

MONITORING MEDIA PLURALISM IN THE DIGITAL ERA

APPLICATION OF THE MEDIA PLURALISM MONITOR IN THE EUROPEAN UNION, ALBANIA, MONTENEGRO, REPUBLIC OF NORTH MACEDONIA, SERBIA & TURKEY IN THE YEAR 2022

Country report: The Czech Republic

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Research Project Report

Issue -

June 2023



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Published by

European University Institute (EUI)

Via dei Roccettini 9, I-50014

San Domenico di Fiesole (FI)

Italy

ISBN:978-92-9466-450-1

doi:10.2870/048026



With the support of the Erasmus+ Programme of the European Union. The European Commission supports the EUI through the EU budget. This publication reflects the views only of the author(s) and the Commission cannot be held responsible for any use which may be made of the information contained therein.

1. About the project

1.1. Overview of the Project

The Media Pluralism Monitor (MPM) is a research tool that is designed to identify potential risks to media pluralism in the Member States of the European Union and in Candidate Countries. This narrative report has been produced on the basis of the implementation of the MPM that was carried out in 2022. The implementation was conducted in 27 EU Member States, as well as in Albania, Montenegro, The Republic of North Macedonia, Serbia and Turkey. This project, under a preparatory action of the European Parliament, was supported by a grant awarded by the European Commission to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute.

1.2. Methodological notes

Authorship and Review

The CMPF partners with experienced, independent national researchers to carry out the data collection and to author the narrative reports, except in the case of Italy where data collection is carried out centrally by the CMPF team. The research is based on a standardised questionnaire that was developed by the CMPF.

In The Czech Republic the CMPF partnered with Václav Štetka (Loughborough University), Jitka Adamčíková and Albín Sybera, who conducted the data collection, scored and commented on the variables in the questionnaire and interviewed experts. The report was reviewed by the CMPF staff. Moreover, to ensure accurate and reliable findings, a group of national experts in each country reviewed the answers to particularly evaluative questions (see Annex II for the list of experts). For a list of selected countries, the final country report was peer-reviewed by an independent country expert.

Risks to media pluralism are examined in four main thematic areas: Fundamental Protection, Market Plurality, Political Independence and Social Inclusiveness. The results are based on the assessment of a number of indicators for each thematic area (see Table 1).

Fundamental Protection	Market Plurality	Political Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political independence of the media	Representation of minorities
Protection of right to information	Plurality of media providers	Editorial autonomy	Local/regional and community media
Journalistic profession, standards and protection	Plurality in digital markets	Audiovisual media, online platforms and elections	Gender equality in the media
Independence and effectiveness of the media authority	Media viability	State regulation of resources and support to the media sector	Media Literacy
Universal reach of traditional media and access to the Internet	Editorial independence from commercial and owners' influence	Independence of PSM	Protection against disinformation and hate speech

Table 1: Areas and Indicators of the Media Pluralism Monitor

The Digital Dimension

The Monitor does not consider the digital dimension to be an isolated area but, rather, as being intertwined with the traditional media and the existing principles of media pluralism and freedom of expression. Nevertheless, the Monitor also extracts digitally specific risk scores, and the report contains a specific analysis of the risks that related to the digital news environment.

The Calculation of Risk

The results for each thematic area and Indicator are presented on a scale from 0 to 100%.

Scores between 0% and 33%: low risk

Scores between 34% and 66%: medium risk

Scores between 67% and 100%: high risk

With regard to the Indicators, scores of 0 are rated as 3%, while scores of 100 are rated as 97%, by default, in order to avoid an assessment that offers a total absence, or certainty, of risk.

Methodological Changes

For every edition of the MPM, the CMPF updates and fine-tunes the questionnaire, based on the evaluation of the tool after its implementation, the results of previous data collection and the existence of newly available data. For the MPM 2023, no major changes were made to the questionnaire, except for the Indicators Transparency of Media Ownership, Plurality in Digital Markets and Editorial Independence from Commercial and Owners Influence (Market Plurality area), and Protection Against Disinformation and Hate Speech (Social Inclusiveness area). The results obtained for these indicators are therefore not strictly comparable with those results obtained in the previous edition of the MPM. The methodological changes are explained on the CMPF website at <http://cmpf.eui.eu/media-pluralism-monitor/>.

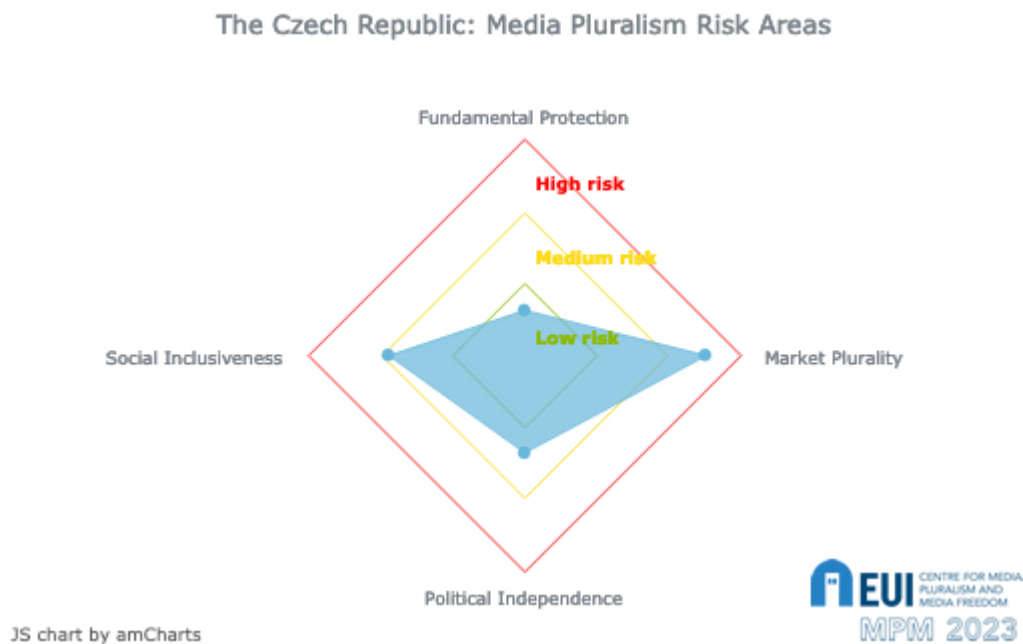
In the Market Plurality area, the names of three Indicators have changed. The former indicator on "News Media Concentration" is now named "Plurality of Media Providers"; "Online Platforms and Competition Enforcement" has been renamed as "Plurality in Digital Markets"; "Commercial & Owners' Influence Over Editorial Content" has been renamed as "Editorial Independence from Commercial and Owner Influence".

Disclaimer: The content of the report does not necessarily reflect the views of the CMPF, nor the position of the members composing the Group of Experts. It represents the views of the national country team who carried out the data collection and authored the report. Due to updates and refinements in the questionnaire, MPM2023 scores may not be fully comparable with those in the previous editions of the MPM. For more details regarding the project, see the CMPF report on MPM2023, which is available on: <http://cmpf.eui.eu/media-pluralism-monitor/>.

2. Introduction

- **Population:** The Czech Republic is a Central European country with an area of 78 866 sq km and a population exceeding 10.5 million inhabitants (CSO, 2023a).
- **Minorities:** The country is ethnically very homogeneous, with a relatively marginal presence of ethnic minorities (estimated 1.5-3% of Roma people, 1.6% of Ukrainians, 1.5% of Slovaks). However, since the beginning of the war in Ukraine, over 600.000 Ukrainian refugees have arrived in the Czech Republic (Radio Prague International, 2023), making the Ukrainian minority by far the largest one in the country. The official (and virtually only) language is Czech.
- **Economic situation:** The GDP has recorded a 2.4% increase in 2022, according to the report of the Czech Statistical Office (CSO, 2023b). Having largely recovered from the pandemic in the first half of the year, it went down into recession again in the second half of 2022, as the impact of war in Ukraine and the rising costs of living started to bite. The average annual inflation rate was 15.1%, making it the second highest inflation in the modern Czech history.
- **Political situation:** The domestic political climate has been relatively calm and stable in the first part of the year, following the Parliamentary Elections in October 2021 which secured a comfortable majority for the centre-right “democratic coalition”, having removed the technocratic-populist party ANO2011 (led by the billionaire PM Andrej Babiš) from the government. The coalition parties have also extended their dominance in the Senate (the Upper Chamber of the Czech Parliament) in the September 2022 elections. The second part of the year has been marked by increasing dissatisfaction of the public with the economic situation – characterized by a steep rise of living costs – which has been used by various anti-system parties and actors, as well as by parliamentary opposition, to mobilize anti-government as well as “anti-war” sentiments. In that heated atmosphere, the campaign for the Presidential Election took place, ending in January 2023 with the victory of the civic (though government-backed) candidate Petr Pavel (former Chairman of the NATO Military Committee), who beat Andrej Babiš in the second round by 58% vs 42% of the votes.
- **Media market:** The advertising market has continued its recovery from the pandemic, recording double-digit rise in the first half of the year (the data from the second half unavailable at the time of writing the report). However, due to the high inflation and the rising costs, the overall financial situation of many media houses has been difficult. The print media continued a decline in circulation numbers, with daily newspapers sales dropping by 11%. Several media houses reported budget cuts and layoffs of personnel, including journalistic staff. On the digital media market, the steep rise of TikTok has continued, claiming 2.5 mil. users at the beginning of 2023 and becoming thereby the third-biggest social media network in the country (behind Facebook and Instagram).
- **Regulatory environment:** One of the most significant changes in 2022 concerned the implementation of the EU Directive 2019/790 via an amendment to the Act 121/2000 Coll., on copyright and related rights (“Copyright Act”) in December 2022. While it intended to strengthen the hand of domestic publishers vis-à-vis global platforms, it resulted in both Google and Facebook having stopped showing previews and photos from news articles, reducing thereby online traffic to the publishers.

3. Results of the data collection: Assessment of the risks to media pluralism



The results of MPM2023, based on data reflecting the situation in 2022, show that the distribution of risks for media pluralism in the Czech Republic follows a similar pattern as last year, with the biggest risks concentrated in the Market Plurality area (84%, high risk). Both Social Inclusiveness and Political Independence scored medium risk (63% and 45%, respectively), while Fundamental Protection continues to show low risk (21%).

Four out of five indicators for **Fundamental Protection** score low risk, demonstrating that, despite occasional controversies (including the blocking of several disinformation websites upon the Russian invasion of Ukraine), the regulatory framework safeguarding freedom of expression and the right to information is in a good condition, that the media authority (Broadcasting Council) operates competently and independently, and that there are no significant gaps in access to communication channels. The key problems within this area are captured under the indicator Journalistic profession, standards and protection (40%, medium risk), reflecting the unstable working conditions, especially in local and regional media, lack of a framework for journalists' protection (including against SLAPPs), as well low authority of the professional journalistic association.

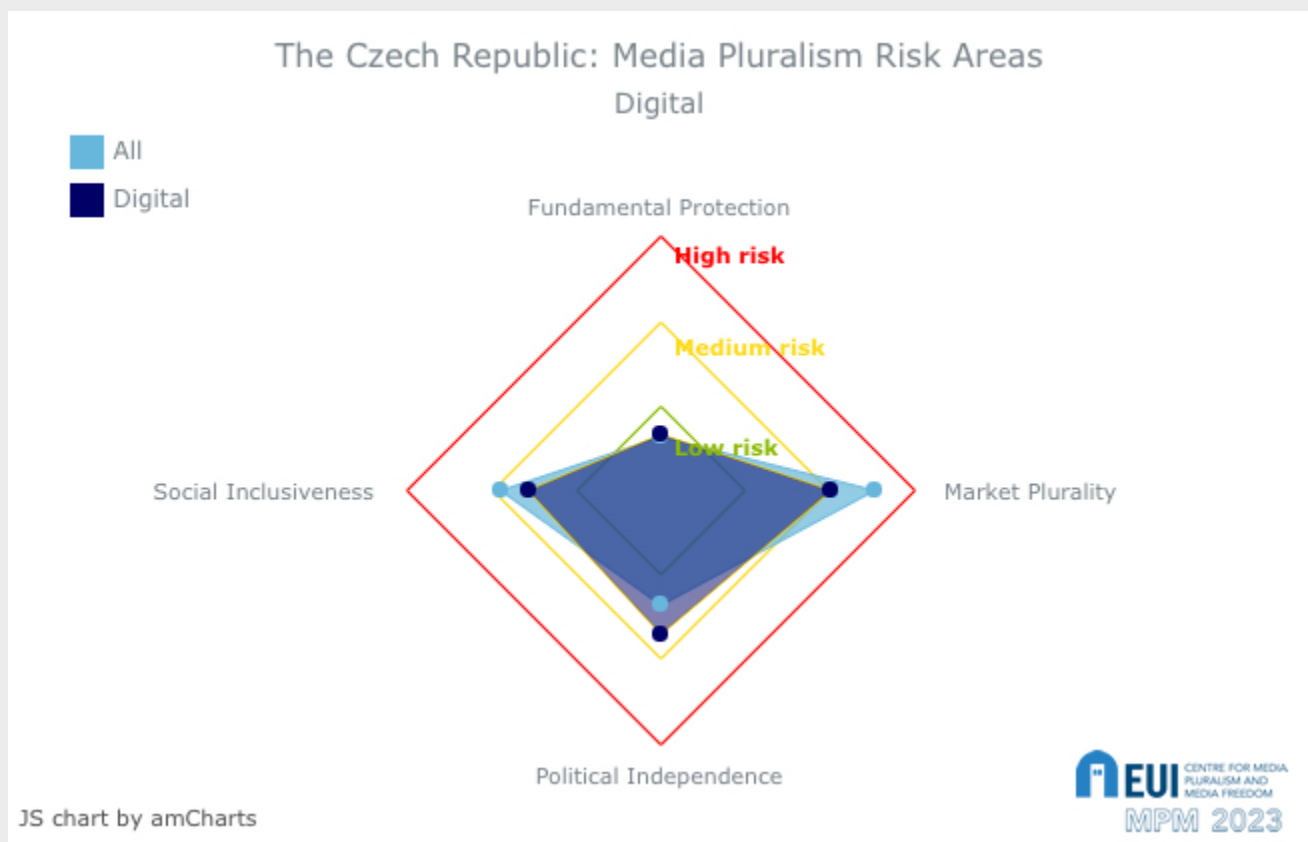
The area of **Market Plurality** increased its risk score compared to last year. Even though there have been some positive developments in the legislation aiming to improve transparency of media ownership (via the Amendment to the Act No. 245/2022 Coll., on the Registration of Beneficial Owners), the high risk score continues to be affected mainly by the lack of regulatory instruments to limit market concentration (which remains very high) and to protect journalists from undue ownership influence, which is particularly palpable given that the market is dominated by owners with principal interests in other areas of economy than media business (and, in case of the ex-PM Andrej Babiš, also in politics). In digital markets, the risks stem mainly from the lack of designated legislation to safeguard plurality, as well as from the fact that most of the digital market leaders are the same companies as those controlling the traditional media.

The **Political Independence** domain has seen a decline of risk by 8 percentage points, down to 45%. Following the change of government at end of 2021, no national news media are being directly controlled by a member of the executive anymore, which used to be among the key sources of risk for this domain. The change also reduced political pressures on the public service media; nevertheless, the risk for the

indicator Independence of PSM Governance and Funding has remained high (75%), mainly because of the continuing refusal of the politicians to initiate the long-overdue increase of the license fees, effectively endangering the ability of PSM to fulfil their mission. The online-related risks are mostly related to lack of effective regulation of online political campaigns and political advertising on social media, which continues to be characterized by low transparency.

The risk for **Social Inclusiveness** remained almost the same as last year (63%). The highest risk is displayed by the indicator Gender equality in the media (92%), reflecting severe underrepresentation of women in the management of both public service and commercial media, as well as on public service media Councils. Other notable risks in this area stem from the fragile situation of local and regional media, which are struggling for survival under the difficult economic conditions, or from the inefficient implementation of media literacy policies, despite repeated calls for improvement. The indicator Protection against disinformation and hate speech recorded significant improvement (the risk declined from 81% to 54%), as there has been an increasing amount of sentencing of hate speech and dissemination of disinformation online, suggesting a change in the so-far lacklustre approach by the Czech courts on these issues, and concrete plans for combatting disinformation have been developed by the government-appointed Commissioner for Media and Counter-Disinformation, raising hopes that the state has finally started taking the fight against disinformation seriously.

Focus on the digital environment



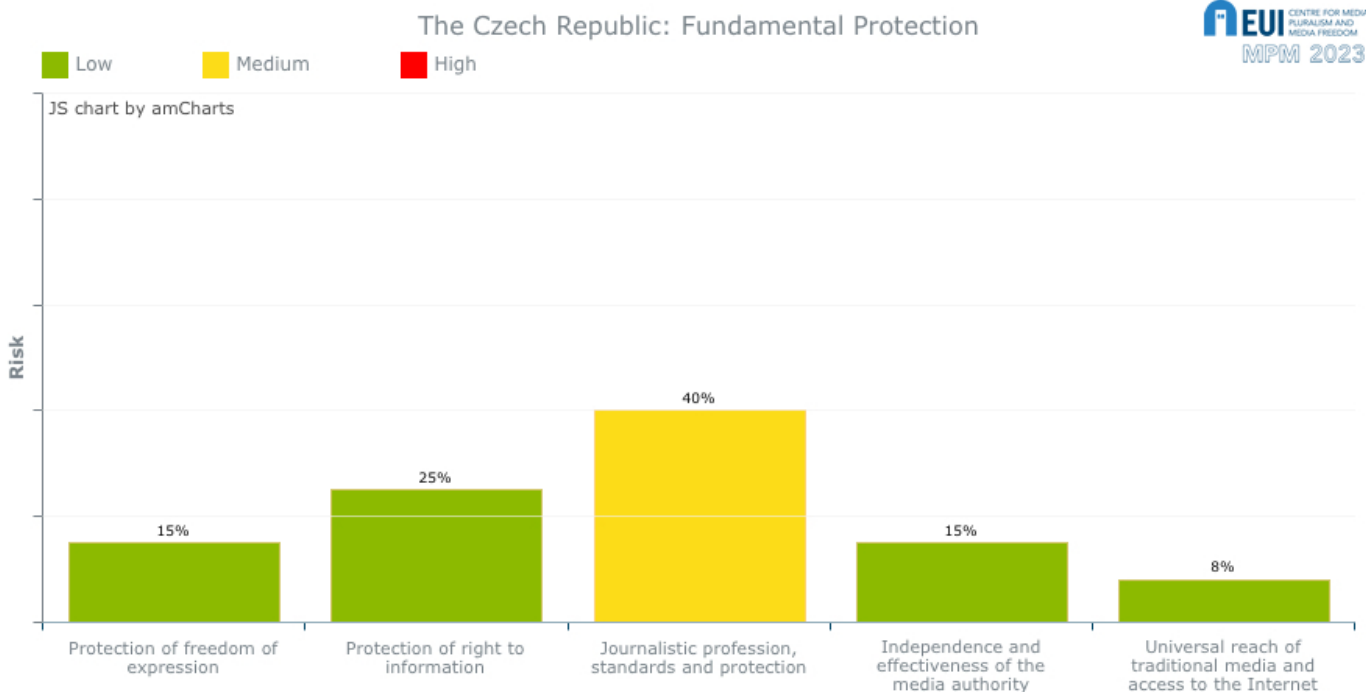
The distribution of risk levels just for the digital media is similar, however with some notable differences in scores; Fundamental Protection copies the overall risks (22%), while Market Plurality (67%) and Social Inclusiveness (51%) are both below the overall score, and Political Independence

shows higher risk (56%) than when offline media are accounted for.

In the Fundamental Protection area, the risks are mostly associated with the journalists' working conditions in the online environment, where they have been facing increasing amount of abuse and threats, especially at against women journalists. Risks in the Market Plurality area are stemming from the insufficient legislative framework that would better protect plurality in online markets, including the still-missing digital tax. In the Political Independence area, the risks largely reflect the persisting issues related to the regulation of online political advertising, which still has some notable gaps, especially in the context of election campaigns. Some of the key risks in the Social Inclusiveness area related to the absence of an adequate policy framework tackling the spreading of disinformation and online hate speech.

3.1. Fundamental Protection (21% - low risk)

The Fundamental Protection indicators represent the regulatory backbone of the media sector in every contemporary democracy. They measure a number of potential areas of risk, including the existence and effectiveness of the implementation of regulatory safeguards for freedom of expression and the right to information; the status of journalists in each country, including their protection and ability to work; the independence and effectiveness of the national regulatory bodies that have the competence to regulate the media sector, and the reach of traditional media and access to the Internet.



The Fundamental Protection area remains classified as low risk (21%), with a 3 percentage point improvement compared to the previous year (24%). Four out of five indicators are characterized by low risk, confirming that the Czech Republic has a well-established legislative framework, which reflects democratic standards and contains a system of appropriate regulatory safeguards. The only indicator that scores medium risk is Journalistic profession, standards and protection.

The indicator **Protection of freedom of expression** displays very low risk (15%), although it has registered an uptake by 6 pp from 2021. The one issue that stirred controversy in 2022 was the temporary blocking of eight websites – identified as the main disseminators of pro-Russian disinformation and propaganda – immediately following the Russian invasion of Ukraine. The selected websites have been blocked between the end of February until May by the private consortium of Czech Internet providers CZ.NIC, upon a request by the Military Intelligence, a unit belonging to the Czech Ministry of Defence. While the act of blocking has not been illegal - as later confirmed by a court's decision (Novinky.cz, 2023) - it highlighted the need to amend the legislative framework to deal with such situations in a manner that is both transparent and based in law. There are some ongoing issues as well, e.g. the fact that defamation remains a criminal offence (even though it does not create notable problems in practice).

The indicator **Protection of right to information** improved from medium risk in 2021 (38%) to low risk (25%). With the phasing out of Covid-19 measures, pandemic-related controversies, which in the past years included attempts at withholding certain information by authorities, have largely diminished in 2022. As of Spring 2023, the Czech legislators have not yet fully ratified the legislation introducing basic elements of protection of persons informing on law transgression, i.e. the whistleblowers (although the Chamber of Deputies has adopted the respective law in April 2023, now to be voted on in the Senate). As a result, the

country's Ministry of Justice is facing fines from the EU over the failure to transpose the EU Whistleblower Protection Directive, which the country failed to transpose by the end of 2021 (iRozhlas.cz, 2023). Although experts agree that public authorities in general respect transparency, there were cases in 2022, such as the lack of information about the Dukovany Nuclear Power Plant tender, or the Ministry of Justice attempting to withhold information to media about the blocked appointment of a particular judge, which prompted criticism from Transparency International and other NGOs and watchdogs.

Medium risk (40%, 1pp higher than in 2021) continues to be displayed by the indicator **Journalistic profession, standards and protection**, reflecting persisting vulnerability of the journalistic profession in the Czech Republic. The already difficult working conditions of Czech journalists have further deteriorated in 2022 due to the energy crisis, sharp rise of costs, and the economic recession, leading to frequent budget cuts and redundancies. Freelance journalists continue to be insufficiently protected, which, combined with overall unsatisfactory working conditions, contributes to the diminishing of local media. This, in turn, has a dire effect on regional journalism. Despite a considerable number of cases involving prominent journalists in the country which bear SLAPP characteristics, there is no specific anti-SLAPP legal framework. Journalists - and especially women - are also increasingly targeted by online attacks, including verbal abuse and threats. The profession is further weakened by low membership in the main professional association (Syndicate of Journalists); given its limited authority, other bodies have gradually established themselves as platforms for defending the interests of the journalistic community and advocating for professional journalistic values, particularly the Endowment for Independent Journalism, or the Association of Online Publishers (established in 2021).

The indicator **Independence and effectiveness of the media authority** remained unchanged from last year (15%) owing to the largely unchanged nature and performance of the main regulatory body. The Council for Radio and Television Broadcasting is primarily an administrative body with strictly defined powers (Radio and Television Broadcasting Act, No. 231/2001 Coll.). Even though the appointment procedures to the Council are not wholly safeguarded from political and economic influence (the Council members are appointed directly by the Prime Minister following their nomination by the Parliament), the body does not cope with the pressure regulatory bodies of the public media have been put up with.

The indicator **Universal reach of traditional media and the Internet** recorded the lowest risk score (8%) of all the indicators in MPM2023. This is due to the overall satisfactory reach and speed of the Internet. The coverage of the terrestrial broadcasting is also high. The most recent data by the Czech Telecommunication Office on the signal coverage state that there is between 99.3%-100% coverage of the Czech territory by Czech Radio and 99.7%-100% coverage of the territory by digital television (<https://digi.ctu.cz/dtv/>).

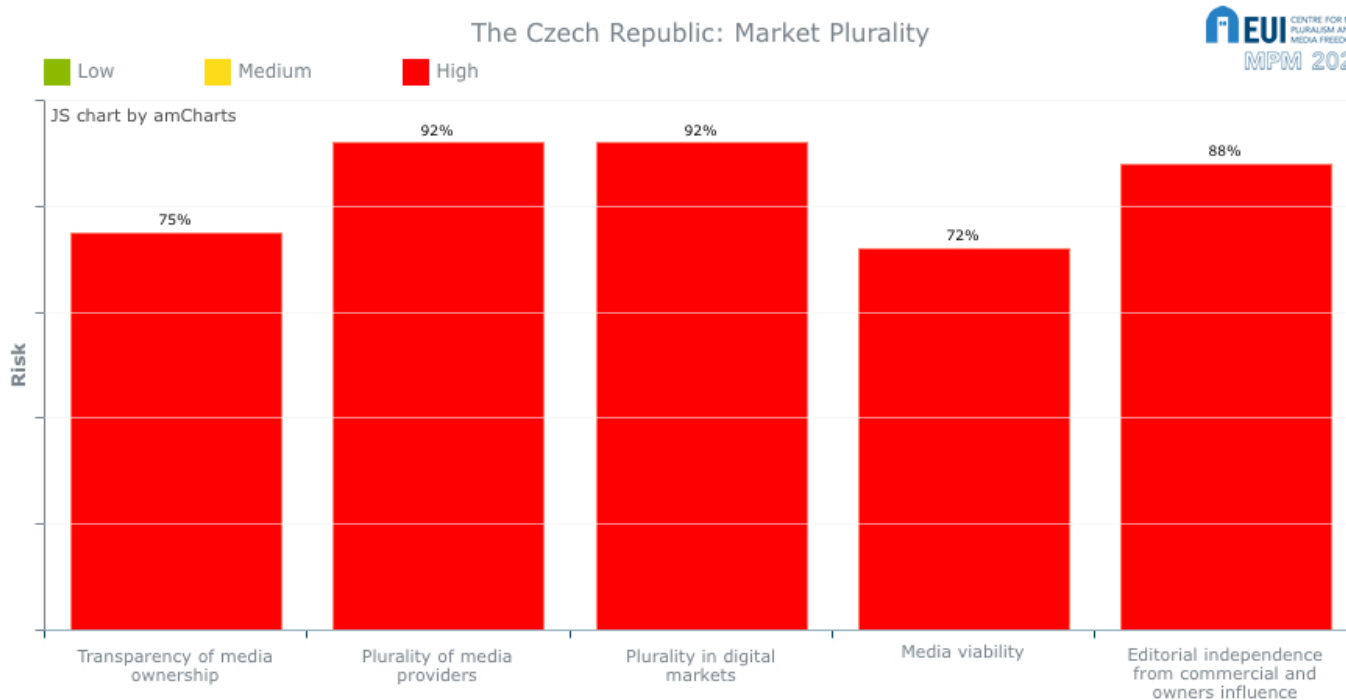
Focus on the digital environment

In the digital domain, the area of Fundamental Protection is within the low risk zone (22%), just like the overall score. There are no major digital-specific issues concerning protection of freedom of expression or the right to information. The controversial decision by the consortium of Czech Internet providers CZ.NIC to block eight specific websites, following the request from a cyber unit the Czech Ministry of Defense, has been ex-post cleared by the court as not having interfered with law, but it made it clear that a proper legislative framework was needed to handle these situations in the future.

Czech journalists are facing increasing abuse, intimidation and threats in the online environment, and especially on social media. Online harassment of female journalists often involves sexist comments or even threats of sexual violence, especially after publishing articles on controversial topics or appearing on TV.

3.2. Market Plurality (84% - high risk)

The Market Plurality area considers the economic dimension of media pluralism, assessing the risks deriving from insufficient transparency in media ownership, the concentration of the market in terms of both production and distribution, the sustainability of media content production, and the influence of commercial interests and ownership on editorial content. The actors included in the assessment are media content providers, with indicators including Transparency of media ownership, Plurality of media providers, Media viability, Editorial independence from commercial and ownership influence, and digital intermediaries (with the indicator on Plurality in digital markets).



The area of Market Plurality continues to be the one with the highest level of risk in the Czech Republic. This year, the risk has grown and all five indicators have been classified as high risk too.

Steps to improve transparency of media ownership have been taken by the Amendment to the Act on the Registration of Beneficial Owners (Act No. 245/2022 Coll.), clarifying the term "beneficial owner", to be understood as "any natural person owning or controlling a legal entity or legal arrangement". However, neither this nor any other legislation overseeing the area of corporate ownership contains any media-specific provisions, which is the main reason for the continuing high level of risk for the indicator of **Transparency of Media Ownership** (75%). This is also confirmed by the recent findings by the Euromedia Ownership Monitor report (Šlerka et al., 2022), according to which the Czech Republic ranks among the countries with the highest level of risk for media ownership transparency. In addition, there are no media-specific rules on the disclosure of financial information to the competent authorities.

With no major changes on the media market over the course of 2022, the indicator **Plurality of Media Providers** (previously News Media Concentration) continues to show high level of risk (92%), very much similar as last year. In all the segments monitored by the MPM, the Top4 news organizations control at least 80% of the market, including the digital one, dominated by the largest Czech online company Seznam (which has a 60% audience share). The high level of concentration is enabled by the lack of formal restrictions on both horizontal and cross-media ownership, and by the traditionally lenient approach of the Office for the Protection of Competition towards assessing market dominance.

The indicator **Plurality in Digital Markets** displays high risk (92%). Among the key factors affecting this

score are the absence of competition rules that would consider the specificities of the digital market sector and safeguard its plurality, but also the overall dominance of the legacy publishers over digital native ones, largely reproducing the concentration patterns from the offline market (with the notable exception of Seznam). The implementation of the EU Directive 2019/790 via an amendment to the Act 121/2000 Coll., on copyright and related rights ("Copyright Act") in December 2022 further underlined the inequalities on the digital market. Having introduced harsh penalties for global platforms in case of not adhering to the obligations stemming from the Act (Kucera, 2022), it led to both Google and Facebook switching off the "snippets" - previews and photos - from news articles, thereby significantly reducing the traffic to the publishers' websites, an act which has been widely interpreted as hurting the smaller publishers more than the big ones. In addition, Google has terminated its News Showcase programme, guaranteeing several Czech publishers – again mostly the smaller ones – financial compensation for content of their news websites that was made available on their Google News Showcase service. The bill aiming to introduce the "digital tax" for global companies has not been passed by the Parliament, and the new government of Petr Fiala (2022-) has abandoned it completely, citing instead the need for the EU-wide agreement on the amount of the tax.

The level of risk for **Media Viability** has dropped 9pp compared to last year, reflecting the partial recovery of the market after the two years of pandemic. Nevertheless, the risk continues to be high (72%), with many news organizations – and publishers in particular – getting under economic pressure due to the energy crisis and the rapidly rising costs. Several of the biggest media houses have cut down the number of their titles, and some have laid off journalistic staff, including the digital native media house Seznam, which also ceased broadcasting its own TV Seznam (Zelenka, 2023). The monopoly publisher of daily regional press, Vltava-Labe-Press, has reduced its regional editions by more than a half, from 70 to 28, adding to the woes about the already troublesome situation of regional media.

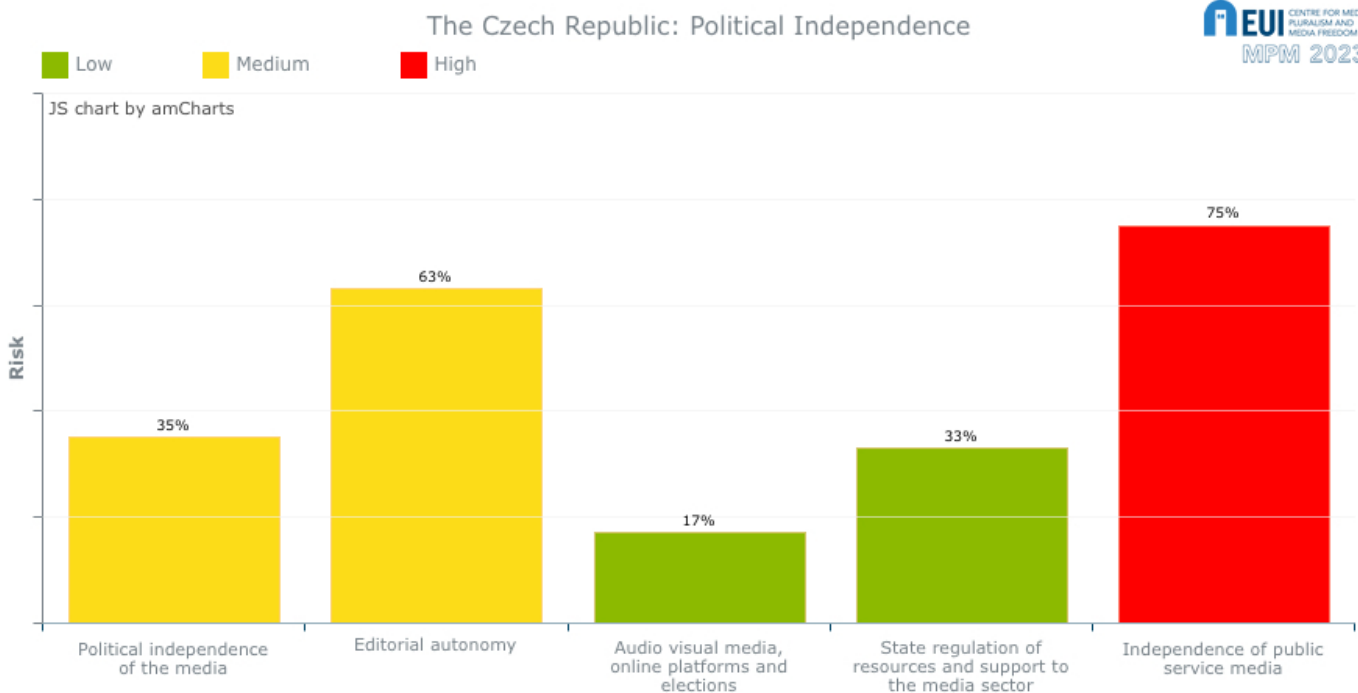
The indicator **Editorial Independence from Commercial and Owners Influence** still remains in the high-risk zone (88%). Just like in previous years, this is due to the almost complete lack of instruments safeguarding editorial independence, whether legislative ones or stemming from self-regulation. The absence of such instruments is particularly palpable in light of the unique ownership situation on the Czech market, which is predominantly controlled by business actors with primary economic interests outside of the media sector (and often in sectors regulated by the state). The conflict of interests, raising concerns about self-censorship and instrumentalization of the news outlets for their owners' business or political agenda, is especially prominent in case of the titles controlled by Andrej Babiš, the leader of the movement ANO 2011, ex-Prime Minister (until December 2021) and the runner-up in the recent Presidential Election (January 2023). Findings from interviews carried out with journalists who have worked in Mr Babiš's newspapers, as well as an analysis of lifestyle/women's magazines and supplements belonging to the same publisher support the allegations that Babiš's media are not independent, and that their editorial content is being systematically subordinated to his political and business interests (Kotíšová & Waschková-Císařová, 2022; Berger, 2022).

Focus on the digital environment

The average level of risk for Market Plurality in the digital environment is lower (67%) than in the overall area – reflecting in part relatively more optimistic economic situation on the digital advertising market, which has grown by +18% in 2022 (SPIR, 2023) – but still has to be considered high. Many of the issues that are negatively affecting market plurality in the traditional media are present in the online domain as well, including high ownership concentration (with the exception of Seznam, most of the key players in the digital markets are the same media houses that dominate offline media), the lack of media-specific legislation concerning transparency of media ownership, or the absence of any state support for digital news media. The implementation of the EU Directive on copyright (the “Copyright Act”) has been welcomed by the largest media houses, but criticised by the smaller players, as they fear for financial consequences of the decision by Google and Facebook to stop showing snippets from news articles, in response to the amendment to the Copyright Act.

3.3. Political Independence (45% - medium risk)

The Political Independence indicators assess the existence and effectiveness of regulatory and self-regulatory safeguards against political bias and political influences over news production, distribution and access. More specifically, the area seeks to evaluate the influence of the State and, more generally, of political power over the functioning of the media market and the independence of the public service media. Furthermore, the area is concerned with the existence and effectiveness of (self)regulation in ensuring editorial independence and the availability of plural political information and viewpoints, in particular during electoral periods.



The Political Independence area displays medium risk level (45%), 8pp lower than last year. The main reason for this improvement has been the departure of Andrej Babiš, the beneficial owner of the media house Mafra, from the seat of the Prime Minister, following the results of the October 2021 Parliament Elections, ending thereby the blatant conflict of interests between his role in the government and his involvement in news media business. In effect, both Political Independence of the Media and Editorial Autonomy indicators have recorded a substantial decline of risk. The distribution of risk levels across the other indicators has remained more or less the same.

The level of risk for **Political Independence of the Media** has been reduced from 60% to 35% compared to last year. Even though the leader of the party ANO, Andrej Babiš, continues to be the beneficial owner of Agrofert, the company in control of a large portion of the Czech news media market (including two daily newspapers, news websites, a commercial radio station, and a number of lifestyle magazines), the fact that he is no longer in the government means his conflict of interests is relatively less severe. Also, given that the political ambitions of some of the other media owners previously interested in pursuing careers in politics – especially Ivo Valenta or Jaromír Soukup – appear to have subsided recently, the case of the media controlled by Agrofert remains to be an exception rather than a rule on the Czech news media scene, at least when it comes to the direct confluence of political and business interests. To further reduce the possibility a direct political control over private media, a group of MPs have proposed an amendment to the Conflict of Interests Act, fixing some loopholes that have so far enabled Andrej Babiš to evade the implications stemming from the Act for his media empire, and effectively enforcing a complete separation between the roles of a politician and a media owner. The adoption of the Act has, however, so far been

blocked by the opposition, led by Babiš's movement ANO (Berger, 2023).

The indicator **Editorial Autonomy** scores medium risk (63%), down from 75% last year. This is largely due to the fact that with the sole exception of Andrej Babiš's newspapers, there is no indication of political influence over editorial contents in major commercial news media. There have also been no traces of politically motivated appointments or dismissals of editors-in-chief during the observed period. However, the lack of self-regulatory instruments that would safeguard the newsrooms against political influences continues to be among the key risks for editorial autonomy; the majority of the news media do not deal with the issue of political interference in their codes of ethics (if these are publicly available at all, which is not always the case).

Audiovisual Media, Online Platforms and Elections displays the lowest risk of all the indicators in the Political Independence area (17%), similarly to last year. This indicates that the media system is relatively well equipped to ensure fair representation of different political actors and viewpoints in audiovisual media and on online platforms, especially during electoral campaigns. The latest available empirical analyses of election coverage by both broadcasting organizations (commissioned by the Czech Broadcasting Council) concerned the 2021 Parliamentary Elections; both analyses concluded that there was no breach of the law concerning impartiality and fair representation (RRTV, 2022a,b). Due to the loopholes in the Act on association in political parties and political movements (No. 302/2016 Coll.), there are, however, persisting issues around transparency of political advertising online, especially on social media, something that Transparency International has repeatedly criticized in its monitoring of election campaigns, including the 2022 Municipality Elections (Transparency International, 2022).

The risk level for the indicator **State Regulation of Resources and Support to Media Sector** is unchanged from last year (33%), reflecting both the overall satisfactory situation concerning the broadcasting spectrum allocation, but also some concerns regarding the transparency of state advertising distribution. The latter was recently criticized for example by the Association of Online Publishers with respect to the campaign of the Ministry of Health for the promotion of vaccination, which according to them discriminated against certain types of media (Association of Online Publishers, 2022). By the end of 2022, the Commissioner for Media and Counter-Disinformation prepared a concrete plan that involved centralization of state advertising and financial support for independent media, aiming to financially support selected media outlets. The plan however drew criticism from the big publishers, represented by the The Publishers' Union, and was subsequently scrapped (Aust & Jetmar, 2023; Unie Vydavatelů, 2023).

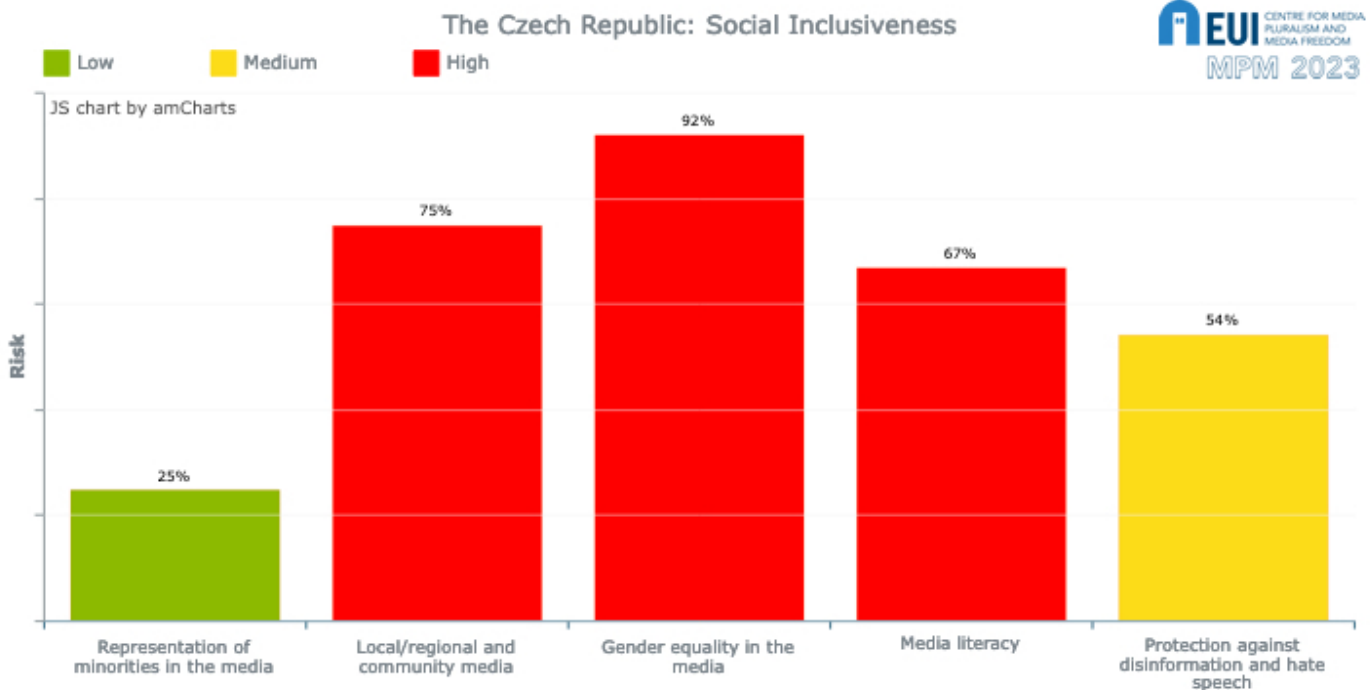
The risk score for **Independence of PSM governance and funding** has also remained the same (75%). While the direct political pressures on the public service media – and the Czech Television in particular – have significantly diminished following the arrival of the new government in 2022, the system of appointments to their regulatory bodies (Councils) continues to be heavily politicized, keeping the power over the Councils effectively in the hands of political parties. The new legislative proposal by the current government coalition that aims to partially reform this system (by involving the Upper Chamber of the Parliament into the process of appointment, or by imposing certain restrictions on civic organizations that may nominate the candidates, in order to increase transparency) has so far been blocked by the opposition. However, the single most important risk comes from the concerns about financial sustainability of public service media, given the lack of political will to even start debating the rise of license fees, which have been frozen since since 2008 (for Czech Television) and 2005 (for Czech Radio). Because of the financial insecurity, both public service media have announced budget cuts and layoff of staff in 2022.

Focus on the digital environment

Political Independence in the digital environment shows medium risk (56%), with the score slightly higher than the overall area. This is mostly due to the issues related to online political advertising, which is not sufficiently regulated; the existing legislation is rather general and, according to the NGO Transparency International, full of loopholes. Due to those, parties/candidates are able to avoid full disclosure of their social media ad spending, and holders of public office (e.g. mayors) can take advantage of posts or videos on social media that appear to promote their office (and their own activities as holders of that office), while in fact engaging in electoral communication. Other persisting issues which are particularly apparent in the online domain concern the lack of monitoring of the use of personal data on individuals by political parties for electoral campaigning purposes.

3.4. Social Inclusiveness (63% - medium risk)

The Social Inclusiveness area focuses on the access to media by specific groups in society: minorities, local and regional communities, women and people with disabilities. It also examines the country's media literacy environment, including the digital skills of the overall population. Finally, it also includes new challenges arising from the uses of digital technologies, which are linked to the Protection against disinformation and hate speech.



Social Inclusiveness displayed medium risk overall (63%), however with three indicators out of five exceeding the high risk threshold: Gender equality in the media, Local/regional and community media, and Media literacy. Low inclusiveness of the Czech media system corresponds with persisting deficiencies in the social and educational policies, such as the inadequate public representation of women, lack of attention to the problems of people in the regions, and scarcity of critical thinking in education. The risk assessment for the indicator Protection against disinformation and hate speech has improved from high to medium risk, reflecting some promising developments throughout 2022; nevertheless, in practice, the existing policy framework tackling the problems of disinformation remains still inefficient. Furthermore, with a significant part of the population having low digital skills (only 24% of Czechs have above basic digital skills, according to Eurostat), and given insufficient emphasis on media literacy, social inclusiveness in the online environment needs to improve as well.

Representation of minorities in the media is rated as low risk (25 %). Airtime access for national minorities is enshrined in law (Broadcasting Act No. 231/2001 Coll.), but it applies only to PSM channels. Apart from the special programs dedicated to ethnic minorities, Czech TV and Czech Radio also broadcast about people with disabilities, seniors, or LGBT+ communities. In March 2022, public media quickly responded to the unexpected influx of immigrants fleeing the war conflict in Ukraine by launching Ukrainian-language broadcasts. The country has a well-developed regulatory framework for providing media content to people with disabilities, yet again there is a significant difference between the PSM channels and commercial stations. Whereas Czech Television provides the share of programs with captions and in sign language above the legal requirements, the private stations tend to broadcast old programs with subtitles in less attractive airtime, while their new production is without subtitles.

The **Local/regional and community media** indicator is evaluated as high risk, with the same score as last year (75%). In 2022, the public discourse was intensely focused on the quality of nationwide and public media, although civil society and media experts have repeatedly pointed to the need to reform media legislation regarding local/regional media. While public service media must provide regional services, no particular frequencies are reserved for private local/regional radios or TVs. As there are no direct or indirect state subsidies for local media, their numbers are declining and the country faces a growth of “information deserts”, the regions with no independent media coverage of current affairs. The space is filled by media with questionable level of autonomy, i.e., official municipal newspapers or private regional television. Community media are not recognized in the current law, and only a few media could fall under this classification anyway.

Gender equality in the media is rated again as high risk, yet the score (92%) is significantly higher than in previous years, which is mainly due to the availability of data that enable for more precise quantification of the gender gap in the media. Women are severely underrepresented in public service and commercial media decision-making positions. For example, the number of women among the editors-in-chief in the most-read news media is below 5%. None of the PSMs (Czech Television, Czech Radio, Czech Press Agency) has a top female executive, and, in fact, never had one. In PSM Councils, women represent only 13% (Mahdalová, 2023). Aside from this, men dominate as experts commenting on political and other relevant matters; according to the analysis by Herot (2022), the share of women participating as experts in news and public affairs programmes on Czech Television is only 17%. Moreover, comprehensive gender equality policies are missing, including internal procedures to prevent bullying and sexual harassment.

The risk score for **Media literacy** increased from medium to high risk (67%). Despite being part of the curriculum, media literacy in primary and secondary education still needs more efficient implementation, including appropriate teacher training and evaluation done by schools to see if teachers are meeting the objectives of media literacy education. As a recent survey (People in Need, 2023) conducted among high school students revealed, the youth's trust in the media is declining. Half of those questioned are convinced that major media, including public service media, deliberately distort or withhold important information. Compared to the 2018 survey, the percentage of those who believe that independent media are necessary for a well-functioning democracy have significantly decreased.

Protection against disinformation and hate speech scored medium risk (54%). The decline in the risk assessment (from 81% in the previous year) reflects some promising development throughout 2022, including the fact that the government has appointed a Commissioner for Media and Counter-Disinformation in March 2022. Under his supervision, a comprehensive national action plan to tackle disinformation was developed, covering a range of areas from blocking content that threatens national security and prosecuting deliberate spreading of disinformation, to financial support for independent media or non-profit organizations. The improvement of the score for this indicator has also been helped by the fact that despite the absence of state financial support, there are some fact-checking initiatives with high ethical and professional standards and initiatives to monitor disinformation. Furthermore, in 2022, the courts have increasingly begun to sanction the spreading of disinformation and those who incite hatred. Also, the efforts to remove hate speech from social media have been more efficient (European Commission, 2022).

Focus on the digital environment

The Social Inclusiveness area shows medium risk in the digital environment (52%). The population remains vulnerable to disinformation because of the missing and/or ineffective policies tackling this highly topical risk. On the other hand, the Czech courts have increasingly begun to sanction the spreading of disinformation and those who incite hatred online. Also, the efforts to remove hate speech from social media have been more efficient than in the past. Nevertheless, hatred spread over the Internet against minorities (especially LGBT+ and women) remains highly common. There are no empirical data on the ratio of digital threats aimed at male versus female journalists; however, anecdotal evidence suggests that intimidation and online abuse of women working in the Czech media is rampant.

4. Conclusions

Judging by the changes in the risk scores across the four areas, the results of MPM2023 for the Czech Republic show a mixed picture. After a slight decline last year, the risk for the Market Plurality area from went back up again, in part reflecting the economic difficulties that many news media organisations (and print media in particular) have faced following the impact of the record-breaking rise of costs in 2022, but also highlighting some long-term structural problems embedded in the Czech media market, including high ownership concentration (both offline and online), and a lack of either regulatory or self-regulatory safeguards that would prevent from undue influence by media owners, many of whom have primary interests outside the realm of media business. On the other hand, for the first time in several years, there has been a notable decline of the risk for the Political Independence area – a turn directly linked to the change of the government and the end of the unprecedented situation when a sitting Prime Minister has at the same time been an owner of one of the largest media houses in the country.

Notwithstanding some improvements in selected areas, many of the risks identified in the previous editions of MPM persist, including those related to public service media, whose sustainability has been threatened due to the stalemate around the issue of the rise of license fees. The promised reform of the system of PSM regulation – aiming to increase its independence on political parties – has also not yet materialized, while other plans designed to combat digital threats and to improve resilience of independent media have been short-lived. This turned out to be the case in relation to the Government's action plan against disinformation, which was effectively scrapped in February 2023, following the abrupt dissolution of the position of the Commissioner for Media and Counter-Disinformation, which was prompted by critical reactions to the action plan, including by the Union of Publishers. Given the absence of any existing alternative to this plan, the state currently does not have a functional strategy or policy instruments to counter the spreading of disinformation or to face a hostile disinformation campaign (Ministry of Interior, 2023). In light of the ongoing war in Ukraine, deepening economic problems of professional news media, as well as the rising public discontent with the costs of living, creating fertile ground for populist and anti-system actors, it is apparent that strengthening state's capacities in the area of strategic communication and fostering resilience against hybrid threats should be among the key policy priorities in this area.

To tackle some of the most pressing risks for media pluralism highlighted in this report, the following policy recommendations are proposed:

Fundamental Protection:

- Finalizing the process of implementing the legislation to protect the whistleblowers, in line with international standards;
- Creating adequate legal framework to regulate strategic lawsuits against public participation (SLAPPs);

Market Plurality:

- Introducing a transparent and fair system of financial support for quality journalism, and especially in the regions;
- Implementing self-regulatory mechanisms to safeguard editorial autonomy from commercial interests;

Political Independence:

- Fixing the loopholes in the regulation of political advertising and online election campaigning;
- Taking steps towards safeguarding financial sustainability of public service media, including the raising of the license fee;

Social Inclusiveness:

- Developing internal policies to improve the imbalance in gender representation and in the management of news media, especially public service broadcasters;
- Enhancing the state's instruments for fighting disinformation, including the legislative framework that should allow for more efficient and legally appropriate ways of countering disinformation and hostile propaganda while preventing the system from political abuse and protecting the freedom of expression.

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ANNEXE I. COUNTRY TEAM

First name	Last name	Position	Institution	MPM2023 CT Leader
Václav	Štetka	<i>Reader in Comparative Political Communication</i>	<i>Loughborough University</i>	X
Jitka	Adamčíková	<i>Media Analyst</i>		
Albín	Sybera	<i>PhD researcher</i>		

ANNEXE II. GROUP OF EXPERTS

The Group of Experts is composed of specialists with a substantial knowledge and experience in the field of media. The role of the Group of Experts was to review especially sensitive/subjective evaluations drafted by the Country Team in order to maximize the objectivity of the replies given, ensuring the accuracy of the final results.

First name	Last name	Position	Institution
Tomáš	Samek	<i>Member</i>	<i>Czech Television Council</i>
Lucie	Sýkorová	<i>Vice-Chair of Board</i>	<i>Association of Online Publishers</i>
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Research Project Report

Issue -

June 2023

doi:10.2870/048026

ISBN:978-92-9466-450-1

QM-03-23-255-EN-N



Publications Office
of the European Union

