithuania, Luxembourg, the Netherlands, Slovakia, Sweden, and the United Kingdom; 14 scored a medium risk (Bulgaria, Croatia, FYRoM, Greece, Hungary, Italy, Latvia, Malta, Poland, Portugal, Romania, Serbia, Slovenia, Spain) and 1 country, Turkey, scored a high risk.

Overall, the majority of the EU countries still fall within the low risk assessment in this area, but the number of countries assessed as being at medium risk has, nonetheless, increased if compared to the previous analysis. In MPM2016, 18 countries scored a low risk, 11 a medium risk, and 1 (Turkey, as in MPM2017) a high risk. The higher number of countries assessed to be at medium risk, and the generally higher scores, explain why the Basic Protection area’s overall score shows an average risk of 32% in 2017, which still means a low risk, but falls within its upper band and is alarmingly close to the medium risk range. Most of the medium-risk countries are the same ones that received a similar score in 2016, except for Luxembourg and Austria which, in 2017, had a lower scores of, respectively, 31% and 29%: the score for Austria benefits from the introduction of the sub-indicator on whistle-blowers under the Indicator on the Protection of right to

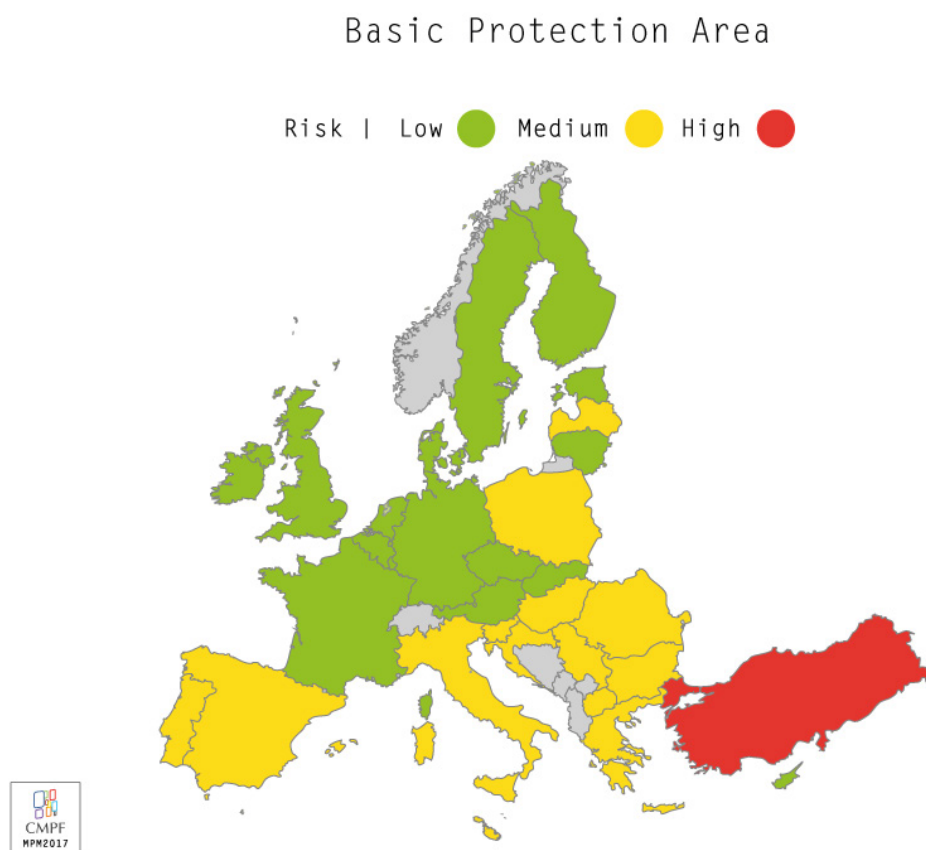
8 Council of the EU, EU Human Rights Guidelines on Freedom of Expression Online and Offline, 12 May 2014, [http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/EN/foraff/142549.pdf](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/EN/foraff/142549.pdf).

9 ECtHR, case Dink v. Turkey, 2668/07, 6102/08, 30079/08, 7072/09 et 7124/09, Judgment on September 14, 2010. See also Council of Europe, Committee of Ministers, Recommendation CM/Rec(2016)4[1] of the Committee of Ministers to Member States on the protection of journalism and the safety of journalists and other media actors, [https://search.coe.int/cm/Pages/result\\_details.aspx?ObjectId=09000016806415d9](https://search.coe.int/cm/Pages/result_details.aspx?ObjectId=09000016806415d9)

information. Based on the MPM data collection, Austria seems to have an effective regulatory framework in relation to whistle-blowers. As regards Luxembourg, the MPM detects a positive element in the Luxembourgish legislation, as there is a regulatory framework in place for whistle-blowers, even if the MPM country team for Luxembourg acknowledges that it may not be effective<sup>10</sup>. The law “is considered to be too restrictive, because it is mainly limited to cases of corruption, trading in influence, or money laundering, and the protection can concern only employment relationships” (Kies and Schall and al 2018).

In MPM2017, Italy shifts from being a low- to being a medium risk, and receives an average score of 36% in the Basic protection area, reporting an alarming assessment on the status of journalists (in particular, in relation to journalists’ physical safety): the same result applies to Malta, where the score has been raised by the assassination of Daphne Caruana Galizia. Portugal and Slovenia also shifted from low- to medium risk for various reasons, including the absence of any law on blowing -thewhistle . Portugal also shows a poor performance in terms of DTT coverage and implementation of net neutrality rules, while Slovenia reported some risks when the independence of the media authority was assessed. Serbia and FYRoM, two of the three candidate countries that are encompassed by the MPM2017, are assessed as being at medium risk (reducing to 12 the EU member states that are assessed as being in the medium band).

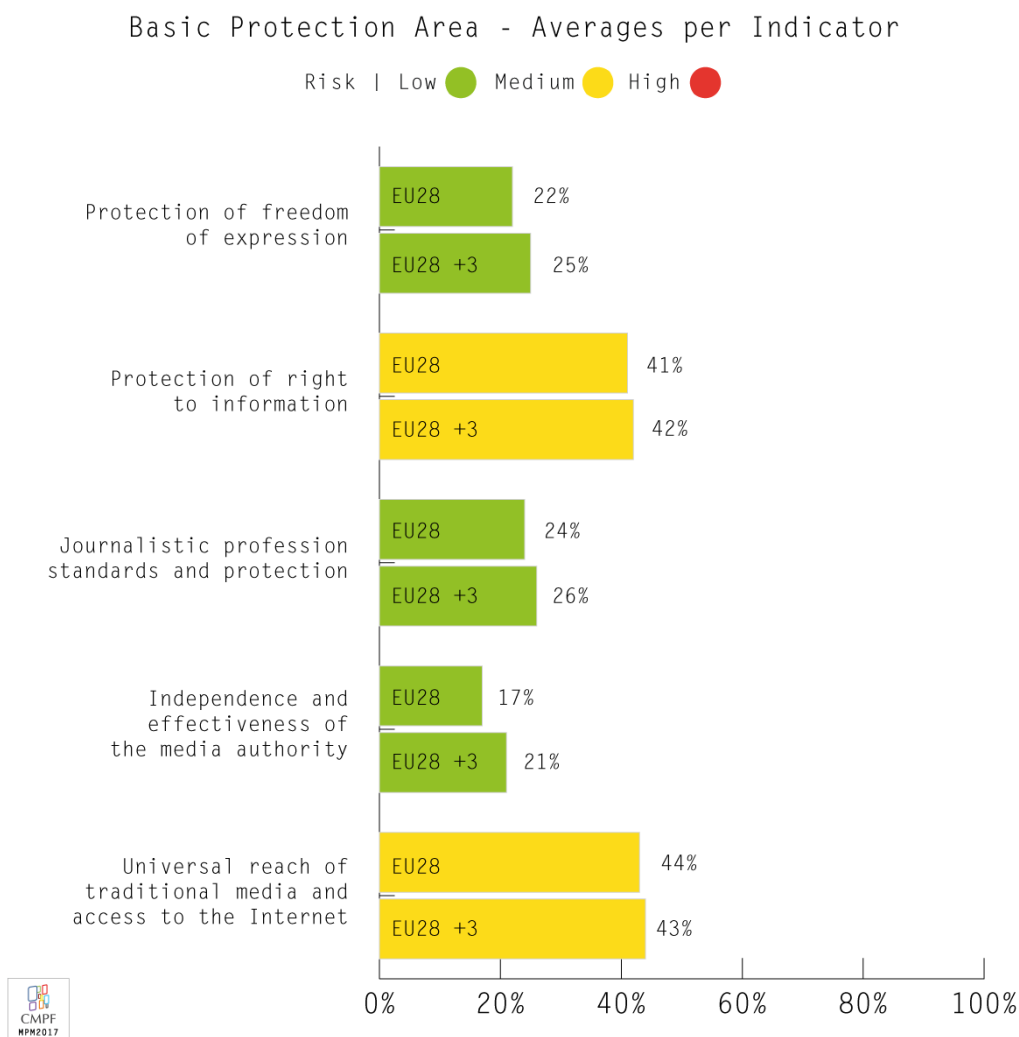
Figure 1.1.1. Basic Protection area - Map of risks per country



In regard to the indicators in the Basic Protection area, the overall situation remains comparable to that of MPM2016. The only indicator that had had a considerable increase in the average risk is the one on the Protection of right to information (42%), and this was mostly due to the inclusion of a new important sub-indicator on the protection of whistle-blowers. The indicators that present higher risks in the Basic Protection area in MPM2017 are the Protection of the Right to Information and the Universal reach of traditional media and access to the Internet, both scoring, on average, a medium risk.

10 The status of whistle-blowers has been at the centre of many debates in recent years in Luxembourg, due to the so called “LuxLeaks affair”. On March 15, 2017, Antoine Deltour and Raphaël Halet, the two whistle-blowers in the case, were recognized as alert launchers and were, at the same time, sentenced to jail with suspended sentences and were fined €1,000 and €1,500, raising questions about the effective recognition of the status of an alert launcher. In January, 2018, Luxembourg’s highest court overturned the verdict for Deltour and fully recognised him as a whistle-blower. The Luxleaks whistle-blower Antoine Deltour has seen his conviction quashed <https://www.bbc.com/news/world-europe-42652161>. Raphael Halet’s sentence of a €1,000 fine was upheld by the court.

Figure 1.1.2. Basic Protection area - Averages per indicator



The assessment relating to the indicator on the Protection of freedom of expression shows a 25% average risk, meaning that it is low risk. The assessment is similar to the 24% that resulted from MPM2016. Freedom of expression is, in general, protected, but the international standards in that regard are particularly neglected in some of the assessed countries when it comes to a proportionate balance between protection of freedom of expression and dignity and, in some cases, respect for the rule of law as regards freedom of expression online. The criminalization of defamation raises concerns in Poland. In particular, this is due to the fact that “Protection of public officials continues to be supported by the use of Criminal Code procedures against journalistic criticism” (Klimkiewicz, 2018).

Within this very essential indicator, around two-thirds of the countries (22) score within the low risk range. Again, as in MPM2016, only Turkey is assessed as being in the high risk range. FYRoM and Serbia are assessed as being at medium risk for this indicator, while Turkey scores a high risk. This explains the sensibly higher average for the EU28 +3 candidates, as shown in Figure 1.1.2.

The increase in risk for the indicator on the Protection of Right to Information, in comparison to MPM2016 (average low risk), is mostly due to the inclusion, within the composition of the indicator, of the sub-indicator on the Protection of whistle-blowers. There are 2 countries that score an overall high risk for the indicator on the Protection of Right to Information, namely, Turkey, because of the many exemptions to access to information that are provided in the law, and Luxembourg, as the country has no law on the access to information, 20 countries score a medium risk (Austria, the Czech Republic, Finland, FYRoM, Hungary, Lithuania, Slovakia, the United Kingdom, Poland, Slovenia, Bulgaria, Croatia, Cyprus, Greece, Romania, Malta, Spain, Estonia, Latvia, Portugal) and just 9 countries score a low risk (Belgium, Denmark, France, Ireland, Germany, Italy, the Netherlands, Serbia, Sweden).

The decrease in the percentage of risk for the indicator on the Journalistic profession must be interpreted in the light of some changes in the composition of the indicator itself. The score modification is mostly due to the inclusion of two new variables: on arbitrary arrests or imprisonments, and on the killings of journalists because of the exercise of their profession, which, in most countries, reduced the risks for this indicator (as explained in the methodology part of this report - see Part 2.), except in the case of Malta and Turkey. As a consequence of the killing of Daphne Caruana Galizia, a blogger and investigative journalist in 2017, the risk for this indicator increased from low to medium risk in Malta<sup>11</sup>; and, as a consequence of the imprisonment of many journalists after the attempted coup of July 2016, the risk also increased in Turkey.

From the data analysis of MPM2017 it is possible to assess a stable and positive trend in relation to the indicator on Independence and the effectiveness of the media authority, which scores as a low risk in 23 countries (in MPM2016, 24 countries scored as being low risk for this indicator). Nonetheless, as shown in Figure 1.1.2, it must be noted that the difference between the average of EU28 and the average of all the 31 countries under analysis is quite important. Again, FYRoM and Serbia are assessed as being in the medium risk band and Turkey in the high risk one. The particularly high score for Turkey (80%) raises the average for this indicator.

The increase in the percentage of risk for the indicator on the Universal reach of traditional media and access to the Internet, in comparison to MPM2016, can be explained by the fact that the MPM2017 assessment is based on thresholds that are very demanding and that are tailored to an already developed environment in terms of connectivity. It must be noted also that a few countries also received a high score because they were not assessed as being fully compliant with the EU Regulation on Open Internet (net neutrality).

---

11 The MPM2017 application covers the 1st January, 2017, -31 December 2017, time frame, adthat is why it does not refer to the murder of Ján Kuciak, journalist, and of his partner Marina Kušnírova,, who were shot dead in Slovakia in February, 2018.

## PROTECTION OF FREEDOM OF EXPRESSION

*Freedom of expression is considered to be the cornerstone of democracy. Freedom of the press, freedom of the media, the right to access information - are essential conditions for a public sphere dialogue in which public opinion is based upon the free exchange of information and opinions – and they stem from freedom of expression. In addition to this, freedom of expression also ‘enables’ other rights, like the right of assembly, the right to join a political party, the right to vote. Its protection is thus at the very core of any democratic society. EU member states share, and are bound to, the respect of freedom of expression as it is enshrined in Art 11 of the EU Charter of Fundamental Rights, and as it is at the core of their common constitutional traditions. It is also a right that has been effectively promoted under the Enlargement and Accession process (Brogi, Dobрева and Parcu, 2014), and by the Council of Europe’s framework for the protection of human rights (Voorhoof, 2014).*

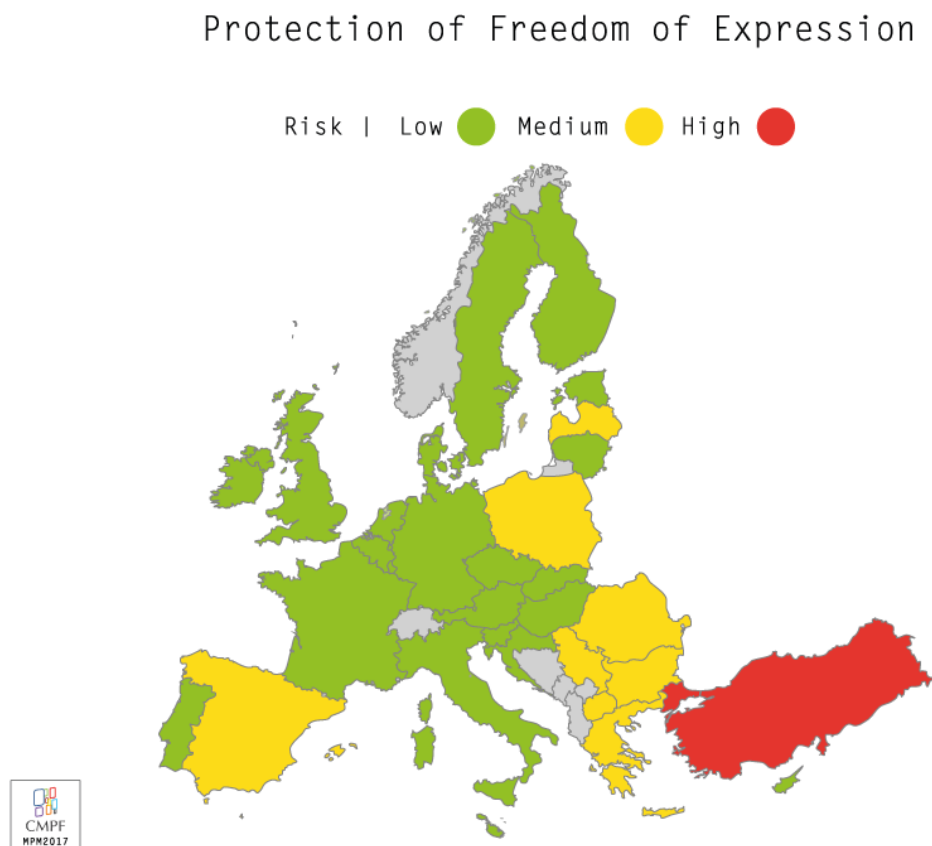
*The indicator on the Protection of freedom of expression under the MPM2017 aims to assess the existence and effective implementation of the regulatory safeguards for freedom of expression in a given country. A country may have good laws protecting the freedom of expression, but they may not be implemented or enforced effectively. Sometimes, constitutional guarantees and international treaty obligations may be eroded by exceptions and derogations, or by other laws that may limit the freedom of expression in an arbitrary way. In order to assess the levels of protection for the freedom of expression, the MPM uses the standards developed by the European Court of Human Rights (ECtHR) under the interpretation of Art. 10 of the European Convention of Human Rights (ECHR). According to these parameters, freedom of expression must be protected under the rule of law: restrictive measures should have a legal basis in domestic law, should be accessible to the person concerned and foreseeable in its effects; limitations must have a “legitimate aim” and be “necessary in a democratic society”. The ECtHR has interpreted the scope of freedom of expression broadly, as it is considered essential for the functioning of a democratic society: “the dynamic interpretation, by the Court, of what is to be considered ‘necessary in a democratic society’ together with the limitation of the ‘margin of appreciation’ by the member states, has been crucial for the impact of Article 10 of the Convention on the protection of freedom of expression in Europe” (Voorhoof, 2014).*

*This indicator also includes a sub-indicator that specifically relates to defamation laws. While defamation laws are an important tool in protecting people from false statements that damage their reputation, such laws can easily be misused and the criminalization of defamation may pose risks for the freedom of expression, producing a chilling effect on journalistic freedom. Journalists, instead, should enjoy a position in which they can exercise their job without fear.*

*Online violations of freedom of expression are growing in frequency and importance. Another element that is therefore taken into account in the indicator is whether freedom of expression online is limited on the same grounds as freedom of expression offline. In this regard, the indicator takes into account whether Art 10 of the ECHR is respected, and, in particular, whether restrictive measures resulting in blocking, removing and filtering online content comply with Art. 10.2 ECHR (i.e., limitations on freedom of expression are prescribed by law, pursue a legitimate aim, and are necessary in a democratic society). The indicator also takes into consideration whether filtering and blocking practices by Internet service and content providers, and by a given state, are arbitrarily limiting the freedom of expression online.*

The Indicator on the Protection of freedom of expression scores as a low risk in 22 countries (3 countries fewer than in MPM2016) namely, Austria, Belgium, Croatia, Cyprus, the Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Ireland, Italy, Lithuania, Luxembourg, Malta, the Netherlands, Portugal, Slovakia, Slovenia, Sweden, the United Kingdom, while 8 countries score a medium risk (Bulgaria, FYRoM, Greece, Latvia, Poland, Romania, Serbia, Spain). Turkey is assessed as being at high risk. It must be noted, however, that the average of all the 31 countries analysed is significantly higher than the average of the scores of the EU-28 countries (25% vs 22%). While Turkey scores a very high risk of 82%, Serbia (48%) and FYRoM (35%) score as being at medium risk, contributing to a higher general average score (the average of the three candidate countries examined is 55%). The results of MPM2017 for this indicator are essentially similar to those resulting from MPM2016.

Figure 1.1.3. Indicator on the Protection of freedom of expression - Map of risks per country



Constitutional and legal protection for the freedom of expression is formally guaranteed in all the countries considered under the MPM2017. It is enshrined in all of their constitutions and/or in the national laws. As a general trend, the relevant international human rights conventions, which are particularly relevant for freedom of expression standard setting, namely, the International Covenant on Civil and Political Rights (ICCPR, Art 19) and the European Convention on Human Rights (ECHR, Art 10), have been ratified with no particular exemptions, with only Malta having two significant reservations to Article 19 of the ICCPR, as highlighted in the MPM2016 general report<sup>12</sup> (see also Nenadic, 2018). It is important to highlight that France<sup>13</sup> and Turkey maintain the derogation from certain rights that are guaranteed by the European Convention on Human Rights, due to the states of emergency decreed in those countries following, respectively, the terrorist attacks in France and the coup d'état in Turkey (Art 15 ECHR).

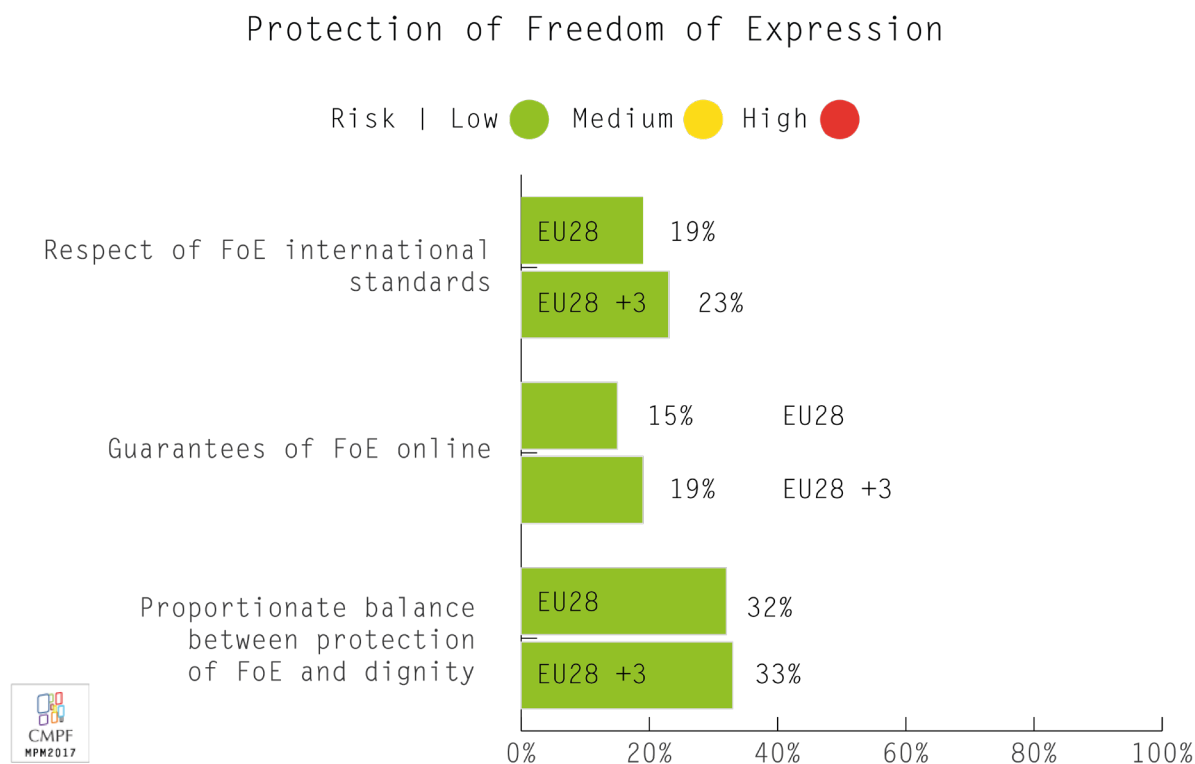
The main differences between the various legal systems in this area are to be found in the limitations to the freedom of expression that are allowed under each constitution, or in special laws, and in the proportionality of the specific limitations on the basis of interests of “national security, territorial integrity or public safety, for the prevention of disorder or crime, for the protection of health or morals, for the protection of the reputation or rights of others, for preventing the disclosure of information received in confidence, or for maintaining the authority and impartiality of the judiciary” (Art. 10(2), ECHR). Countries that are assessed as being at medium risk usually have a satisfactory or solid regulatory framework in place, which is in line with international standards, but they demonstrate poor implementation, which, in practice, leads to systematic violations of the exercise of freedom of expression.

12 Malta has made two peculiar and significant reservations to Article 19 of the ICCPR that may affect the assessment of the risks for freedom of expression in the country, declaring that Article 19 ICCPR does not affect the Constitutional provision that allows for restrictions on the freedom of expression of public officials, as long as such restrictions are “reasonably justifiable in a democratic society”. According to the Code of Conduct of Public Officers in Malta, public officers are precluded from taking an active part in political discussions, or in other political activity, during working hours or at the workplace. Malta also reserved the right not to apply Article 19, to the extent that non-application is fully compatible with domestic legislation that regulates “the limitations on the political activities of aliens”, and in accordance with Article 16 of the ECHR (Restrictions on the political activity of aliens).

13 France formally lifted the “état d’urgence” on November 1st, 2017, but some derogations from the rights guaranteed by the ECHR were transposed to the new anti-terrorism law (Loi 2017-1510), which was adopted on 30 October, 2017. See, for instance, <https://www.ouest-france.fr/terrorisme/fin-de-l-etat-d-urgence-les-4-mesures-qui-ne-disparaitront-pas-5349720>.



Figure 1.1.4. Indicator on Protection of freedom of expression - Averages per sub-indicator



It is not surprising, therefore, that, in the detailed analysis of the components of the indicator, the sub-indicator that scored the highest risk is, once again, the one relating to the Proportionate balance between the protection of freedom of expression and dignity (33%), although there has been a slight improvement if scores are compared to MPM2016 (35%), which is mostly due to the fact that 2 variables of this sub-indicator were merged in MPM2017. Under this sub-indicator, 4 countries scored a high risk (Latvia, Poland, Portugal, Turkey), 9 countries a medium risk (Austria, Czech Republic, Finland, FYRoM, Greece, Italy, Luxembourg, Malta, and Slovenia), and among the countries that score a low risk, 2 (Croatia and Spain) are in the highest range of low risk and are almost at medium risk (33%). In particular, all countries have legislation on defamation, but the scope of it varies from country to country, and the limitations on the grounds of honour and reputation are often shaped in laws that are not fully homogeneous or comparable and so may not be consistent with international standards relating to the freedom of expression (CMPF, 2017). Imprisonment for defamation (libel) is possible in most EU member states (even if not often implemented, in practice), along with pecuniary sanctions; high damages requests are very common remedies to libel in cases of civil defamation. Among the countries that score highest, Poland should be singled out, given that while most sentences result in a fine, or community service, there have also been cases in which the courts handed down suspended sentences of deprivation of liberty. It must be added that the crucial role in deciding on the legitimate use of restrictions on the freedom of expression in Poland is played by the common courts and the Constitutional Tribunal. In recent years, both the Constitutional Tribunal and the common courts have undergone legal reform, which has raised broad concerns about judicial independence<sup>14</sup> (see Klimkiewicz 2018).

Defamation laws, particularly Penal Code Article 299 (Insult to the President) and Article 301 (Insulting Turkishness) are problematic for press freedom in Turkey. The Venice Commission of the Council of Europe recommended to reform them, pointing to the “vague wording” of the law. The request was repeated by a CoE Parliamentary Assembly debate on 25 April, 2017<sup>15</sup>.

According to the BIA Media Monitoring Report, between April and June, 2017, two journalists were standing trial in defamation cases and were facing a total of 9 years and 4 months in prison<sup>16</sup>. In the same period, 18 journalists stood

<sup>14</sup> In July 2017 ([http://europa.eu/rapid/press-release\\_IP-17-2205\\_en.htm](http://europa.eu/rapid/press-release_IP-17-2205_en.htm)) the Commission launched an infringement procedure on the “Polish Law on Ordinary Courts”; also on the grounds of its impact on the independence of the judiciary. In December, 2017, the Commission triggered Article 7(1)’s procedure for the first time, and submitted to the Council a Reasoned Proposal in accordance with Art. 7(1) of the Treaty of the European Union regarding the rule of law in Poland [http://europa.eu/rapid/press-release\\_IP-17-5367\\_en.htm](http://europa.eu/rapid/press-release_IP-17-5367_en.htm). See, also [http://europa.eu/rapid/press-release\\_IP-18-5830\\_en.htm](http://europa.eu/rapid/press-release_IP-18-5830_en.htm).

<sup>15</sup> “The functioning of democratic institutions in Turkey”, Parliamentary Assembly, 25.04.2017, <http://assembly.coe.int/nw/xml/XRef/Xref-XML2HTML-EN.asp?fileid=23665&lang=en>

<sup>16</sup> MPM2017 data collection for Turkey.

trial on the charge of “Defaming President Erdoğan”: nine of these were sentenced to 4 years, 5 months and 20 days in prison, as well as punitive fines<sup>17</sup>.

Within the Protection of freedom of expression, the MPM analyses also whether the freedom of expression online is formally guaranteed and respected, in practice. This specific focus is interesting, since it gives an overview of how different countries interpret and apply the rule of law for the freedom of expression online. In general, the laws are not specifically drafted to protect the freedom of expression online: according to international standards, online expression should be limited to the same grounds and extent as offline expression. Nonetheless, this may lead to an incoherent enforcement of the provisions relating to restrictions online, to a different set of remedies to tackle illegal content online, as well as to a lack of predictability and the foreseeable consequences of expression online. The sub-indicator on guarantees of the freedom of expression online seeks to analyse whether restrictive measures, such as blocking, filtering and removing online content, comply with the three conditions set by Article 10(2) ECHR, namely, that limitations on the freedom of expression are prescribed by law, pursue a legitimate aim that is foreseen in Article 10(2) ECHR, and that are necessary in a democratic society according to the case-law of the ECtHR. Another aim of the sub-indicator is to collect information on, and to assess the risks stemming from, the blocking and filtering practices of governments and online intermediaries. It must be noted that, in 2016, at EU level, the Commission agreed a Code of Conduct on combatting illegal hate speech, which was signed by major IT companies, thus delegating to private online platforms the removal or blocking of access to content that is deemed to be illegal hate speech by those platforms themselves<sup>18</sup>.

The sub-indicator on the Guarantees of Freedom of Expression online is the one at the lowest risk within this indicator, with 8 countries scoring a medium risk level (Bulgaria, Germany, Greece, Latvia, Poland, Romania) and/or high risk (Serbia and Turkey). Among relevant developments on this issue, the German NetzDG, Network Enforcement Act, which was adopted in 2017, requires social network companies (including Facebook, Twitter and Google) to remove content that is considered illegal, according to the German Criminal Code, within 24 hours of it being brought to their attention. This law, undoubtedly, is a first attempt to respond to the massive spread of illegal content online, but it was criticised for delegating the interpretation and the enforcement of some articles of the Criminal Code to private companies<sup>19</sup>. Nonetheless, the law foresees a monitoring mechanism on the implementation: platforms are obliged (Section 2 of the Network Enforcement Act) to report bi-annually on the implementation of the law (first results expected in the second half of 2018).

Other countries that scored a medium risk have seen convictions for insults on Facebook (Bulgaria), a lack of clarity in the rules that are applicable to the online environment and the use of criminal defamation proceedings. In Poland, journalists and media professionals are facing political pressure and self-censorship seems to grow when controversial issues are at stake<sup>20</sup> (Klimkiewicz 2018). Turkey scored a high risk for this sub-indicator, with very high risks reported for all the variables that compose it, which confirms its outlier position in comparison with the other countries assessed. According to the data collection, the high risk detected in Serbia is mostly due to the role of social media and search engines as parallel structures that arbitrarily remove online content without any judicial review: this is an element that is not clearly acknowledged in other countries, but which may be considered to be a feature to be further analysed and researched, also in the light of recent developments in EU policy in that regard. It must be noted, nonetheless, that data on this sub-indicator are not available for all of the MPM2017 31 countries: it is very difficult indeed to have sound and transparent information on what types of online content the member states and the private intermediaries are blocking, filtering and removing<sup>21</sup>.

17 According to the CPJ (Committee to Protect Journalists) in 2017, “Despite releasing some journalists in 2017, Turkey remains the world’s worst jailer for the second consecutive year, with 73 journalists behind bars.” <https://cpj.org/reports/2017/12/journalists-prison-jail-record-number-turkey-china-egypt.php>

18 Code of conduct to counter hate speech online, [http://ec.europa.eu/newsroom/just/item-detail.cfm?item\\_id=54300](http://ec.europa.eu/newsroom/just/item-detail.cfm?item_id=54300). The implementation of the Code is regularly assessed. IT companies and the European Commission agreed to discuss ways to promote transparency and encourage counter and alternative narratives online.

19 See “OSCE Representative on Freedom of the Media warns Germany social networks law could have disproportionate effect” <https://www.osce.org/fom/347651>; Germany: Draft Bill on Social Networks Raises Serious Free Expression Concerns, <https://www.coe.int/en/web/media-freedom/all-alerts/-/soj/alert/25419466>

Art. 19, Germany: The Act to Improve the Enforcement of the Law in Social Networks, <https://www.article19.org/wp-content/uploads/2017/09/170901-Legal-Analysis-German-NetzDG-Act.pdf> Will Germany’s new law kill free speech online? <https://www.bbc.com/news/blogs-trending-41042266>

20 From the MPM2017 Poland (data collection): the case illustrating this uncertainty is the termination of the news blog mediainside.pl on 17 August, 2017, due to the publication of information on its blog about the firing of Marzena Paczuska and the appointment of Jarosław Olechowski as the editor-in-chief of the main national news programme of Polish public television (Wiadomości – the News). Mediainside.pl apologised to those quoted in their account and published an official statement: “To our great sadness, it seems that in the newest history of Poland, it is impossible to write freely even about the media, without political backing”

21 It will be interesting, therefore, to check whether transparency obligations under the EC Code of Conduct to counter hate speech may be useful in collecting data, at the national level also, and to better understand the final impact on the freedom of expression of this type of self-regulatory initiative.

As previously said, Turkey is the only state that scored a high risk for this very basic indicator on the protection of freedom of expression (82%). According to Inceoglu et al (2018), “the Anti-terror Law (TMK, no. 3713 of 1991) and the related articles of the Turkish Penal Code (TCK) are interpreted and applied in ways that impede the freedom of expression of Members of Parliament, academics and journalists. Based on the Anti-Terror law and the Penal Code, journalists are charged with “being a member of an armed organisation”, with “propagandising for an illegal organisation”, with “forming an illegal organisation”, “participating in the coup” and “targeting the unity of the state and the integrity of the country”. The judiciary seems to have been captured by political power and its decisions appear not to follow the rule of law. This was the case, for instance, in the trial against the journalist Mehmet Altan, who was abusively imprisoned for a long period. The judging tribunal simply ignored a decision from the Turkish Constitutional Court, which had previously established that his pre-trial detention, prolonged for longer than a year, had violated his rights to freedom and personal security, as well as his freedom of expression. On this basis, the Court had established that he should be released immediately, but the lower tribunal not only decided not to apply this decision but finally condemned him to life imprisonment<sup>22</sup>.

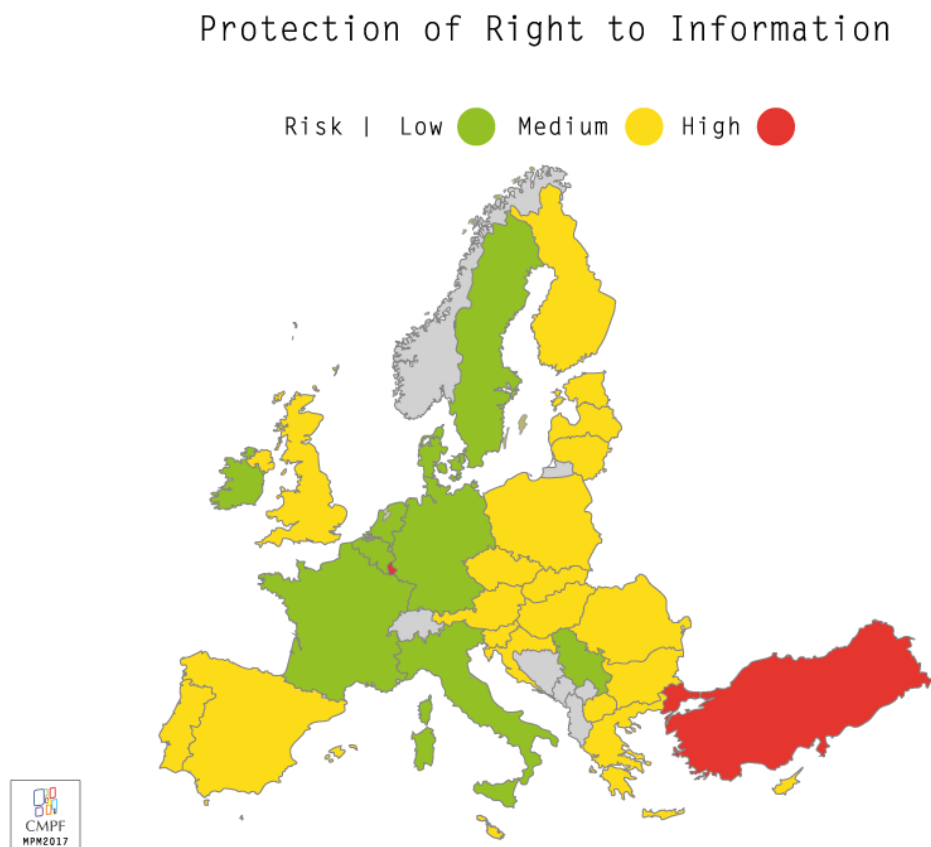
---

22 Mehmet Altan was temporarily released in June, 2018, after 21 months of imprisonment. On 20 March, 2018, the European Court of Human Rights ruled that his rights under the European Convention on Human Rights had been violated (Art. 5 Right to liberty and security, and Art.10 - Freedom of expression).

## PROTECTION OF THE RIGHT TO INFORMATION

The indicator on the Protection of the right to information is designed to assess the existence and effective implementation of regulatory safeguards in relation to access to information and to the protection of whistle-blowers, this latter being a new sub-indicator that is included in MPM2017. Hence, it aims to assess one of the building blocks of media freedom and especially investigative journalism. The indicator, as in the past MPM editions, focuses on the right of access to information that is held by public authorities and the state, the lawfulness of its limitations, as well as the existence and effectiveness of appeal mechanisms in cases where there is the denial of access to information. The indicator is based on the principle that all information in the hands of the State belongs to the public, with limited and qualified exceptions that must be justified by the State authorities. The indicator has also been enhanced by a sub-indicator on whistle-blowers' protection, which aims to understand whether, in a given country, legislation on the topic exists, whether it is implemented in practice and whether the country is free from arbitrary sanctioning of whistle-blowers. Based on the standards of the Council of Europe, (Recommendation CM/Rec (2014)7 of the Committee of Ministers to Member States on the protection of whistle-blowers) a "whistle-blower" is "any person who reports or discloses information on a threat or harm to the public interest in the context of their work-based relationship, whether it be in the public or private sector."<sup>23</sup> Whistle-blowing is fundamental to journalists in shedding light on wrongdoing in the workplace (e.g.. corruption, fraud), and in exposing situations that are harmful to the public interest. Whistle-blowers should be protected, as they need specific channels so as to be able to expose their case without fear, and as their actions potentially expose them to negative personal consequences.

Figure 1.1.5. Indicator on the Protection of the right to information - Map of risks per country

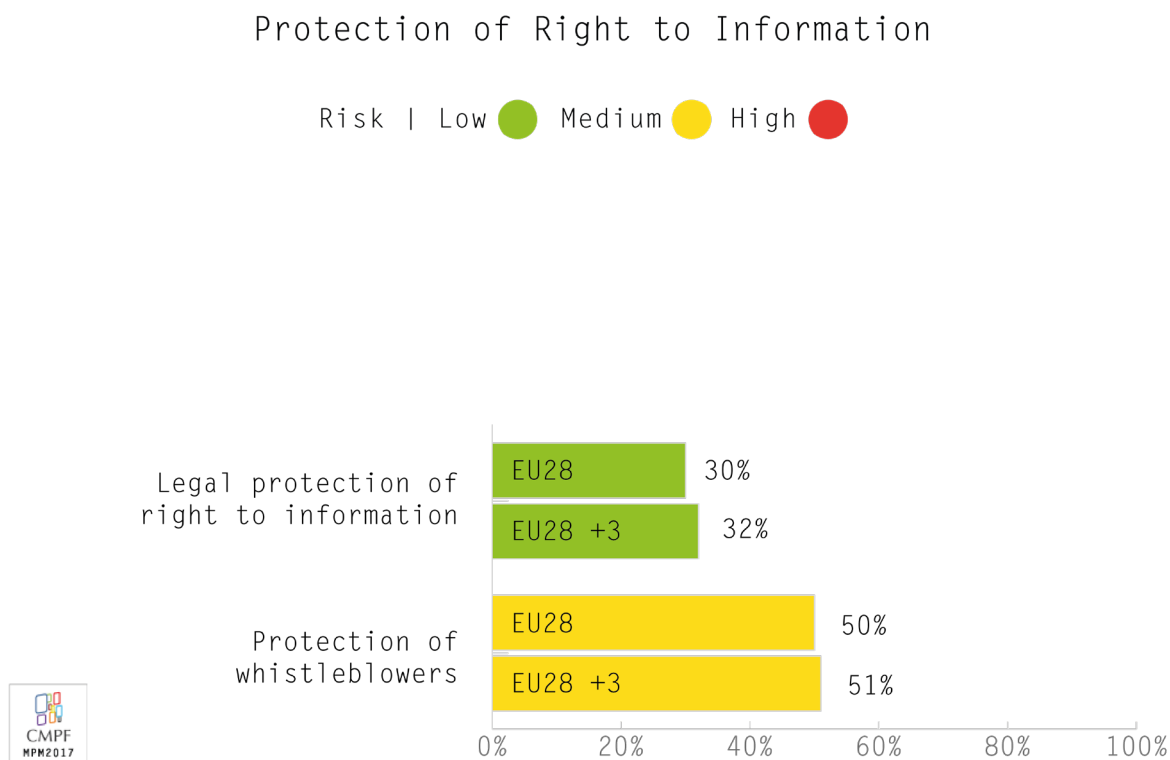


The indicator on the protection of the right to information scores an average of 42% risk, reaching a medium risk level, which is quite alarming in the Basic Protection area. It must be noted that, in comparison to the MPM2016, this indicator increased from 24% to 42%, mostly due to the inclusion of a new sub-indicator that assesses the risks that are linked to the lack of Protection for whistle-blowers.

With this change in the methodology, the majority of countries ended up scoring a medium risk (20 countries - (Austria, Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Finland, FYRoM, Greece, Hungary, Latvia, Portugal, Lithuania, Malta, Poland, Romania, Slovakia, Slovenia, Spain, the United Kingdom), with 2 at high risk (Luxembourg and Turkey), and only 9 countries scoring a low risk (Belgium, Denmark, France, Germany, Ireland, Italy, Serbia, the Netherlands, Sweden). This highlights a specific problem related to whistle-blowers protection standards in the analysed countries.

23 [https://search.coe.int/cm/Pages/result\\_details.aspx?ObjectId=09000016805c5ea5](https://search.coe.int/cm/Pages/result_details.aspx?ObjectId=09000016805c5ea5)

Figure 1.1.6. Indicator on Protection of the right to information - Averages per sub-indicator



The sub-indicator on the Legal protection of the right to information remained within the low risk range (32%), although it was higher than in MPM2016 (24%). In this sub-indicator the majority of countries scored a low risk (21), with 7 countries at medium risk (Bulgaria, Croatia, Cyprus, Hungary, Spain, Malta, Slovenia) and 3 countries at high risk (Austria, Luxembourg and Turkey). Austria and Luxembourg confirmed the negative scores in regard to the respect of access to information standards, resulting both from MPM2015 and MPM2016 assessments. In Austria, Article 20(4) of the Federal Constitution states that there is a right to information. However, the obligation of administrative authorities (at a national, regional and local level) to maintain secrecy has precedence (Article 20(3)). There is no positive obligation for the authorities to provide information to the public. In Luxembourg, the Ministry of State has elaborated a new draft bill on “open and transparent administration”, which has been widely criticised by civil society organisations as being too restrictive (and, Schall, 2018). In Turkey, the right to freedom of information faces too many exemptions, interpreted broadly, thus severely limiting the effective scope of the right.

As for the sub-indicator on the Protection of whistle-blowers, the situation is alarming. The average risk for this sub-indicator is 51% (medium risk), with 24 countries scoring a medium risk (Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Finland, France, FYRoM, Italy, Lithuania, Serbia, Slovakia, Slovenia, Spain, and Poland) or high risk (Estonia, Greece, Latvia, Luxembourg, Malta, Portugal, Romania, Turkey and the United Kingdom), and only 7 countries are at low risk (Austria, Belgium, Germany, Hungary, Ireland, the Netherlands, Sweden). This is due to the fact that there is either no comprehensive regulatory framework for the protection of whistle-blowers (Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, Latvia, Lithuania, Poland, Portugal, Slovenia, Spain, Turkey) or when it does exist it is not generally enforced in practice (Austria, France, FYRoM, Germany, Greece, Hungary, Ireland, Luxembourg, Romania, Serbia, Slovakia, the United Kingdom). Other cases are those of a law, as in the case of Malta, that does not fit the purpose (the weakness of regulation to protect whistle-blowers: the law does not protect whistle-blowers if they fail at first resort to take on internal reporting procedures, or if they report to the press or other media) or, as in the case of Italy, they can hardly be assessed in terms of practical application, due to its recent adoption. In Luxembourg, the regulatory measures in place are assessed as being too restrictive, because they are mainly limited to cases of corruption, trading in influence, or to money laundering.

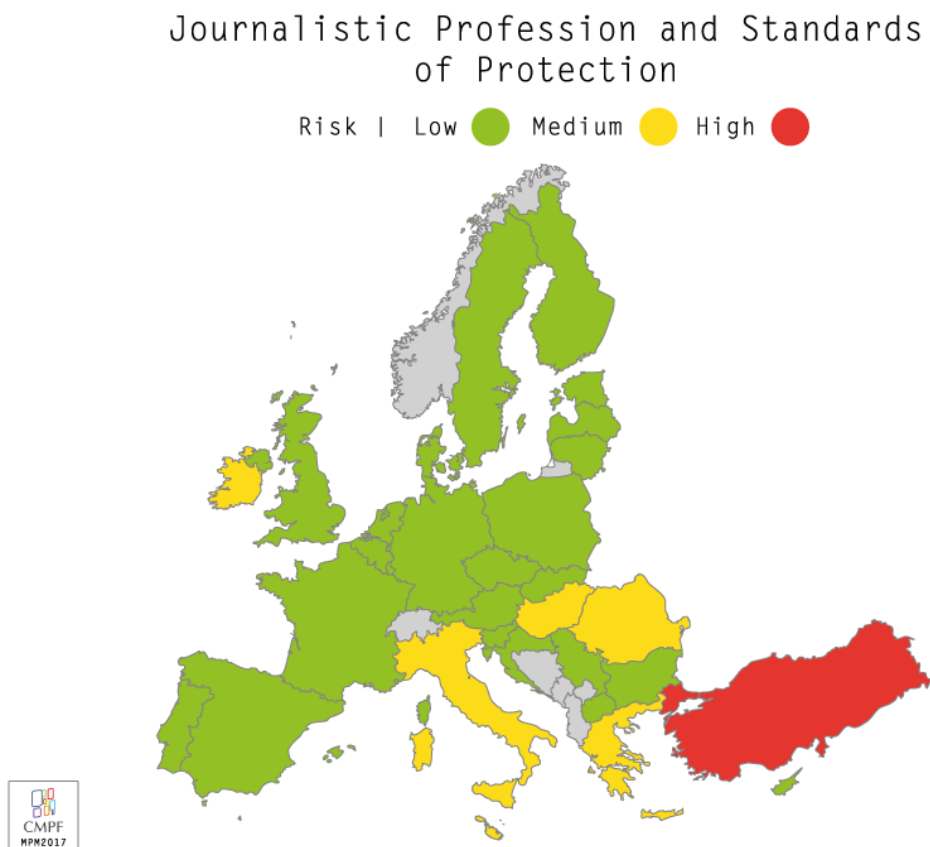
It must also be noted that retrieving datasets and research, both on the implementation of the law on whistle-blowers and on the effective conditions of whistle-blowers (i.e., whether, for instance, whistle-blowers are facing negative consequences in relation to their actions) proved to be difficult.

## JOURNALISTIC PROFESSION, STANDARDS AND PROTECTION

Journalists (and other media actors) are those who, in a functioning democratic society, feed the public debate and ensure that the public is informed on all matters of public interest. In contributing to the public debate, journalists influence public opinion and, in the end, the electoral choices of voters and the accountability of politicians. It is therefore important that, in a democratic society, access to the journalistic profession is not limited (i.e., subject to licensing schemes)<sup>24</sup>; and that journalists can act independently to political and commercial interests and that may rely on an “enabling environment” to carry out their job. In this regard, the standards are provided by the ECtHR: the Court has stressed, in its case-law, in which countries have positive obligations to “create a favourable environment for participation in public debate by all persons concerned, enabling them to express their opinions and ideas without fear”<sup>25</sup>. This means also that the countries have a duty to guarantee a safe environment in which journalists and other media actors can exercise their watchdog function<sup>26</sup>.

The MPM indicator on the Journalistic profession, standards and protection deals with a range of different aspects concerning the journalists and journalism. The indicator is composed of four sub-indicators which describe risks that result from conditions to access the profession; from the level of the representation of the interests of media professionals and media employers in labour relations, and the effectiveness of professional organisations in guaranteeing professional standards; from safety conditions, both physical and “digital”, and working conditions; and from the existence and levels of the implementation of rules on the protection of journalistic sources. MPM2017 has also introduced two new variables in order to acknowledge the situation in those countries in which cases of the arbitrary arrests or the imprisonment of journalists because of the exercising of their profession, are envisaged (whether there are, for instance, politically motivated arrests/detainment and imprisonment of journalists) and the cases of severe threats to the lives of journalists, including physical threats, injuries and killings.

Figure 1.1.7. Indicator on Journalistic profession, standards and protection - Map of risks per country



This indicator scores a low risk 26%. This risk is lower than in MPM2016, but must be read in the light of the different composition of the sub-indicator on the protection of journalists. The inclusion of two new variables on arbitrary arrests or imprisonments, and the killings of journalists, formally reduced the risks for this indicator in the majority of the coun-

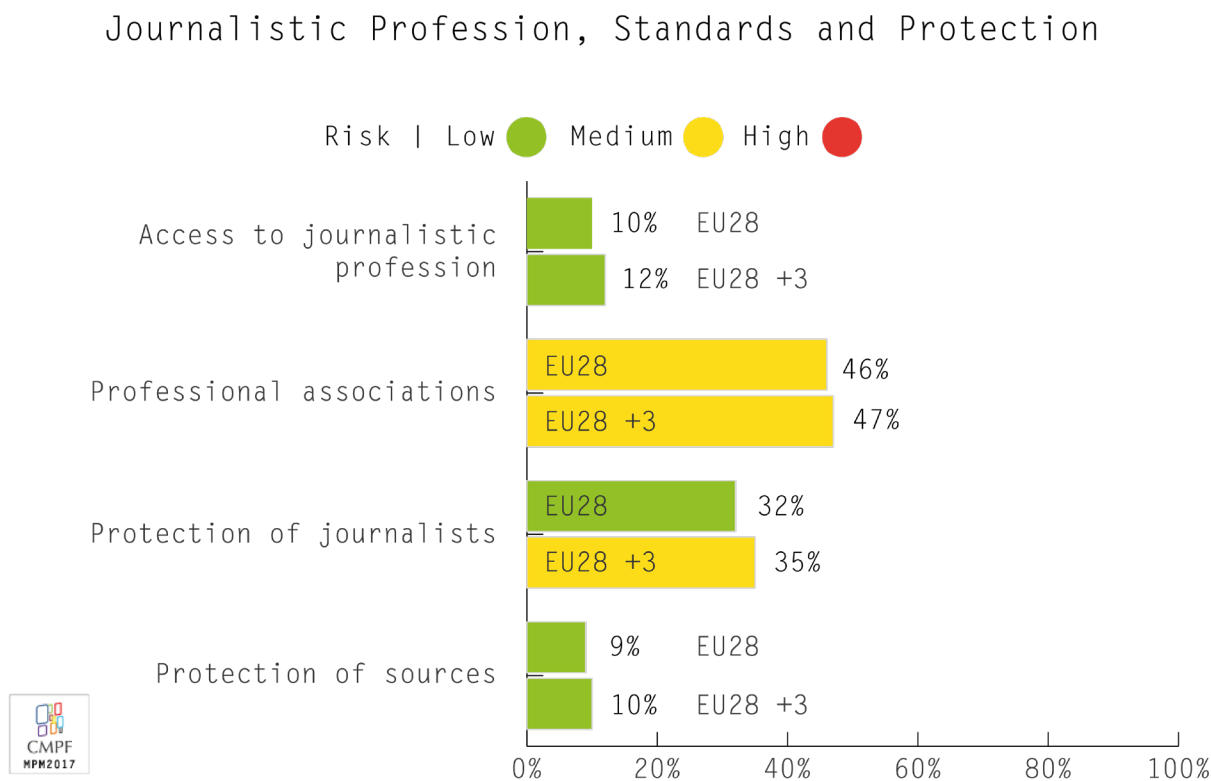
24 Cf. Art. 19, Licensing of media workers, <https://www.article19.org/pages/en/licensing-of-media-workers.html>.

25 ECtHR, case *Dink v. Turkey*, 2668/07, 6102/08, 30079/08, 7072/09 et 7124/09. See also, the Committee of Ministers adopted a Recommendation on the protection of journalism and the safety of journalists and other media actors (2016) 4.

26 This obligation was also stressed during the 2016 Colloquium on Fundamental Rights, see the Media pluralism and democracy: outcomes of the 2016 Annual Colloquium on Fundamental Rights, [http://ec.europa.eu/information\\_society/newsroom/image/document/2016-50/2016-fundamental-colloquium-conclusions\\_40602.pdf](http://ec.europa.eu/information_society/newsroom/image/document/2016-50/2016-fundamental-colloquium-conclusions_40602.pdf)

tries assessed by the MPM, with the only exceptions of Malta and Turkey. It is suggested, therefore, that the results of this indicator be read taking into account the composition of the indicator itself and the scoring per sub-indicator, which analyse different risks that are related to the status of journalists, to better compare the results with MPM2016.

**Figure 1.1.8. Indicator on Journalistic profession, standards and protection - Averages per sub-indicator**



Access to the journalistic profession does not show particular limitations in the EU (average of the indicator 12%). As a standard in Europe, in most countries the access to the profession is open: self-regulatory instruments prescribe who may practice journalism; commonly there is licensing or registration of journalists, and this is made on the basis of transparent, objective, proportionate and non-discriminatory requirements. As in MPM2016, Italy scores a high risk under this sub-indicator, as access to the journalistic profession is conditional upon the rules defined by a specific law (n.69 of 1963) that requires mandatory enrolment in the *Albo dei Giornalisti* (Register of Journalists), which is kept by the *Ordine dei Giornalisti* (Order of Journalists), in order to be qualified as a professional journalist. As in MPM2016, in some countries, access to journalism seems to be restrained *de facto* by poor working conditions that are associated with the profession itself (Austria, Hungary), and by political pressures (Hungary). Although there are no legal barriers, the country report also stresses that access to the profession in Ireland is influenced by education (and the level of education, by income).

The assessment of the effectiveness of professional associations and unions in supporting better working conditions, including independence for member journalists<sup>27</sup>, shows an average medium and stable risk (47% against the 46% of MPM2016). This somehow confirms a general trend, as most of the countries analysed score a high or medium risk under the relevant variables (see also CMPE, 2017).

The indicator on the Journalistic profession, standards and protection contains a variable to assess the risks for the protection of journalists, both in terms of professional standards and safety, including those in the digital media. The assassination of Daphne Caruana Galizia, in October, 2017, in Malta, was a crime that heavily influenced public opinion on the role, and on the threats to investigative journalists. Her murder shook the international community and abruptly brought into focus and raised awareness in Europe on the issue of the safety of journalists. Daphne Caruana Galizia was a very well known Maltese journalist. She published in many local newspapers and also personally edited the *Running Commentary*, a very popular blog in which she was reporting on cases of misconduct, corruption and money-laundering, mostly involving Maltese politicians. CMPE, in MPM2016, acknowledged her problematic situation and the threats

<sup>27</sup> Please, note that the assessment for this variable is subject to the so called “Group of experts’ procedure”, see below, Part 2 of this report. This means that the MPM country team evaluation was checked against the opinion of seven experts, who represented stakeholders in the media sector, NGOs and academics.

she was suffering<sup>28</sup>. As regards the MPM2017, the risk relating to the sub-indicator on the protection of journalists has sensibly risen for Malta. The murder of Daphne Caruana Galizia has been a sad reminder of the fact that Europe is not immune from such horrible crimes being committed against journalists. This event should remind EU governments that they have the positive obligation to guarantee an enabling environment for journalists (ECtHR Dink vs Turkey) and they have to put in place all the efforts to avoid impunity for such crimes. The killing of Daphne Caruana Galizia was followed, in early 2018, by the murder of the investigative journalist Ján Kuciak and his fiancée Martina Kušnírová, in Slovakia. Kuciak was investigating the links of local politicians with Italian organised crime. It must be noted that, as it covers just the events which occurred in 2017, the MPM2017 is not assessing the impact of these last murders on the indicator on the Status of journalists. The results for Slovakia, therefore, cannot be used as an evaluation of the situation in the light of 2018's events. CMPE, nonetheless, uses the opportunity of this report, written in 2018, to stress the need to keep the alarm level high when it comes to the protection of journalists, something that is not clearly focussed upon by all European governments. For instance, recently, the new Italian minister for Internal Affairs has declared he is planning to reconsider the need for the state armed escort for the journalist Roberto Saviano, internationally known for his inquiries into Italian criminal organisations<sup>29</sup>, who has been seriously threatened by them as a consequence. Statements like this, grounded on the assumption that having an armed escort is a privilege, may be detrimental to the establishment of an enabling environment for journalists.

It must be noted that, in MPM2017, 13 countries (Bulgaria, Croatia, Cyprus, France, Greece, Hungary, Ireland, Italy, Malta, Romania, Serbia, Slovenia, Sweden) are assessed as having a medium risk in relation to the sub-indicator on the protection of journalists, meaning that there are either poor working conditions or threats. When analysing the details of the sub-indicator, 12 countries have reported cases of threats to journalists in their countries (Belgium, Cyprus, Estonia, FYRoM, Germany, Hungary, Ireland, Lithuania, the Netherlands, Poland, Slovenia, the United Kingdom) and 12 have reported cases of both threats and attacks (Bulgaria, Croatia, Finland, France, Greece, Italy, Malta, Romania, Serbia, Spain, Sweden, Turkey). In the case of Croatia, for instance, there have been multiple threats to, and attacks on, journalists in recent years. Among the most prominent, an effigy of a columnist Ante Tomić was burned publicly during a carnival in 2014, and he was also attacked twice in his hometown, Split. An investigative journalist Željko Peratović, was brutally attacked in 2014. The European Journalists' Association noted the case, and sent an open letter to all of the relevant public officials. They supported the Croatian Journalists' Association (HND) in requesting that public authorities classify the case as an attempted murder<sup>30</sup>. In Greece, attacks on journalists are becoming frequent, for instance, the attacks by Golden Dawn members: in April, 2017. ESIEA, the journalists' association based in Athens, reported on a group of about ten masked individuals who burst into the office of *Kathimerini* in Thessaloniki, throwing paint and flyers. In Italy, there were many cases of journalists being beaten and threatened, mostly by organised crime. In 2017, in order to guarantee their safety, the Italian government granted an armed escort to 20 journalists. In Romania, according to MPM2017 data collection, there have been many cases of journalists being threatened by politicians. Cases of impunity for crimes against journalists (the murder of Dada Vujasinovic in Serbia, and of Hrant Dink in Turkey) have been reported.

Turkey also scores as a high risk in the sub-indicator on the Protection of journalists as a consequence of the imprisonment of many journalists. After the attempted coup of July, 2016, the risk gravely increased in the country. In the aftermath of the coup-attempt, the government has used excessive powers, gained under the state of emergency, to purge media outlets and to silence dissident journalists. According to the Platform for Independent Journalism, P24, at least 153 media workers are in jail, about 200 media outlets (including community and minority media outlets) were closed as at March 15, 2018 (Inceoglu et al 2018).

As regards digital safety of journalists, the indicator on the Journalistic profession, standards and protection in the MPM collects information on the existence of threats to the digital safety of journalists, including through the illegitimate surveillance of their searches and online activities, their email or social media profiles, hacking and other attacks by state or non-state actors. Threats of violence, typically made online, have become increasingly common in recent years. As public figures, journalists are often targeted. The data show that online threats are faced by journalists in 17 countries. Journalists are often subjected to hate speech, and are also implicitly or explicitly threatened with violence. The analysis of the cases shows that, sometimes, individual journalists are singled out online, and in some cases they are repeatedly attacked over an extended period, both on the social media and/or by private email or messages.

28 Her bank accounts were being frozen with precautionary warrants for €47,460 after a court upheld (8 February, 2017) a request from the Maltese Economy Minister, Chris Cardona, and his consultant, Joe Gerada, to issue garnishee orders alongside the four libel suits they had filed against her (CoE, 10 Feb. 2017).

29 [https://www.repubblica.it/politica/2018/06/21/news/da\\_salvini\\_avvertimento\\_a\\_saviano\\_valutiamo\\_se\\_gli\\_serve\\_la\\_scor-ta\\_-199583859/](https://www.repubblica.it/politica/2018/06/21/news/da_salvini_avvertimento_a_saviano_valutiamo_se_gli_serve_la_scor-ta_-199583859/)

30 MPM2017 data collection



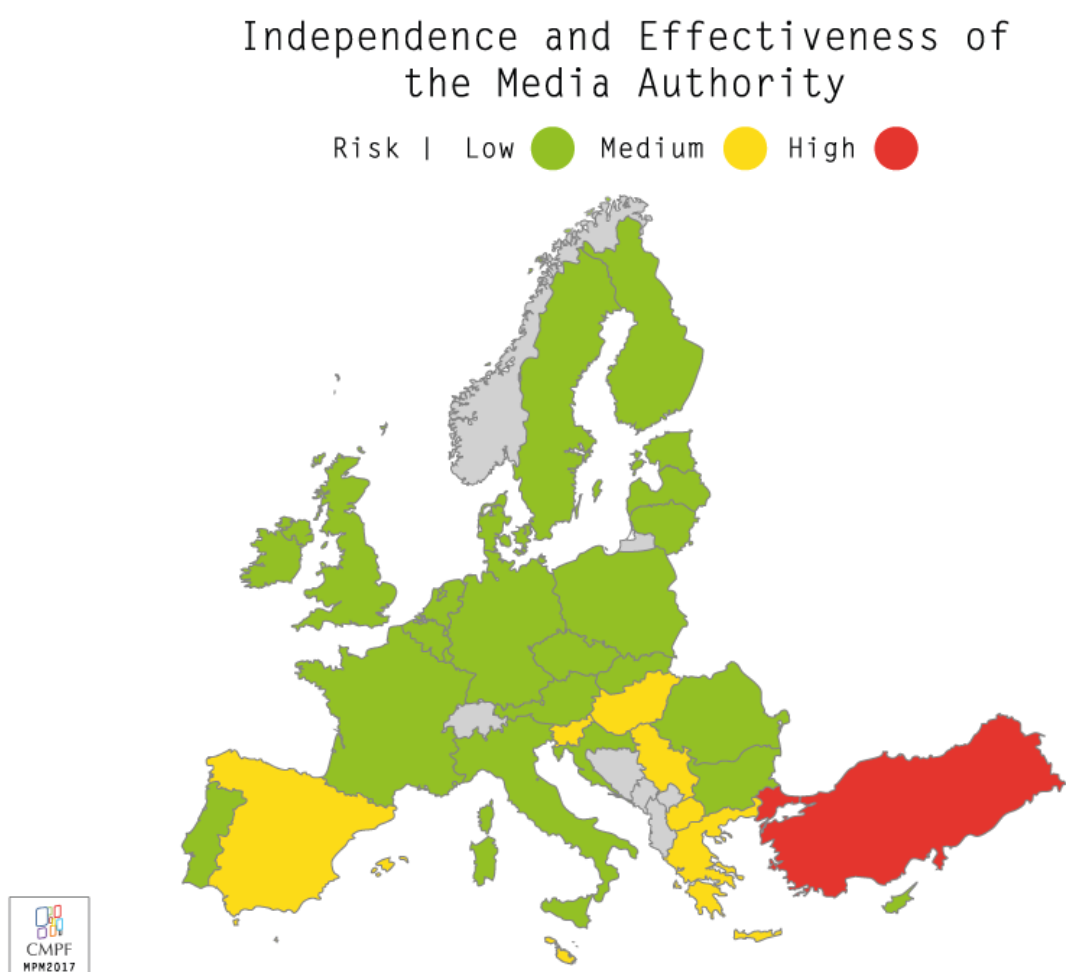
In France, the law allows a wide range of public officials (including the police, the gendarmerie, intelligence and anti-terrorist agencies, as well as several government ministries) to directly monitor computer, tablet and smartphone use in real time, and without prior authorisation, for the purpose of gathering metadata (Willsher, 2013). This legislation contains no exemptions that might apply to journalistic communications<sup>31</sup>.

A final note on the protection of sources: the Netherlands seems to be the only country where protection of sources is not established in any law, or in case-law, and this represents a risk in this country. The Dutch government has been repeatedly criticised by the European Court of Human Rights for not having legislation in place that legally guarantees the protection of journalistic sources. In Greece, there is no general recognition of this professional secrecy for journalists, but a 2003 Presidential Decree states that journalists have the right not to disclose their sources of information, information which they have secured in confidence. This is a limited legal recognition of the protection of sources, as it only applies to radio and television news and current affairs programmes. Moreover, there is no legal elaboration of any permissible restrictions to it. According to MPM2017 data, only a few countries report poor implementation of the rules on the protection of sources (FYRoM, Hungary, UK).

## INDEPENDENCE AND EFFECTIVENESS OF THE MEDIA AUTHORITY

The indicator on the independence and effectiveness of the media authority is designed to capture a number of the different characteristics of the media authorities in the countries analysed: whether the appointment procedures guarantee their independence and whether the authorities are independent in practice; whether the allocation of budgetary resources protects authorities from coercive budgetary pressures and ensures the possibility to perform their functions freely; the type of powers and appeal mechanisms which are in place with regard to the authorities' decisions; and the transparency and accountability of their actions. On a methodological note, the MPM considers a media authority to be a public body which upholds the rules that are formulated in media acts and laws and which oversees the media market. For those countries that do not have an authority specifically devoted to media regulation, the MPM asks to consider and assess the authority that is part of the European Regulators' Group for Audiovisual Media Services (ERGA) or of the European Platform of Regulatory Authorities (EPRA). For Estonia, for instance, the Technical Regulation Authority is considered, while, for Spain, the MPM considers the competition authority.

Figure 1.1.9. Indicator on Independence and effectiveness of the media authority - Map of risks per country



Media authorities are increasingly becoming key actors in media regulation in Europe. The recent agreement of the Trilogue<sup>32</sup> on the revision of the Audiovisual Media Services Directive (AVMSD) stresses their importance (within the scope of the AVMSD, the authorities for audiovisual media services) and aims to reinforce their independence from political and commercial interests. In particular, the draft reform includes a requirement for Member States to have independent regulatory authorities for audiovisual media services that should be legally distinct from the executive power, and also functionally independent of their respective governments and of any other public or private body. The independent audiovisual media authorities should not be instructed by any other body in relation to the exercise of their tasks and they should exercise their powers impartially and transparently, in line with the objectives of the AVMSD, including in relation to media pluralism, cultural and linguistic diversity, consumer protection, accessibility, non-discrimination,

32 [http://europa.eu/rapid/press-release\\_MEMO-18-4093\\_en.htm](http://europa.eu/rapid/press-release_MEMO-18-4093_en.htm)

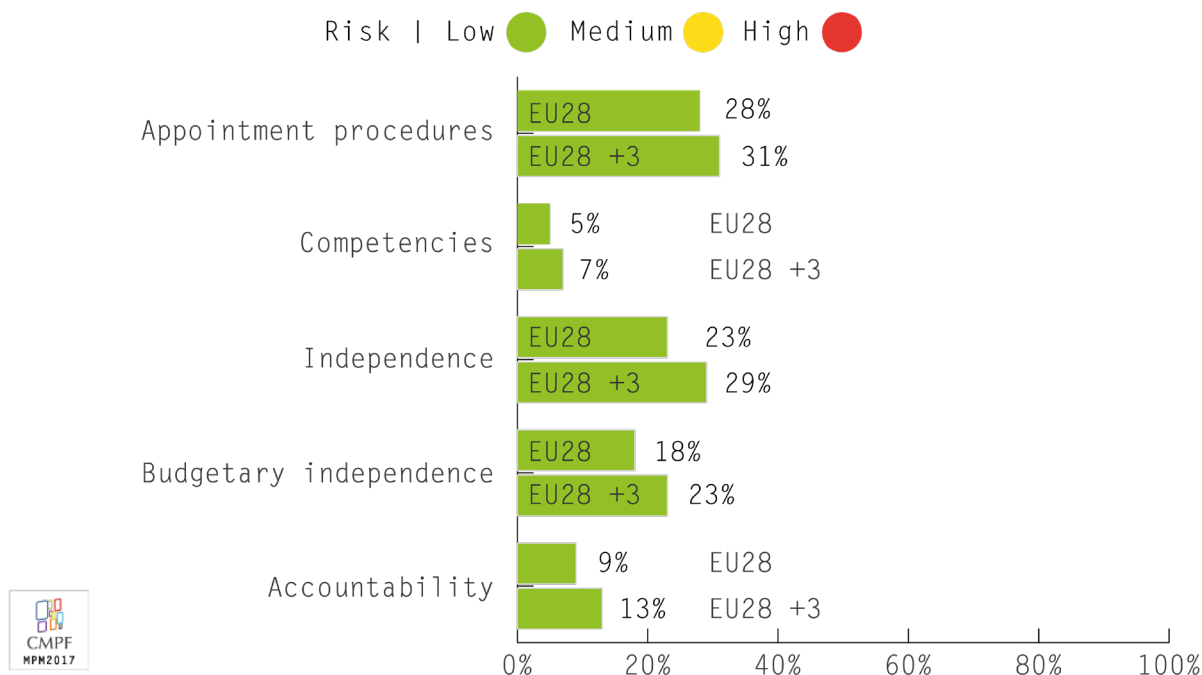
the internal market and the promotion of fair competition. The competencies of audiovisual media authorities should be clearly defined in law and should have adequate resources and enforcement powers in order to carry out their functions effectively. Member States have to set up transparent procedures for the appointment and dismissal of the head of a national regulatory authority or the members of the collegiate body. An appeal mechanism against the decision of a regulator at the national level will also be provided.<sup>33</sup>

The standards that have been highlighted by the draft directive are those that the MPM already uses to assess the independence and effectiveness of the media authorities. It must be acknowledged that the MPM methodology considers a media authority to be a public body which upholds the rules that are formulated in media acts and laws and which oversees the (audiovisual) media market. For those countries that do not have an authority devoted to media regulation, the MPM asks to consider and assess the authority that is part of the European Regulators Group for Audiovisual Media Services (ERGA), or of the European Platform for Regulatory Authorities (EPRA). In Estonia, for instance, the Technical Regulation Authority is considered, while for Spain it is the competition authority that is considered.

In MPM2017, the average score for the indicator on Independence and effectiveness of the media authority is 21%, meaning that it is a low risk. There are no major changes in the assessment of this indicator if compared to MPM2016. Just 7 countries reach a medium risk (FYRoM, Greece, Hungary, Malta, Serbia, Slovenia, and Spain). This is due to the fact that, despite most of these countries having laws in place to ensure more transparency and independence for the media authorities, the appointment procedures are not always effective in safeguarding the political and/or commercial independence of the members. The data collection for these countries reports also that, in practice, media authorities are subject to some kind of political interference in their activities. Turkey is the only country that scores a high risk in this indicator, confirming the assessment in MPM2016. In addition to the evaluation of MPM2016, stressing the political capture of the body, it must be added that, in the aftermath of the coup attempt, the government issued decree-laws ordering the closure of TV channels and radio stations, predominantly for alleged links to the Gülen movement, thus bypassing the role of the authority. The closures and suspensions extended to a number of channels that were broadcasting in the Kurdish language, one Alevi channel and some opposition channels<sup>34</sup>.

Figure 1.1.10. Indicator on Independence and effectiveness of the media authority - Averages per sub-indicator

### Independence and Effectiveness of the Media Authority



33 [http://europa.eu/rapid/press-release\\_MEMO-18-4093\\_en.htm](http://europa.eu/rapid/press-release_MEMO-18-4093_en.htm)

34 MPM2017 data collection for Turkey. (see country report)

In general, the main risks seen in the indicator stem from the sub-indicator on appointing procedures and from the indicator assessing the effective independence of the media authority. As in MPM2016, this is due to the weak effectiveness of mechanisms that exclude political or commercial influences and ensure the independence of the authorities through appropriate appointment procedures for the members of the authorities. Political influence on appointments do not automatically mean that the authority will act in line with political input, but it clearly poses a risk of further interference. The sub-indicator on the independence of the media authority scores a low risk, with a percentage (29%) close to the medium risk level, highlighting some cases where the authority has been captured by external pressure. Bulgaria, Croatia, Cyprus, FYRoM, Germany, Italy, Latvia, Malta, Poland, Romania, Slovenia and Spain score as a medium risk for this sub-indicator. Hungary, Serbia and Turkey score as a high risk. In Hungary, as reported by the MPM country team, since its establishment under the new media laws that came into effect in 2010, the Media Council has not shown professional independence from political or commercial influences in a great number of regulatory decisions. In particular, the Council's tendering and licensing decisions have been heavily criticized by both domestic and international rights groups for being lacking in transparency, and on many occasions, for decisions that appear to favour outlets with close ties to the government. In Serbia, the media authority has not been politically independent since its initial establishment, based on the Broadcasting law from 2002: the Council of the Regulatory Body for Electronic Media, REM, operates with only six of nine members and, according to the MPM2017 data collection, lacks independence in monitoring broadcasters so as to ensure that they meet their programming obligations. A number of OSCE/ODIHR EAM interlocutors expressed concerns with regard to REM membership, the underlying reluctance of the ruling coalition to support civil society nominations during election campaigns, leading to a general lack in the regulator's independence.

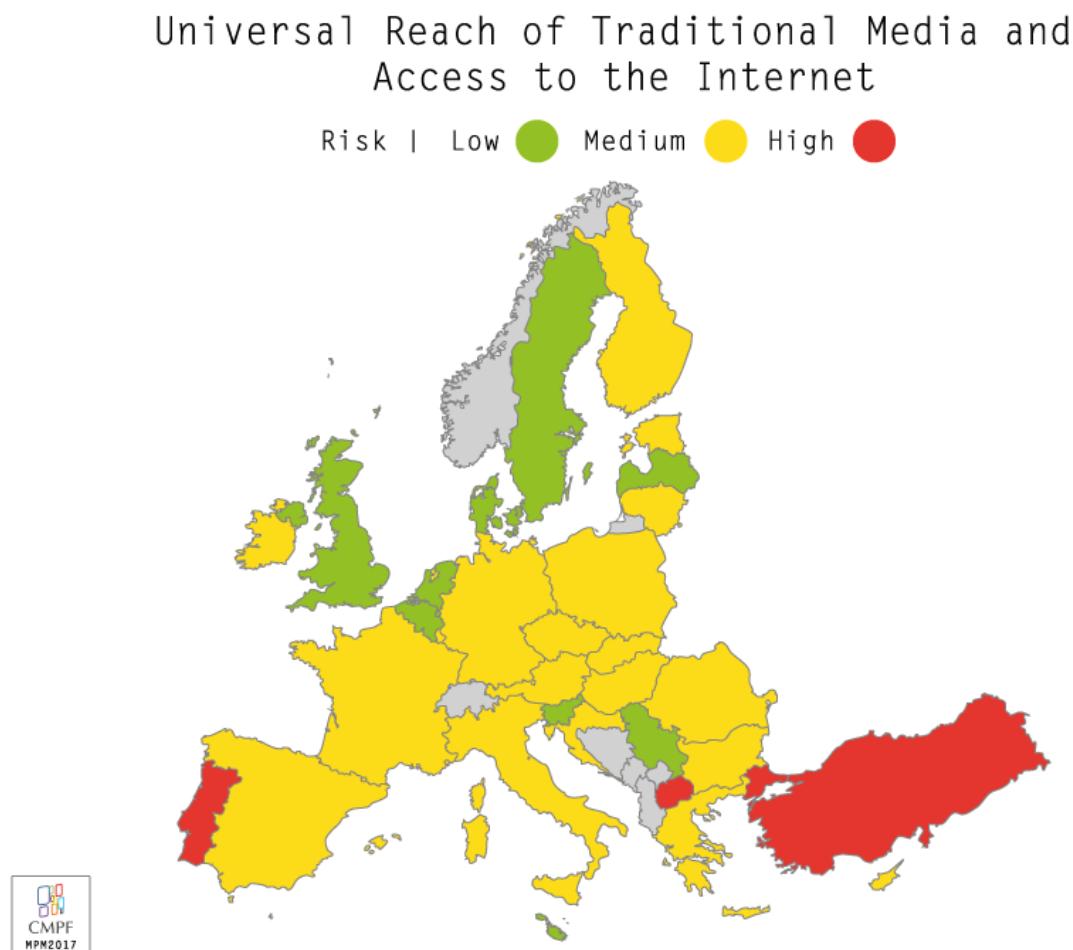
Across the 31 countries under consideration, the assessment of the competencies of the authorities scores an overall (low) 7% risk level. Within this sub-indicator the main problem comes from a few cases in which the government has overruled the decisions of the media authority.

Media authorities have an important role in the governance of the national media sectors and media pluralism. MPM2016 had already highlighted some trends relating not only to the level of independence of the media authorities, but also to their "resilience" vis à vis political power. Media authorities can be exposed, for instance, to political turnover and to the changes stemming from media regulation reforms in a given country. That was the case of Poland as regards MPM2016, where the KRRiT was deprived of competencies by a very controversial legislative reform. In some cases, the government may overrule the decisions of independent authorities. It must be noted that a recent decision of the European Union Court of Justice (2017) in the case C-560/15 *Europa Way srl-AGCOM*, has stated that, according to the EU framework on electronic communications, the procedure for the allocation of frequencies in the so-called beauty contest for the DTTV in Italy should not have been overruled by the government and the parliament. This interference constitutes an infringement of the NRA's independence and the sentence, probably, sets clearer EU standards on media and communication authorities, at least for the convergent ones.

## UNIVERSAL REACH OF TRADITIONAL MEDIA AND ACCESS TO THE INTERNET

The aim of the indicator on the universal reach of traditional media and access to the Internet is to describe the risks to pluralism that arise from an insufficient level of access to platforms of content distribution. It assesses the risk stemming from traditional tv and radio network coverage, broadband coverage and access to the internet. The indicator consists also of variables on net neutrality.

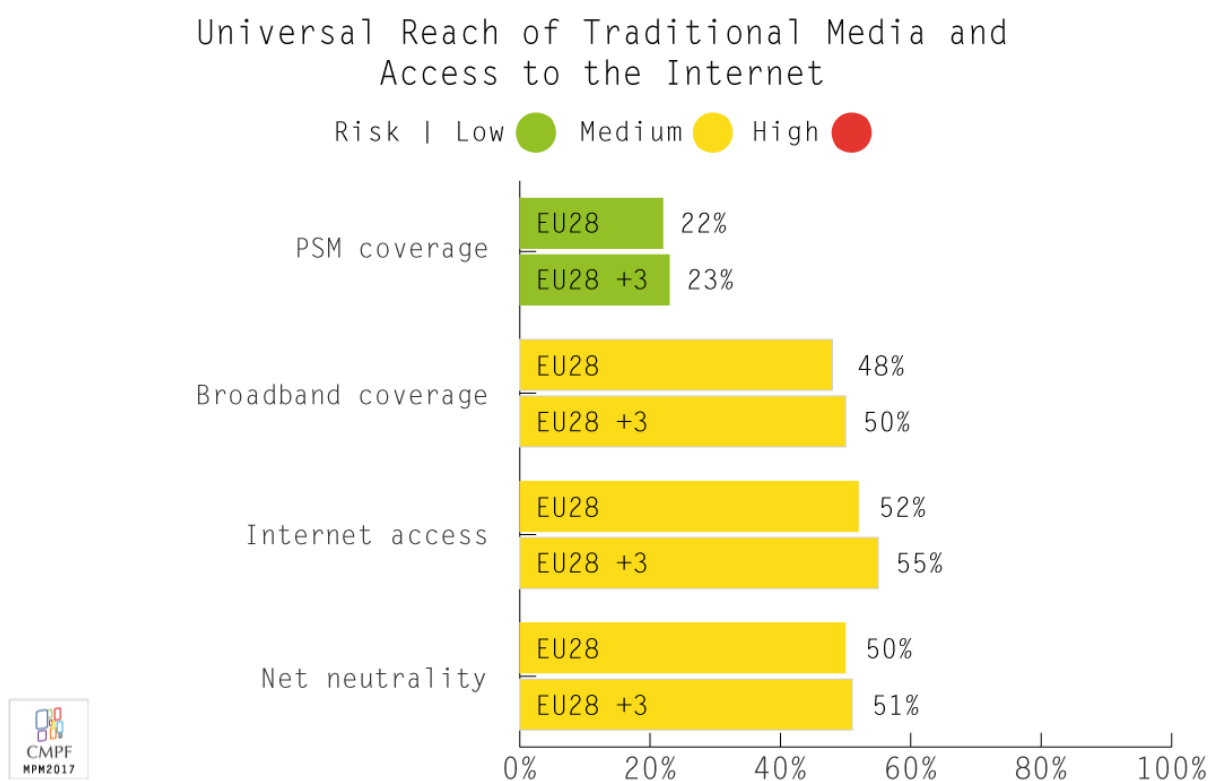
Figure 1.1.11. Indicator on Universal reach of traditional media and access to the Internet - Map of risks per country



The majority of the countries analysed by MPM2017 scored a medium risk for the indicator Universal reach of traditional media and access to the Internet (19 of 31), with 9 countries attaining a low risk (Belgium, Denmark, Latvia, Malta, the Netherlands, Serbia, Slovenia, Sweden, the United Kingdom) and only 3 countries (FYRoM, Portugal, Turkey) showing as high risk.

In Europe, most of the population is covered, and served, by the networks and programmes of PSM. Considering the high threshold for assessing the risk levels (Low: 99% or more; Medium: >98% and <99%; High: <98%), the coverage of PSM in Europe is quite satisfactory: 8 countries score a medium risk (22 countries score a low risk). Luxembourg scores as a high risk, due to the lack of a regulation asking for the full coverage of the local public radio and the effective allegedly low coverage (90%) of the (small) territory of the country.

Figure 1.1.12. Indicator on Universal reach of traditional media and access to the Internet - Averages per sub-indicator



As for Internet Access, 7 countries scored as a medium risk, 14 as a high one, with just 9 countries attaining a low risk level (Serbia is not assessed due to a lack of data). MPM2017, again, has a very high threshold for assessing this risk, which is calculated by taking into account the existing levels of access to the internet in EU countries<sup>35</sup>.

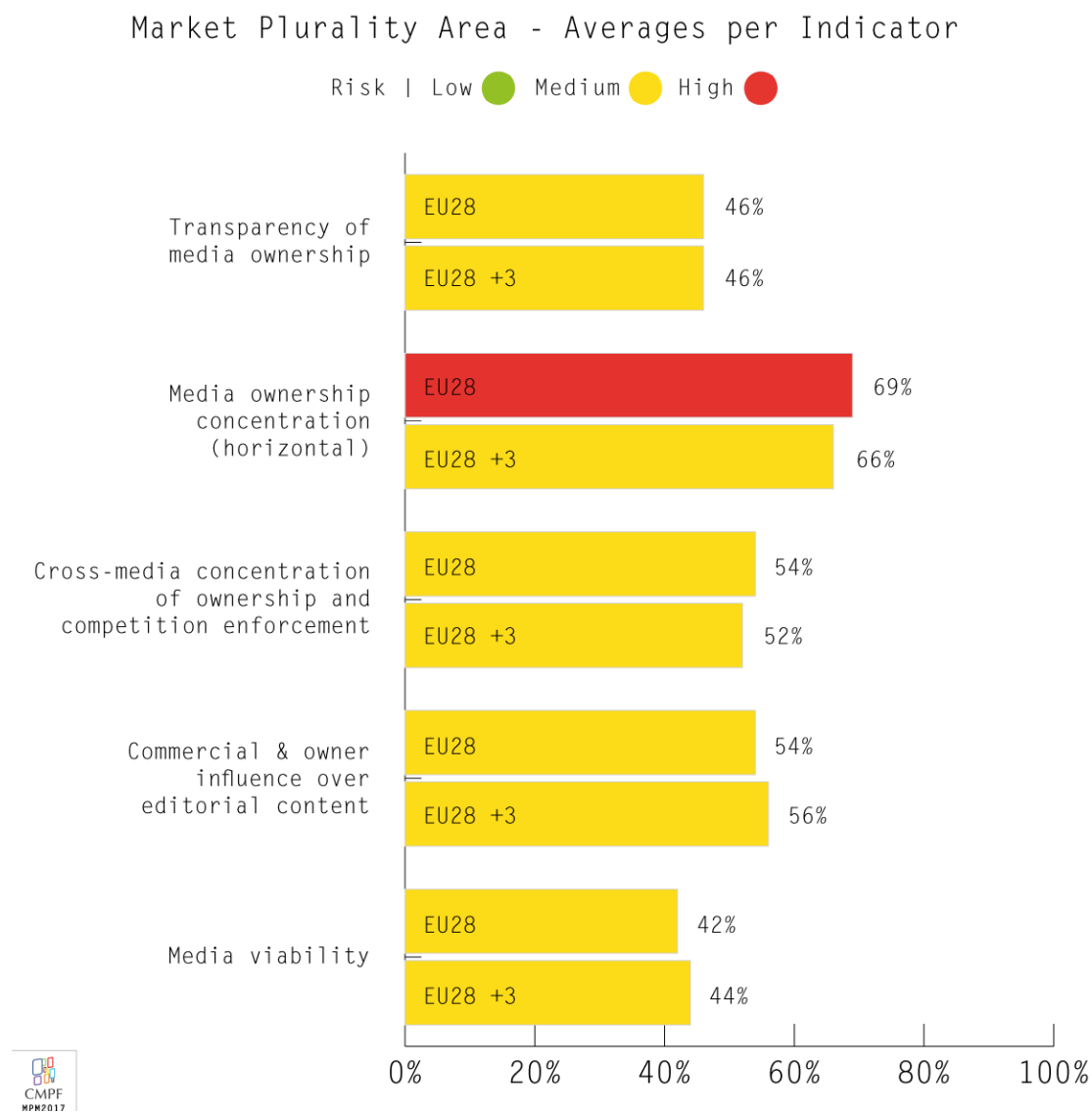
This indicator also showed high concentration of the market shares in the hands of the TOP 4 Internet Service providers (ISPs) in the large majority of the countries analysed. In 6 countries, no data were found. Harmonised rules on net neutrality have applied throughout the EU as of 30 April, 2016, following the adoption of Regulation (EU) 2015/2120 on 25 November, 2015 (which is directly binding). So the principle of net neutrality has been introduced directly in all 28 EU member states. Ireland and Portugal, nonetheless, score as a high risk for this sub-indicator, with Turkey, as they still report a partial non-compliance with the effective situation in relation to both EU Regulation and Berec guidelines.

<sup>35</sup> MPM2017 uses speed data from the content distribution management company Akamai, which has servers around the world and is reported to handle a large percentage of global Internet traffic. Of the European countries considered by the MPM, no country currently has speed under 7.1 Mbps or over 22.8 Mbps.



The results for the Market Plurality area show only two countries with a low risk level (France and Germany), 23 countries with a medium risk level (Austria, Belgium, Croatia, Cyprus, Denmark, FYRoM, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, the Netherlands, Portugal, Serbia, Slovakia, Slovenia, Spain, Sweden, Turkey and the United Kingdom) and 6 countries (Bulgaria, the Czech Republic, Estonia, Finland, Poland and Romania) that score a high risk. In total, there is an average risk of 53% for the area, resulting in an increase of 4% in comparison to MPM2016, and this is partially related to the changes introduced in the indicator on the Transparency of media ownership, which now give a heavier weight to the direct disclosure to the public of ownership information (see below), as opposed to a similar weight given to ownership information disclosure, both to the public and to public authorities. As happened in MPM2016, France scored the lowest risk level in this area.

Figure 1.2.2. Market Plurality area - Averages per indicator



None of the indicators in the Market Plurality area scores as a low risk on average across the 31 countries. All score as being at medium risk. The risk level for the indicator on media ownership concentration is estimated at 66%, on average, very close to the threshold of high risk. The only countries that score as a low risk for this area are Germany and France, i.e., two big countries with a high GDP, a large population and territory. Moreover, this is the only area in which some indicators score a higher risk for the EU28 in comparison to the EU28 + 3, as in the case of the indicators on cross-media concentration of ownership and competition enforcement (EU28 score 54% and EU28 + 3 score 52%) and on media ownership concentration (EU28 69% and EU28 + 3 66%).

In comparison to MPM2016 data, two indicators (of five) demonstrated a considerable increase in their risk level (transparency of media ownership and media viability), a result that is partially due to methodological refinements that have been made in the MPM 2017 variable for these indicators.

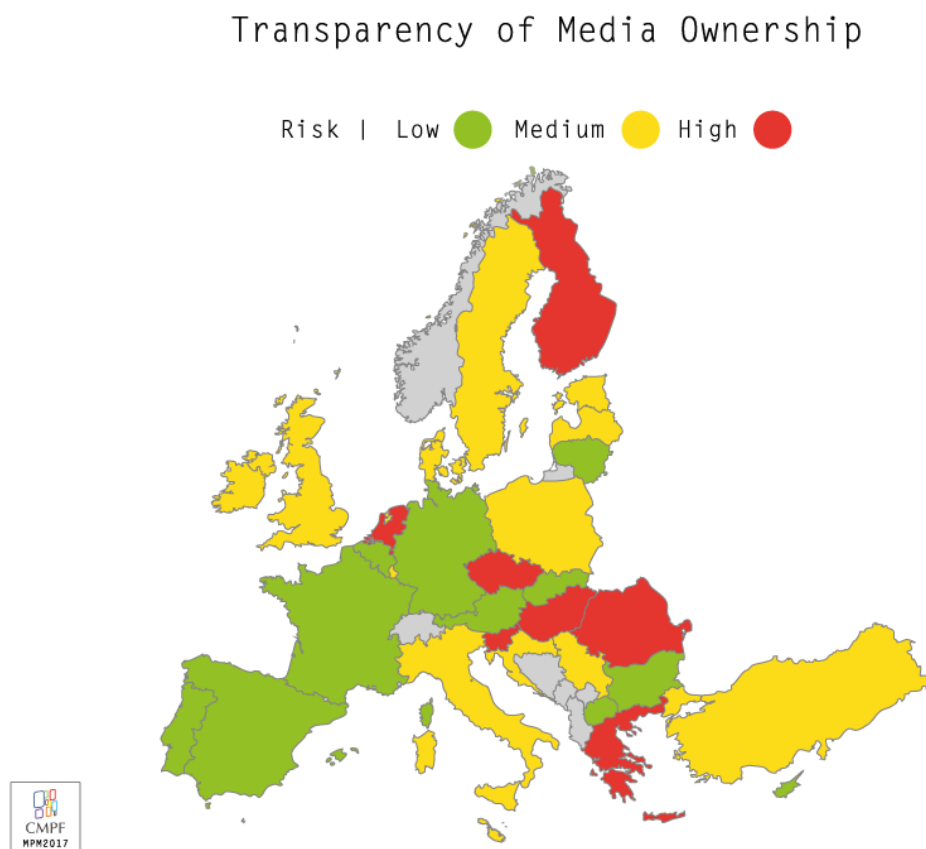


## TRANSPARENCY OF MEDIA OWNERSHIP

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

Differently to MPM2016, MPM2017 focuses on the disclosure of ownership information directly to the public, giving less weight to the information that is disclosed only to public authorities. With this change, this indicator has demonstrated a considerable increase in the average risk level, moving from 34% in 2016 to 46% in 2017, although this is still within the medium risk range.

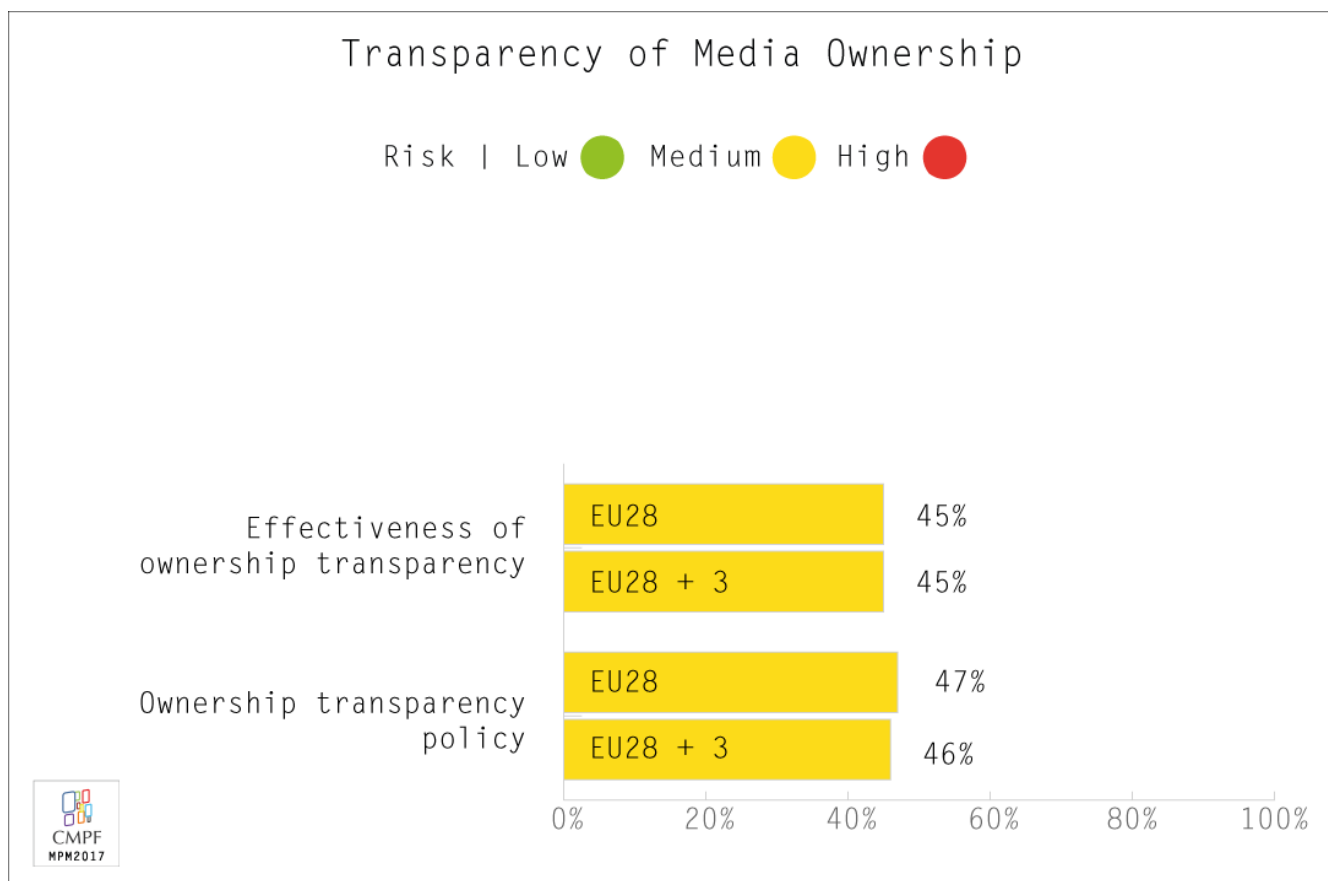
*Figure 1.2.3. Indicator on Transparency of media ownership - Map of risks per country*



In MPM2017, only 11 countries scored a low risk level for the indicator on the transparency of ownership (Austria, Belgium, Bulgaria, Cyprus, France, FYRoM, Germany, Lithuania, Portugal, Slovakia and Spain), 7 less than the 18 countries that scored as low risk in 2016. In fact, of these 11 countries 3 score in the very highest range of the low risk band (33% - Bulgaria, FYRoM and Lithuania).

Moreover, 7 countries scored a high risk for this indicator (Slovenia, Hungary, Romania, the Netherlands, Greece, Finland and the Czech Republic), with just 1 of these countries having media-specific provisions in their national laws that require the disclosure of ownership details directly to the public (Hungary), but still with no legal requirements to disclose to the public information about the ultimate owners of media outlets. High risk can also be due to poor information being offered to the public (Slovenia), or to incomplete information being provided by the media authority (the Netherlands). On top of this, the real owners of the media often remain undisclosed due to various legal loopholes (Romania). In Greece, the absence of agreements with foreign authorities, the media authority's limited ability to cross-check ownership information with the information held by other domestic bodies, and the restraint on its capacity to scrutinise the information available due to insufficient resources, undermine the transparency of media ownership (Psychogiopoulou and Kandyla, 2018), and in Bulgaria the identification of ultimate owners is still an issue of concern, despite the existence of three media ownership registers and a general Commercial register, as in some cases it is impossible to identify the ultimate owners, because the identification process leads to offshore companies.

Figure 1.2.4. Indicator on Transparency of media ownership - Averages per sub-indicator



The average score for this indicator is better for EU28 + 3 than just for EU28, with one sub-indicator scoring the same percentage for the 2 groups of countries (the effectiveness of ownership transparency - 45%) and one sub-indicator scoring better for EU 28 + 3 than only for the EU28 (46% and 47% respectively).

Nevertheless, the two sub-indicators of the Transparency of media ownership indicator are in the same risk range (medium), with almost the same percentage of risk, although the indicator on ownership transparency policy showed an increase in comparison to 2016 (34%), mostly due to changes introduced to this indicator for the MPM2017. This result should not be a surprise, as the risks examined are strictly connected: the sub-indicator on the effectiveness of ownership transparency asks for the availability, in practice, of publicly accessible information that allows identification of the beneficial and ultimate owners of media outlets, while the other sub-indicator is concerned with the legal framework so as to insure that such information is made available, both to the public and to public authorities.

## HORIZONTAL CONCENTRATION OF MEDIA OWNERSHIP

*The second indicator of the Market Plurality area is the one on the Concentration of media ownership. This indicator is composed of several sub-indicators that aim to assess the threats to media pluralism that arise from the structure of the media market. This indicator presents a traditional measure of market concentration that aims at the relationship between external pluralism and the concrete plurality and market dimension of different media outlets in each market segment. The risk level of this indicator is evaluated by taking into account the existence and effectiveness of the implementation of regulatory safeguards against a high horizontal concentration of ownership in different media markets. It does this by measuring the effective concentration of the market using a Top4 index.<sup>36</sup> Furthermore, the assessment is carried out by considering the existence and effectiveness of ad hoc regulatory safeguards against a high horizontal concentration of ownership and/or control in a specific media sector, and the existence of competition rules that take into account the specificities of the media sector when analysing mergers in a particular market. The assessment of the legal framework is linked, then, to the effective measuring of the concentration of the given market, and this allows a better evaluation of the risk, considering both the legal standards and the effective conditions of the media market. The analysis is carried out by separately considering the main different media markets (audiovisual, radio, newspapers, and online content providers<sup>37</sup>).*

As regards audiovisual media, the Monitor adopts the definition that is laid down in the Audiovisual Media Services Directive 2010/13/EU.<sup>38</sup> The variables under consideration cover both linear and non-linear audiovisual media services. This approach is intended to reflect the technological developments that have been dramatically altering traditional broadcasting markets (and the regulatory environment).

This indicator has suffered no change in the last year, with no significant changes in the results if compared to MPM2016. As can be seen from the map below, no country scores as low risk, which is the same result that was achieved in MPM2016, confirming an important level of horizontal market concentration in all of the countries examined by the MPM. The 2017 result is that 14 countries score as a medium risk (Croatia, Cyprus, France, FYRoM, Germany, Greece, Italy, Malta, Serbia, Slovakia, Slovenia, Spain, Turkey and the United Kingdom) and 17 as high risk (Austria, Belgium, Bulgaria, the Czech Republic, Denmark, Estonia, Finland, Hungary, Ireland, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, Portugal, Romania and Sweden).

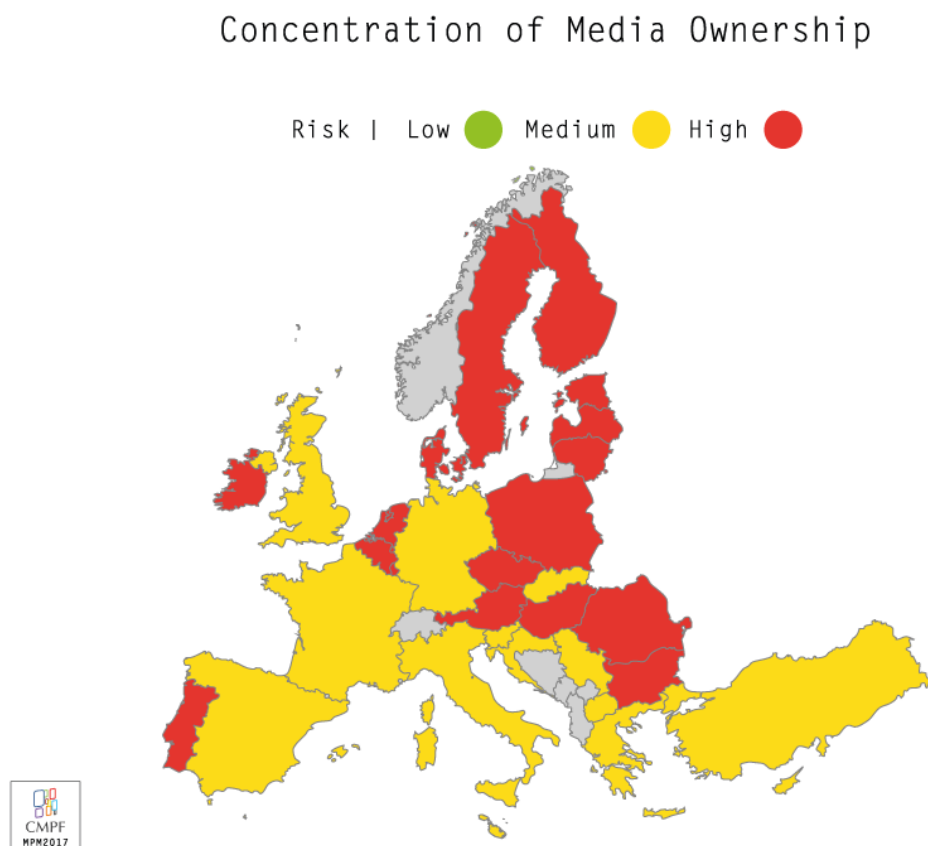
---

36 Concentration is measured by using the Top4 (or C4 or four-firm) concentration ratio. The four-firm concentration ratio is an indicator of the size of the four largest firms within an industry, compared to the output of the entire industry.

37 The indicator on media ownership concentration (horizontal), however, does not yet consider online content providers.

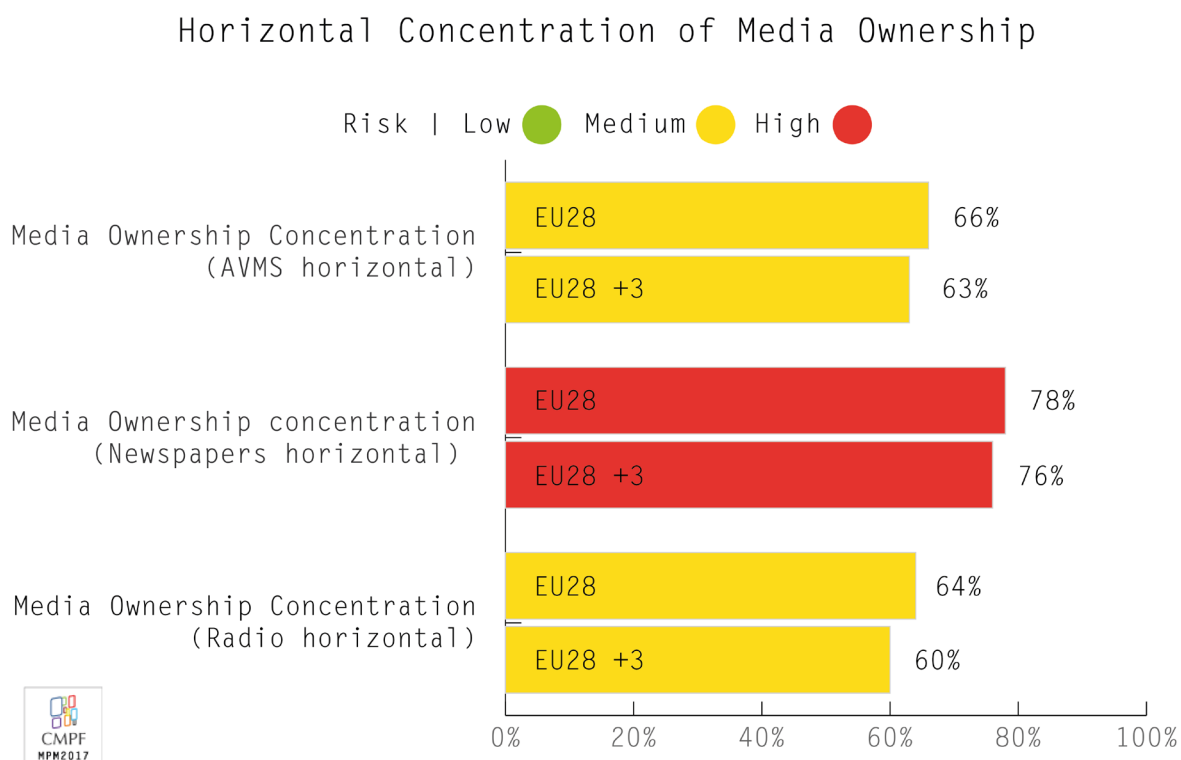
38 Available at <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32010L0013&from=EN>

Figure 1.2.5. Indicator on Media ownership concentration (horizontal) - Map of risks per country



The histogram (Figure 1.2.6.) shows that 2 sub-indicators scored a medium average risk (AVMS and Radio), with 1 scoring a high risk (the Newspaper sector), which is probably related to the specific financial difficulties that printed media outlets are facing – and which is also reflected in the indicator on media viability -, with the newspaper sector being the one with the biggest problems in terms of revenues in recent years.

Figure 1.2.6. Indicator on Media ownership concentration (horizontal) - Averages per sub-indicator



The result of this indicator in MPM2017 confirms that market concentration is a source of medium or high risk for media pluralism in all of the EU countries, without exception. The economic difficulties of several of the traditional media, illustrated by other indicators, suggests that horizontal media concentration is unlikely to recede in the future, as many types of media will continue to merge in order to survive, and this will remain one of the most common elements of risk for the MPM project to monitor and investigate in EU countries in the future.

As regards the audiovisual sector, the only country scoring as a low risk is Turkey, while most of the countries score a medium risk (22, comprising Austria, Belgium, Croatia, Cyprus, the Czech Republic, Denmark, France, FYRoM, Germany, Greece, Hungary, Italy, Latvia, Malta, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain and the United Kingdom), and the remaining 8 countries scored in the high risk zone (Bulgaria, Estonia, Finland, Ireland, Lithuania, Luxembourg, the Netherlands, Sweden).

Similarly, in the radio sector, only 3 countries scored as a low risk (Croatia, FYRoM and Turkey), while 19 countries scored as a medium risk (Austria, Belgium, Cyprus, Czech Republic, France, Greece, Hungary, Italy, Latvia, Malta, the Netherlands, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain and the United Kingdom) and the remaining 9 countries scored as a high risk (Bulgaria, Denmark, Estonia, Finland, Germany, Ireland, Lithuania, Luxembourg, Sweden).

Finally, as far as the newspaper sector is concerned, only Greece scores as a low risk for this sub-indicator (mostly due to a regulatory anti-concentration framework being in place, and to a low Top4 ratio for newspaper readership) with Germany (again with a relatively low Top4 ratio for readership at 38%), Serbia, Croatia, Italy, the United Kingdom, Slovenia, FYRoM, Spain scoring as a medium risk and all remaining countries scoring as a high risk. In this indicator, all of the sub-indicators score better for EU28+3 than for EU28 only.

## CROSS-MEDIA CONCENTRATION OF OWNERSHIP AND COMPETITION ENFORCEMENT

*This indicator consists of two sub-indicators. The first seeks to assess the risks to media pluralism that arise from cross-media concentration of ownership. Cross-media concentration reflects the level of control that may be exercised by one, or a few, media owners in a number of sectors within the industry (e.g., the position held by a media conglomerate in the audiovisual and newspaper publishing markets). The second sub-indicators seek to assess whether, and, if so, how, competition enforcement, that is, antitrust and merger control and safeguards to ensure the proportionality of Public Service Media (PSM) funding, contribute to the enhancement of media pluralism.*

The trend to media concentration, in relation to the financial crisis of traditional media, is an element of additional risk for media pluralism in the EU. Mergers among media companies are not only a horizontal phenomenon, but interest all of the media markets, creating a trend toward conglomerate formations of media, in an attempt to exploit economies of scale and of scope. The specific attention, or the lack thereof, of competition authorities, who are called to evaluate conglomerate mergers, to the pluralistic dimensions is part of the MPM's investigation:

As in MPM2016, in MPM2017 this indicator scores as a medium risk (52%, a percentage that is comparable to the 54% of 2016), with only 8 countries (Germany, the United Kingdom, France, Greece, Slovakia, Cyprus, Italy and Serbia) scoring as a low risk, 15 countries show as a medium risk (Hungary, Turkey, Croatia, Ireland, the Netherlands, Portugal, Austria, FYRoM, Latvia, Lithuania, Sweden, Slovenia, Belgium, the Czech Republic and Finland) and 8 countries as a high risk (Romania, Malta, Spain, Denmark, Bulgaria, Estonia, Poland and Luxembourg).

*Figure 1.2.7. Indicator on Cross-media concentration of ownership and competition enforcement - Map of risks per country*

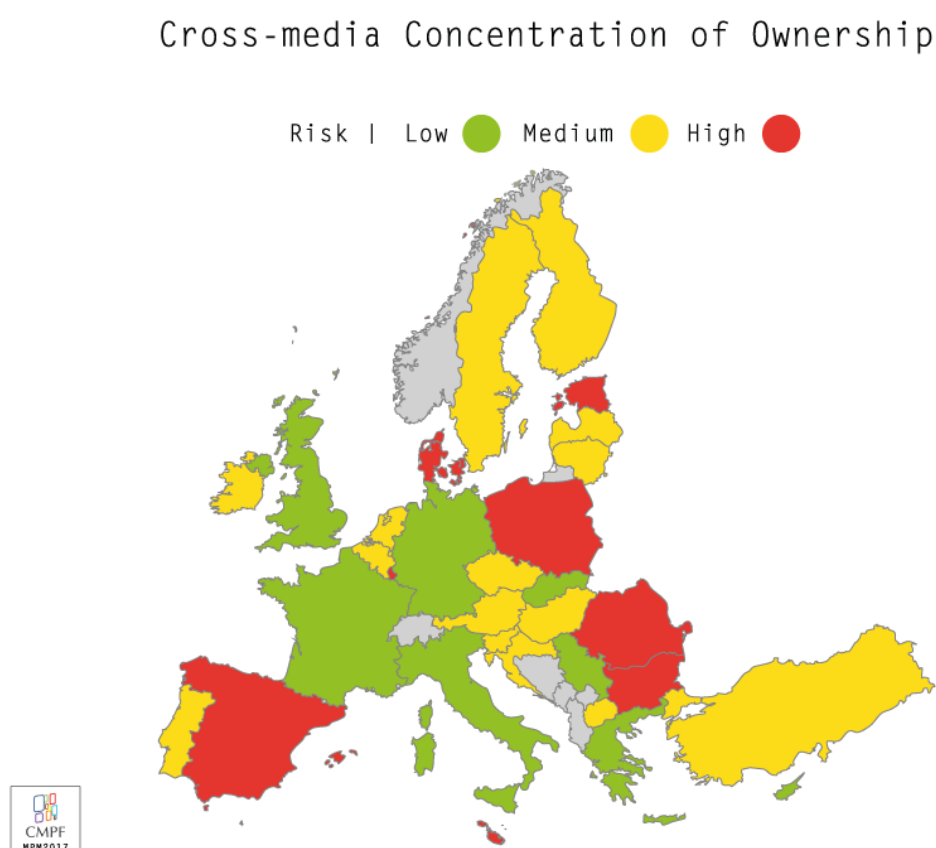
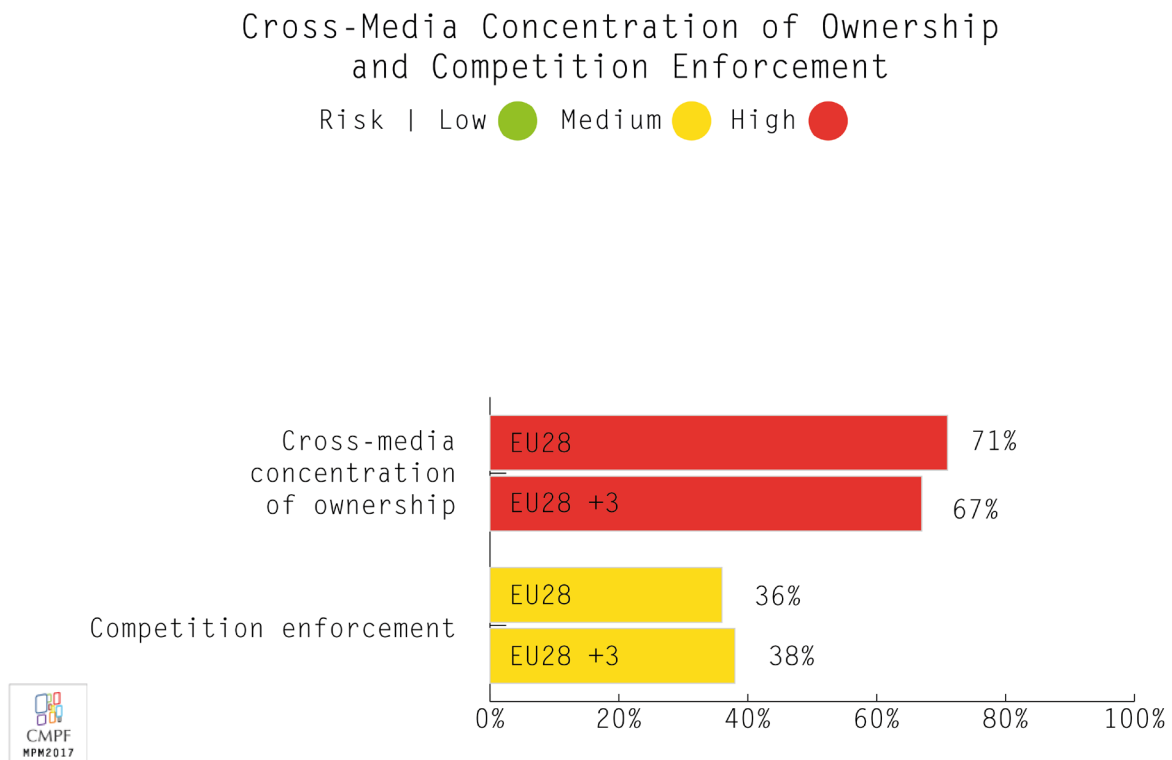


Figure 1.2.8. Indicator on Cross-media concentration of ownership and competition enforcement - Averages per sub-indicator



The sub-indicator that scores the higher risk within this indicator is that on the cross-media concentration of ownership - with EU28 scoring a higher risk than EU28 + 3 (71% and 67%, respectively), partly due to the absence of data, as is the case with FYRoM and Malta, or to the lack of specific thresholds or other limitations in media legislation that prevent a high degree of cross-media concentration of ownership, as is the case with Denmark. Most countries have no specific provisions in the media legislation that can prevent a high degree of cross-media concentration of ownership (16 countries). This is the case with Belgium, Bulgaria, the Czech Republic, Denmark, Estonia, Finland, Ireland, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, Portugal, Romania, Spain and Sweden. Greece, Malta, Serbia, Slovakia, the United Kingdom, Germany, France, Hungary, Slovenia, Austria, Turkey, Italy, Croatia have a medium risk, while Bulgaria, Poland, Denmark, Ireland, Luxembourg, the Netherlands, Portugal, Romania, Latvia, Lithuania, Sweden, the Czech Republic, Belgium, Estonia, Finland and Spain score a high risk.

The medium risk for the sub-indicator on Competition enforcement results from the fact that most of the competition laws in the assessed States do not take into account the specificities of the media sector (Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Estonia, Finland, FYRoM, Latvia, Lithuania, Luxembourg, Malta, Poland, Romania, Slovenia and Sweden). In fact, among the countries that have no specific provisions in the media law to prevent the cross-media concentration of ownership, and only 4 have competition laws that take into account the specificities of the media sector (Ireland, the Netherlands, Portugal and Spain). This regulatory reality may be particularly damaging to media pluralism because competition enforcement alone is usually insufficient to remedy concerns arising from acquisition by a media firm of significant opinion-forming power. Moreover, most of the assessed countries have mechanisms and safeguards to ensure the proportionality of PSM funding, so that State funds granted to PSM do not exceed what is necessary in order to provide the public service, with no disproportionate effects on competition. Although this information relates to a different variable, it shows that at least as far as competition between private media outlets and public service media is concerned, there are rules that prevent the State from adversely impacting on competition through the granting of disproportionate funds to the public service media.

## COMMERCIAL AND OWNER INFLUENCE OVER EDITORIAL CONTENT

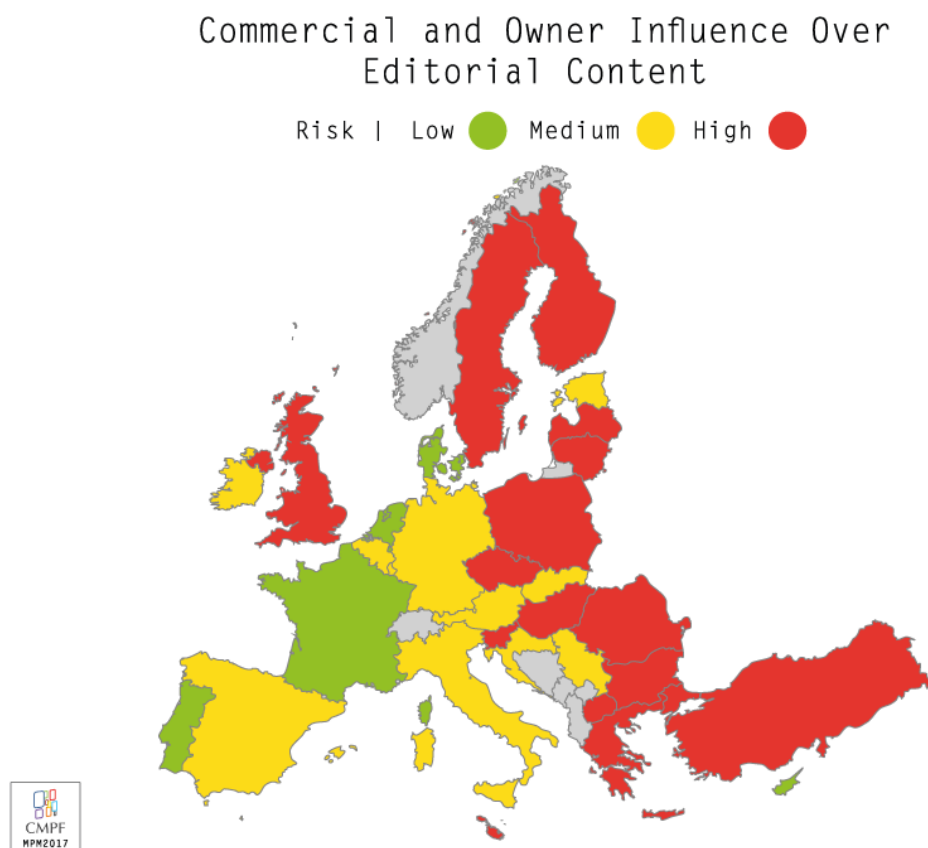
*This indicator seeks to assess the risks to media pluralism that arise from the qualitative dimension of ownership concentration, that is, commercial influence over editorial content. To this end, variables evaluate a given media landscape in the light of a number of practices that may undermine editorial freedom. More particularly, the indicator includes variables that assess, inter alia, the mechanisms granting social protection to journalists in cases where ownership and/or the editorial line change, laws prohibiting advertorials, regulations stipulating the obligation of journalists and/or media outlets to not be influenced by commercial interests and, more generally, whether the media in the landscape concerned are governed by practices through which commercial interests dictate editorial decisions.*

On average, the risk level for this indicator is at the medium risk level (55%)

In 2017, the structure of this indicator has remained unchanged, with the same variables as in MPM2016. The risk level also stayed stable, with almost the same percentage as that shown in MPM2016 (55%), which is within the medium risk level.

Only 5 countries scored as low risk (the Netherlands, France, Portugal, Cyprus, Denmark), 12 countries scored as a medium risk (Austria, Germany, Luxembourg, Estonia, Slovakia, Spain, Italy, Belgium, Croatia, Greece, Ireland and Serbia), with 5 of them in the highest range of the medium risk band (Belgium, Croatia, Greece, Ireland and Serbia), and 14 countries scored as a high risk (Finland, Hungary, Sweden, the United Kingdom, the Czech Republic, FYRoM, Turkey, Latvia, Lithuania, Slovenia, Malta, Poland, Romania and Bulgaria).

*Figure 1.2.9. Indicator on Commercial and owner influence over editorial content - Map of risks per country*



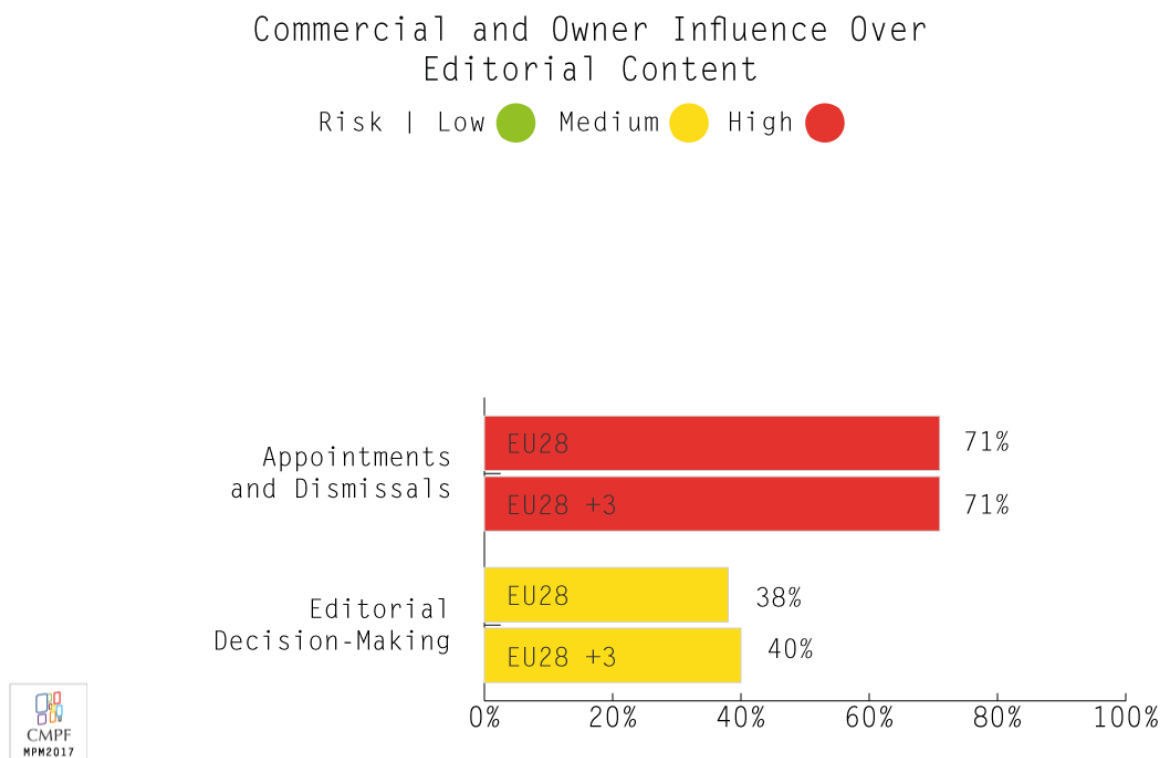
The sub-indicator that scores the highest risk within this indicator is the one on the Appointments and Dismissals (of journalists in general, and of editors-in-chief in particular): this is mostly related to the lack (or poor implementation) of legal mechanisms granting social protection to journalists in case of changes of ownership or editorial line, as well as to the absence of regulatory safeguards, including self-regulatory instruments, which seek to ensure that decisions regarding the appointments and dismissals of editors-in-chief are not influenced by the commercial interests of the media owners. With the problems that revenues have faced in recent years in the printed press sector, it is becoming common place



to use more advertising techniques in order to try to make the media outlets more sustainable. Even in bigger countries with a tradition of the printed press, as in the UK, the use of native advertisements is becoming commonplace, even in traditional newspapers, as highlighted by UK country team for the MPM 2017.<sup>39</sup> In other countries, such as Bulgaria, the commercial influence is combined with external political pressure, as highlighted in the IREX Report 2017.<sup>40</sup>

As for the sub-indicator on Editorial Decision-Making, the risk resides more in the practical implementation of measures to ensure that editorial content is independent from commercial influence, as in most countries there are laws or self-regulatory regimes in place. This is the case, for instance, in Hungary and Bulgaria, the countries that scored the highest risk for this sub-indicator (83%). In Hungary, although there are self-regulatory regimes ensuring editorial integrity and independence, as well as provisions in media law specifying the independence of the media, in practice (as reported by the respective MPM country team), the editorial content of news media is heavily influenced by commercial and economic factors. The same happens in Bulgaria, which, despite having legal provisions that aim to protect editorial independence from political and economic pressures, media owners and other commercial entities systematically influence editorial content and often commercial and political influence are interrelated, as highlighted in the IREX report *Media Sustainability Index for: Bulgaria* (2017), which acknowledges that there is “visible political pressure on the leading national media”.<sup>41</sup>

Figure 1.2.10. Indicator on Commercial and owner influence over editorial content - Averages per sub-indicator



Clearly, the interaction of high concentration (horizontal or cross-media) with a strong commercial and owners’ influence over editorial content can represent a severe source of risk to media pluralism. The score of the last 3 indicators, and, in general, the unitary consideration of the area of Market Plurality, therefore requires a combined reading of the specific results so as to fully assess and recognise the risks to media pluralism that are a direct consequence of the elevated concentration of media markets that the MPM has found in Europe.

39 In their analysis they quote Sharethrough, Native Ads vs Display Ads. Available at: <https://www.sharethrough.com/resources/native-ads-vs-display-ads/>

40 <https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2017-bulgaria.pdf>

41 Available at <https://www.irex.org/sites/default/files/pdf/media-sustainability-index-europe-eurasia-2017-bulgaria.pdf>

## MEDIA VIABILITY

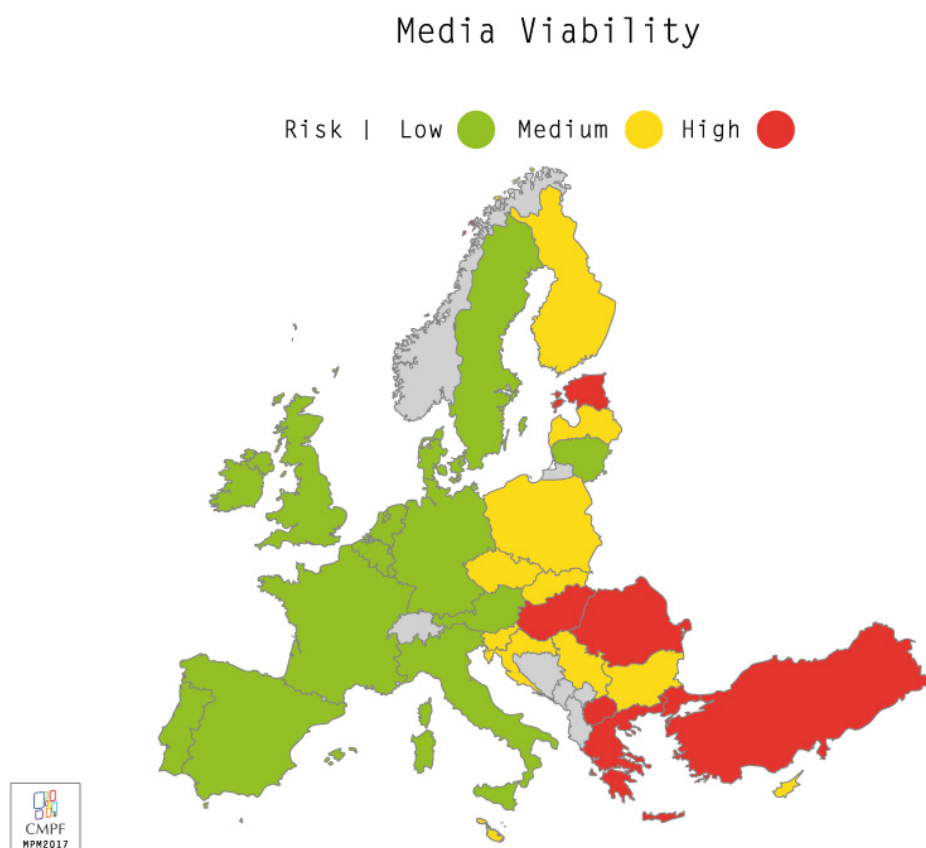
*This indicator mainly assesses market revenue trends in four different sectors, namely, television, radio, newspaper publishing and online advertising. The Monitor attempts to examine the parameters that determine media sustainability, with a focus on market developments.*

The country teams were asked to evaluate the growth of, or decline in, the sector-specific revenues in relation to the GDP trends in the same period.

This has led to a sizeable increase in the percentage of risk compared to 2016, going from 30% (low risk) to 42% (medium risk) in 2017. At present, the indicator still has the lowest average risk for the Market Plurality area, but its rapid growth is a signal of suffering in the traditional media industry. The risk level was also impacted by the fact that MPM2017 methodology has been slightly modified and internet usage is not calculated anymore within this indicator (what was the case in MPM2016).

On average, 14 countries score as low risk for the indicator on media viability (Germany, France, Luxembourg, Lithuania, Spain, the United Kingdom, the Netherlands, Portugal, Italy, Sweden, Denmark, Austria, Ireland and Belgium), 11 as medium risk (Finland, Croatia, Malta, Bulgaria, Latvia, Slovenia, Serbia, Slovakia, Cyprus, the Czech Republic and Poland) and 6 as high risk (FYRoM, Estonia, Turkey, Hungary, Romania and Greece), with Greece at the highest end of high risk with 90%, basically due to the methodological assessment of the absence of data regarding revenues in the different sectors, the lack of initiatives aiming to develop alternative sources of revenue for the media sector and the lack of support schemes for the media sector.

*Figure 1.2.11. Indicator on Media viability - Map of risks per country*



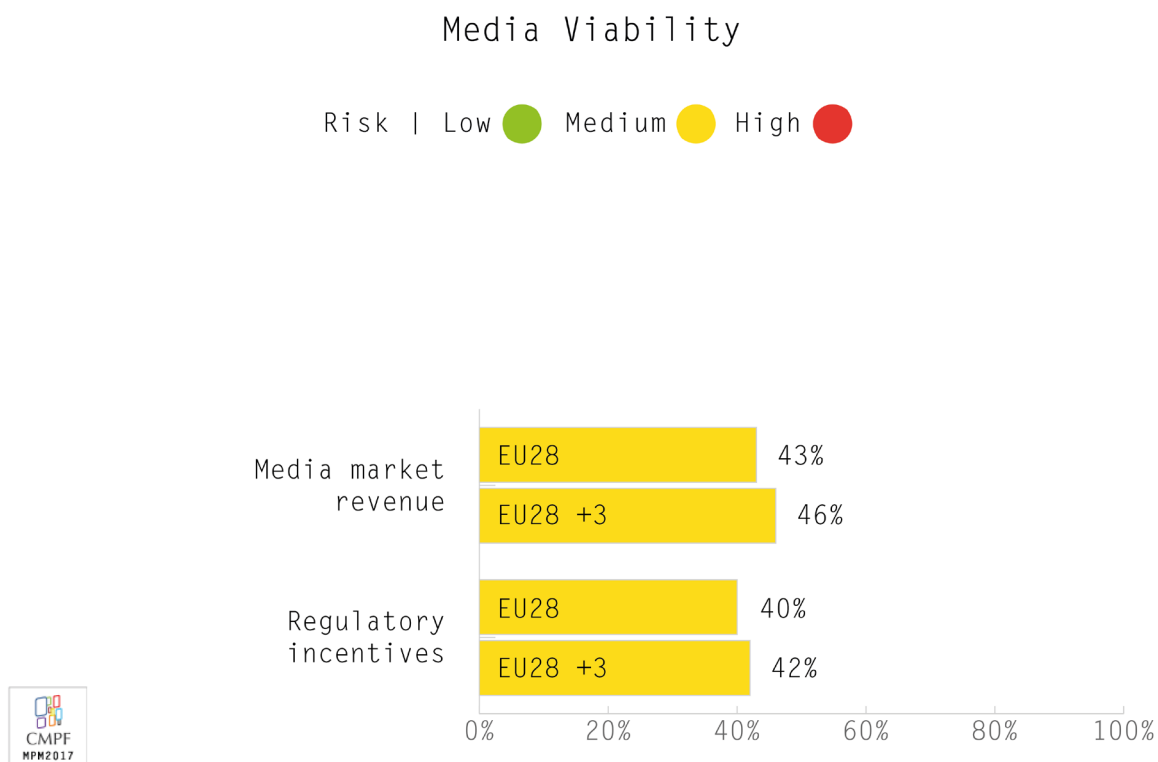
The two sub-indicators of the Media Viability indicator score similar risks levels. This is mostly explained by the fact that the countries which have problems with media revenues usually face similar problems with regard to the development of alternative sources of revenue and do not have support schemes for the media sector (or when they do have support schemes, they are not properly implemented). Estonia and Croatia are two examples that confirm this assessment. The former has experienced marked decreases in revenues in the traditional audiovisual and newspaper sectors in the last

two years and has no support schemes for the media sector. The latter, in its turn, has legal provisions establishing such schemes, but these schemes are not, in practice, operative.

It is important to highlight that - according to the MPM2017 data - the vast majority of the countries assessed have seen an increase in the expenditure for online advertising over the past two years (24 countries), with the exception of Hungary and Spain, which are in a stationary situation, and a few other countries that have no data available in that respect (Serbia, Malta, FYRoM, Greece, Sweden). The audiovisual sector faces a similar scenario, with most of the countries showing an increase in revenues (16 countries), with only 4 presenting a decrease (Bulgaria, Estonia, Slovenia, FYRoM), 4 are in a stationary situation (Denmark, Italy, Latvia, Lithuania), while 7 countries have no updated data in this regard (France, Greece, Malta, the Netherlands, Portugal, Romania, Serbia).

The same scenario was found in the sub-indicator on Regulatory incentives, which assesses the existence of laws establishing favourable support schemes for the media sector and whether such State support schemes are properly implemented. Among the countries that have laws establishing favourable support schemes for the media sector, only 9 were assessed by the MPM country teams as having properly implemented these schemes (Denmark, France, Germany, Lithuania, the Netherlands, Portugal, Spain, Sweden and the United Kingdom), with 8 countries that do not even have a law establishing such schemes (Cyprus, the Czech Republic, Estonia, Greece, Poland, Romania, Slovakia and Turkey).

Figure 1.2.12. Indicator on Media viability - Averages per sub-indicator



### 1.3 ANALYSIS OF POLITICAL INDEPENDENCE AREA

The area of Political Independence was designed to assess the risks of political interference in five different dimensions with respect to: media systems, media organisations, newsrooms, content production and, especially, to public service media. The five indicators focus on examining the existence and effectiveness of regulatory safeguards against political bias and political control over media outlets, news agencies and distribution networks. They are also concerned with the existence and effectiveness of self-regulation in ensuring editorial independence. Moreover, they seek to evaluate the influence of state (and, more generally), of political power, over the functioning of the media market, and the independence of public service media.

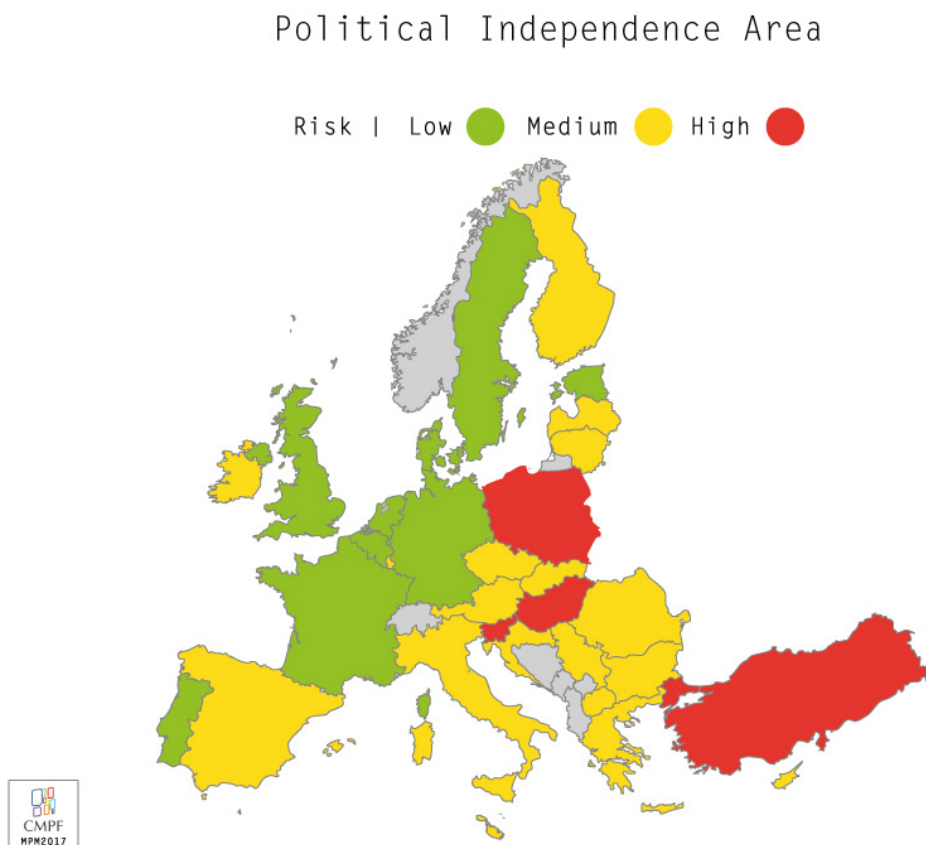
The five indicators related to Political Independence are:

- Political independence of media
- Editorial autonomy
- Media and democratic electoral process
- State regulation of resources and support to media sector
- Independence of PSM governance and funding

In the Political Independence area, a vast majority (18) of the countries examined scored as a medium risk, (see Figure 1.3.1.), 9 are at low risk (Belgium, Denmark, Estonia, France, Germany, the Netherlands, Portugal, Sweden, and the United Kingdom), and 4 are found to be at high risk from political interference with the media: Turkey, and three EU member states - Hungary, Poland and Slovenia. This shows that 2017 brought no major changes in this area if compared to previous measurements.

When comparing the 2017 results with those of 2016 (CMPF, 2017), the level of risk has increased for one country only: in Poland, where it went from medium to high risk. The increase in risk for Poland is related to higher risks being indicated for the distribution of state subsidies to media outlets. Still, indicators on political independence, and especially on the independence of public service media, remain the chief concern for Poland within this area, but also within the entire Monitor (for a more detailed explanation of the Polish case see: Klimkiewicz, 2017 and 2018).

Figure 1.3.1. Political Independence area - Map of risks per country



In Hungary and Slovenia, the absence of clear regulation and transparency in allocating state subsidies to the media remains a pressing issue. In addition, and many concerns for media pluralism in Hungary are related to a severe lack of editorial autonomy that is derived from systematic political interference in appointments and in the dismissals of editors-in-chief, and with regular attempts to influence editorial content. In Slovenia, as the country team reported, a conflict of interest between media ownership and holding government office is widely present, especially at local level.

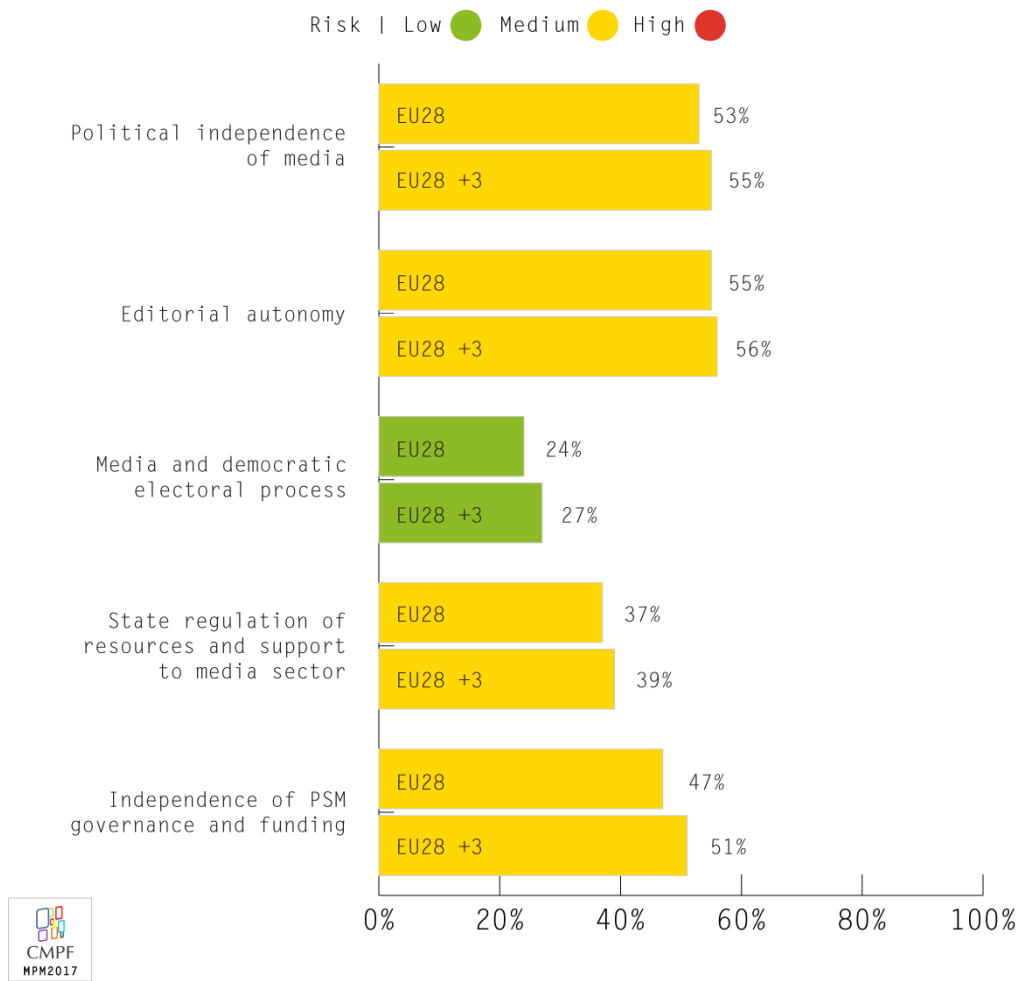
Turkey is the only country that scores high risks for all five indicators within this area, and, in general, a lack of political independence is the subject causing the highest concern there. Following an attempted military coup on July 20, 2016, a three month state of emergency was declared in this EU candidate country. Since then, Turkey has been ruled under a state of emergency by decrees (Inceoglu et al., 2018). Furthermore, on April 16, 2017, a constitutional referendum was held and the amendments that expanded presidential powers by transforming the country from a parliamentary democracy into a presidential system were passed (Inceoglu et al., 2018). At the same time, journalists are imprisoned on charges of aiding a terrorist organisation through news content and columns, and six journalists and columnists were sentenced to life in prison on the grounds of their alleged roles in the failed coup attempt (Inceoglu et al., 2018).

In 2017, the MPM was, for the first time, implemented in Serbia and FYRoM. Overall, both countries scored a medium risk on Political Independence, but Serbia showed a significantly higher score (65% as compared to FYRoM's 50%). The country team reports that the majority of the media in Serbia, including the public service media, are not independent and they clearly favour the ruling party (Scurlija Milojevic, 2018). Political independence of media has the highest risk score of all indicators (88%), since the Serbian legislation does not impose any restrictions on any conflict of interest between media ownership and the holding of government office. Further high risks are related to a lack of transparency and favouritism in buying advertising space in the media during election campaigns, and in the allocation of state funds to both commercial and public service media (Scurlija Milojevic, 2018). In the case of FYRoM, the only indicator that scores as a high risk within this area is the Independence of PSM governance and funding (83%). As the country team reported, in the past two decades, almost all of the high positions in the public broadcaster were politically influenced, and the funding of the PSM has been repeatedly used as a mechanism threatening the independence of the PSM (Trpevska and Micevski, 2018).

The main causes of risk in the area of Political Independence derive from a general lack of political independence of the media, and this results either from the non-existence of regulation to prevent conflicts of interest, or from its poor implementation in many countries, as well as from other indirect means of political control over the media. Editorial autonomy in most countries is not well protected either by regulation or by self-regulation, and another alarming indicator in several countries is the lack of the independence of public service media governance and funding (see Figure 1.3.2.). In general, the risks to all indicators in the area of Political independence are slightly higher in the EU Candidate Countries than in the Member States.

Figure 1.3.2. Political Independence area - Averages per indicator

Political Independence Area - Averages per Indicator



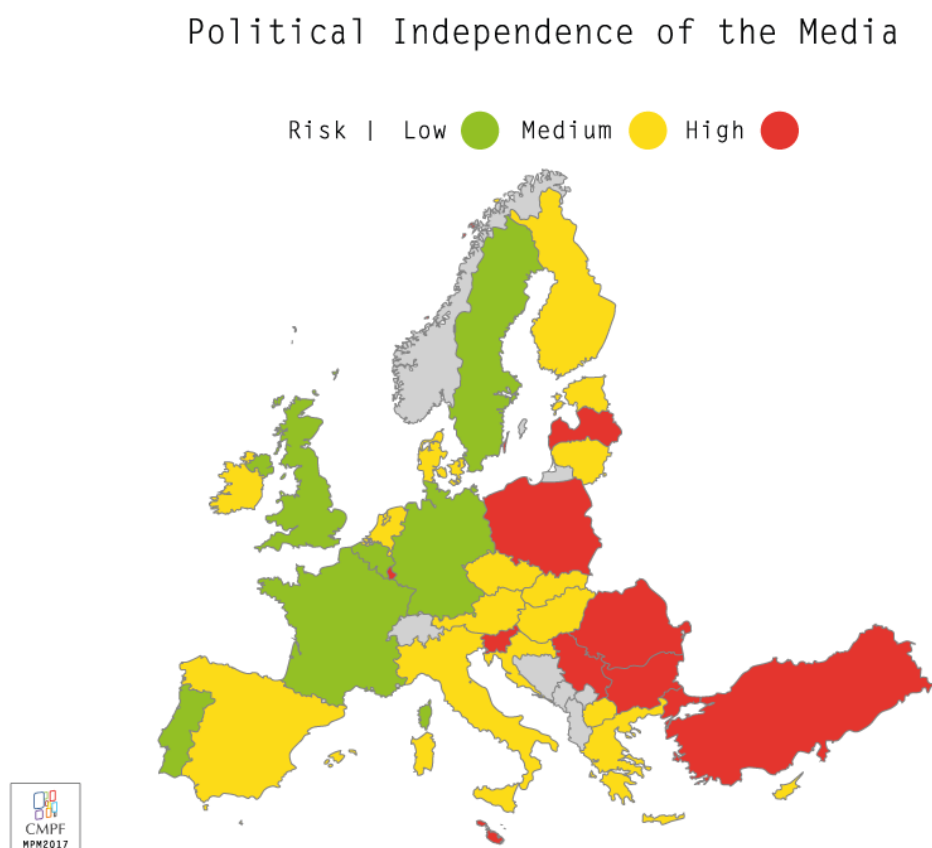
## POLITICAL INDEPENDENCE OF MEDIA

*This indicator assesses the availability, and the effective implementation of, regulatory safeguards against conflict of interest and control (both direct and indirect) over media by politicians, taking into consideration the diversity of European media systems and the cultural differences among the countries observed. The indicator consists of six sub-indicators: the first relates to the general rules on Conflicts of interest, while the other five aim to capture Political control over the audiovisual media, radio, newspapers, news agencies, and distribution networks. Control is here understood as being broader than ownership, as it includes both direct ownership and any form of indirect control. Indirect control implies that parties, partisan groups or politicians, are not directly involved in the ownership structure, but they exercise power through intermediaries (e.g., family members or friendly businessmen). The conflict of interests is defined as an incompatibility between holding government office and owning media (Djankov et al., 2003). The MPM, therefore, takes into consideration the existence of rules that prohibit media proprietors from holding government office, as well as the situation in practice. According to the public choice theory, a situation in which media ownership is related to government, which manages many of the resources that are important for the media, may undermine both democracy and markets (Dajnkov et al. 2003). At the same time, public interest theory sees information as a public good that should be available to everyone, and the government is assumed to be a neutral arbiter if private media outlets serve mainly commercial or political interests (Dajnkov et al. 2003). Transparency of media ownership and the availability of information on the political affiliation of media owners is therefore a key precondition for assessing the extent of the politicisation of control over the media.*

The Political independence of the media continues to be one of the highest scoring indicators of the MPM. As shown in Figure 1.3.3., the Political independence of the media is at high risk in Bulgaria, Latvia, Luxembourg, Malta, Poland, Romania, Serbia, Slovenia and Turkey. Serbia and Turkey score a very high 88 percent, followed by Malta and Romania, both above 80 percent. In Malta, there is no law that makes government office incompatible with media ownership which has allowed the two leading parties that alternate in government to be among the key players in the media market (Nenadic, 2018). A similar situation is found in Romania, where parties, partisan groups or politicians can be the owners of all types of mass media and there are no specific rules on conflicts of interest between holding government office and media ownership. As highlighted by the country team, 2017 simply made more visible the degradation, polarisation and politicisation of the mainstream media, especially in the context of the protests against the government attempts to water down anti-corruption laws (Marincea and Bodea, 2018).

On the other end of the spectrum, 6 countries acquired a low risk on this indicator: Belgium, France, Germany, Portugal, Sweden, and the United Kingdom, with Portugal scoring the lowest (as in the MPM 2016). The remaining 16 countries performed within a medium risk band, including the FYRoM.

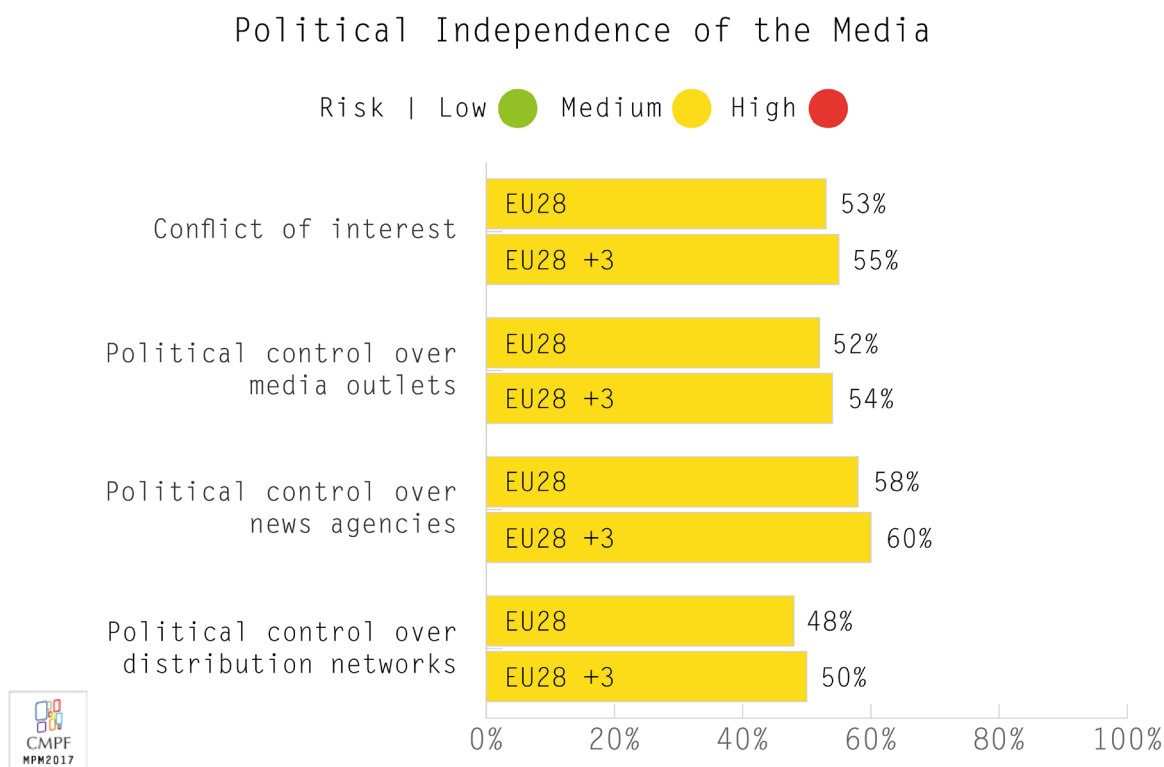
Figure 1.3.3. Indicator on Political independence of media - Map of risks per country



Methodological note: if compared to the MPM2016, this indicator was slightly revised to ensure more accuracy in the results. In the MPM2016 there was a sub-indicator for different types of media (audiovisual, radio and print) which was composed of a set of three variables in order to assess the legal safeguards that aim to prevent the media from political ownership, their implementation and the situation in practice. The country teams reported this as being too restrictive and as potentially overemphasising the risk. To address this concern, the MPM2017 maintained only the assessment of the situation, in practice, for each different type of media, and looked at the existence and effectiveness of the legal framework to prevent political control over the media in general. This change did not significantly affect the results, it just made them more balanced by bringing several countries from high risk to medium risk band: namely, Austria, Croatia, the Czech Republic, Hungary, Italy, and Slovakia. The final three, however, still score very close to a high risk. In Hungary, for example, the Media Act includes provisions restricting political parties and politicians from directly providing linear media services, which contributes to a more positive assessment. However, politicians and political parties exert influence and control over media via proxies, straw men and oligarchs (Bognar et al., 2018).



Figure 1.3.4. Indicator on Political independence of media - Averages per sub-indicator



As shown in the Figure above, 1.3.4., the Political control over news agencies is the highest scoring component of this indicator and this is due to the fact that, in many EU countries, the leading news agencies are owned and funded by the state. There are, however, some good practice examples, such as the Czech News Agency and the News Agency of the Slovak Republic. Both operate as public service institutions that do not receive subsidies from the state budget but are instead fully funded by its own business activities, which contributes their independence from political influences (Štětka and Hájek, 2018; Sampor, 2018). Another model that seems to support independence is noted for Austria, Germany, Italy, Sweden and the United Kingdom, where some of the leading news agencies are owned by a vast consortium of national media companies and publishers.

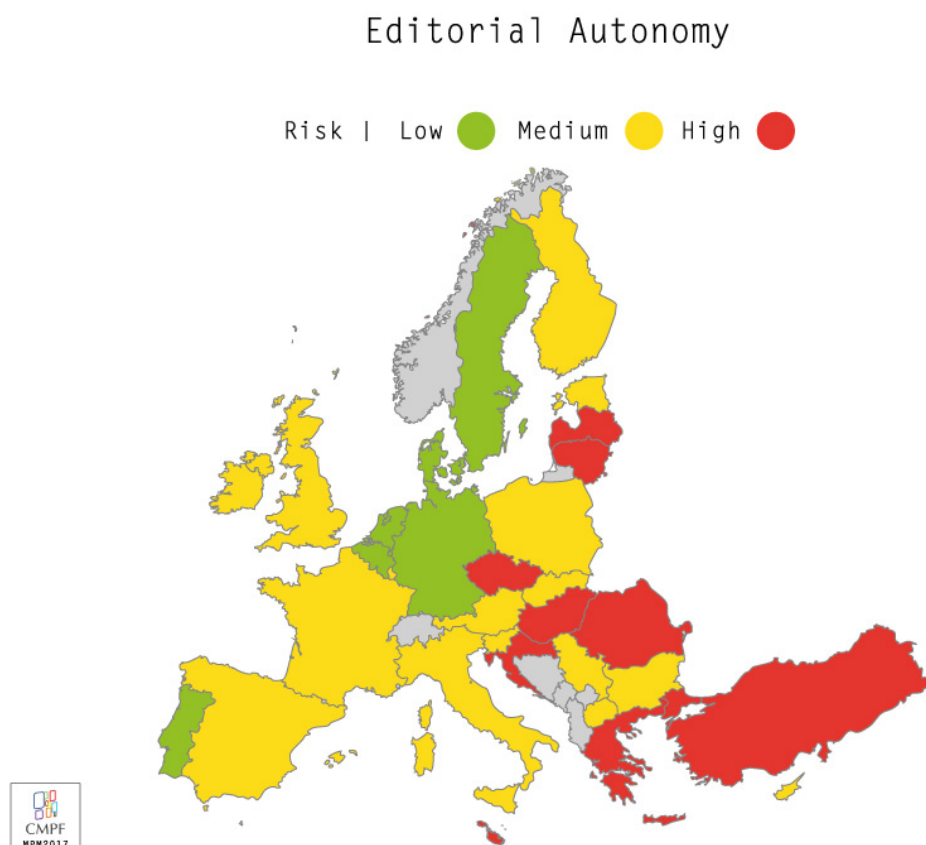
## EDITORIAL AUTONOMY

*The indicator on Editorial autonomy is designed to assess the existence and effectiveness of regulatory and self-regulatory measures that guarantee freedom from political interference in editorial decisions and content. In order to exercise their social role as the watchdog of society and as a provider of information that serves public interest and debate, journalists have to be able to act independently from undue influences. In this regard, effective self-regulation in the form of codes of conduct, codes of ethics or editorial statutes, is of particular importance, as well as the appointment and the dismissal procedures of editors in chief. The importance of co- and self-regulation, as a complement to the legislative and judicial and/or administrative mechanisms, is emphasised in the Audiovisual Media Services Directive (2010). The pluralism of the media itself is insufficient to ensure the freedom of information if the independence of the practice of journalism is not guaranteed. The Council of Europe's Recommendation on media pluralism and the diversity of media content (CM/Rec(2007)2) therefore highlights that, while encouraging the media to supply the public with diverse and inclusive media content, member states should also respect the principle of editorial independence.*

The freedom of journalists and editors to make decisions without interference from the owners of a publication, their political leanings, or outside political pressures, should be a paramount condition for a free and plural media environment. According to MPM2017's results, this is not the case in 25 of the 31 countries under examination: 16 countries scored a medium risk, of which 8 were very close to the high band (Austria, Bulgaria, Italy, Luxembourg, Poland, Slovenia, Spain and the United Kingdom); and editorial autonomy is at high risk in 9 countries (Croatia, Czech Republic, Greece, Hungary, Latvia, Lithuania, Malta, Romania, and Turkey). While the results are largely in line with the MPM 2016, the risk level has slightly decreased for Austria and Slovakia because, in 2017, there were no new cases reported of political interference in appointments and/or the dismissals of editors-in-chief.

Croatia and Turkey continue to be the highest scoring countries for this indicator. In Croatia, the country analysis reports systematic cases of political interference in the appointment and dismissal of editors-in-chief, and there are neither safeguards nor efficient self-regulation to prevent this interference (Bilic et al., 2018). As emphasised by the country team, this is particularly visible in the case of the PSM (Croatian Radiotelevision - HRT), where dozens of editors and journalists are often dismissed immediately following parliamentary elections. In Turkey, the situation is so severe that it is hardly comparable to any other monitored country. Continual extensions of the state of emergency and the changes in the political system have strengthened the political capture of media outlets in the country (Inceoglu et al., 2018).

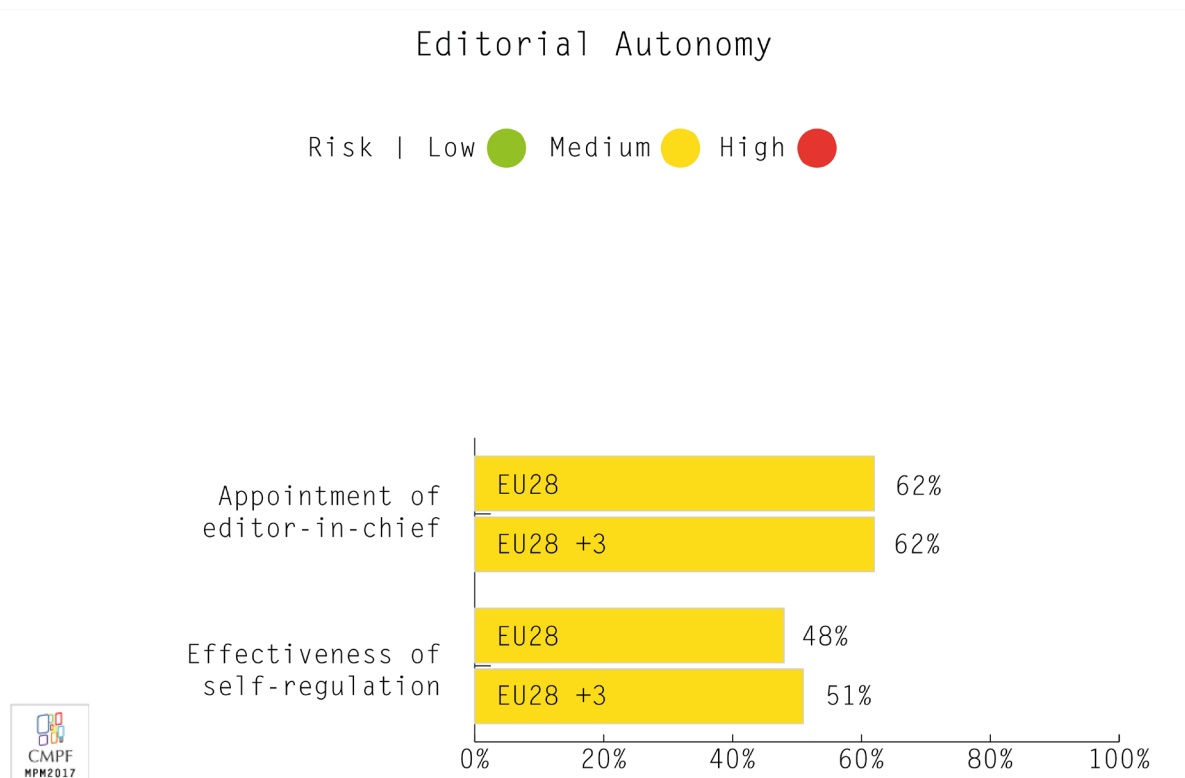
Figure 1.3.5. Indicator on Editorial autonomy - Map of risks per country



The indicator on Editorial autonomy is composed of two sub-indicators: one focusing on specific safeguards and practices related to the appointment and dismissal of editors-in-chief; and the other capturing the existence and effectiveness of self-regulatory measures, such as journalistic codes and codes of ethics, that stipulate editorial independence in both traditional and online news media. On average, the sub-indicator on Editors-in-chief is more at risk (see Figure 1.3.6) than that on Self-regulation.

While a vast majority of countries have no common regulatory safeguards with which to guarantee autonomy when appointing and dismissing editors-in-chief, leading news media in most of the countries observed do have some form of self-regulation that emphasises editorial independence. Exceptions are Austria, Croatia, the Czech Republic, Greece, Ireland, Malta, the UK and Turkey, where self-regulation at the level of media companies either does not exist, or it does not encompass leading media organisations, or it is just not made publicly available.

Figure 1.3.6. Indicator on Editorial autonomy - Averages per sub-indicator



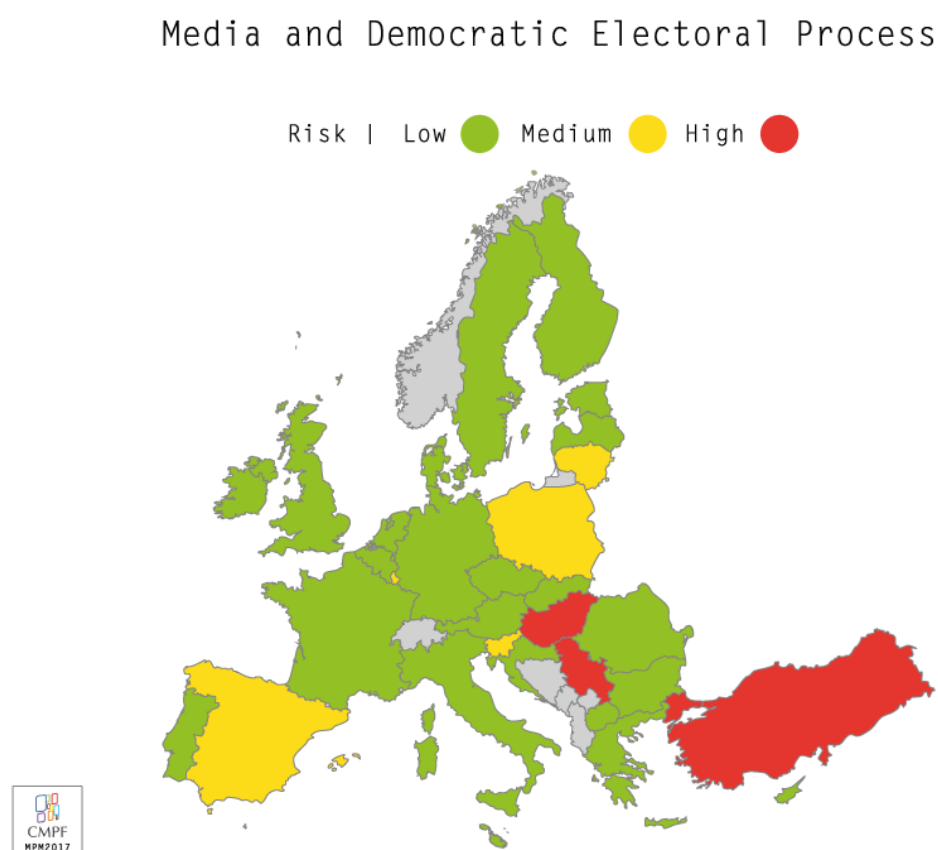
With regard to editorial independence in practice, as in 2016, most countries (24 of the 31 examined) score either a medium or a high risk. Political interference in editorial autonomy is a risk difficult to assess due to its complexity and to all of the subtle means of exercising it. In order to ensure the maximum level of objectivity, the assessments provided by the country teams on this matter therefore underwent peer-review by a group of multi-level stakeholders in each of the monitored countries. Here, it is also worth mentioning that the majority of countries that score a medium or a high risk to Editorial autonomy, also score a medium or high risk to the Political independence of the media. For instance, Latvia, Malta, Romania, and Turkey scored a high risk on both indicators. In the two EU candidate countries which have implemented the MPM for the first time, Editorial autonomy is at medium risk. In FYRoM, during the rule of the previous nationalist-populist government, all types of media organisations were at high risk of political interference in editorial policy, but there has been some improvement since the political change in 2017 (Trpevska and Micevski, 2018). In Serbia, there are systematic cases of political influence on the editorial content and in the appointment and dismissal of editors-in-chief, despite legal safeguards being available (Sucurlija Milojevic, 2018).

## MEDIA AND DEMOCRATIC ELECTORAL PROCESS

The indicator *Media and democratic electoral process* assesses the existence and implementation of a regulatory and self-regulatory framework for the fair representation of different political actors and viewpoints on PSM and private channels, especially during electoral campaigns. The indicator also takes into consideration the regulation of political advertising, and its implementation in practice. The focus is on the risks from bias in the audiovisual media, since television remains the main source of news for citizens in the EU (Standard Eurobarometer, 88). However, the continuous rise of online sources and platforms as resources for news (SE, 88), and as channels for more direct and less controlled political marketing, call for a deeper examination of the related practice and the regulation that is available.

As regards audiovisual media bias, especially during electoral campaigns, the vast majority of countries scored a low risk (23 of 31), including FYRoM. Five countries are found to be at medium risk (Lithuania, Luxembourg, Poland, Slovenia, and Spain), and 3 are at high risk (Hungary, Serbia, and Turkey). Hungary and Turkey retain the high risk level that had already been identified in the previous year's Monitor examination (see CMPF, 2017). Serbia joins them as, even though Serbian media laws prescribe rules on the fair representation of political parties and on their access to airtime on the PSM channels, which are applicable to all types of political elections, these provisions are not fully enforced in practice (Sucurlija Milojevic, 2018). Furthermore, as the country team stated, access to airtime in the private media is not guaranteed, and some political actors are clearly favoured over others, with different and preferential treatment also being provided in relation to selling advertising space during an election campaign.

Figure 1.3.7. Indicator on Media and democratic electoral process - Map of risks per country

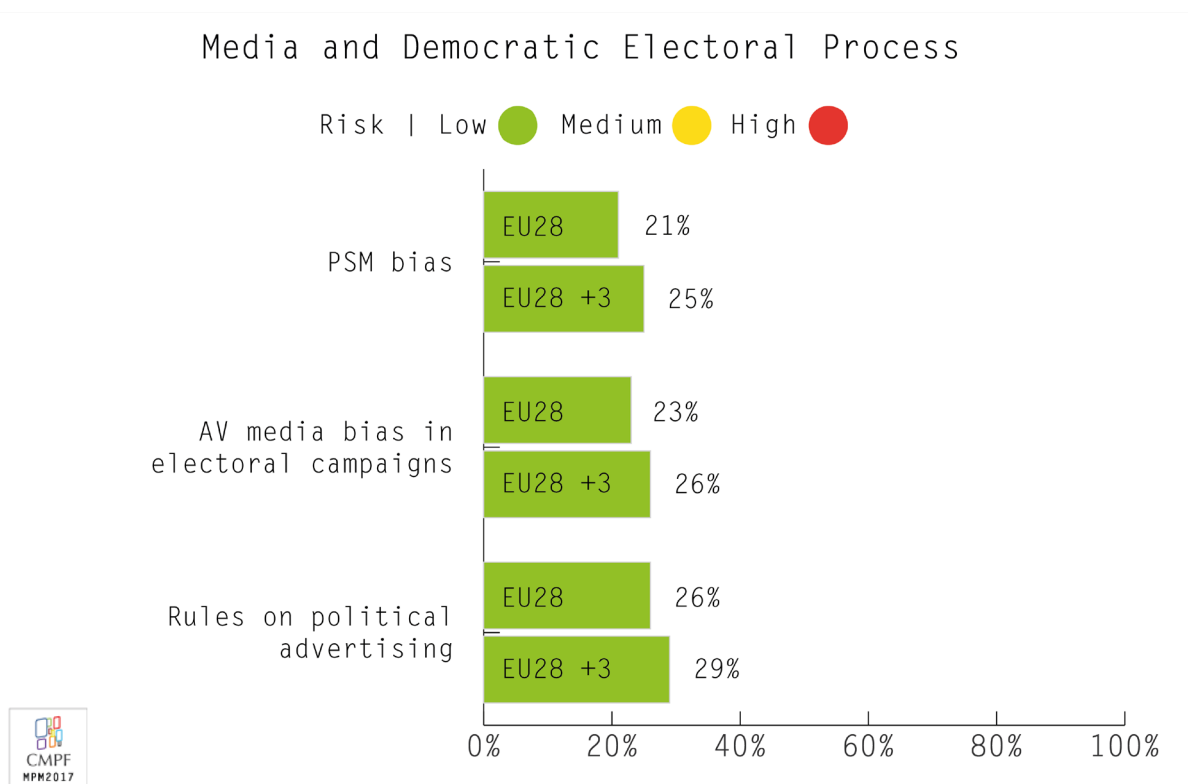


The MPM2017 analysis has shown that in all of the countries the law imposes rules to ensure the fair representation of political viewpoints in news and informative programmes on PSM channels and services. It is, however, less common for such regulation and/or self-regulatory measures to exist for private channels and services. Despite the generally available rules on PSM impartiality, even these are not always respected in practice. Some cases of PSM bias have been noted in Croatia, FYRoM, Italy, Lithuania, Luxembourg, Malta, Romania, Serbia and Slovenia, while in Hungary, Poland, Spain and Turkey different groups of political actors and/or political viewpoints are represented in a biased way, clearly favouring some political actors, and/or viewpoints, over others.

A novelty within this 2017 indicator is the introduction of a new variable that aims to assess the existence of legislation that prevents certain political actors from capturing online political communication by buying and targeting online political advertising in a non-transparent manner. The question posed is: is there a regulation that aims to ensure the fairness and transparency of online political advertising during electoral campaigns? According to the MPM 2017's results, only nine countries (Belgium, Bulgaria, Denmark, Finland, Germany, Italy, Lithuania, Portugal and Sweden) at present have some kind of legislation or guidelines that require the transparency of online political advertisements. In all these cases, it is the general law on political advertising during electoral period that directly applies also to the online dimension.

In 2017, parliamentary elections were held in the Netherlands, Bulgaria, Malta, the United Kingdom and Germany. In most of these countries this did not affect the overall scoring of the indicator. The indicator Media and democratic electoral process therefore continues to obtain, on average, the lowest risk score across the 31 European countries in relation to the area of Political independence. However, it is important to note that, apart from the newly added variable addressing the regulatory framework for online political advertising, the focus of this indicator is still on audiovisual media. Future editions of the MPM will introduce a new set of measures through which to better assess the roles of online media and intermediaries in electoral processes.

Figure 1.3.8. Indicator on Media and democratic electoral process - Averages per sub-indicator

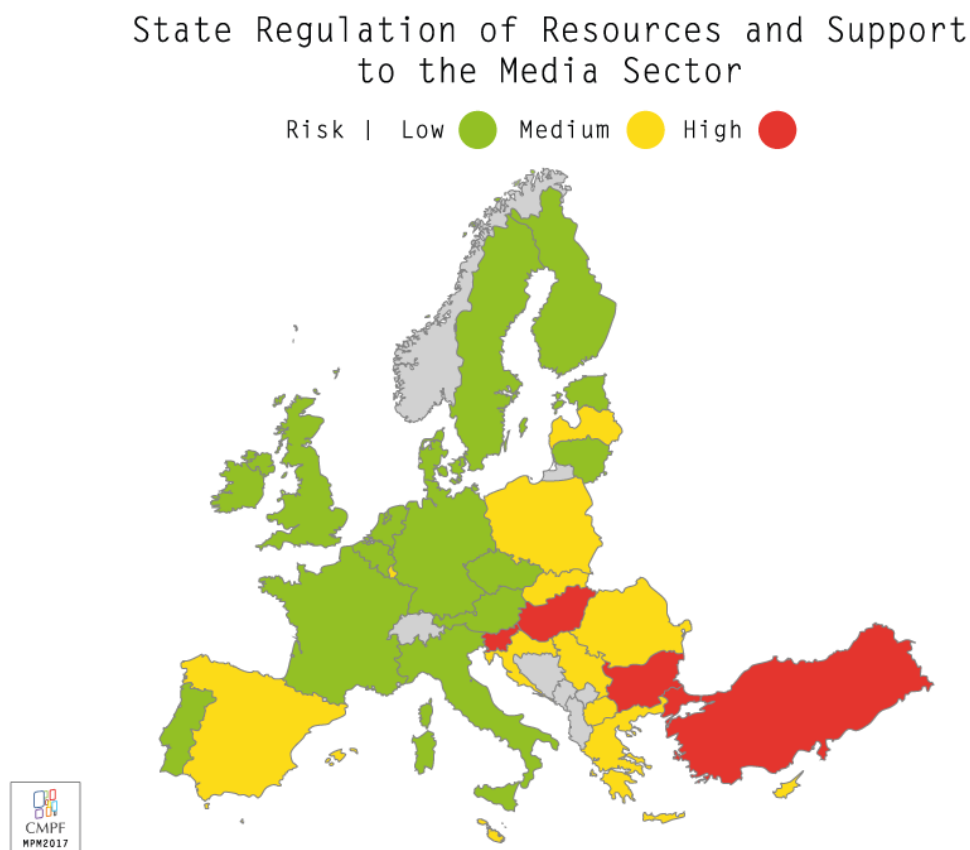


## STATE REGULATION OF RESOURCES AND SUPPORT TO MEDIA SECTOR

*This indicator assesses the legal and practical situation in relation to the distribution of state managed resources for the media. In a situation where media organisations face economic difficulties that are caused by recent economic crisis and ongoing technological disruption, financial support from the state can be crucial, especially for non-profit, community media and other less commercial forms of journalism. It is therefore of particular importance that fair and transparent rules on the distribution of state resources and support are in place, as well as their being effectively implemented. The lack of clear and transparent rules may be conducive to favouritism. The lack of available data on allocation, in practice, is also seen to be a potential risk, since the lack of transparency can conceal a practice of channelling money to specific media outlets in a biased manner.*

Four countries scored a high risk for the indicator on the State regulation of resources and support to the media sector: Bulgaria, Hungary, Slovenia, and Turkey, (which are the same countries as in MPM2016). 12 countries are in the medium risk band, and the largest number of countries (15) scored a low risk. These results roughly correspond to the MPM 2016. Some differences are recorded for Luxembourg, where the assessment for the distribution of state advertising to media outlets rose from a medium to a high risk, and for Greece, where it moved in the opposite direction (from a high to a medium risk). The reason for the more positive assessment for Greece, as reported by the country team, are the recent legislative amendments that have introduced administrative fines for failing to comply with the criteria for the distribution of state advertising, more precisely for failing to respect that a minimum of 30% of the advertising budget is allocated to regional media.

**Figure 1.3.9. Indicator on State regulation of resources and support to media sector - Map of risks per country**



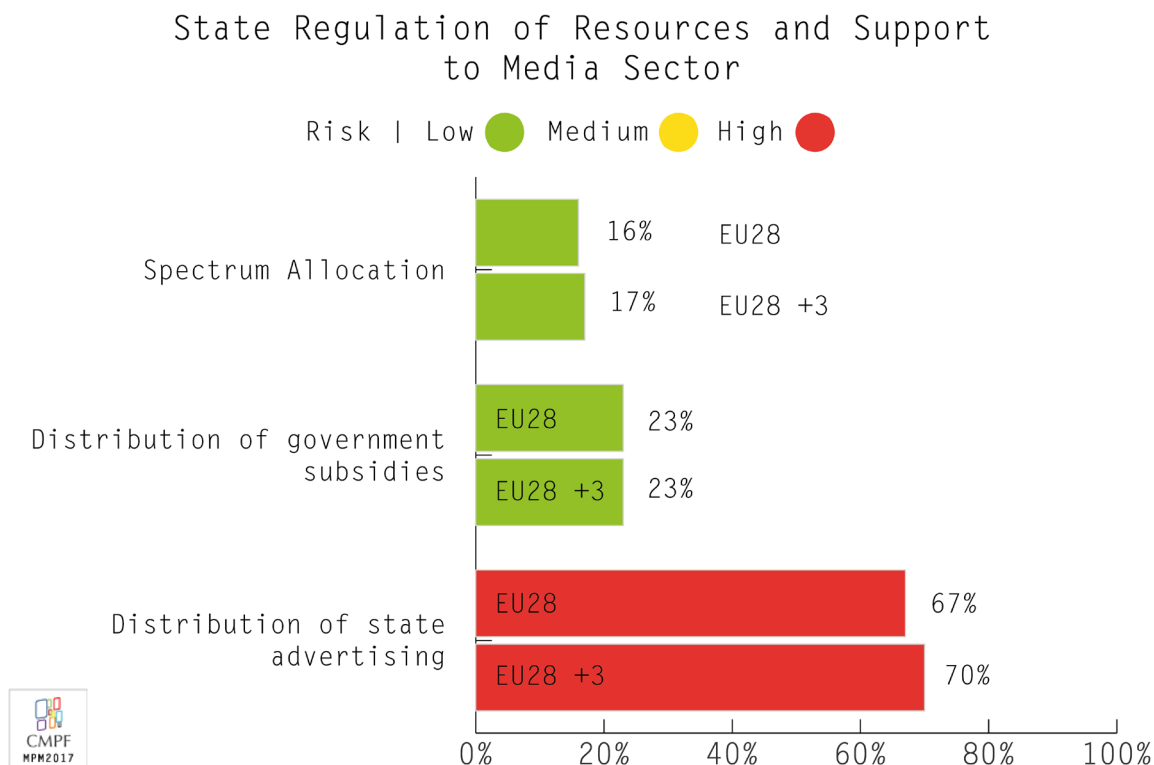
This indicator is composed of three sub-indicators: Spectrum allocation, Government subsidies, and Rules on state advertising. The sub-indicator on Spectrum allocation, which assesses the existence and implementation of the legal framework that enacts the general regulatory principles and policy objectives of the Radio Spectrum Policy Programme (2012), continues to be at low risk for the vast majority of countries. Most have effective regulation and no disputes have recently been recorded on this matter. However, there are a few exceptions: Greece (see also MPM2016), Bulgaria, Hungary, Italy, Slovenia, Spain and Turkey.

The European Court of Justice (Case C-376/13 European Commission v Bulgaria Judgment of the Court (Ninth Chamber) of 23 April 2015) ruled that the procedure for the authorisations for digital terrestrial TV in Bulgaria was based on disproportionately restrictive award conditions, leading to the exclusion of potential candidates. In Italy, the government overruled a decision of the media authority (Brogi, 2018).

The second component of this indicator is related to the allocation of state subsidies to the media, both direct and indirect. Direct state subsidies can be, for example, cash grants and interest-free loans, while indirect state subsidies include tax exemptions, and reduced postal service and telephone rates. The logic of the MPM is that, if there are subsidies, there should be fair and transparent rules for their distribution. Otherwise, there is a risk of favouritism. On average, as in MPM2016, countries scored a low risk on this sub-indicator, with a few exceptions that perform within a medium/high risk band: Cyprus, Greece, Hungary, Luxembourg, Poland, and Slovenia. These medium risks, here, mainly result from a lack of legislation that provides fair and transparent rules for the distribution of state subsidies to media outlets.

Finally, as in the previous round of monitoring, state advertising persists in being the most problematic issue for most countries, and it is the highest scoring component of this indicator (Figure 1.3.10.). For the purpose of the MPM, state advertising is described as any advertising paid for by governments (national, regional, local) and state-owned institutions and companies to the media. Most countries (21), amongst which are Serbia and FYRoM, scored a high risk because they lack the legislation to ensure fair and transparent rules on the distribution of state advertising to media outlets, and this is also reflected, in practice, through low transparency in relation to the distribution criteria, the amounts and the beneficiaries. High risks in relation to state advertising continue to be present to a greater extent in new democracies (CEE) than in the other members of the EU.

Figure 1.3.10. Indicator on State regulation of resources and support to media sector - Averages per sub-indicator



## INDEPENDENCE OF PSM GOVERNANCE AND FUNDING

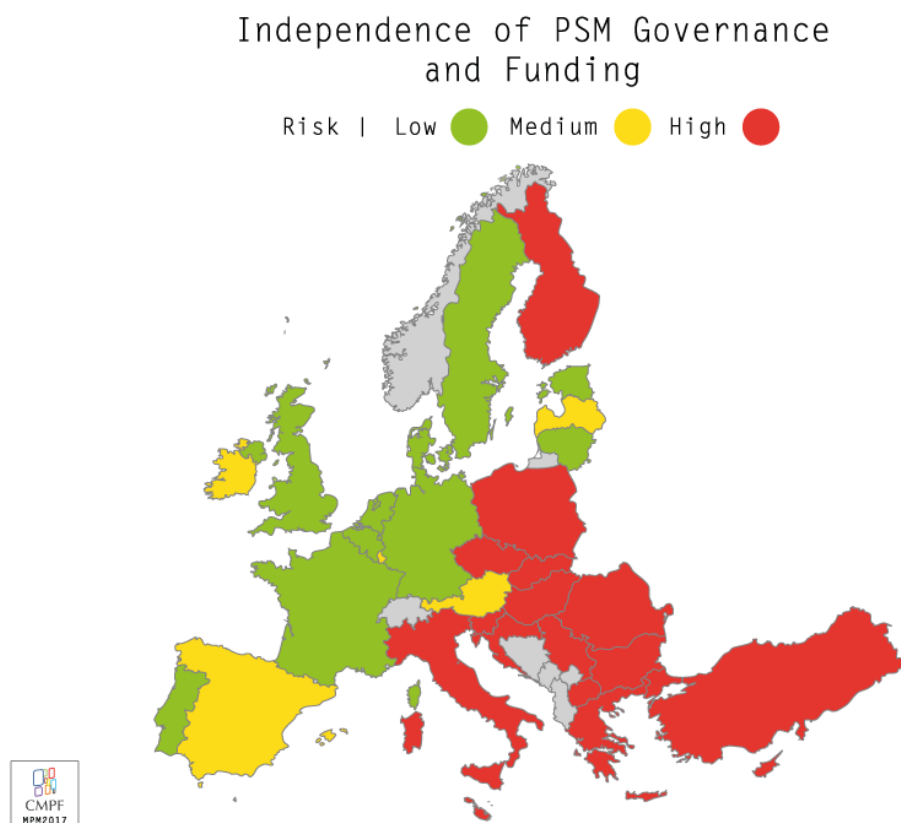
*The Independence of PSM governance and funding indicator is designed to measure the risks which stem from appointments procedures for top management positions in the public service media, and the risks arising from the PSM funding mechanisms and procedures. The reasons behind giving a special focus to PSM are twofold, and they emerge from its perceived special role in society and its relationship with the state (CMPE, 2016). PSM systems are usually established by the state, which, in some cases, still has an influence over them. Given that the PSM are thought of as being media that are both owned by the public and responsible to it, that are characterised by nationwide access, and that produce content for all communities (Smith, 2012), it is feared that the PSM that are under political influence will no longer fulfil the above-mentioned roles. Specifically, it is feared that this will produce biased content and reduce the ability of citizens to make informed choices. In order to secure its independence, it has frequently been suggested that the state should have only a minimal ability to interfere with the appointment procedures to its boards and to exert influence by funding (Bardoel and Haensen, 2008; Benson and Powers, 2011; Council of Europe, 2012; Hanretty, 2009; Papatheodorou and Machin, 2003).*

As the map below (Figure 1.3.11.) shows, there is somehow a clear division when it comes to the scoring of the indicator on the Independence of public service media governance and funding. Among the lowest scoring countries are those located in Western Europe: The United Kingdom, Germany, France, Belgium and the Netherlands, together with Denmark, Estonia, Lithuania, Portugal, and Sweden. Among the high risk scoring countries are those that are mostly the central-eastern European states: Bulgaria, Croatia, the Czech Republic, FYRoM, Hungary, Poland, Romania, Serbia, Slovakia, and Slovenia. High risk is also recorded for Finland, Italy, Greece, Malta, Cyprus, and Turkey, while five countries (Latvia, Luxembourg, Spain, Austria, Ireland) perform with a medium risk on the Independence of the PSM.

The most noticeable change of risk between the MPM2017 and the MPM2016 is in the case of Bulgaria, which moved from being at low risk on this indicator to the high risk level. This worsening is related to amendments in the Radio and Television Act which allow for indefinite extension of the regular 3-year mandates of the directors general and the management boards of the PSM in cases when the term of office is completed, and a new Director General is not elected by the media authority (CEM) (Spasov et al., 2018). These amendments, as highlighted by the country team, have legalised a delay of over a year in the appointment of a new Director General of Bulgarian National Television. The situation has deteriorated also in Croatia, where the Supervisory Committee of the PSM was dismissed by the Parliament before the end of its mandate, following the Committee's 2016 report in which it exposed many irregularities in the PSM's management (Bilic et al., 2018).

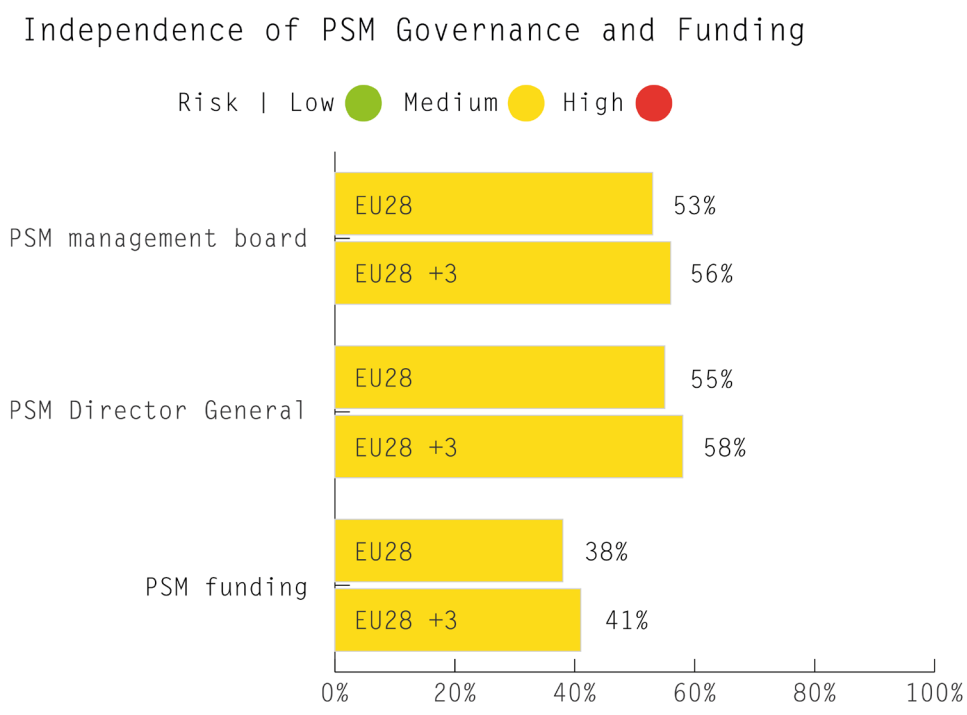


Figure 1.3.11. Indicator on Independence of PSM governance and funding - Map of risks per country



This indicator consists of three sub-indicators: one looking at the risks arising from PSM funding, and two assessing the risks stemming from both appointments to the PSM management boards and the appointment of the director general. As shown in the figure below (Figure 1.3.12.) generally, risks are more related to the appointment procedures than to PSM financing. In the majority of countries, appointment procedures for the management of PSM lack proper safeguards and remain vulnerable to political influence. While selection and appointment procedures are often run by special committees, or media authorities, final approvals are, in many cases, given by parliamentary vote or by the government (a competent Minister).

Figure 1.3.12. Indicator on Independence of PSM governance and funding - Averages per sub-indicator



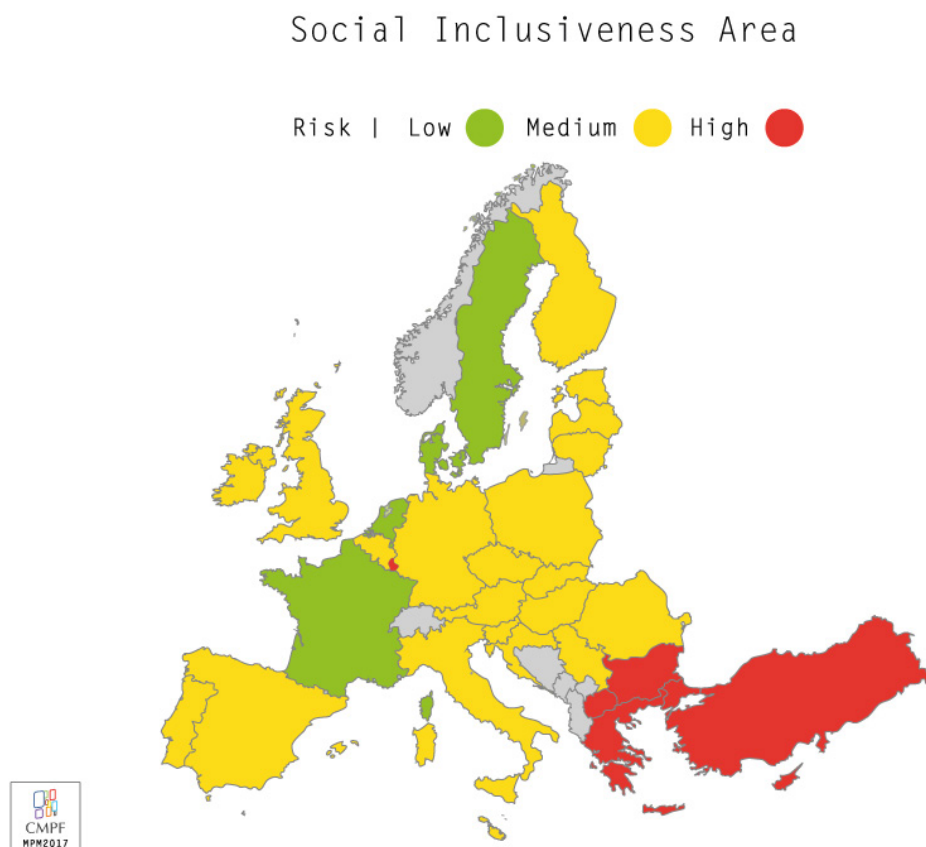
## 1.4 ANALYSIS OF SOCIAL INCLUSIVENESS AREA

The Social Inclusiveness area examines the access to the media by various social and cultural groups, such as minorities, local/regional communities, people with disabilities, and women. The access of different social groups to the media is a key aspect of a participatory media system and it is a core element of media pluralism. In addition, the Monitor considers media literacy to be a precondition for using media effectively. The area covers the following indicators:

- Access to media for minorities
- Access to media for local/regional communities and community media
- Access to media for people with disabilities
- Access to media for women
- Media literacy

In the area of Social Inclusiveness, two thirds of the countries (21) are in the medium risk band. 6 countries scored a high risk (Bulgaria, Cyprus, FYRoM, Greece, Luxembourg, and Turkey) and 4 countries are in the low risk band (Denmark, France, the Netherlands, and Sweden). In comparison to the results of the MPM2016, Belgium and the United Kingdom went from scoring a low to scoring a medium risk, and Luxembourg, Cyprus, and Bulgaria from scoring a medium to scoring a high risk, while the remainder of the countries remained at their previous risk level. However, it should be noted that the results of the MPM2017 in this area are not fully comparable to those of the MPM2016 as, even though there were no changes in the indicator-level, several changes have been made at the sub-indicator and variable-levels.<sup>42</sup> These refinements of individual variables generally do not affect the relationship between the indicators, but they do result in the higher scoring of individual indicators.

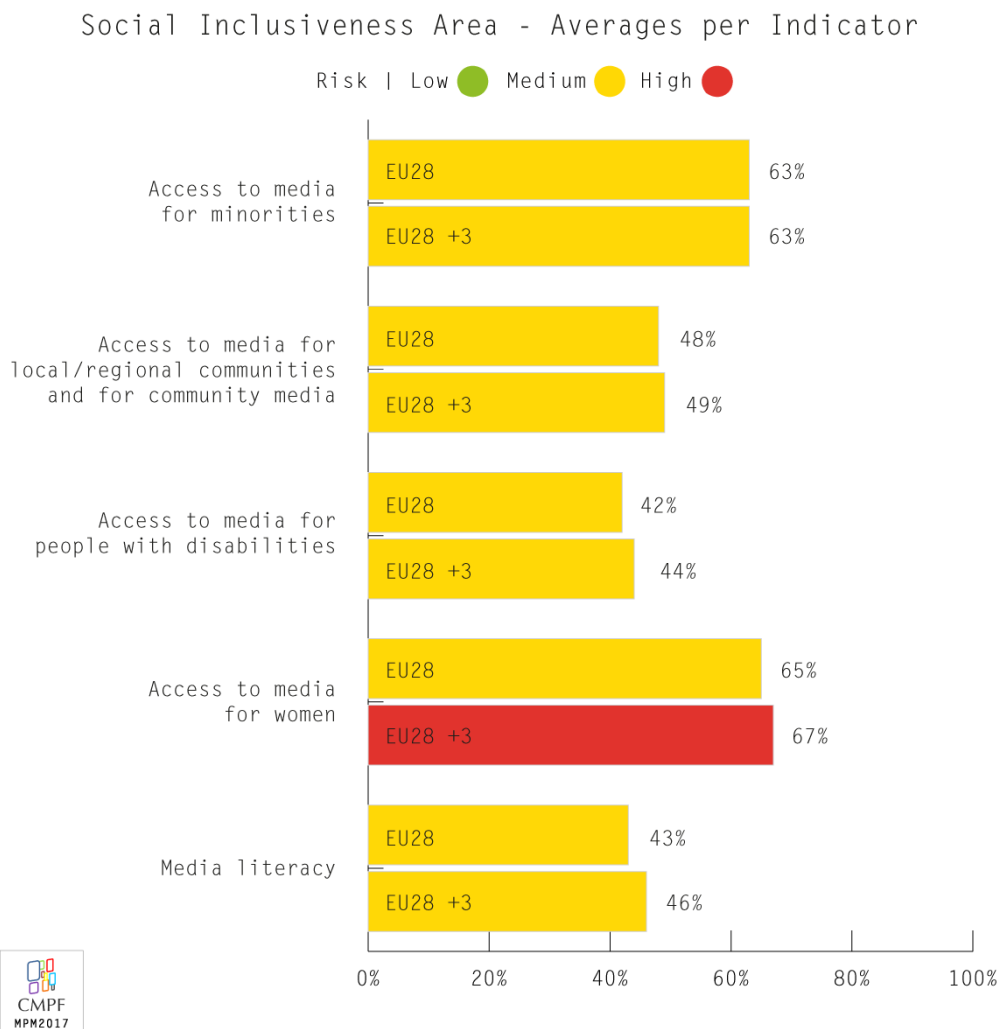
Figure 1.4.1. Social Inclusiveness area - Map of risks per country



<sup>42</sup> More detailed explanations of the modifications introduced in this area are described under the respective indicators' chapters and in the Methodology section of the report

As in 2016, the highest scoring indicators of the area on Social Inclusiveness are: Access to the media for women, and Access to the media for minorities. The difference is that, in 2017, the risk levels have increased for both indicators, and especially for the Access to the media for women, which has now entered the high risk band (both indicators scored as being at medium risk in 2016). As noted above, this is, to some extent, related to the refinements introduced within the indicators, which required a more detailed assessment at the national level. For the other three indicators, also slightly refined, the risk remained at the medium level, although with a slightly increased percentage if compared to the previous round of the MPM (see Figure 1.4.2.).

Figure 1.4.2. Social Inclusiveness area - Averages per indicator



The results for the two countries that were monitored for the first time in 2017, FYRoM and Serbia, suggest reasons for concern. In FYRoM the area of Social Inclusiveness scored a high risk (69%), and this resulted from insufficient access to the media for people with disabilities, women and marginalised communities, and also from the poor state of media literacy (Trpevska and Micevski, 2018). In Serbia, Social Inclusiveness is on the border between a medium and a high risk. Again, media literacy is underdeveloped and minorities, people with disabilities and women do not have easy access to media (Sucurlija Milojevic, 2018).

## ACCESS TO MEDIA FOR MINORITIES

*The Monitor assesses minorities' access to airtime on public service media, both in terms of legal safeguards and in practice. It further assesses whether the minorities have access to airtime on private TV and radio, and it takes into account both those minorities that are legally recognised and those that are not. Variables have been elaborated on the basis of CoE and OSCE documents. The OSCE's Oslo Recommendations<sup>43</sup> (p. 6) states: "Persons belonging to national minorities should have access to broadcast time in their own language on publicly funded media. At national, regional and local levels the amount and quality of time allocated to broadcasting in the language of a given minority should be commensurate with the numerical size and concentration of the national minority and appropriate to its situation and needs." The Council of Europe's European Charter for Regional or Minority Languages (Council of Europe 1992, Article 11) and its Framework Convention for the Protection of National Minorities, which emphasises that the Convention Parties shall ensure, within the framework of their legal systems, that persons belonging to a national minority are not discriminated against but are facilitated in their access to the media (Council of Europe, 1995, Article 9).*

*For the purpose of the MPM, "minority" is defined as a cultural or social group that is:*

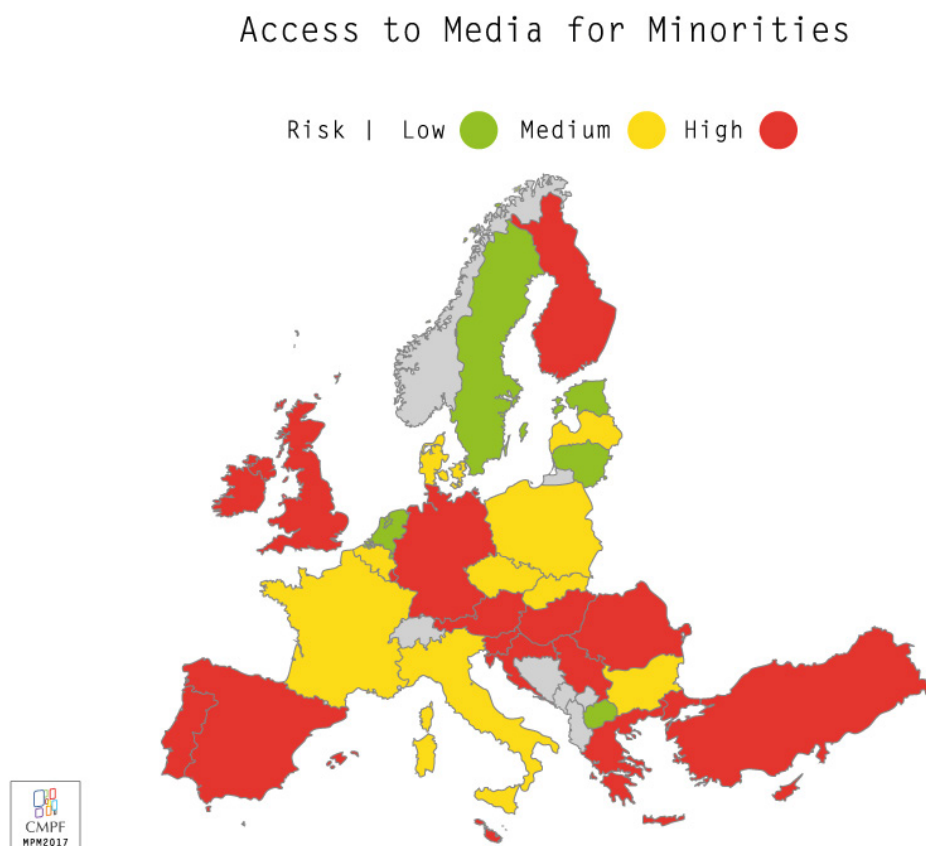
- numerically inferior to the rest of the population of a state,*
- smaller than the majority group in the respective country;*
- in a non-dominant position,*
- whose members possess ethnic, religious or linguistic characteristics differing from those of the rest of the population.*

*The composition of this indicator in the MPM 2017 was refined, based on observations during the previous rounds of implementation and following discussions with country teams. Several variables have been eliminated and new ones introduced. The aim of the changes was, on the one hand, to improve the distinction between minorities that are legally recognised and those that are not. On the other hand, a clearer separation was made between access for minorities to the PSM and to private broadcasters.*

For the second consecutive year, the results on the indicator Access to media for minorities show that this is one of the highest risk level indicators in the area of Social Inclusiveness, and it is among the top risk scores across all of the Monitor's areas. In the great majority of countries, namely, 17, minorities seem not to have adequate access to airtime, which results in a high risk score. 9 countries score a medium risk (the Czech Republic, Latvia, Poland, Slovakia, Italy, Belgium, Bulgaria, Denmark and France), and only 5 acquire a low risk level: Estonia, FYRoM, the Netherlands, Sweden, and Lithuania, with the latter is on the border with the medium risk level. These low risks represent the assessments of local experts, according to which most minorities have adequate access to airtime on the PSM and on private channels in those countries.

43 OSCE (1998) The Oslo Recommendations Regarding the Linguistic Rights of National Minorities & Explanatory Note. <https://www.osce.org/hcnm/oslo-recommendations>

Figure 1.4.3. Indicator on Access to media for minorities - Map of risks per country



The indicator on Access to media for minorities contains two sub-indicators: one examines whether minorities (both those legally recognised and those not recognised by the law) have access to private TV and radio channels; while the other assesses the situation in relation to public service media: whether the law guarantees access to airtime on the PSM channels to legally recognised minorities, and whether minorities (both those legally recognised and those minorities not recognised by the law) have access to it in practice.

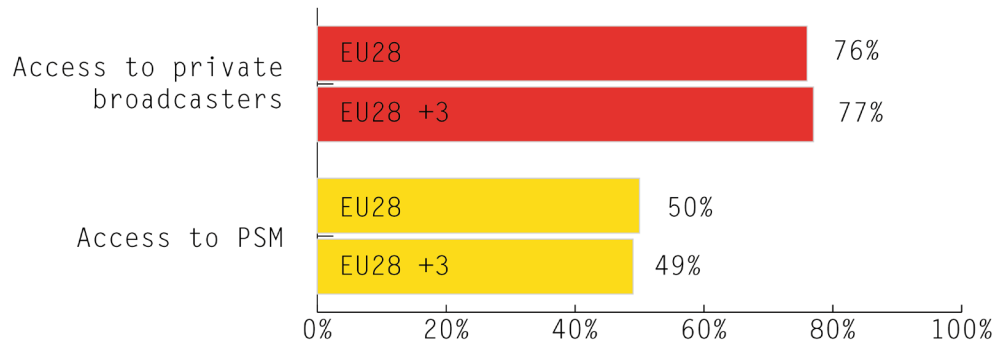
Higher risk scores are related to insufficient access to private TV and radio for minorities. In 9 countries (Austria, Croatia, Cyprus, Finland, Greece, Hungary, Serbia, Slovenia and Turkey) most minorities, be they recognised or not by law, do not have access to airtime on commercial broadcasters, or the airtime they have is not proportional to the size of their populations in the country.

However, it is of even higher concern that many of the public service media perform with a medium risk level, considering their remit and role in society. More than one third of the countries (12) do not have legal guarantees of access to airtime on the PSM for minorities. In practice, in 9 of 31 countries, most legally recognised minorities do not have access to airtime, or the access that they are granted is not proportional to the size of their populations. In a further 10 countries there are no legally recognised minorities, or, as is the case in Bulgaria, the law does not differentiate between 'recognised' and 'not recognised' minorities. In 8 countries (Austria, Croatia, the Czech Republic, Hungary, Malta, Poland, Portugal and Romania), national news on PSM is not available in any of the minority languages. Only in four countries (the Czech Republic, Estonia, the Netherlands and Slovakia), according to the data collected by country teams, do minorities have access to the PSM, without any significant exception. On a specific variable that seeks to evaluate whether minorities, which are not recognised by law, have access to airtime on the PSM channels in practice, 23 countries scored a medium or a high risk.

Figure 1.4.4. Indicator on Access to the media for minorities - Averages per sub-indicator

### Access to Media for Minorities

Risk | Low ● Medium ● High ●



## ACCESS TO MEDIA FOR LOCAL/REGIONAL COMMUNITIES AND COMMUNITY MEDIA

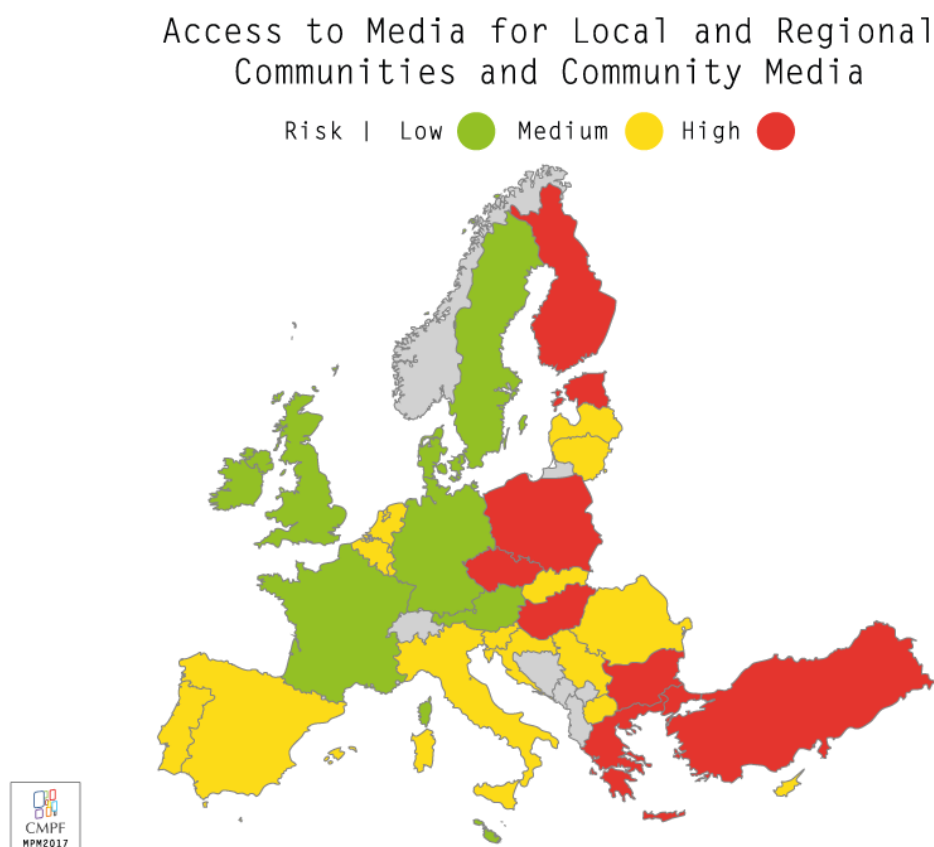
*Media at the regional and local level are particularly important for democracy, since their relationship with local audiences tends to be closer if compared to national media. That proximity is confirmed by both the user statistics and by the level of the participation of users in the media. Regional and local media can also serve as alternative spaces for discussion for those identities and languages that are marginalised by the national media. A solid regulatory framework and support measures can help regional media in their democratic mission (Cappello et al., 2016). This is becoming increasingly important now, when more and more local and regional newspapers and broadcasters are struggling to survive.*

*Community media are also critical in ensuring media pluralism, and they are an indicator of a sound democratic society. They tend to focus on local issues and can contribute to facilitating local discussions (UNESCO, 2017). In the MPM, community media are defined as media that are non-profit and that are accountable to the community that they seek to serve. They are open to participation by the members of the community for the creation of content. As such, they are a distinct group within the media sector, alongside commercial and public media. Community media are addressed at specific target groups and social benefit is their primary concern.*

*This MPM indicator assesses whether local and regional communities are guaranteed access to the media, both in terms of legal safeguards and of policy or financial support. It also covers community media, both from the point of view of the legal and practical guarantees of access to media platforms and independence, as well as in terms of policy measures. In comparison to the MPM 2016, only a few changes were made to the variables of this indicator. Most of these related to the formulation of questions and descriptions. One new variable was added that asked if state subsidies are distributed to media outlets in a fair and transparent manner, since, if they are not, this may diminish pluralism.*

More than two thirds of the countries (23) scored in the medium or high risk band (see Figure 1.4.5.), and as many as 8 scored a high risk (Turkey, Hungary, Bulgaria, the Czech Republic, Poland, Estonia, Finland and Greece). FYRoM and Serbia perform within the medium risk band. In Serbia, community media are recognised by the law, but the law does not guarantee their independence. Furthermore, the co-funding of local and regional media is often carried out through a procedure that is neither transparent nor fair. In FYRoM, the Access to the media for local communities and for community media is just below the high risk threshold. There is no obligation in the relevant law for the state to support local or regional media, nor does the state subsidise community media and, as a result, there are only three non-profit radio stations in the country.

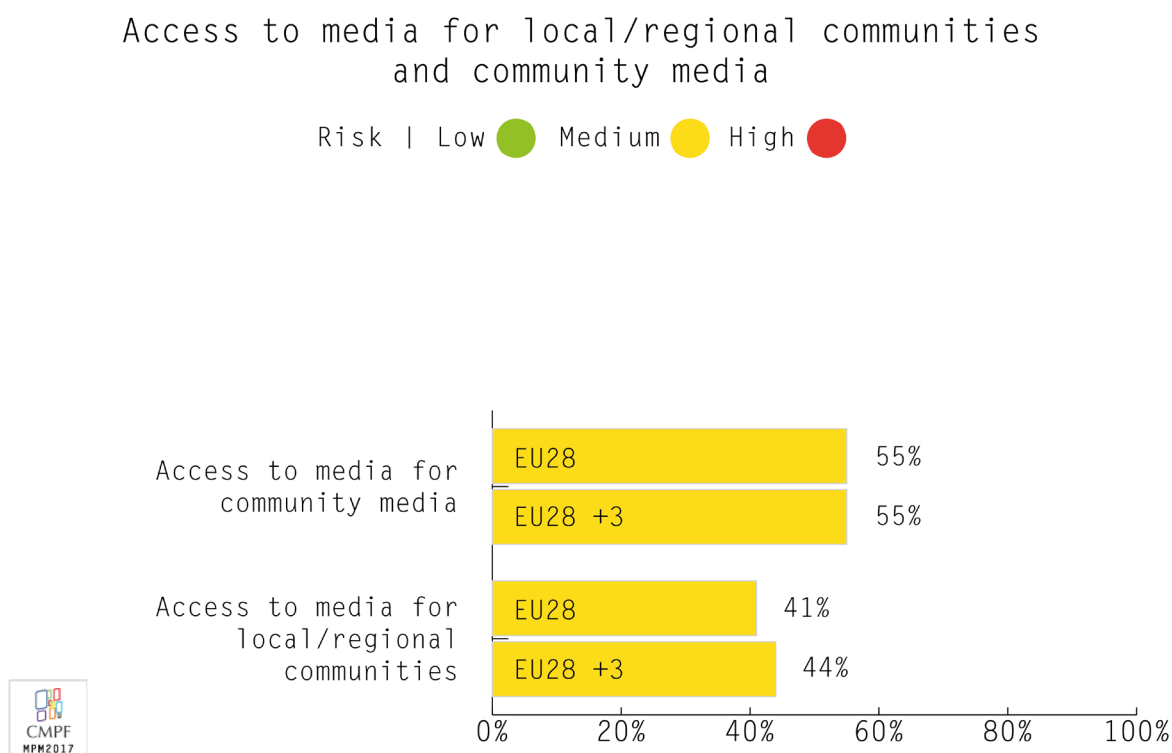
**Figure 1.4.5. Indicator on Access to media for local/regional communities and community media - Map of risks per country**



As in 2016, the sub-indicator on community media scores a higher risk if compared to that focusing on local and regional communities (see Figure 1.4.6.). It assesses whether the community media are guaranteed access to media platforms (e.g., by the reservation of TV or radio frequencies for community media, or guarantees of access to networks via must-carry rules), whether the community media's independence is safeguarded, and whether these media benefit from state support, subsidies or targeted policy measures. Seven countries (Cyprus, the Czech Republic, Estonia, Finland, Hungary, Luxembourg and Spain) scored a high risk on this sub-indicator.

The second sub-indicator examines whether there are legal safeguards for access to the media for local and regional communities, and whether the state supports local and regional media through subsidies or policy measures. The MPM assesses whether the law contains specific provisions granting access to the media platforms for regional or local media, and whether these provisions are implemented. Moreover, it assesses if the PSM are obliged to keep their own local/regional correspondents or branches, and if they have obligations to broadcast national news in regional and minority languages. The overall results drawn from this sub-indicator show that more than half of the countries (18) fall into the medium or high risk band, and 12 scored on the low risk level, with 4 (Austria, Germany, Portugal and Spain) being at the minimal possible risk level.

Figure 1.4.6. Indicator on Access to media for local/regional communities and community media - Averages per sub-indicator





## ACCESS TO MEDIA FOR PEOPLE WITH DISABILITIES

*All citizens have the right to access the media and persons with disabilities need this access in order to live independently and to participate fully in all aspects of life (European Blind Union, 2016). This is an issue for a large number of people, since there are circa 30 million who are visually impaired<sup>44</sup> and 50 million who are deaf or hard of hearing Europeans<sup>45</sup>, which together constitutes about 10% of the total EU population. The UN Convention on the Rights of Persons with Disabilities, which has been ratified by over 170 states and by all of the EU countries (European Commission, 2016), stresses that states should encourage the media, including providers of information through the Internet, to make their services accessible to persons with disabilities; and that they should promote the use of sign languages (Article 21). The Convention also asserts that states shall take all appropriate measures to ensure that persons with disabilities enjoy access to television programmes in accessible formats (Article 30)<sup>46</sup>. “Denying access to TV and on-demand content means discrimination on the basis of Article 30 of that Convention.”<sup>47</sup> At the European level, the Audiovisual Media Services Directive (AVMSD, 2010, Article 7) contains a non-binding measure stating that “Member States shall encourage media service providers under their jurisdiction to ensure that their services are gradually made accessible to people with a visual or hearing disability”.*

*The MPM indicator assesses the regulatory framework, including the policies and laws on access to media content for people with disabilities, and the availability of support services for people with hearing and visual impairments. In the framework of the MPM, people with disabilities are defined as those who are blind, partially sighted, deaf and hard of hearing. The indicator was refined for the MPM 2017’s implementation: several new variables were added to make the assessment of risks to accessibility more accurate, taking into account the key issues and the latest developments in this area. Particular attention was dedicated to enactment by adding two new variables that asked about the implementation of (i) the policy on access to media content by people with disabilities, and (ii) the legislation requiring access services.*

As in 2016, this is the indicator that showed the lowest risk in the Social Inclusiveness area, although it is still in the frame of medium risk. The largest number of countries (12) scored a medium risk, 11 are at a low risk, and 8 (Romania, Slovenia, Greece, Latvia, Malta, Lithuania, FYRoM and Luxembourg) acquired a high risk. The highest risk scoring country is Luxembourg, as in 2016, and the lowest scoring is Sweden. While Luxembourg has elaborated action plans to achieve several of the objectives of the United Nations Convention on the Rights of Persons with Disabilities, which was ratified in 2011, the outcomes are still insufficient, as the objectives defined in the Convention are not transposed into specific national laws (Kies and Schall, 2018). In practice, RTL Télé Lëtzebuerg (which fulfils public service missions), includes French and German subtitles for one programme only (the second broadcast of the national news at 20.30), and no audio descriptions are available. Sweden, on the other hand, has a well-developed policy on access to media content by people with disabilities, and support for people with visual and hearing impairments to access TV is available.

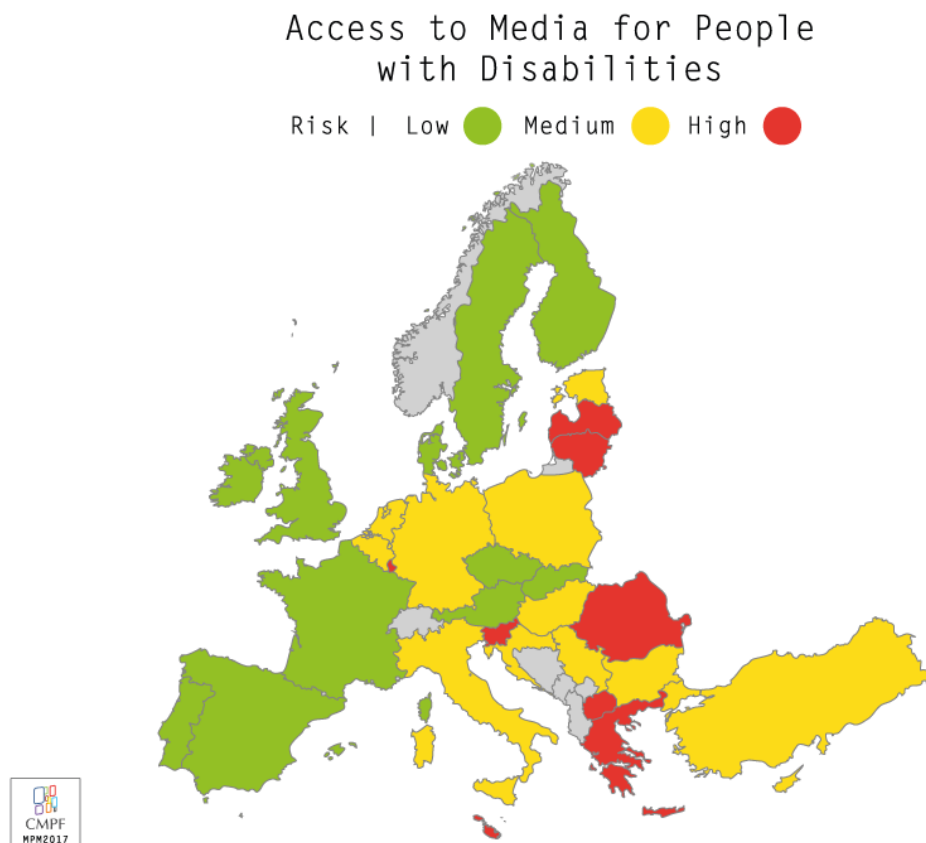
44 European Blind Union: <http://www.euroblind.org/resources/information/#details>

45 European Federation of Hard of Hearing People (2011). State of subtitling accessing EU. Report. [http://ec.europa.eu/internal\\_market/consultations/2011/audiovisual/non-registered-organisations/european-federation-of-hard-of-hearing-people-efhoh-en.pdf](http://ec.europa.eu/internal_market/consultations/2011/audiovisual/non-registered-organisations/european-federation-of-hard-of-hearing-people-efhoh-en.pdf)

46 The Convention establishes that “States Parties shall take all appropriate measures to ensure that persons with disabilities can exercise the right to freedom of expression and opinion, including the freedom to seek, receive and impart information and ideas on an equal basis with others and through all forms of communication of their choice.” See Articles 21 and 30: Freedom of expression and opinion, and access to information of the UN Convention on the Rights of Persons with Disabilities: <https://www.un.org/development/desa/disabilities/convention-on-the-rights-of-persons-with-disabilities/convention-on-the-rights-of-persons-with-disabilities-2.html>

47 <http://www.euroblind.org/newsletter/2016/july-august/newsletter/online/en/newsletter/feature/>

Figure 1.4.7. Indicator on Access to media for people with disabilities - Map of risks per country



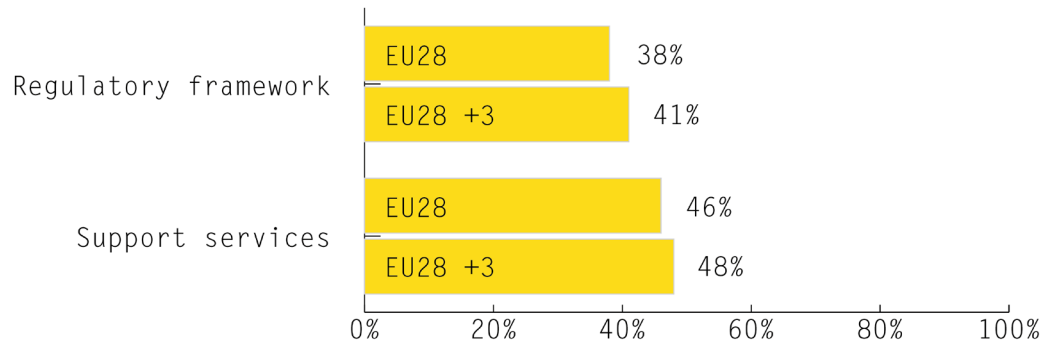
Overall, as shown in Figure 1.4.7., there is a lot of variation across the 31 countries in terms of the level of accessibility for people with disabilities. In general, countries seem to perform better on the regulation than on the practice side. This suggests that even when there are laws and policies on access to media content by people with disabilities, these are not always fully implemented in reality. One country (Latvia) has no policy on access to media content by people with disabilities, and in 20 countries existing policies are only nascent. However, even in cases where there are well-developed policies, such as in the Czech Republic, Germany, Malta, Portugal and Spain, these are partly implemented, or only some of the policy measures are concretely undertaken. Denmark, France, Slovakia, Sweden and the United Kingdom are the only countries in which policies on access to media content by people with disabilities are well developed and implemented. In addition, while the vast majority of countries (27) also have a law that requires access services for people with disabilities, in almost half (12) the law in question is not implemented effectively.

In practice, in almost half of the countries (14), subtitles, signing and sound descriptions in the audiovisual media for people with hearing impairment are available only on an irregular basis, or in the least popular scheduling windows (medium risk). In FYRoM, no subtitles, signing and sound descriptions are available, as the country team reported, which represents a high risk. As regards the levels of audio description available for blind people, 10 countries scored a medium risk, and 13 fall into the high risk band, since no audio descriptions for blind people are made available there.

Figure 1.4.8. Indicator on Access to media for people with disabilities - Averages per sub-indicator

## Access to Media for People with Disabilities

Risk | Low ● Medium ● High ●



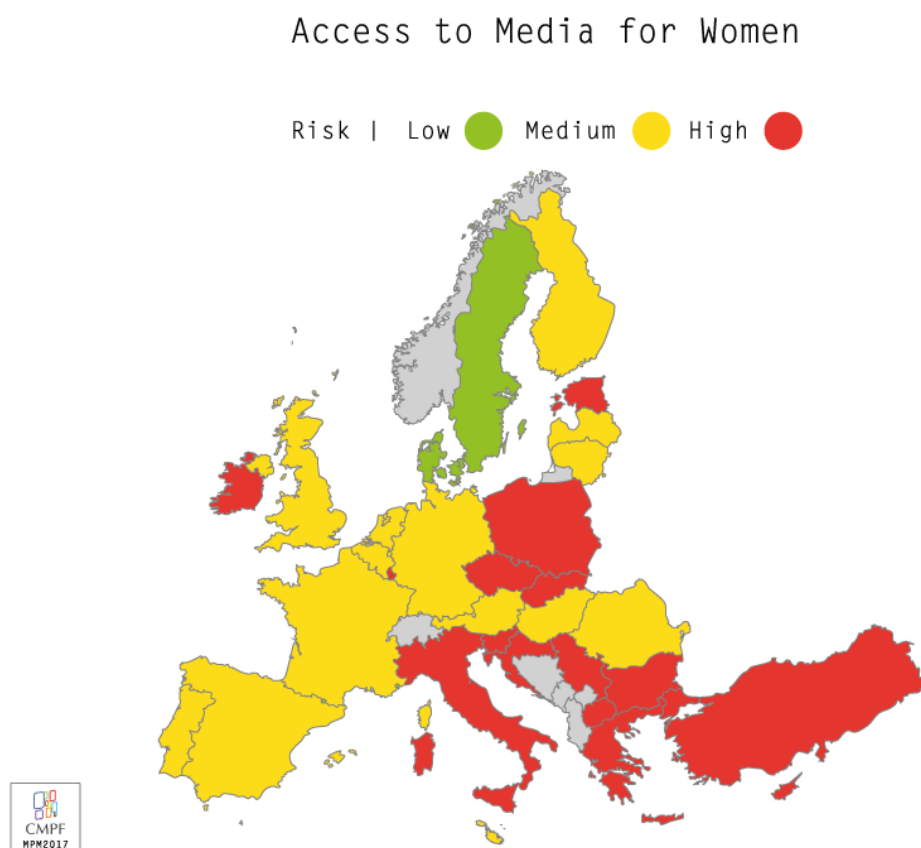
## ACCESS TO MEDIA FOR WOMEN

Gender equality is a fundamental value (Treaty on European Union, 2008) and a strategic objective of the EU (European Commission, 2015<sup>48</sup>). The Council of Europe considers gender equality to be an integral part of human rights, inter-related with media freedom, including editorial freedom, and hand-in-hand with freedom of expression, to be a fundamental right (Council of Europe Recommendation, 2013). However, gender gaps are still a reality in the media sector. The EU-wide study, conducted by the European Institute for Gender Equality (EIGE, 2013, p. 59), stresses that significant inequalities, including under-representation and career barriers, remain entrenched in the media sector. Part of the EIGE conclusions are confirmed by the results of this indicator in previous implementations of the MPM (Nenadic and Ostling, 2017).

The indicator Access to media for women evaluates the availability, comprehensiveness and implementation of gender equality policies within the public service media; as well as the proportion of women at the level of management, among news reporters and in news content. The indicator was slightly improved, if compared to the MPM 2016, in order to collect more relevant data, and to make a more targeted assessment of the risks in this area. A variable was added to assess the implementation of PSM gender equality policies, since poor implementation and the following-up of policies were identified as very plausible risks. Moreover, the indicator was expanded to also cover access to the private media.

Access to the media for women is the indicator with the highest risk score in the Social inclusiveness area (this was also the case in 2016). It is the only indicator across all of the MPM areas that, on average for all countries, results in a high risk level. This suggests, for the second consecutive year, that women are underrepresented in both managerial roles and the content of the media in Europe. Furthermore, the overall risk score has increased, if compared to the MPM 2016 (when it was scored as a medium risk, on average), and it is now in the high risk band. This is largely related to the refinements of the indicator. More specifically, the questions posed in the MPM 2017 are more detailed - seeking to evaluate the implementation of existing policies and to calculate the precise proportion of women in managerial roles in both the public service and commercial broadcasters. This may suggest that the deeper one digs, the more inequality will be discovered. As shown in the map, in Figure 1.4.9, 15 countries scored a high risk on this indicator, and only 2 (Sweden and Denmark) scored as a low risk.

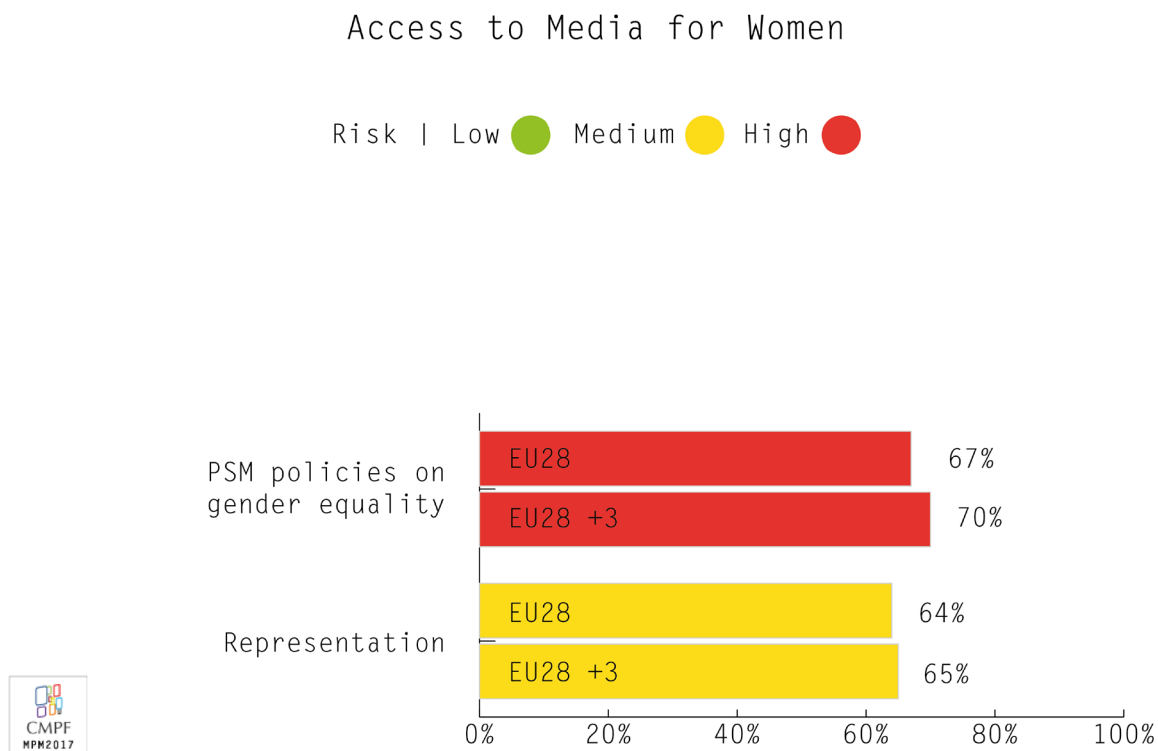
Figure 1.4.9. Indicator on Access to media for women - Map of risks per country



48 European Commission (2015). Strategic engagement for gender equality 2016-2019. [http://ec.europa.eu/justice/gender-equality/document/files/strategic\\_engagement\\_en.pdf](http://ec.europa.eu/justice/gender-equality/document/files/strategic_engagement_en.pdf)

Public service media have a comprehensive gender equality policy that covers both personnel issues and programming content in only 8 countries (Austria, Belgium, Denmark, Finland, France, Germany, Sweden and the United Kingdom), and in most of these cases, available policies are only partly implemented. In almost half of the countries (15), women are either not represented on PSM management boards or their share is at 29% or lower. The results are even more worrisome when we look at the top executive positions in the PSM (Chairs of Board, Directors) - in 22 of 31 countries, these posts are occupied by men. The situation is similar for the private TV companies: in 15 countries, the proportion of women among the members of management boards is 29%, or lower, and in 16 countries, executives (Chairs, Directors) are predominantly men. It is also important to note here that, in an additional 8 countries, the data on the organisational structure of private broadcasters and the composition of their boards was not available, which is seen as a risk that is related to the lack of transparency.

Figure 1.4.10. Indicator on Access to media for women - Averages per sub-indicator



## MEDIA LITERACY

*Media literacy is a fundamental prerequisite of an accessible media system, and a core element of media pluralism. People need to master media literacy skills so as to fully enjoy fundamental rights, such as freedom of expression and access to information (UNESCO, 2013). The European Commission has recently put the promotion of media literacy as one of the key follow-up actions to the Annual Colloquium on Fundamental Rights in 2016.<sup>49</sup> Moreover, the European Audiovisual Media Services Directive (AVMSD, 2010) requires both the development of media literacy in all sections of society and the measurement of its progress.<sup>50</sup> The Monitor bases its definition of media literacy on both the AVMSD text and the European Association for Viewers Interests' (EAVI) media literacy study, which was carried out in 2009: "Media literacy is an individual's capacity to interpret autonomously and critically the flow, substance, value and consequence of media in all its many forms" (EAVI, 2009). "Media literacy" refers to skills, knowledge and understanding that allow consumers to use media effectively and safely. Media-literate people are able to exercise informed choices, understand the nature of content and services and take advantage of the full range of opportunities offered by new communications technologies. They are better able to protect themselves and their families from harmful or offensive material" (AVMSD, 2010).*

*The MPM indicator covers two major dimensions of media literacy: environmental factors, and individual competencies, which follow the logic of the categorisation used by EAVI (2009: 5). EAVI defines environmental factors as a set of contextual factors that have an impact upon the broad span of media literacy, including informational availability, media policy, education and the roles and responsibilities of stakeholders in the media community. Individual competencies are defined as an individual capacity to exercise certain skills (including inter alia cognitive processing, analysis, communication). These competencies draw on a broad range of capabilities, and embrace increasing levels of awareness, the capacity for critical thought and the ability to produce and communicate a message (EAVI 2009).*

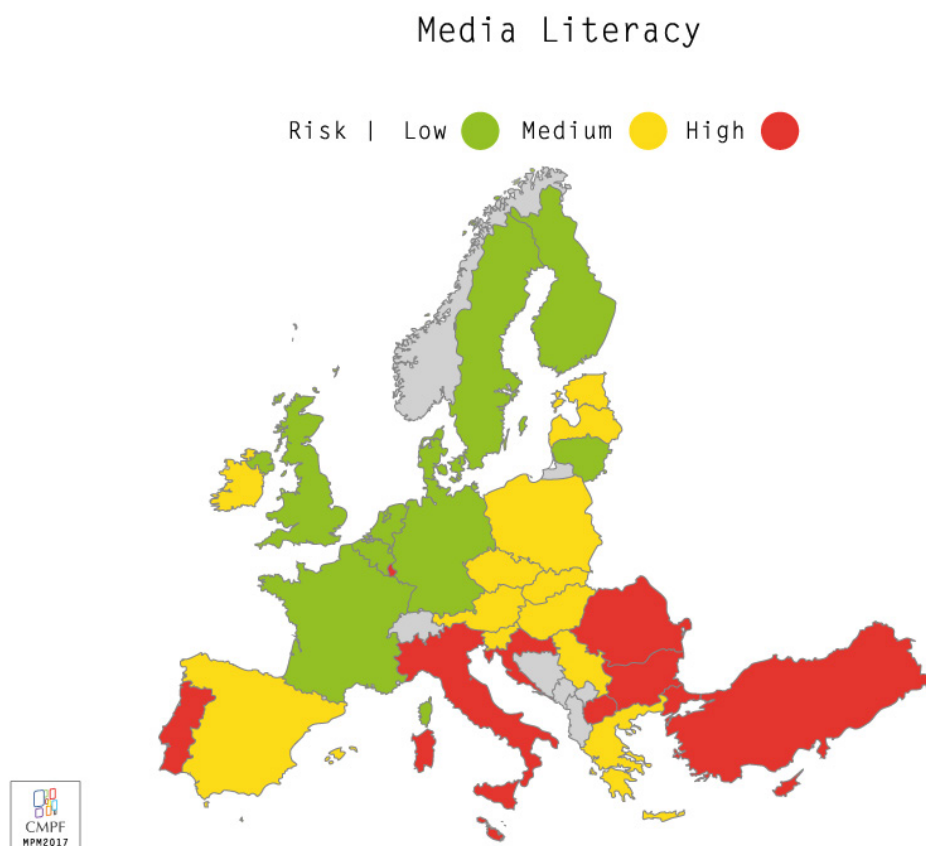
*Two new variables were added to this indicator for the MPM 2017, and these are based primarily on discussions with media literacy experts that took place at the European University Institute on 3 November 2016. A variable was added to assess the implementation of media literacy policies, and a variable asking about the quality of teachers' training in media literacy was added, because poor teaching quality was identified as being a potential risk, both by country teams in MPM2016 and by the media literacy experts consulted. Furthermore, the two variables on digital competencies, one on digital usage, and one on digital communication, were merged into one, composite indicator so as to reflect the Eurostat methodology (Eurostat data is used to score this variable), and because the results relating to the two sets of skills across countries are very similar.*

12 countries scored a medium risk on Media literacy, 9 are at high risk (Bulgaria, Croatia, Cyprus, FYRoM, Italy, Malta, Portugal, Romania, and Turkey), and 10 showed a low risk (Belgium, Denmark, Finland, France, Germany, Lithuania, Luxembourg, the Netherlands, Sweden, and the United Kingdom). These results are largely in line with the MPM 2016, with a few exceptions. On the positive side, Lithuania progressed from scoring a medium risk to scoring a low risk, due to, among other things, a strategic document on media policy with a strong focus on media literacy that has been designed by the Ministry of Culture and approved by the Media Council (which has an advisory function). For three countries, namely, Cyprus, Portugal and Croatia, the risk has increased from the medium to the high level. This is largely related to changes in methodology, but also reflects the state of play in relation to the quality of teachers' training in media literacy. In Cyprus and Croatia, the training programmes in media literacy for teachers are limited, meaning that they do not comprise the study of critical skills, or are not up-to-date with the latest societal changes, while in Portugal, according to the country team, teachers are not provided with any training in media literacy.

49 European Commission (2016). "The European Commission presents follow-up actions from Fundamental Rights Colloquium on media pluralism and democracy". Published: 9 December 2016. [http://ec.europa.eu/newsroom/just/item-detail.cfm?&item\\_id=51071](http://ec.europa.eu/newsroom/just/item-detail.cfm?&item_id=51071)

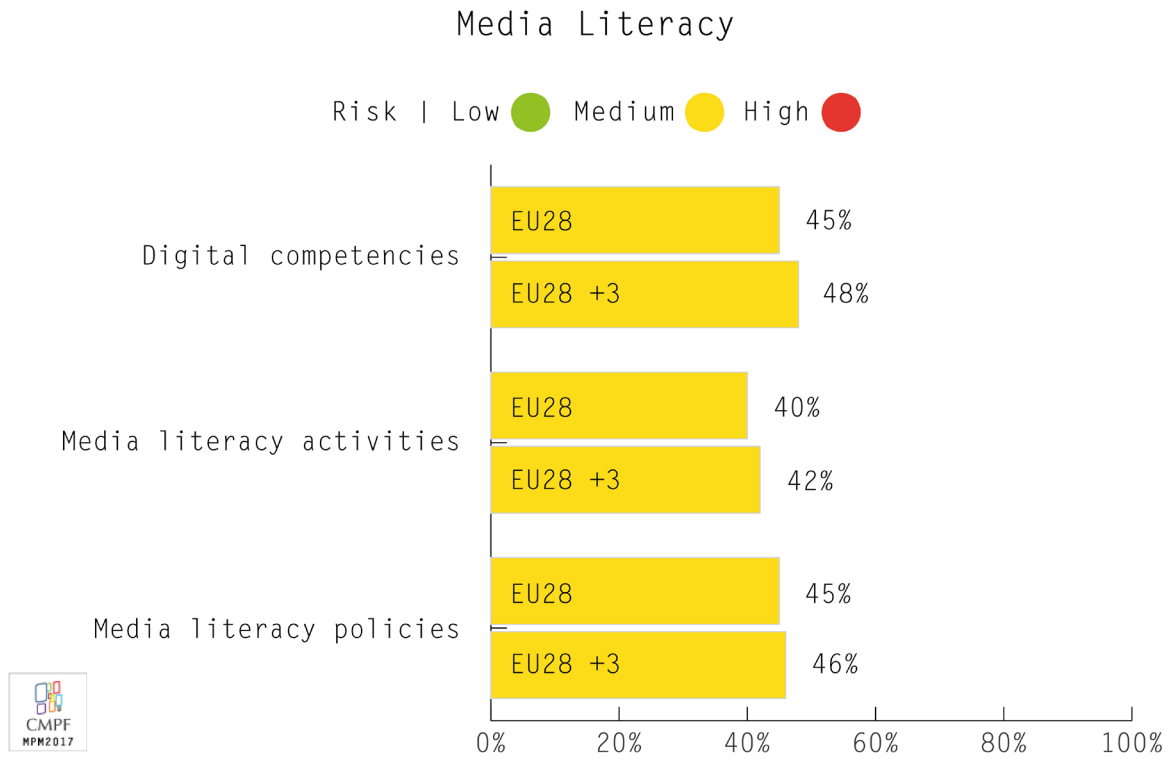
50 The AVMSD is currently under revision. The European Parliament's Committee for Culture and Education, on 25 April 2017, proposed the maintenance of media literacy measures in the Audiovisual Media Services Directive (AVMSD). Source: EAVI (2017). Press Release: European Parliament Votes for Media Literacy. <https://www.eavi.eu/5637/?lang=it>. The Trilogue agreement of the 7th of June 2018 has confirmed this in its agreed text.

Figure 1.4.11. Indicator on Media literacy - Map of risks per country



This indicator is composed of three sub-indicators: Media literacy policies, Media literacy activities and Digital competencies. The first two assess the media literacy environment by covering the quality and implementation of the media literacy policy, the presence of media literacy in the educational curriculum, including the quality of teachers' training, the presence of media literacy in the non-formal education offer, and the extent of the media literacy activities that are carried out. More than two thirds of the countries (24) either have underdeveloped media literacy policies or have no media literacy policy at all. This suggests that there has been no significant progress since the MPM 2016. Furthermore, in 14 countries, media literacy is present in the education curriculum only to a limited extent (medium risk), and in 8 countries it is completely absent, which represents a risk (Bulgaria, Cyprus, FYRoM, Italy, Luxembourg, Malta, Poland and Slovenia). The training programme in media literacy for teachers is either limited or not even provided in 24 of the countries. In two thirds of the countries, the subject of media literacy is absent, or it is present only to a limited extent, in non-formal education also, and a similar situation is seen in relation to other activities that are related to media literacy. Looking at the individual competencies, the results for the vast majority of the countries (23) show a medium or a high risk, meaning that the percentage of the population that has at least basic digital skills is 66%, or lower.

Figure 1.4.12. Indicator on Media literacy - Averages per sub-indicator





# CONCLUSIONS

The results of the MPM2017 monitoring exercise generally confirm the highlights of the previous rounds of the MPM's implementation: none of the analysed countries are free from risks to media pluralism. What is worrisome is that the latest findings show either a stagnation or a deterioration in all of the four major areas covered by the MPM, and an increase in risk for the area of Basic protection is a particular source of concern.

Detailed results for each of the 31 countries that is analysed by the MPM2017 can be found in the country narrative reports, which are produced by the MPM2017's country teams, as listed in Part 2, which relates to the methodology utilised.

Overall, 2017 was marked by events that have had a significant impact on media freedom and media pluralism in Europe. The average risk level for Basic Protection has risen, and this is due to several indicators scoring higher risk levels. The assassination, in Malta, in October 2017, of the investigative journalist and blogger Daphne Caruana Galizia, makes 2017 one of the darkest years for freedom of expression for the continent since the Charlie Hebdo massacre of 2015. Caruana Galizia's assassination represents a sad reminder to Europe of the need to keep its guard high when it comes to the safety of journalists. As events later in 2018 have once again demonstrated, with the assassination of the journalist Ján Kuciak and of his fiancée Martina Kušnírová in Slovakia, in February 2018, Europe is not immune from lethal attacks against journalists. At the time of the publication of this report, there was no indication as to the masterminds behind the three assassinations. The MPM2017's analysis highlights that journalists and other media actors are currently facing a series of threats and attacks in several of the EU's countries.

These events, and the findings revealed, should be a constant reminder to EU governments that they have a positive obligation to guarantee an enabling environment for journalists, as expressed by the European Court of Human Rights in its case-law. States are required to create a favourable environment for participation in public debate by all citizens, thus enabling them to express and impart opinions and ideas without fear. The State must not solely refrain from any unjustified interference with individuals' freedom of expression, but must also proactively protect the individual right to freedom of expression in the case of any kind of intimidation.

Member States also have a duty to deploy all means to avoid impunity for crimes that are linked to journalism. The Guidelines annexed to Recommendation CM/Rec(2016)4 of the Committee of Ministers of the Council of Europe on the protection of journalism and the safety of journalists and other media actors, state that: "It is imperative that everyone involved in killings of, attacks on and ill-treatment of journalists and other media actors be brought to justice. Investigations into such crimes and the prosecution of those responsible for them must therefore meet a number of general requirements. When those responsible for such crimes are not brought to justice, a culture of impunity can arise, which calls for particular courses of action".

It is, therefore, essential for the EU and its Member States to prioritise the protection of journalists, while governments must comply with their positive obligations to ensure that freedom of expression and media freedom are guaranteed.

Closely linked to the safety of journalists - whistle-blowers' protection, a theme newly highlighted in MPM2017, is still weak in EU Member States. MPM2017 data seem to confirm the need of a harmonisation at EU level of basic rules on whistle-blowers' protection<sup>51</sup>.

Turkey's specific situation must be highlighted once again, especially when analysing the Basic Protection area results, for which the country scored a high risk in all the indicators. The data analysis shows that not only freedom of expression, but also the basics of the rule of law are systematically challenged and jeopardised in Turkey.

The MPM2017's analysis highlights also some of the other elements that contribute to the worrisome general assessment of the score for the Basic Protection area, which relate to a lack of full transparency as regards the procedures and criteria that are adopted by digital intermediaries when removing or filtering online content and, in the end, in the application

51 The European Commission proposed, in 2018, a Directive on the protection of persons reporting on breaches of Union law that should ensure a harmonised EU-wide protection for whistle-blowers in regard to breaches of EU legislation in the fields of public procurement; financial services, money laundering and terrorist financing; product safety; transport safety; environmental protection; nuclear safety; food and feed safety, animal health and welfare; public health; consumer protection; privacy, data protection and the security of network and information systems. It also applies to breaches of EU competition rules, violations and abuse of corporate tax rules, and damage to the EU's financial interests. See COM/2018/214 final [https://ec.europa.eu/info/sites/info/files/placeholder\\_10.pdf](https://ec.europa.eu/info/sites/info/files/placeholder_10.pdf)

of the rule of law when it comes to freedom of expression online. This is a crucial topic, raised also at the EU level in the context of the debate on the disinformation that is spread by the Web<sup>52</sup>, in the context of the discussion on the regulatory measures to be adopted to combat hate speech<sup>53</sup>, in the context of the reform of the Audiovisual Media Services Directive<sup>54</sup>, and in the debate on measures to protect copyright in the online environment<sup>55</sup>.

As regards the Market Plurality area, the MPM2017 confirms the trends of previous rounds of assessment. The area continues to face an average medium risk, confirming that EU member states' media markets are highly concentrated. Media ownership concentration is one of the indicators with the highest risk within the whole MPM, this year scoring an average 66%, and concentration remains one of the most evident barriers to the diversity of information and viewpoints. Lack of transparency in media ownership is another risk that was captured by the MPM, confirming again 2016's trends. The results also shed light on the financial constraints that the media sector is facing, especially those of the newspaper and radio sectors, which have seen a decrease in revenues in recent years in most of the countries analysed. The Internet has challenged the traditional business models of the publishing industry: MPM2017's results also demonstrate that media outlets still need to develop new strategies and business models in order to increase their revenues.

Editorial autonomy continues to be a vulnerable indicator, both in terms of political and commercial influences on journalists. Working conditions that are increasingly poor and that expose journalists to external and undue pressures in their professional activity in most of the countries examined.

2017 brought no major changes in the area of Political Independence. Political independence of the media persists in being one of the highest scoring indicators of the MPM, and a lack of independence in public service media management and funding, especially in the CEE, remains a matter of concern. Moreover, the latest developments suggest a further deterioration in the trend: in Bulgaria, amendments in the Radio and Television Act have allowed for the indefinite extension of the regular 3-year mandates of the Directors General and the management boards of the PSM in cases when the term of office is completed, and a new Director General is not elected by the media authority (CEM) (Spasov et al., 2018). In Croatia, the Supervisory Committee of the PSM was dismissed by the Parliament before the end of its mandate, following the Committee's 2016 report, which it exposed many irregularities in the management of the PSM (Bilic et al., 2018).

As in the MPM2016, Access to the media for women is the indicator with the highest risk score in the Social inclusiveness area. In 2017, it is the only indicator across all of the MPM areas that, on average, scores a high risk level. This suggests, for the second consecutive year, that women are underrepresented in both managerial and content creation roles in European media organisations.

More than two thirds of the countries (24) under examination either have underdeveloped media literacy policies or no media literacy policy at all. This suggests that, even though media literacy has often been praised as being a solution to growing disinformation related issues, there has been no progress on this matter since the MPM2016.

The findings of the MPM2017 not only confirm that no EU Member State is free from risks to media pluralism, but also show that such risks are increasing, both as a consequence of deteriorating compliance with standards on freedom of expression and media pluralism that were taken for granted, and of the development of a new online media environment, that challenges traditional legal, economic and socio-political power structures.

The observed risks must be assessed in the specific country's context and in the specific media and political landscapes. Measuring the risks to media pluralism is an essential exercise for the promotion of both media pluralism and media freedom. The MPM provides data to researchers and civil society, and it may help policymakers to better understand country specific problems; it provides a basis for further analysis and for defining relevant policies in order to foster an enabling environment for debate and peaceful democratic discourse.

---

52 See, for instance, the report of the Independent High Level Group on fake news and online disinformation, A multi-dimensional approach to disinformation, March 2018 <https://ec.europa.eu/digital-single-market/en/news/final-report-high-level-expert-group-fake-news-and-online-disinformation>

53 [http://ec.europa.eu/newsroom/just/item-detail.cfm?item\\_id=54300](http://ec.europa.eu/newsroom/just/item-detail.cfm?item_id=54300)

54 <https://ec.europa.eu/digital-single-market/en/revision-audiovisual-media-services-directive-avmsd>

55 Especially, see the debate on the Directive of the European Parliament and of the Council on copyright in the Digital Single Market – COM (2016)593

## 2. METHODOLOGY

### 2.1 THE RESEARCH DESIGN

The Media Pluralism Monitor organises the risks for media pluralism into four main areas: Basic Protection, Market Plurality, Political Independence and Social Inclusiveness. This categorisation allows for an assessment that encompasses the different components and meanings of “media pluralism”. These areas are assessed according to the scoring of 20 indicators and 200 variables, in total. The research design of the MPM is based on a questionnaire compiled by the national country teams, and these teams consist of experts in media pluralism and media freedom. The questionnaire is composed of legal, economic and socio-political questions in order to allow an assessment of media pluralism risks in any given country, taking into account the legal framework, its implementation, and the effective conditions of the media landscape. Legal and socio-political questions are closed, while economic questions ask for a numerical value that is formally translated into a level of risk. For a number of particularly sensitive and complex indicators, the MPM employs an external peer review system, called the Group of Experts. This group of experts, which includes national stakeholders and experts in the area, conducts a review of the answers to questions that require a qualitative type of measurement and/or cannot be based on measurable and easily verifiable data. Data for MPM2017 was gathered through a structured questionnaire with closed questions (except for the economic questions, where benchmarks are set in order to translate them into qualitative answers – please see the ‘User Guide’ in Appendix I for details). This method allowed for the gathering of both quantitative and qualitative data, which proved to be crucial in assessing the risks to media pluralism in the EU. Additionally, this method allowed the quantitative analysis of answers and the production of a numerical risk assessment, which is essential in order to obtain comparable results across countries. The data is collected using an online platform that was developed by the CMPF. The CMPF checks and supervises the quality and consistency of the data collected, and of the methodology used.

The final assessment per area of risk is carried out using a standardised formula developed by the CMPF. Each variable is assessed by a question and receives a score from 0 to 1, according to the specific answer. The legal questions (yes/no replies) are rated 0 or 1. The other variables (three-option replies) are rated 0/0.5/1 according to the band into which the reply falls. The overall result is the average of variables of the same question type. The MPM is a holistic tool that is designed to identify the potential risks to media pluralism in Member States. The research design of the MPM was developed and tested during the two pilot implementations of the Monitor in 2014 and 2015. It mostly focuses its analysis on news and current affairs. However, it must be noted that, as in previous MPMs (2014, 2015 and 2016), “all indicators that assess the general universality of media coverage and the outreach of the diffusion of information” (CMPF, 2015, 2016 and 2017) are included in the MPM. “They are considered to be basic indicators that are relevant to the infrastructure and universality principles as a whole” (CMPF, 2015, 2016 and 2017). In particular, indicators on access to the media for minorities, people with disabilities, and media literacy, are preserved as part of this holistic principle. In order to meet the challenges emerging from this periodic large scale comparative analysis, the MPM2017 is mostly informed by secondary data, collected through a questionnaire, and it is supplemented with primary data gathered through interviews and document analyses (e.g., of legal and academic texts), together with the group of experts’ evaluation of the variables that are more difficult to measure and/or that required a qualitative type of measurement, and/or showed a lack of measurable and easily verifiable data. As was already discovered from the first MPM’s pilot-test implementation (2014), there are many reliable, available materials which can be used as primary and secondary sources, e.g., national laws, case law, decision practice, governmental documents, NGO reports, official statistics, and academic research. The secondary data analysis, with the cited integrations, has therefore proven to be a useful and effective approach in order to ensure reliable and valid findings in the context of this project.

## 2.2 RESEARCH AND FINE-TUNING OF THE VARIABLES

The MPM2017 is an update of the MPM2016 tool. As in previous years, the CMPE, in fact, updated and fine-tuned the MPM2016 questionnaire, based on the evaluation of the tool after its implementation, the results of the 2016 data collection, new developments in the field of media, and newly available data. Below is a description of the main changes to the MPM2017 questionnaire.

The Basic Protection Area retains its scope, with some adjustments. The main changes in the Area of Basic Protection were the inclusion of five new variables, three under Indicator 2 on the Protection of the right to information, regarding the protection of whistle-blowers, and two under Indicator 3 (Status of journalists, standards and protection), regarding the protection of journalists. In particular, some variables on the detention and killings of journalists were added, in order to collect more reliable data on countries that are facing specific problems in complying with very basic standards on the safety of journalists. Some other variables were merged with similar ones for the sake of clarity in the answers (which sometimes overlapped) and some other variables were fine-tuned in their terminology.

With regard to the area of Market Plurality, the main changes were made in Indicator 6 (Transparency of media ownership) and Indicator 10 (Media viability). The indicator on the Transparency of media ownership was revised and enhanced in order to better capture the level of compliance of the regulation of each country with international standards (in particular, those highlighted by the Access Info Europe <https://www.access-info.org/media-ownership-transparency>). With regard to the indicator on Media viability, the variables regarding the variations in the revenues in each media market is now assessed by taking into account the GDP trends in the last two years.

The area of Political Independence retains its scope. However, based on the experience of the MPM2016 and considering growing digital challenges, the indicators within this area have been further developed and fine-tuned. The indicator Political independence of the media (renamed from Political control over media outlets, in order to be in line with the “positive” names of other indicators and to better reflect its range) continues to evaluate the issue of conflicts of interest between government office and media ownership. The second part of the indicator, focusing on political control over media, news agencies and distribution networks, has been improved to better reflect media realities. In the MPM2016, Political control of the media accounted for most of this indicator. There was a sub-indicator for each type of media (audiovisual, print, radio, TV) composed of a set of three variables so as to assess the legal safeguards that aim to prevent political ownership, their implementation and the situation in practice. Country teams reported this as being too restrictive and as potentially overemphasising the risk. The MPM2017 therefore maintains only the assessment of the situation in practice for each different type of media, and looks at the existence and effectiveness of the legal framework that aims to prevent political control of the media, in general. This is the biggest change in this area. Another change was made to the indicator Media and the democratic electoral process, which assesses the existence and implementation of the regulatory and self-regulatory framework for the fair representation of different political actors and viewpoints on PSM and the private channels and services, especially during electoral campaigns. In the MPM2017 this indicator extends to the online sphere by introducing a new variable that captures whether there is a regulation that aims to ensure the fairness and transparency of online political advertising during electoral campaigns.

At indicator-level, there are no changes in the area of Social Inclusiveness. Changes, however, have been made on the sub-indicator and variable-levels. Access to the media for minorities: several variables have been eliminated and new ones introduced. The aim of the changes was, on the one hand, to improve the distinction between minorities that are legally recognised and those that are not. On the other hand, a clearer separation was made between access for minorities to the PSM and to private broadcasters. These changes were made based on thorough discussions with country teams, both during the data collection and during a dedicated session at the Final conference in 2016.

Some variables focusing on the proportionality of access to TV, radio and print were eliminated for three reasons: (1) the questions were too broad, asking about all types of minorities and about both public and private media, while not specifying any media sample, (2) most of the MPM2016 countries did not have data on the programming hours that are/were dedicated to minorities, (3) these variables were not symmetrical with the first sub-indicator about access to the PSM. These changes should allow us to increase the accuracy of the answers and to carry out a more symmetrical analysis about access to the PSM and to private broadcasters. The proportionality of access will still be assessed by offering apposite answer options under the new variables.

Access to media for local/regional communities and for community media: only a few changes were made to the variables in this indicator. Most related to the formulation of questions and descriptions. A new variable was added that asked if the state subsidies are distributed to media outlets in a fair and transparent manner. This addition was made because, in 2016, several country teams stressed that local media subsidies are misused by local governments, e.g., to fund media outlets that favour their political line, which is clearly a risk to pluralism. A variable on the proportionality of subsidies for community media across communities was removed, because it partly overlapped with the subsidy-variable above, and because of the very broad scope of the question. The variable asking whether the PSM are obliged to have national news available in regional and minority languages was transformed to focus on the practice, as opposed to the legal framework (new variable question: “Does the PSM have national news available in minority languages?”), in order to avoid misjudging countries that do not have related legislation but that, nevertheless, have good practices. This variable was also moved to the related indicator on minorities (see above), considering that this indicator is more relevant to access to the media for minorities.

Access to the media for people with disabilities: several new variables were added to this indicator in order to make the assessment of risks to accessibility more accurate, taking into account the key issues and the latest developments in this area. This was done in close consultation with both academic and civil society experts working in the field. Particular attention was dedicated to enactment by adding two new variables that asked about the implementation of (i) the policy on access to media content by people with disabilities, and (ii) the legislation requiring access services. Moreover, a variable assessing the adequacy of information about existing audiovisual access services was added (e.g., a central online repository of all available access files for country/language specific programmes as a good practice, or the marking of the services in the TV programme, highlighting them in the local or national newspapers where the TV programmes are advertised, or the icons or “earcons” used on TV). This issue was considered important because information about access services is often lacking, which means that, even if accessibility is deployed, this is much less valuable if people are not adequately informed about it.

Access to the media for women: several new variables were added to this indicator in consultation with academic experts in the field in order to collect more relevant data, and to make a more targeted assessment of risks in this area. A variable was added to assess the implementation of the PSM gender equality policies, since poor implementation and following-up of policies were identified as being very plausible risks. Moreover, the indicator was expanded to also cover access to the private media. Given the major relevance, and in order to limit the number of variables in the Monitor, the focus was placed on the representation of women on the management boards of private TV companies (not radio or print).

Media literacy: two new variables were added to this indicator and these were based on conclusions from the workshop with media literacy experts that took place at the European University Institute on 3 November 2016, and on further consultations with experts. A variable was added to assess the implementation of media literacy policies, a highly relevant aspect for the development of media literacy. Moreover, a variable asking about the quality of teachers’ training in media literacy was added because poor teaching quality was identified as being a potential risk, both by the country teams in MPM2016 and by the media literacy experts consulted. Finally, the two variables on digital competencies, one on digital usage and one on digital communication, were merged into one, composite indicator so as to reflect the Eurostat methodology (in fact, Eurostat data were used to score this variable) and because the results on the two set of skills across countries were, in the past, very similar.

## 2.3 MPM2017 STRUCTURE AND CALIBRATION

All of the questions in the MPM questionnaire are classified as variables. Variables are grouped into sub-indicators, and sub-indicators into indicators, which are integral parts of each MPM area. In addition, each question in the questionnaire has been classified as belonging to one of the four question types: Legal existence (L-e) questions, which are focused on whether or not a particular provision exists in a country’s legal framework; Legal implementation (L-i) questions, which are designed to examine whether due process is in place to ensure the effectiveness of the legal safeguard; Socio-political (S) questions, which examine the actual practice (i.e., a reality check); while economic (E) questions were designed to assess the risk, based on the economic data that are related and that affect media pluralism (e.g., market revenues, audience shares). In order to determine the risk for each variable, sub-indicator and indicator, a standardised formula has been applied to the entire MPM questionnaire. The formula was designed by drawing from previous studies in which the indices were based on a list of questions/indicators where answers were calibrated on a scale from 0 to 1 (e.g., Gilardi, 2002; Hanretty, 2009). In other words, in the process of calibration, quantitative and qualitative answers of both a dichotomous (e.g., yes - no) and a polychotomous (e.g., low, medium, high risk) nature have been transformed into a scale ranging from 0 to 1, assigning values to the answers of the Monitor. Each variable received a score from 0 to 1, according to the answer to the specific question, with scores closer to 0 pointing to a low risk assessment, and those closer to 1 pointing to

a high risk assessment. Specifically, answers to the Legal-existence (L-e) questions, whose response type was yes/no, were coded as 0 or 1. Questions with a three-option reply (low, medium, high risk) were coded as 0, 0.5 or 1, according to their risk assessment. The same calibration was applied to the Economic questions (E), whose answers were firstly transformed into qualitative replies (low, medium, high risk), based on pre-set benchmarks.

The MPM allows the possibility to answer by using the options 'not applicable' and 'no data' to all questions. The option 'not applicable' was introduced in MPM2015 to better capture the specificities of the national contexts and to allow for the exclusion of questions which are irrelevant, or which are totally inapplicable to a country's media system. For example, if a country does not have any state subsidy for the media, the questions relating to the existence and implementation of the legislation to ensure fair and transparent allocation were coded as 'not applicable'. This reply option was also used with logically dependent variables. For example, if the variable question asks whether there is a law that aims to protect the freedom of expression, and the answer to this question is 'no', then the following variable which asks about the effectiveness of the law is coded as 'not applicable'. All the questions coded as 'not applicable' are excluded from the final calculation. As the previous implementations have shown, some of the economic data are missing across many of the EU Member States, and in order to better capture this information, the Monitor allows the option of a 'no data' answer. Following the choice of this answer, the country teams were asked to evaluate whether the lack of data represents a transparency problem within their national context, i.e., to evaluate whether the lack of data should be seen as being problematic in their country. In this way also, the specific characteristics of the national context were accounted for, since there may be a variety of reasons why certain data are not available/accessible across EU Member States and Candidate Countries, and not all of these reasons may be causes for concern. In order to ensure that all 'no data' answers have contributed to national risk assessments in the same way, a standardised procedure to assign values to the 'no data' answers was developed by the CMPF. According to this procedure, each 'no data' answer was coded and assigned one among the following three possible values: 1) Low Risk: a value of 0.25; 2) High Risk: a value of 0.75; 3) Missing data was interpreted as a 'not applicable' and excluded from the analysis. The number of the 'missing data' values was limited, as much as possible, and was adopted only as a residual category in cases where comments that evaluated the reason behind the lack of data were missing, incomplete, or were impossible to interpret.

In normal cases, the following procedure was applied: firstly, if a local team took a position in the answer, indicating that a high risk is present, or, in contrast, that the lack of data is not problematic, the CMPF has followed this suggestion and has coded 'no data' accordingly, with either a low or a high risk value. In cases where the answer was vague, or where its meaning had to be deduced, the following criteria were considered: a) taking into account the local context: if the data are not collected because they are considered to be of limited interest, e.g., because the country is too small to collect detailed information, because a particular medium has a very limited reach, etc., a 'low risk' value was assigned; b) if there is the evasion of a legal requirement to collect the lacking data, a 'high risk' value was assigned; c) for questions concerned with the audience data and the revenue/market share data: • if the country presents data on audience, but not on revenues/market share: the market share data is excluded from the analysis, i.e., the answer is given a 'missing data' value, meaning that the findings are based on the audience variable alone. In other words, the revenue data are considered to be optional. • if the country presents data on the revenues, but not data on audience shares: the lack of audience shares data is coded as being 'high risk' in all cases, since it is the standard reference for the market. • if the country produces neither data on the audience, nor on the market share: according to above mentioned rules, the lack of audience shares' data is coded as being 'high risk', and the lack of market shares data as being 'missing data'.

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

## 2.4 MPM2017 AGGREGATION METHOD

The aggregation method relied on approaches used in previous studies (for an overview, see Hanretty and Koop, 2012), but taking into account the traditions and logic of the Media Pluralism Monitor project. Specifically, the method based on the mean of the item scores, used as the most common aggregation method in calculating indices, was updated to take into account the logic of the MPM, which has traditionally relied on the groupings of legal, socio-political and economic indicators. Consequently, the procedure for establishing the risk assessment of an indicator was as follows: 1) calculate the mean of L-e variables within the sub-indicator, 2) calculate the mean of L-i variables within the sub-indicator, 3) calculate the mean of 1) and 2). This is the value of the L within the sub-indicator (the L variable is 'e' or 'i' according to the type of opening question/variable), 4) calculate the mean of E variables within the sub-indicator, 5) calculate the mean of S variables within the sub-indicator, 6) calculate the mean of 3), 4) and 5). This is the result of the sub-indicator. 7) the value of the indicator is calculated as the mean of all its sub-indicators. Finally, the risk assessment of the area is

calculated as the mean of all its indicators (five per area). It should be noted that all values were presented as percentages for ease of use and interpretation (e.g., a score of 0.46 is presented as a risk of 46%). The results for each area and indicator are presented on a scale from 0% to 100%. Scores between 0 and 33% are considered to be low risk, 34 to 66% are considered to be a medium risk, while those between 67 and 100% are thought of as high risk. On the level of indicators, scores of 0 were rated 3% and scores of 100 were rated at 97% by default, in order to avoid an assessment of a total absence or certainty of risk, concepts, in contrast with the natural logic of the MPM tool. This trimming of the extreme values, as a methodological novelty that was introduced in MPM2016, was developed in a collaboration with Gianni Betti<sup>56</sup>, Professor of Statistics at the University of Siena.

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

## 2.5 DATA COLLECTION

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

### 2.5.1 THE QUESTIONNAIRE

The MPM2017 research network was mostly confirmed from 2016, in an effort, as much as was possible, to ensure continuity, and therefore comparability. The questionnaire was answered by national teams that were composed of renowned experts in media pluralism and media freedom in each of the countries analysed, excluding Italy and Malta, for which the data collection was carried out directly by the CMPF team. As in previous pilot implementations, cooperation with national teams of experts proved to be essential during the implementation of the MPM2017. Firstly, due to the necessity of relying on secondary data, which is often in the native language, it was essential to have local experts who were able to collect these data, but also to evaluate their reliability and validity. Another benefit of using a local team to implement the Monitor was the ability to build on their access to their local networks, particularly access to the local stakeholders. Given that one of the objectives of this project is to establish and maintain contacts with the relevant stakeholders, local teams' input in growing the network of informed stakeholders who join in the discussions on media pluralism, has been proven to be invaluable. Finally, local teams are fundamental in providing answers to socio-political questions. In answering some of these questions, local teams have to provide their expert evaluation, since objective ways of measurement are sometimes missing. Hence, having a reliable and independent local team which consists of renowned experts in this field, was crucial for the implementation of this project.

---

56 Gianni Betti: <https://www.deps.unisi.it/en/department/staff/faculty/gianni-betti>

## 2.5.2 LOCAL TEAM LEADERS

Below is the list of the MPM teams for the 2017 implementation:

Austria	Institute for Comparative Media and Communication Studies (CMC)	Joseph Seethaler
Belgium	KU Leuven	Peggy Valcke
Bulgaria	Foundation Media Democracy	Orlin Spassov
Croatia	Institute for Development and International Relations (IRMO)	Paško Bilić
Cyprus	Media consultant	Christophoros Christophorou
Czech Republic	Charles University	Vaclav Stetka
Denmark	Media consultant	Kasper Netterstrøm
Estonia	Media consultant	Andres Kõnno
Finland	University of Jyväskylä	Ville Manninen
France	Science Po	Thierry Vedel/Geisel Garcia Grana
Germany	Department of Communication Studies and Media Research, LMU Munich	Thomas Hanitzsch
Greece	ELIAMEP	Evangelia Psychogiopoulou/ Anna Kandyla
Hungary	CEU/CMDS	Marius Dragomir
Ireland	Dublin City University	Roddy Flynn
Italy	EUI/CMPF	
Latvia	Riga Stradins University	Anda Rozukalne
Lithuania	Vytautas Magnus University	Aukse Balcytiene
Luxembourg	University of Luxembourg	Raphael Kies
Malta	EUI/CMPF	
The Netherlands	Media consultant	Mara Rossini
Poland	University of Krakow	Beata Klimkiewicz
Portugal	Universidade Nova de Lisboa	Francisco Rui Nunes Cádima
Romania	Median Research Centre & CEU	Marina Popescu
Slovakia	Pan European University	Zeljko Martin Sampor
Slovenia	University of Ljubljana	Marko Milosavljevic
Spain	Universitat Ramon Llull	Pere Masip
Sweden	University of Gothenburg	Mathias A. Färdigh
United Kingdom	University of Edinburgh	Rachael Craufurd Smith
FYROM	Institute of Communication Studies	Snezana Trpevska
Serbia	University of Belgrade	Jelena Surculija
Turkey	Galatasaray University	Yasemin Inceoglu



Local teams provided answers to the questionnaire, accompanied by comments in which the rationale for the answer was described, and the sources on which the answer was based. This was inserted on the online platform that was designed and further developed during the pilot-test implementations (2014, 2015). The platform allowed for centralised data collection and the comparison of answers, and it is an invaluable asset in a cross-national comparison of this scale. The platform contains not only the questionnaire and the answers to it, but also detailed descriptions of variables/questions, suggested databases and methods of measurement, a glossary of definitions, FAQs, and other elements which were designed in cooperation with local teams in order to facilitate data collection and to ensure its comparability and high quality. Another benefit of the online platform as a centralised data collection vehicle was that it allowed the CMPF to continuously monitor the progress of the data collection, in order to verify the quality of the responses, and to provide feedback to the local teams on how to review their answers in order to increase their quality and/or comparability. Frequent centralised verifications of the local teams' answers were necessary in order to ensure that all of the teams had understood a question in the same way, that the sources used for the answers were relevant and adequate, and that the evaluations of the answers were carried out and were based on the same criteria across countries. In addition, frequent validation points have ensured that the final datasets are as complete and comparable as possible, and also that the time-frame and deadlines for the project were followed and respected. One of the biggest challenges of the MPM, in general, is to ensure the validity and reliability of the data, which were based on the evaluations and answers to those questions for which no objective measurement exists. Building on the experience of the previous implementations, this implementation also relied on the revision of particularly sensitive and/or difficult to measure questions by the national experts and stakeholders. This part of the research design ensured that the validity of the results was increased, and that relevant stakeholders had a say in the project and an opportunity to share their views and opinions.

### 2.5.3 THE GROUP OF EXPERTS

Already, the procedure for the group of experts' evaluations is standard. The process starts by the local teams' nomination of seven experts and stakeholders in the national media system. All local teams are asked to nominate specialists with substantial knowledge and experience in the field of media, who have a good reputation in their professional community. The group of national experts is supposed to consist of experts from various fields, namely:

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

The aim of this specific composition of the group of experts is to ensure that all of the relevant stakeholders are represented, and their views taken into account. Once the group of experts for a particular country is defined and confirmed, experts are given access to the MPM platform and the questions that they are supposed to evaluate. These questions, and the local teams' answers to them, are previously checked by the CMPF team and, if it is needed, are revised in collaboration with the local team. Hence, the answers to the questions that are subjected to the experts' evaluations are as complete as possible and they are motivated by comments and sources before the experts are given access to them. Once they are granted access, the experts are asked for confirmation of the accuracy of the country team's evaluation. Each member of the group of experts records her/his agreement or disagreement with the scoring on the MPM platform, or, alternatively, they have the option to declare that a specific question does not fall within his/her field of expertise. In a case when an expert disagrees with the scoring, s/he needs to provide a short written explanation and a suggestion for an alternative score on the platform. Once experts complete their evaluations, the country teams are asked to review the feedback of each member of the group of experts and to take their views into account when providing the final answer to the questions that is subjected to expert evaluation. Country teams do not necessarily need to change their answers if any of the experts disagree with their initial answer, but if this is the case, they are asked to explain why they have decided to keep their original answer and to address, in a comment on the final answer, any disagreement that is expressed by the experts

involved. Although the procedure described above ensures that this part of the methodology is applied to all countries' data in a standardised and consistent way, which increases the comparability of the findings and the robustness of the method, several challenges were faced in its implementation. Firstly, a problem was detected in regard to nominations in small countries, in which some of the organisations whose representatives were sought did not exist, or where there is limited availability. In such cases, exceptions were made, and their group of experts consisted of fewer than seven representatives. Additionally, another challenge which was faced was in ensuring the nominated experts' participation. Given that the Monitor's language is English, some experts faced language barriers, while some others weren't able to participate due to time constraints and previous engagements. Due to the time constraints on the project, the decision was made that the group of experts' procedure was considered finished, either by the fact that all of the nominated experts had participated, or that each question has been evaluated by more than half of all experts (i.e., four of seven) by the time that the data collection had to close in order that the project meet its deadlines. The group of experts, both as a method and as an activity involving stakeholders, proved to be of great value to the project. From the methodological perspective, this procedure ensures higher reliability and the validity of answers to particularly sensitive and/or difficult to measure questions. Experts also contribute to data collection by providing alternative information and sources, which the country teams might not have initially discovered or taken into account. Finally, by employing this procedure, it is ensured that a range of opinions from the most relevant stakeholders within a media system are acknowledged and made known. The group of experts' procedure is also beneficial to the project as an activity through which relevant stakeholders are not only informed about the project, but are also able to be actively engaged in it.

#### 2.5.4 ONLINE PLURALISM INDICATORS

CMPF is engaged in a permanent debate with other academics and institutions who are discussing these topics in order to find suitable solutions for the measuring of the plurality of the availability and of the consumption of information online, with a special focus on the role of the online intermediaries. Several variables in the MPM assess online related types of risks:

the safety of journalists, and the violation of freedom of expression online; the ownership concentration of Internet content providers and Internet service providers; net neutrality; the access to, and quality of, the Internet infrastructure; the use of the Internet, and digital skills. In the Basic Protection area, a specific assessment of respect for the rule of law as regards freedom of expression online was requested, as well as an assessment of arbitrary filtering, blocking and take-down practices by governments and online intermediaries. In the Political Independence area, the MPM introduced the variable that explores whether the existing self-regulatory measures consider the online activities of the media and individual journalists, or whether media organisations are developing new digital-specific self-regulation in order to increase accountability and to reduce the risk of undue influence. The reasoning for this derives from the notion that self-regulation usually offers more flexibility and is adapted more easily than state regulation in safeguarding editorial autonomy in the ever changing conditions of the online media environment.

Still, measuring pluralism in the digital world remains a very challenging task, and the best method for measurement remains to be found. One of the most pressing issues is the lack of reliable and comparative data that would enable the assessment of particularly important issues for online pluralism in recent years, including (Nenadic and Ostling, 2016):

1. Freedom of expression online and the role of ISPs;
2. Net neutrality;
3. The role of online intermediaries (such as search engines, news aggregators and social media);
4. Concentration of Internet service providers (ISPs) and Internet content providers (ICPs);
5. Media and digital literacy, focusing on the ability to interpret and to critically assess online content, as well as on the skills needed to contribute to the content production and dissemination.

Finally: the digital safety of journalists and online political communication and advertising during electoral campaigns.

## 2.5.5 USER GUIDE AND ONLINE PLATFORM

The existing platform of the MPM tool, which has been developed by the CMPF, contains the questionnaire, the user guide, the instructions for the country teams, and it also incorporates the procedure for assessment by external experts and a chat option that allows for direct, real time communication between the country teams and the CMPF on specific issues under each variable.

# BIBLIOGRAPHY

Bardoel, J. and d'Haenens, L. (2008) Reinventing public service broadcasting in Europe: prospects, promises and problems. *Media, Culture and Society*. 30 (3): 337-355.

Benson, R. and Powers, M. (2011) *Public media and political independence: Lessons for the Future of Journalism*. Freepress.

Bilic, P., Petricusic, A., Eterovic, R. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Croatia. Available at: [http://cmpf.eu.eu/wp-content/uploads/2018/11/Croatia\\_MPM2017\\_country-report.pdf](http://cmpf.eu.eu/wp-content/uploads/2018/11/Croatia_MPM2017_country-report.pdf)

Bognar, E., Batorfy, A and Dragomir, M. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Hungary. Available at: [http://cmpf.eu.eu/wp-content/uploads/2018/11/Hungary\\_MPM2017\\_country-report.pdf](http://cmpf.eu.eu/wp-content/uploads/2018/11/Hungary_MPM2017_country-report.pdf)

Brogi, E. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Italy. Available at: [http://cmpf.eu.eu/wp-content/uploads/2018/11/Italy\\_MPM2017\\_country-report.pdf](http://cmpf.eu.eu/wp-content/uploads/2018/11/Italy_MPM2017_country-report.pdf)

Brogi, E. and Parcu, P.L. (2018) A comparison of a new index based on the Media Pluralism Monitor with some other indices ranking freedom of expression, EUI RSCAS, 2018/34, <http://cadmus.eu.eu//handle/1814/57104> ,

Cappello M. (ed.) (2016). Regional and local broadcasting in Europe, IRIS Special 2016-1. European Audiovisual Observatory, Strasbourg. Available at: <https://rm.coe.int/16807889a7>

CMPF (2017) Monitoring Media Pluralism in Europe: Application of the Media Pluralism Monitor 2016 in the European Union, Montenegro and Turkey. Available at: <http://cadmus.eu.eu//handle/1814/46786>

CMPF (2016) Brogi, E., Ginsborg, L., Ostling, A., Parcu, P. L., Simunjak, M. Monitoring Media Pluralism in Europe – Testing and Implementation of the Media Pluralism Monitor 2015 – Policy Report, Robert Schuman Centre for Advanced Studies, San Domenico di Fiesole (FI): European University Institute. Available at: <http://cadmus.eu.eu//handle/1814/40864>

CMPF (2015) Monitoring Media Pluralism in Europe – Testing and Implementation of the Media Pluralism Monitor 2014. Policy report. Centre for Media Pluralism and Media Freedom. European University Institute. Available at: <http://cmpf.eu.eu>

Commission Staff Working Document (2007) Media pluralism in the Member States of the European Union. SEC (2007) 32, 8. Retrieved from: [http://ec.europa.eu/information\\_society/media\\_taskforce/doc/pluralism/media\\_pluralism\\_swp\\_en.pdf](http://ec.europa.eu/information_society/media_taskforce/doc/pluralism/media_pluralism_swp_en.pdf)

Council of Europe (1992) European Charter for Regional or Minority Languages. Strasbourg, 5.XI.1992. <http://www.coe.int/en/web/conventions/full-list/-/conventions/rms/090000168069517584>

Council of Europe (1995) Framework Convention for the Protection of National Minorities. Strasbourg, February 1995. <https://rm.coe.int/16800c10cf>

Council of Europe Recommendation (2007) CM/Rec(2007)2 of the Committee of Ministers to member states on media pluralism and diversity of media content. Adopted by the Committee of Ministers on 31 January 2007 at the 985th meeting of the Ministers' Deputies. [https://search.coe.int/cm/Pages/result\\_details.aspx?ObjectId=09000016805d6be3](https://search.coe.int/cm/Pages/result_details.aspx?ObjectId=09000016805d6be3)

Council of Europe Recommendation (2012) CM/Rec(2012)1 of the Committee of Ministers to member States on public service media governance. Adopted by the Committee of Ministers on 15 February 2012 at the 1134th meeting of the Ministers' Deputies. [https://wcd.coe.int/ViewDoc.jsp?id=1908265#P212\\_20764](https://wcd.coe.int/ViewDoc.jsp?id=1908265#P212_20764)

Council of Europe Recommendation (2013). CM/Rec(2013)1 of the Committee of Ministers to member States on gender equality and media. Adopted by the Committee of Ministers on 10 July 2013 at the 1176th meeting of the Ministers' Deputies. <https://wcd.coe.int/ViewDoc.jsp?p=&Ref=C/c%282013%291&Language=lanEnglish&Ver=original&Site=CM&BackColorInternet=C3C3C3&BackColorIntranet=EDB021&BackColorLogged=F5D383&direct=true>

Council of Europe Recommendation CM/Rec(2014)7 of the Committee of Ministers to member States on the protection of whistleblowers adopted by the Committee of Ministers of the Council of Europe on 30 April 2014 and explanatory memorandum <https://rm.coe.int/16807096c7>

Council of Europe Recommendation CM/Rec(2016)4 of the Committee of Ministers to member States on the protection of journalism and safety of journalists and other media actors [https://search.coe.int/cm/Pages/result\\_details.aspx?ObjectId=09000016806415d9#\\_ftn1](https://search.coe.int/cm/Pages/result_details.aspx?ObjectId=09000016806415d9#_ftn1)

Council of Europe Recommendation CM/Rec(2018)1 of the Committee of Ministers to member States on media pluralism and transparency of media ownership, adopted by the Committee of Ministers on 7 March 2018 [https://search.coe.int/cm/Pages/result\\_details.aspx?ObjectId=0900001680790e13](https://search.coe.int/cm/Pages/result_details.aspx?ObjectId=0900001680790e13)

Directive 2010/13/EU of the European Parliament and of the Council of 10 March 2010 on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) <http://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX:32010L0013>

Djankov, S.; McLiesh, C.; Nenova, T. and Shleifer, A. (2003) Who owns the media? *Journal of Law and Economics* 46(2): 341-381.

EAVI (European Association for Viewers Interests) (2009) Study on Assessment Criteria for Media Literacy Levels - A Comprehensive View of the Concept of Media Literacy and an Understanding of how Media Literacy Level in Europe should be assessed - Final Report. [http://ec.europa.eu/assets/eac/culture/library/studies/literacy-criteria-report\\_en.pdf](http://ec.europa.eu/assets/eac/culture/library/studies/literacy-criteria-report_en.pdf)

EIGE (European Institute for Gender Equality) (2013). Review of the Implementation of the Beijing Platform for Action in the EU Member States: Women and the Media – Advancing Gender Equality in Decision-Making in Media Organisations. Luxembourg: Publications Office of the European Union. Available at: <http://eige.europa.eu/sites/default/files/documents/MH3113742ENC-Women-and-Media-Report-EIGE.pdf>

The European Blind Union (2016) Contribution of the European Blind Union to the consultation on COM(2016)287/final. Proposal for a DIRECTIVE OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL amending Directive 2010/13/EU.

European Commission (2015) Strategic engagement for gender equality 2016-2019. [http://ec.europa.eu/justice/gender-equality/document/files/strategic\\_engagement\\_en.pdf](http://ec.europa.eu/justice/gender-equality/document/files/strategic_engagement_en.pdf)

European Commission (2016) Ex-post REFIT evaluation of the Audiovisual Media Services Directive 2010/13/EU.

European Commission (2016b) “The European Commission presents follow-up actions from Fundamental Rights Colloquium on media pluralism and democracy”. Published: 9 December 2016. [http://ec.europa.eu/newsroom/just/item-detail.cfm?&item\\_id=51071](http://ec.europa.eu/newsroom/just/item-detail.cfm?&item_id=51071)

EUROPEAN COMMISSION STAFF WORKING DOCUMENT. SWD(2016) 170 final. Brussels, 25.5.2016. <http://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52016SC0170&from=EN>

European Disability Forum (EDF) (2016) EDF statement on the Proposal for a Directive of the European Parliament and of the Council amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services in view

of changing market realities (COM(2016)287). June 2016. [http://cms.horus.be/files/99909/MediaArchive/ICT/Final\\_EDF\\_Position\\_AVMSD\\_Revision.pdf](http://cms.horus.be/files/99909/MediaArchive/ICT/Final_EDF_Position_AVMSD_Revision.pdf)

European Federation of Hard of Hearing People (2011). State of subtitling accessing EU. Report. [http://ec.europa.eu/internal\\_market/consultations/2011/audiovisual/non-registered-organisations/european-federation-of-hard-of-hearing-people-efhoh- en.pdf](http://ec.europa.eu/internal_market/consultations/2011/audiovisual/non-registered-organisations/european-federation-of-hard-of-hearing-people-efhoh- en.pdf)

European Union of the Deaf (undated) Audiovisual media services directive. News article: <http://www.eud.eu/news/policy/audio-visual-media-services/>

Eurostat (2012) Graduations in ISCED 3 to 6 by field of education and sex [educ\_grad5]. ISCED9. Upper secondary education (level 3) - pre-vocational and vocational programme orientation. FIELD: Journalism and information.

Eurostat (2015). Employment by sex, age and detailed economic activity (from 2008 onwards, NACE Rev. 2 two digit level) - 1 000 [lfsa\_egan22d]. Age from 15 to 64 years, NACE\_R2: Programming and broadcasting activities.

Hallin, D. C., and Mancini, P. (2004) *Comparing Media Systems: Three models of Media and Politics*. Cambridge, UK: Cambridge University Press.

Hanretty, C. (2009) Explaining the De Facto Independence of Public Broadcasters. *British Journal of Political Science* 40 (1): 75-89.

Inceoglu, Y., Sozeri, C., Erbaysal, T. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Turkey. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Turkey\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Turkey_MPM2017_country-report.pdf)

INDIREG (2011) Final Report: Indicators for independence and efficient functioning of audiovisual media services regulatory bodies for the purpose of enforcing the rules in the AVMS Directive (SMART 2009/0001). Hans Bredow Institute for Media Research et al.

Jakubowicz, K.I. (2004) Ideas in Our Heads: Introduction of PSB as Part of Media System Change in Central and Eastern Europe, *European Journal of Communication* 19(1): 53-74.

Kies R. and Schall I. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Luxembourg. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Luxembourg\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Luxembourg_MPM2017_country-report.pdf)

Klimkiewicz, B. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Poland. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Poland\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Poland_MPM2017_country-report.pdf)

Klimkiewicz, B. (2017) Media Pluralism Monitor 2016. Monitoring risks for media pluralism in EU and beyond. Country Report: Poland. <http://cadmus.eui.eu/handle/1814/46807>

KU Leuven – ICRI, Jönköping International Business School – MMTTC, Central European University – CMCS, Ernst & Young Consultancy Belgium (2009) Independent Study on Indicators for Media Pluralism in the Member States – Towards a Risk-Based Approach (Final Report and Annexes: User Guide, MPM, Country Reports, prepared for the European Commission). Brussels: European Commission. Available from: <https://ec.europa.eu/digital-single-market/en/media-pluralism-monitor-mpm>

Marincea, A. and Bodea, R., (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Romania. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Romania\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Romania_MPM2017_country-report.pdf)

Mungiu Pippidi, A. (2008) “How Media and Politics Shape Each Other in the New Europe”, in Jakubowicz, K. and Sukosd, M (eds.) *Finding the Right Place on the Map: Central and Eastern European Media Change in a Global Perspective*, pp. 87-101.

Nenadic, I (2017) Media Pluralism Monitor 2016. Monitoring risks for media pluralism in EU and beyond. Country Report: Malta. Available at: <http://cmpf.eui.eu/media-pluralism-monitor/mpm-2016-results/malta/>

Nenadic, I. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Malta. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Malta\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Malta_MPM2017_country-report.pdf)

Nenadic, I. and Ostling, A. (2016) "Assessing Media Pluralism in the Digital Age". Book chapter in "Internet Science: Third International Conference", INSCI 2016, Florence, Italy, September 12-14, 2016, Proceedings. [http://link.springer.com/chapter/10.1007%2F978-3-319-45982-0\\_20](http://link.springer.com/chapter/10.1007%2F978-3-319-45982-0_20)

OSCE (1998) The Oslo Recommendations Regarding the Linguistic Rights of National Minorities & Explanatory Note. <https://www.osce.org/hcnm/oslo-recommendations>

Papatheodorou, F. and Machin, D. (2003) The Umbilical Cord That Was Never Cut: The Post-Dictatorial Intimacy between the Political Elite and the Mass Media in Greece and Spain. *European Journal of Communication* 18 (1): 31-54.

Psychogiopoulou, E and Kandyla, A. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Greece. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Greece\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Greece_MPM2017_country-report.pdf)

Radio Spectrum Policy Programme (2012) Decision No 243/2012/EU of the European Parliament and of the Council of 14 March 2012 establishing a multiannual radio spectrum policy programme. Available at: <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A32012D0243>

Sampor, Z., (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Slovakia. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Slovakia\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Slovakia_MPM2017_country-report.pdf)

Smith, E. (2012) *A road map to public service broadcasting*. Kuala Lumpur, Malaysia: Asia-Pacific Broadcasting Union.

Spasov, O., Ognyanova, N., Daskalova, N. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Bulgaria Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Bulgaria\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Bulgaria_MPM2017_country-report.pdf)

*Standard Eurobarometer 88 (2017) Public opinion in the European Union. European Commission, Directorate-General for Communication.*

Štětka, V. and Hájek, R., (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Czech Republic. Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Czech\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Czech_MPM2017_country-report.pdf)

Sucurlija Milojevic, J. (2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Serbia Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/Serbia\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/Serbia_MPM2017_country-report.pdf)

Trpevska, S. and Micevski I.,(2018) Media Pluralism Monitor 2017. Monitoring risks for media pluralism in EU and beyond. Country Report: Macedonia Available at: [http://cmpf.eui.eu/wp-content/uploads/2018/11/FYRoM\\_MPM2017\\_country-report.pdf](http://cmpf.eui.eu/wp-content/uploads/2018/11/FYRoM_MPM2017_country-report.pdf)

UNESCO (2013) Global Media and Information Literacy Assessment Framework: Country Readiness and Competencies. United Nations Educational, Scientific and Cultural Organisation. Available at: <http://unesdoc.unesco.org/images/0022/002246/224655e.pdf#page=22>

UNESCO (2017) Community Media Sustainability. Webpage. <http://en.unesco.org/themes/community-media-sustainability>

## ANNEXE 1

2017 Questionnaire.

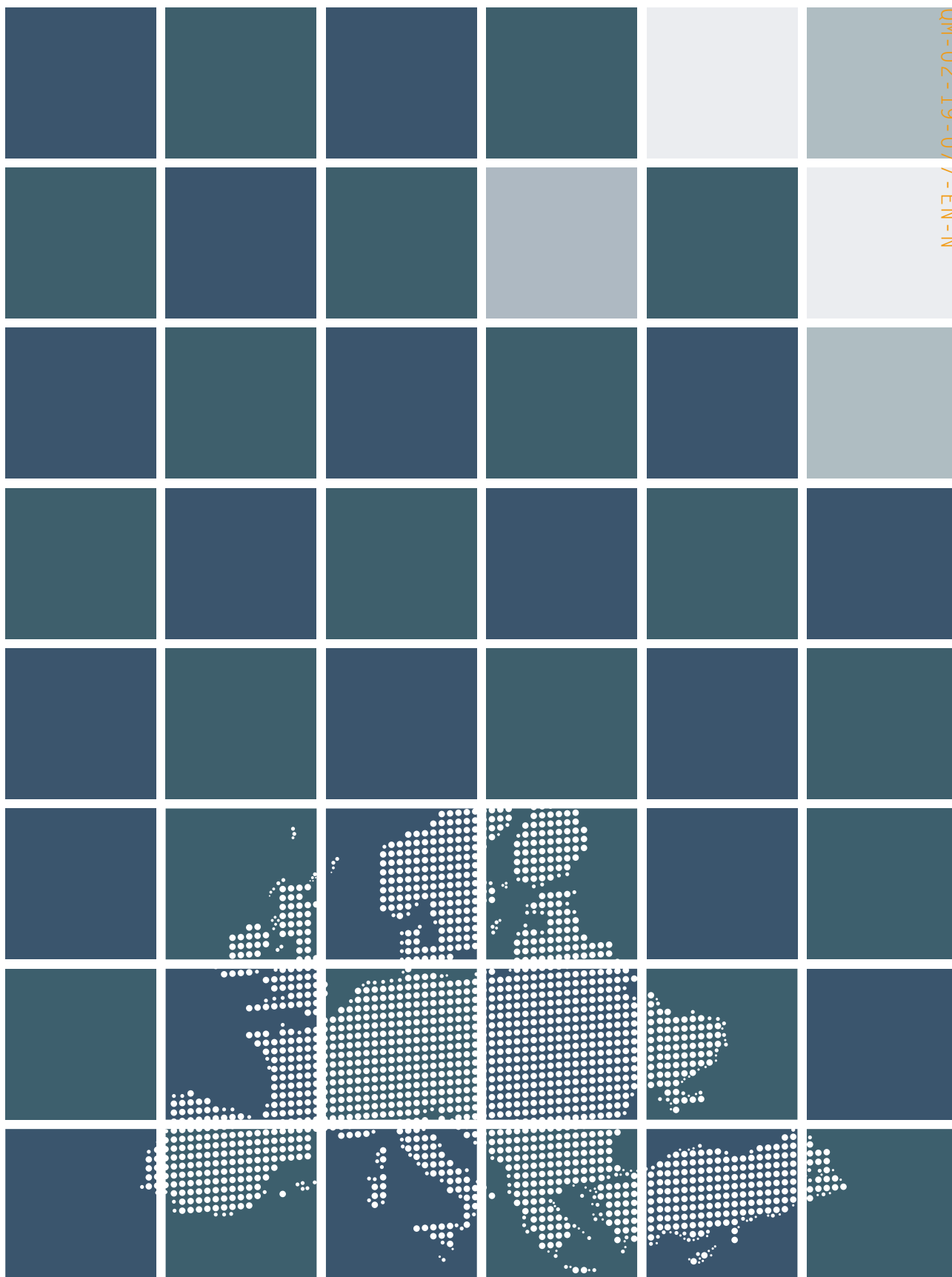
Available at: <http://cmpf.eui.eu/wp-content/uploads/2018/12/questionnaire-MPM2017-for-publication.pdf>

Media Pluralism Monitor Website: <http://cmpf.eui.eu/media-pluralism-monitor/>





QM-02-19-077-EN-N



Publications Office

<http://monitor.cmpf.eui.eu>  
ISBN:978-92-9084-742-7  
doi:10.2870/699885