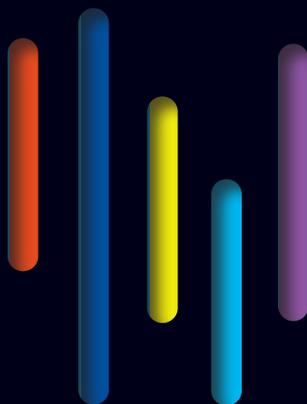


# SUCCESS AND FAILURE IN NEWS MEDIA PERFORMANCE COMPARATIVE ANALYSIS IN THE MEDIA FOR DEMOCRACY MONITOR 2021



EDITED BY **JOSEF TRAPPEL & TALES TOMAZ**

NORDICOM

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The Euromedia Research Group



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**COMPARATIVE ANALYSIS**  
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## Success and Failure in News Media Performance

*Comparative Analysis in The Media for Democracy Monitor 2021*

Josef Trappel & Tales Tomaz (Eds.)

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## Preface

This volume completes the book trilogy of the 2021 edition of the Media for Democracy Monitor (MDM). This social science-based monitoring instrument follows the compelling logic suggested by Kaarle Nordenstreng (2001): In a democracy, media have influence, media enjoy freedom, media should be responsible and accountable, and thus, media need monitoring and criticism. Johan Galtung (1999: 23) valued media monitoring as essential for democracies: “To monitor the media is to make them transparent, a basic condition for democracy to function”. And Denis McQuail (1999: 27) inspired this research by suggesting that social sciences should be “concerned with assessing the quality of what the media do according to standards derived from theories of democracy, often in association with projects of media policy and regulation”.

The 33 authors of this volume are united in their belief that democracy is a fragile form of people “lawfully governing themselves”, following John Keane’s (2009: xv) captivatingly simple definition of democracy. Contemporary democracies, Keane argues, are best described as monitory democracies, characterised by an abundance of monitory institutions skilfully trading in the “business of stirring up questions of power, often with political effect. [...] These public monitors thrive within the new galaxy of communicative abundance” (Keane, 2013: 47).

Within this framework of digital communication abundance and the fragility of mature contemporary democracies, the key object of the MDM constitutes a systematic and indicator-based instrument to map and evaluate the performance of leading news media in contemporary democracies.

The empirical approach is based on 30 indicators (defined and described in a research manual) equally applied to all participating countries (for information on the methodology and indicators, see Tomaz & Trappel, Chapter 1). The 2021 edition includes 18 countries from around the globe, the majority being European. Findings have been published in two Open Access volumes by Nordicom (Trappel & Tomaz, 2021a, 2021b), as well as on the website of the Euromedia Research Group, the academic host of the MDM. Results are reported in individual country reports, allowing users to select countries or indicators and compare them one by one (The Media for Democracy Monitor, 2021).

After completing the country reports, and based on the results, the research team selected salient items and issues of particular relevance for further inves-

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Trappel, J., & Tomaz, T., (2022). Preface. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 7–9). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-p>

tigation. Team members and country report authors took up these issues and elaborated them further in comparative chapters, presented in this volume.

These selected issues fall into four categories: First, there are burning, prominent issues on the public agenda. Chapter 2, “Countering misinformation in and from the newsroom”; Chapter 3, “Protecting journalists from harassment”; Chapter 4, “Gender inequalities in and through the media”; and Chapter 5, “Investigative journalism and the watchdog role of news media” fall into this category. Results show that digitalisation in conjunction with cyclical crises of capitalist economies resulted in aggravating deterioration of journalistic working conditions, and leading news media are still searching for the best strategies with which to tackle them.

Second are critical issues of continuity. Here, the following chapters are subsumed: Chapter 6, “Comparing news media reach”; Chapter 7, “Soaring media ownership concentration”; Chapter 8, “Commercial influence in newsrooms”; Chapter 9, “Public service media”; Chapter 10, “Ethical codes of conduct in journalism”; and Chapter 11, “Media accountability”. In general, findings confirm that digitalisation did not solve any of the preexisting problems, but created a plethora of new ones.

Third, we address underresearched issues of growing relevance. Chapter 12, “Media transparency”; Chapter 13, “Journalistic practices contesting the concept of internal pluralism”; and Chapter 14, “Practising democracy in the newsroom” fall into this category. In short, seemingly simple solutions and concepts become complex when applied to democratic requirements.

Finally, issues on the rise include Chapter 15, “The professionalisation of journalism”, and Chapter 16, “Innovation in journalism”. Here again, additional challenges are to be expected, rather than simple solutions for democracy-related problems.

All chapters are informed first and foremost by the comparative results of the MDM country reports (Trappel & Tomaz, 2021a, 2021b), but they also include other relevant sources and reflect the state of the art in social sciences on the topic under scrutiny.

This 2021 MDM research project addresses a number of stakeholders. The qualitative approach provides scholars, students, journalists, editors, media owners, politicians, and the interested public with best practices from countries around the globe. It appears that leading news media, irrespective of language, culture, size, and location of the country, share rather similar problems when it comes to their role in democracy. Solutions, however, differ considerably. It has been fascinating to discover that countries scoring high in their democratic performance are not necessarily those with the most advanced and creative problem-solution strategies – and vice versa; much can also be learned from countries generally not performing that well.

As editors and coordinators of this two-year research endeavour, we are deeply impressed by the enduring motivation of team members to not only deliver country reports, but also to engage in the horizontal analysis of relevant issues. We tremen-

dously enjoyed the collaboration with so many colleagues across so many borders, but we would have enjoyed it even more if we could have met in person for our research coordination meetings. The Covid-19 pandemic did not allow this; however, it provided us all with a new research topic (“media for democracy in times of crisis”) and also new ways and means of digital collaboration. Because of this, the ecological footprint of our research turned out to be much smaller than expected.

We express our deep gratitude, once again, to the fabulous editorial team at Nordicom, namely Karin Hjorthen Zelano, Kristin Clay, Josefine Bové, Per Nilsson, and director Jonas Ohlsson. Their kind and well-tempered support carried us safely across the many perilous cliffs of such a voluminous publication project. The opportunity to have all results published fully Open Access is a major achievement and a sign of great generosity by Nordicom. Finally, we thank the Dutch Journalism Fund (SVDJ) for their support in presenting and disseminating our findings.

*Josef Trappel & Tales Tomaz*

Salzburg, Austria, December 2021

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## Chapter 1

# Democracy at stake

## *On the need of news media monitoring*

Tales Tomaz & Josef Trappel

### Abstract

In this chapter, we discuss why news media monitoring is needed and propose a theoretical and methodological framework to implement it, which underlies the Media for Democracy Monitor (MDM) research project. The framework is derived from normative theories of the roles of news media and journalism in liberal democracies. These roles are related to core dimensions of democracy, namely freedom, equality, and control, which reunite elements from liberal and republican theories. The context of this discussion is the increasing popular suspicion regarding liberal democracy and the crisis around news media as institutions. We conclude with a brief reflection on the results of the 2021 MDM research project, which identified some worrisome developments in news media performance but, overall, stability in the last decade, despite the disruption caused by digitalisation.

**Keywords:** democracy, news media, journalism, media monitoring, digital media

## Introduction

As we enter the third decade of the twenty-first century, democracy as a system of governance does not seem to enjoy its highest popularity. Research by the recently created Centre for the Future of Democracy at the University of Cambridge analysed thousands of surveys from the last 50 years in several countries and concluded that dissatisfaction with democracy has steadily risen, reaching now an all-time global high (Foa et al., 2020). Since the mid-1990s alone, the share of dissatisfied individuals increased by 10 per cent.

It is not simply a matter of popular support. There are more countries becoming authoritarian regimes than adopting liberal democracy, as measured by the Varieties of Democracy Institute in their democracy report (Alizada et al., 2021). In a similar vein, the influential political scholar Larry Diamond (2015) coined the term “democratic recession” to describe what he sees as a halt in the expansion of freedom and democracy in the world since the mid-2000s. The

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second half of the twentieth century saw an increasing number of countries adopting fair and regular elections, more political accountability, transparency, and restraint of power. However, breakdowns of democracies, the decline of freedom and rule of the law, and the resurgence of authoritarianism are, for Diamond, evident signs that the benign postwar wave is over.

In most accounts, Africa, Asia, Eastern Europe, and Latin America are the most affected regions. They display a higher number of recent democracies, whose immature political systems have never actually reached a point of stabilisation. Their economic shortcomings are known to make populations more prone to authoritarian alternatives. But scholars also warn of developments in the so-called stable, liberal democracies of the West, namely North America and Europe. No one could imagine, 20 years ago, that the United States of America would elect a populist outsider such as Donald Trump for president. In their already classic *How Democracies Die*, Steven Levitsky and Daniel Ziblatt (2018) argue that Trump's election is an alarming sign that American democracy is in decay. It perfectly illustrates how stable democracies are currently being threatened. Instead of classic military intervention as depicted in traditional textbooks, the primary risks come from abuse of power and violation of democratic institutions and norms by democratically elected rulers mobilising populist sentiments. Western Europe faces its own challenges as well. In 2017, for the first time since the 1930s, a radical far-right party gained representation in the German parliament. Many other countries, including the Nordics, are dealing with a similar far-right wave, whose most characteristic trait is the permanent scapegoating of immigrants for the stagnation of living standards for the working class. It is true that with the EU, Europe is pursuing the greatest project of economic integration ever. However, some scholars argue that as this economic integration was not accompanied by social integration, it has undermined public trust and participation in democratic processes, and ultimately civil society (Busschaert, 2016). That is why this integration is felt by many throughout the continent not as a sign of healthy and democratic governance, but as an elitist project at the expense of ordinary people.

However, not all scholars consider democracy to be under siege. While Pew Research surveys observe worldwide dissatisfaction with the way democracy is working (Wike & Schumacher, 2020), they normally exhibit much lower support for autocratic regimes (Wike et al., 2017). Furthermore, Erik Voeten (2016) argues that abstract preference for democracy or other regimes is not a good indicator for measuring popular support. Instead, we should be asking about their confidence in actual democratic institutions, which can be more concretely perceived by citizens. Applying this methodology, Voeten (2016) concludes that there is no evidence that popular support for democracy is actually diminishing. Finally, there is a lack of consensus about the actual reach of the democratic recession or whether consolidated Western democracies are really in danger of

collapsing. Simply calling “populism” a danger is not a thoughtful response. According to Francis Fukuyama (2016: 68), populism is often “the label that political elites attach to policies supported by ordinary citizens that they don’t like”. Populism is often a reaction triggered when masses feel they are losing power to elites, and arguably, it can even mean that democracy is vibrant. In this sense, broader conceptions of democracy regard disaffection and apathy as forms of political acts as well, and citizens have been looking for new routes of engagement and participation outside of the electoral system (Dahlgren, 2013).

Nonetheless, even those who dispute the extent of the democratic crisis or its causes agree that liberal democracy is struggling to keep its ascendant pace. Though it is questionable to say that people want an authoritarian system, it is clear that many are not satisfied or confident with the current state of liberal democracies. There is a feeling that elites are co-opting governments for their own benefit. Because of this, “there is an increasing disconnect between citizens and government” (Kundnani, 2020: 8).

### News media’s role in democracy and current threats

One institution that historically has been closely related to democracy is journalism. In its traditional narrative, particularly the one developed in the United States, professional journalism plays a crucial role in democracies by providing reliable political knowledge and holding the powerful accountable. Democratic societies need news media for information and continuous observation; therefore, news media are granted freedom to operate without interference by political, economic, or social interest.

There is empirical evidence that news media indeed can improve the quality of liberal democracies. Analysing data from more than a hundred countries, scholars Aymo Brunetti and Beatrice Weder (2003) found that independent press is a strong factor behind reduced corruption, hence contributing to make societies function under the rule of the law. Corroborating these findings, Stanford economist James Hamilton (2016) conducted an exhaustive study about the economic costs and benefits of investigative journalism, analysing several stories in the United States. Hamilton shows that, although news outlets are not able to monetise the whole value of investigative journalism, society benefits greatly from it. In many cases, one dollar invested by a newspaper in an investigation “can generate hundreds of dollars in benefits to society from changes in public policy” (Hamilton, 2016: 10). Because of this, Hamilton argues, investigative journalism should be seen as a public good.

Local news media are especially crucial for a healthy political debate. Kübler and Goodman (2019) researched the relations between media coverage and local politics in Switzerland and found that much of the variation in turnout

in local elections can be explained by the level of activity of the municipal newspaper market. The larger the share of newspaper readers in a municipality, the higher the rate of electoral participation in that municipality. Similar results are also found in other democracies. Small, but relevant, news outlets increase the likelihood that citizens will vote and express their opinions about local candidates (Hayes & Lawless, 2015). Lee Shaker's (2014) study about the closure of newspapers in American cities confirms that civic engagement wanes without local news coverage. In sum, both political participation and knowledge are stronger in cities and regions with active news outlets.

Additionally, local news counter political polarisation. When cities lose news outlets, their citizens turn instead to national coverage of politics and begin to use partisan heuristics to deliberate on local politics instead of issue-based reasoning, increasing polarisation (Darr et al., 2018). Not only voters tend to polarise; representatives from less-covered localities are more likely to follow partisan orientations, found a study by Snyder and Strömberg (2010) in the United States. According to these findings, low standards of local press coverage result in politicians working less for their constituencies, evidenced by partisan voting records, low participation in hearings, and lack of engagement in getting federal money to flow to their districts. Hence, quality press coverage is crucial for electoral accountability.

Findings like these sustain the journalistic credo that news media are important for strengthening democracy. But the issue is more complex. News media must grapple with a troublesome financial scenario. In fact, news productions are facing a continuous decrease in funding, leading to whole neighbourhoods, cities, and regions falling outside the coverage of professional reporters (Abernathy, 2018; Pickard, 2020). Even established news media have fewer resources than before, resulting in cutting jobs in the newsrooms, shortening time and money for coverage, and burdening remaining staff with a multitude of tasks. Subsequently, journalists must rely much more on either official statements or information provided by agencies, performing less in-depth, independent investigation. In other words, a core function for holding the powerful accountable – investigative journalism – is being undermined, largely due to decreasing revenues (Curran, 2011).

Global advertising spending – a major revenue source for most news media in liberal democracies – has been stagnant on a per capita basis (Winseck, 2019). However, the market share of legacy media is shrinking compared with online media, whose share amounted to more than half for the first time in 2019 (Enberg, 2019). In theory, television and print news outlets could transition online and recover their funding. And they are trying. However, digital publishers struggle to make money. In fact, a survey found that nearly 40 per cent of digital publishers see either a drop or a stagnation in their ad revenues (Simpson, 2015). This is not only the case for small and less relevant publishers.

Despite continuous growth in online reading, the British leading news company Guardian Media Group, which operates *The Guardian* and *The Observer*, wrestles with continuous losses in digital revenues (Hammett, 2016).

The main reason for the lack of funding for online news media is that most of online ad spending does not flow to publishers; advertising intermediaries capture between 55 and 70 per cent of every dollar spent on online ads (Iwańska, 2020). These are tech firms which provide services from targeting and trading to verification for digital ad placements. Although this tech supply chain is crowded with numerous players, Google and Facebook receive the dominant share of the revenues, making up half of the digital ad spending at the global level. The duopoly share is even bigger in rich countries (Enberg, 2019; Winseck, 2019). In this sense, the ad spending that used to flow to news media and legacy publishers is now concentrated to digital media in general, and a few tech firms in particular.

Besides financial-economic crisis, news media have to deal with other factors undermining their role in democracies, such as a lack of trust. The *Reuters Institute Digital News Report* has found that trust in the media has fallen year after year – until the Covid-19 pandemic, which seemed to remind many of the importance of professional news (Newman et al., 2021). The main reason for distrust has been that the media “are not considered to be sufficiently independent from political or business elites” (Newman et al., 2019: 20). On a similar note, Van Aelst and colleagues (2017: 3) list several concerns with regard to the contribution of news media to democratic societies in current times:

- (1) declining supply of political information, (2) declining quality of news,
- (3) increasing media concentration and declining diversity of news, (4) increasing fragmentation and polarization, (5) increasing relativism and (6) increasing inequality in political knowledge.

Many of these concerns are not new. Media concentration and declining diversity of news, for example, are long-standing issues. American scholar Robert McChesney (2008: 427) identifies media concentration as a deadly threat to democracy: “This concentration accentuates the core tendencies of a profit-driven, advertising supported media system: hyper-commercialism and denigration of journalism and public service. It is a poison pill for democracy”. Much along the same lines, Edwin C. Baker (2007) considers media concentration a multidimensional challenge for democracy. For James Curran (2011), hyper-commercialism is the very reason we see a loss of news media quality in the United States.

In fact, establishment media tend to see themselves primarily as a business, networked into economic and political power structures, confounding freedom of the media with freedom of trade (Christians et al., 2009). Most democratic societies do not challenge this conception. Not by chance does much of the media coverage simply reproduce the status quo, which favours established and

powerful actors, particularly economic elites (Maesele & Raeijmaekers, 2017). Recent research indicates that even legacy news media agents and traditional formats can play a central role in spreading disinformation, in spite of reasoning that seems to justify their contribution to democracy (Benkler et al., 2018).

Looking at this scenario, some scholars claim that the legacy news industry is dead: “Journalism is transitioning from a more or less coherent industry to a highly varied and diverse range of practices” (Deuze & Witschge, 2018: 166). These practices go beyond a traditional newsroom-centred practice towards a post-industrial, enterprise-oriented way of practising the profession. Self-employed journalists work on project-based contracts in allegiance with other professionals, in collaboration with but independent of news organisations, ascending in their career as they are able to monetise specific content. Others see journalistic practices expanding to other formats and languages, such as entertainment, which are sometimes considered more decisive than the legacy news media industry in connecting the audience with public issues (Jones, 2010; Peters, 2013).

### Why media monitoring is needed

In the context of news media crisis, many placed hope in digital technology to ultimately provide what democracies need in terms of information. Early on, the Internet was heralded as a full-fledged – and an even better – substitute for journalism regarding the nurture of a healthy public sphere. Networked communication could provide the information necessary for democracies (Benkler, 2006), and legacy news media seemed unnecessary, since technology allows each citizen to be a “local journalist”, reporting what happens in their neighbourhood and freely expressing themselves in social media. Digital technology was generally seen with optimism, although critical voices have always been present (Miller & Vaccari, 2020).

Two decades later, the optimism has vanished. Public discourse abandoned its original faith in the democratic benefits of networked communication to the point that even tech experts no longer believe in the potential of digital technology for strengthening democracy. On the contrary, they are rather concerned that “the use of technology will *mostly weaken core aspects of democracy and democratic representation in the next decade* [emphasis original]”, according to a Pew Research survey (Anderson & Rainie, 2020: 4).

There are many reasons for the contemporary scepticism. First, the business model underlying the recent developments of the Internet has brought up an ecosystem of data collection that has facilitated the most sophisticated surveillance system ever created (Zuboff, 2019). By following the online behaviour of billions of users, large tech companies such as Google and Facebook are able

to offer advertisers extremely segmented profiles of potential consumers. One possibly problematic application of this strategy has been in political campaigns, as politicians can reach citizens based on their specific interests and vulnerabilities, almost at an individual level, identifying both the voters more likely to be convinced and the issues that would make them vote, a strategy extensively used by Trump (Wong, 2020). No journalists, no researchers, no prosecutors, no critical citizens to voice enquiries; such ads go straight to susceptible people. Holding political communication accountable is extremely difficult under these circumstances.

The possibility of reporting independent of a news organisation, which was earlier celebrated as “citizen journalism”, might sound like an interesting idea as long as the citizen does not need to put much effort – money, time, and knowledge – into it. But in situations that require these resources, an industry with an established structure and means is needed. Furthermore, access to direct communication opens up possibilities for citizens, but authoritarian politicians also increasingly benefit from this technical possibility, speaking directly to their followers (Krämer, 2017). In this way, they avoid contact with the press. Again, there are no skilled journalists to scrutinise their messages, contest arguments, or filter propaganda.

Nor is technology helping democracy when it allows a rapid spread of mis- and disinformation. Most research on disinformation rightly acknowledges that there are many aspects contributing to this unwelcome trend in contemporary communication, ranging from economic incentives for producing misleading content to radicalising right-wing movements (Benkler et al., 2018; Farkas & Schou, 2018). However, the specific role of the Internet and digital media as technological infrastructures should not be downplayed. The decentralised communication provided by digital media, and its very platform design, are key factors for the success of disinformation campaigns (Krafft & Donovan, 2020).

Democracy is also endangered by algorithmic-driven decisions in digital media. Social media’s business model relies on algorithmic personalisation, which tends to be homophilic, making users interact with others who have similar ideological preferences and political views (Barberá, 2015). Additionally, algorithmic-driven decisions have enabled the creation of “social robots”: automated accounts in social networks that generate content in a similar way as humans, inflating arguments regarding specific public issues. Findings confirm that, although their effects on populations are uncertain, botnets have heavily distorted public discussion on digital platforms about Brexit and the American presidential elections in 2016, ultimately representing a threat to democracy (Bastos & Mercea, 2017; Bessi & Ferrara, 2016).

Of course, digital technologies have sparked interesting developments as well; for instance, online communication seems to increase voter turnout (Bond et al., 2012). In addition, many studies find evidence that using social media

for informational purposes has a significant effect on both online and offline political participation (Dennis, 2019; Dimitrova et al., 2014; Kahne & Bowyer, 2018), especially in countries without a free and independent press (Boulianne, 2019). Findings suggest that even casual conversation in non-political online communities is likely to develop into more civic engagement and political mobilisation (Graham et al., 2016). The major stance, however, is that, instead of being an unequivocal driving force for democracy, the Internet brings many challenges and contributes to putting more pressure on public communication (Hardy, 2014; Hindman, 2018; McChesney, 2013; Trappel, 2019).

However, the most striking issue for an increasing number of social theorists is the persistent centrality of legacy news media in public discourse. Citizens are still highly interested in news coming from a traditional information industry. The *Digital News Report* finds that 59 per cent of the global population affirm to be either “extremely interested” or “very interested” in news (Newman et al., 2021: 13). This interest is primarily directed to news produced by legacy media outlets. Although use of social media increases over time, including for news-related activities, people still rely mostly on television to be informed. Even considering specifically digital consumers, people tend to get their news from known brands, most of them predating the Internet, and most of the content circulating in social networks actually comes from these legacy publishers (Hardy, 2014; Jakubowicz, 2015; Newman et al., 2021). Despite a tendency for trust to decline in the last years, people still trust news from mainstream media more than news from social media and digital aggregators of news, a gap which increased during the Covid-19 pandemic (Newman et al., 2021).

Not only is interest and trust in mainstream journalism greater than that in news on social media and other forms of networked communication. After exhaustive analysis of the causes of “information disaster” in the US, Benkler, Faris, and Roberts (2018: 386) conclude that although much attention is drawn to new technologies, “professional journalism continues to play a critical role in anchoring public debate in facts and evidence-based norms”. This means that, despite the hype surrounding the Internet, public discourse is still shaped more by the editorial work of paid professionals than the opinions, sharings, and likings of social media users.

Therefore, even though being in crisis, leading news media still play the most important role in the information ecosystem of mature democracies. They enjoy popularity and influence and can use their clout to hold the powerful accountable. This also means, however, that they can abuse their power and harm democracy. If leading news media do not abide by normative standards for journalistic and editorial work, they are more likely to side with the powerful, undermining democracy. News media too must be held accountable.

One of the methods that democratic societies developed to hold news media accountable is monitoring their performance. Many scholars consider that the

normative expectations of the news industry and their shortcomings require regular media monitoring (Bertrand, 2003; Galtung, 1999; Nordenstreng & Griffin, 1999). Galtung (1999: 23) summarises what media monitoring ultimately is:

Monitoring is much more than trend watching: To monitor is to understand in order to act in an informed, well-reasoned way. Monitoring is beyond mirroring what happens in the fourth pillar of society (in addition to State, capital and civil society). To monitor the media is to make them transparent, a basic condition for democracy to function.

Accountability in this context refers not only to the output of the media, but also “to the willingness of the media to answer for what they do by their acts of publication, including what they do to society at large, and refers as well to the feasibility of securing accountability where there is unwillingness” (McQuail, 2009: 132).

Sharing this concern, many projects have arisen with the objective of monitoring media performance and holding them accountable (for a list of successful initiatives in the US and Europe, see Trappel & Tomaz, 2021a: 12). The Media for Democracy Monitor (MDM) is one of these projects, conducted by researchers from the Euromedia Research Group in partnership with colleagues from academic institutions around the world. The MDM aims to provide theory-led comparative research on leading news media focusing on production and distribution structures, within which media use and content consumption occurs.

However, any project with the purpose of scientifically monitoring media performance regarding its role in democracies must first deal with the normative expectations placed upon news media in democratic theory. These expectations, in turn, require a clear concept of democracy as a framework. In fact, democratic theory comprises a vast array of concepts, providing several aspects of great relevance to the debate about the role of the media and journalism in democracy. In the following, we present the aspects considered by the MDM project to be the most relevant. This theoretical discussion closely follows the original version published in 2011 (Trappel, 2011), but considers further scholarly developments in this last decade.

## Models of democracies and normative expectations for the media

Democracies are usually divided into two models or traditions: the liberal and the republican (Cunningham, 2002; Glasser, 2009; Held, 2006). Liberalism originates from the Anglo-American world, based especially in John Locke’s and Thomas Hobbes’s thinking, and considers democracy as an “essentially procedural mechanism designed to facilitate the expression of individual preferences”

(Glasser, 2009: 94). In a further development of this model, Schumpeter (1976) argued that democracy means government *for* the people, but not necessarily *by* the people, with decisions made by informed and competent elites elected by the people and held accountable during the electoral periods. According to Glasser (2009) delegating power to elites is justified by citizens' lack of interest – and the necessary expertise – to govern themselves. Scholars have good cause to characterise this model of democracy as elitist (see Baker, 2004).

The role of journalism and the media in this model of democracy is to identify and make public the wrongdoings of elected representatives. By doing this, news media increase the chances for elections to “reward effective elite response to popular needs” (Baker, 2006: 114). The essential role of the press in elitist liberal democracies is therefore acting as a watchdog to bring possible misconduct to public attention. Little importance is placed on continuous routine information, as people typically lack both the time and interest to follow their elected representatives' day-to-day business. Consequently, Zaller (2003) claims that limiting political reporting to crucial problems demanding attention would be sufficient. Journalism would then foster the public interest to focus on a limited number of important public issues. The idea of limiting political coverage, however, places a considerable burden on journalists: “Journalists cannot talk about every potential problem because their audience would ignore them; it is the job of reporters – in cooperation with political and interest groups – to decide what requires attention and bring it to the public” (Zaller, 2003: 121). According to this ideal, citizens would thus have a critical dependence on the restricted choices of journalists, who must be skilled and responsible and able to identify issues that may become important enough to be brought to the public's attention.

The republican model of democracy, on the other hand, brings different expectations. It is inspired by the writings of Jean-Jacques Rousseau and considers democracy as “a system of decision-making about public affairs in which citizens are directly involved” (Held, 2006: 4). Republican concepts rely on dialogue, debate, and activism within a democratic society, rather than decisions made by elected, though elitist, representatives. In a republican democracy, “the epistemological hope is that those speakers with better arguments will prevail over those without – and this hope presumably requires that these better arguments ultimately gather larger audiences” (Baker, 2007: 11). Therefore, the most characteristic element of republicanism in this sense is “its insistence on the active participation of citizens in democratic self-governance. [...] Republicanism asserts that democracy requires civic virtues from its citizens” (Dahlgren, 2007: 59).

Glasser suggests three models of republican democracies: pluralist, civic, and direct. The pluralist model is characterised by different groups competing in society, and the civic model depends on the cultivation of different voices and perspectives in society – journalism is tasked with accommodating these

differences. The most radical is the direct model, which rejects any distribution of resources “that would have the effect of creating unequal opportunities for political participation” (Glasser, 2009: 104). Thus, according to Glasser, in the direct model, “freedom of the press exists to serve the interests of the community, not the interests of journalists and their managers” (Glasser, 2009: 104).

Baker offers an alternative by suggesting a complex model as the most sophisticated form of democracy, where decisions are based on exhaustive deliberation processes:

[In complex democracies, the] media should support varying types of discourses – bargaining discourses of the liberal pluralist, discourses aimed at the common good emphasised by republicans, and smaller self-definitional as well as minority cultural discourses especially important to the fairness of the democratic participation of smaller or otherwise marginal groups. (Baker, 2006: 119)

Further exploring republican variations, Strömbäck (2005: 336) speaks of a participatory democracy, which thrives on people engaging and putting forth effort to advance their own causes: “The stronger civil society is, and the more social capital a society has, the more democracy thrives”. The most challenging model of democracy Strömbäck offers is the deliberative model, which, in the same vein as the complex and direct models, depends on public discussions based on rationality, impartiality, and intellectual honesty and equality, with the goal of agreement or better understanding (Strömbäck, 2005).

In these dialogue- and deliberation-based models of democracy, journalism has not only the obligation to inform about potentially crucial issues (as in the elitist model), but also to act as a forum for the debate; the media should inspire people to participate in the public discourse, and journalism should give voice to groups that need to express themselves in public to make their cause heard. (Trappel et al., 2011: 18)

Recently, pluralist variations of the republican model are making a comeback, such as so-called radical democracy, which welcomes widespread participation but rejects the possibility of an ultimate consensus from this dialogue. This model highlights the persistence of conflict, dissent, and irreconcilable demands in society (Cunningham, 2015). For radical pluralists, democracy is a system designed to provisionally settle this ineradicable antagonism by accepting the contingent, and hence, political nature of any social order. “Not only is conflict an unavoidable fact of social and political life, but recognition and institutionalization of this fact within democratic culture, practices, and institutions is a necessary bulwark against autocracy”, according to Cunningham (2002: 184). In this notion of democracy, the forum provided by news media should not consider the conclusions of any deliberation as definitive, contesting the universality of

hegemonic views of society and underscoring whose interests are favoured by competing ideas (Karpainen, 2013; Ræijmaekers & Maesele, 2015).

In sum, there are different models of democracy, and each of them implies specific roles for the media. Denis McQuail (2009) nicely summarises the normative demands coming from both liberal and republican traditions in four journalistic roles: the monitorial, the facilitative, the radical, and the collaborative. The monitorial role requires news media to provide information about current and recent events to the general public. The facilitative role prescribes the provision of a deliberative public space where the media helps to develop a shared framework for society. The radical role refers to the exposure of abuse and wrongdoing, as well as contesting hegemony in the social order. The collaborative role relates to the cooperation between the media and state in times of crisis, such as the Covid-19 pandemic, providing reliable information to citizens.

## Theoretical concept and methodology of the MDM

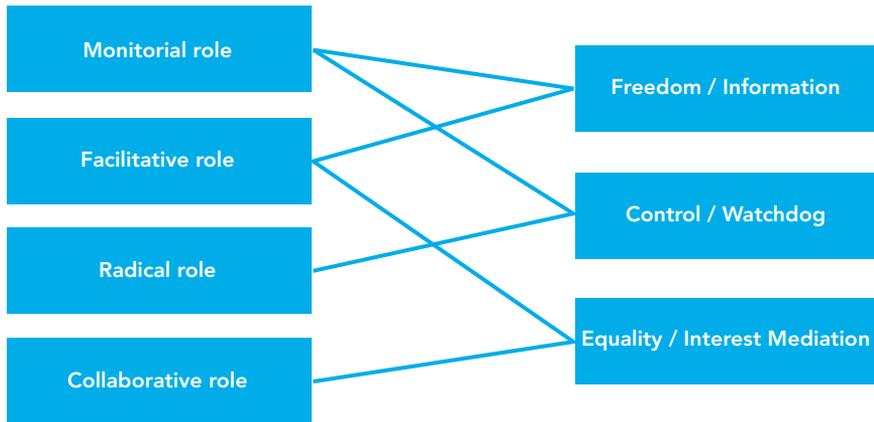
In the MDM, we are aware of the differences and contradictions of these democratic frameworks and the respective normative roles for news media, but we also understand that the analysis of existent mature democracies might require both liberal and republican aspects. This is indeed the argument by Bühlmann and colleagues (2012), who affirm that a strategy combining these different models is more suitable for grasping the rather subtle variations in advanced democracies. In this respect, Diamond and Morlino (2004) provide an interesting synthesis. For them, the liberal and the republican elements of democracies complement one another: The liberal element ensures that the rights of individuals and groups are protected under the law, while the republican element enforces the law and provides a contextualised understanding of the public interest, which public officials should serve (Diamond & Morlino, 2004).

Furthermore, even if relying on different logics, both models revolve around two basic constituents of democracies, namely freedom and equality. Irrespective of the way they are embraced in liberal and republican models, these values are also “necessarily linked to accountability and responsiveness”, a third value that can be simply called control (Diamond & Morlino, 2004: 7). Hence Diamond and Morlino’s (2004: 4) conclusion that mature democracies have to make progress in these three dimensions of freedom, equality, and control: “A quality or good democracy [should] be one that provides its citizens a high degree of freedom, political equality, and popular control over public policies and policy makers through the legitimate and lawful functioning of stable institutions”.

In the MDM research project, we take these three democratic dimensions as a legitimate theoretical arrangement of elements from both the liberal and

republican models. In the first volume of our 2021 MDM trilogy, we discuss in detail how we apply freedom, equality, and control to the roles of the news media (Trappel & Tomaz, 2021a). In short, freedom refers to the conditions of receiving and imparting information, to which McQuail’s (2009) monitorial and facilitative roles correspond. Equality involves the mediation of different interests in society, ensuring that conflicts are fairly expressed and represented, reflecting the facilitative and collaborative roles of the media. Control refers to the capacity of acting as a watchdog, monitoring power-holders, and calling them to account, including the media themselves, a demand in the monitorial and radical roles (see Figure 1.1).

**Figure 1.1** Triple mandate of news media to uphold democracy



*Comments:* The boxes to the left show the news media’s roles for responding to the normative demands coming from both liberal and republican traditions. The boxes to the right depict the corresponding three dimensions of democracy.

*Source:* Elaboration of the MDM research team based on theories of democracy and McQuail’s (2009) roles of news media (for more details, see Trappel, 2011; Trappel & Tomaz, 2021a).

Following this theoretical framework, monitoring the performance of the media with respect to their contribution to democracy entails upholding freedom, equality, and control, which for the news media means serving as 1) an information provider, 2) a forum for mediating interests, and 3) a watchdog against power abuse.

In order to properly assess the fulfilment of this triple mandate, it is necessary to rely on corresponding empirical criteria. In the MDM, we have developed 30 indicators that cover structural conditions in the three dimensions. The indicators within the *Freedom / Information (F)* dimension address the reach and consumption of leading news media, the autonomy of editorial staff from political and commercial interference, access to the means of production by historically

marginalised groups, and conditions against abuse in online communication, such as the spread of misinformation and hate speech. In the dimension *Equality / Interest Mediation (E)*, indicators refer to the quantity of different media outlets, diversity of news formats, availability of minority and alternative media, costs to access the media, existence of self-regulation mechanisms, and levels of popular participation in media governance and content. Finally, performance in the dimension *Control / Watchdog (C)* is assessed by means of indicators such as the existence of independent media councils, the level of independence of news media, transparency of data, journalists' professionalism, training and security, and financial resources for investigation. (For a full list of indicators and the chapters where they are discussed in this book, see the Appendix; for a detailed explanation of each indicator, see Trappel & Tomaz, 2021a: 18–52).

For each indicator, we have developed a research question and corresponding criteria that must be observed. Data was gathered from secondary sources – such as broad media surveys (e.g., the *Reuters Institute Digital News Report*) and specific national reports – and interviews with relevant stakeholders of leading news media or associations related to them, such as journalists' unions, media councils, and academic departments. The fulfilment of these criteria within each indicator is scored as follows (Trappel & Tomaz, 2021a: 17):

- 3 points: all or almost all criteria are fulfilled
- 2 points: the clear majority of criteria or the most important criteria are met
- 1 point: some criteria are met, but poorly
- 0 points: no major criteria are met

In accordance with our theoretical framework, these indicators should be applied to *leading* news media, not to every information provider available in a country. As aforementioned, trusted brands of editorial news production still occupy the core of the information ecosystem, even in countries with high penetration of digital media and networked communication. This does not mean focusing exclusively on national media; in many news markets, regional and local media are also influential forces in public discourse and must be part of the sample.

Furthermore, these indicators should only be applied to advanced, mature democracies. Here, we mean countries where the political system displays solid institutional support for those three main democratic goals: freedom, equality, and control. Historically, this description resembles so-called Western (North American and European) political systems, which have been called liberal democracies because of the prevalence of the representative system, even if also displaying many republican elements (Diamond & Morlino, 2004). Therefore, these indicators are not appropriate to survey the performance of journalism in countries without the governmental and political institutions committed to the promotion of those three goals or where these institutions have been

systematically undermined by relevant political forces. We do not want to say that there is no democracy outside of the established Western framework, only that our instrument is limited in scope to grasp any alternative arrangement.

Following these theoretical and methodological assumptions, a pilot MDM project was conducted in 2009 (d’Haenens et al., 2009; Trappel & Meier, 2011). In 2011, the MDM research teams performed a full monitoring exercise in ten countries: Australia, Austria, Germany, Finland, Lithuania, the Netherlands, Portugal, Sweden, Switzerland, and the United Kingdom. The country reports were published in the book *The Media for Democracy Monitor: A Cross National Study of Leading News Media* (Trappel et al., 2011). Ten years later, we repeated the monitoring in nine of these countries (Lithuania did not participate again) and included nine others: Belgium (Flanders), Canada, Chile, Denmark, Greece, Hong Kong, Iceland, Italy, and South Korea. The full country reports were again published, in two book volumes (Trappel & Tomaz, 2021c, 2021d). By the time of publication of this book, Hong Kong does not meet the criteria for our 2021 monitoring exercise, as intervention from the Chinese government undermines their claim to a liberal democracy. The decision to include Hong Kong occurred in 2019, when it still shared decisive characteristics of Western democracies (for a detailed explanation in this regard, see Trappel & Tomaz, 2021b: 425).

While the 2021 monitoring was coordinated at the University of Salzburg, Austria, local teams were established in each country, composed of both emerging and experienced scholars affiliated with higher education institutions (see the list of researchers and affiliations in the contributor’s list at the end of this book). Each country team defined their own sample of relevant leading news media (that is, relevant in the formation of public opinion), taking reach, market share, and mention frequency in the national information ecosystem as criteria for their sampling. Data gathering occurred in 2019 and 2020, mostly before the Covid-19 pandemic began. In this period, each country team conducted between six and fourteen semi-structured interviews with media stakeholders (on average, eleven interviews per country), in addition to collecting and analysing as much secondary data as possible. Country teams exchanged initial findings in a hybrid meeting in Salzburg in June 2020, when they presented their first scoring proposal and had the opportunity to learn about the performance of other countries. This provided for a fine-tuned comparative scoring.

Each country report, published in June 2021, provides details about the news media sample and the data sources, including the interviewees (though mostly anonymised). These first two volumes detail the performance of leading news media in the 18 countries for each indicator (Trappel & Tomaz, 2021c, 2021d). In this third volume, our challenge was to select the indicators that brought the most interesting or important results and undergo cross-country and, when possible, longitudinal comparisons, searching for patterns and tendencies after a decade of digitalisation. Our exercise confirms most of the public and

scholarly discourse about the structural crisis of news media, both concerning economic conditions and trust from society. The advertising-based business model seems to struggle everywhere. Digital platforms (alias social media) are increasingly becoming the main source of news for many news seekers, especially for younger generations. Old poisons, such as media concentration and hyper-commercialisation, continue to haunt media systems of many countries. And 25 years after the Beijing Declaration and Platform for Action, gender inequalities in the media are strikingly persistent, both at the organisational and the news content level. Therefore, news media perform poorly in many aspects, and civil society, politicians, and media stakeholders have reason to worry. But we also find that, in general, performance is similar to what it was in 2011 (in the aftermath of the 2008 global financial crisis). The Covid-19 pandemic reinforced trust in professional news in many countries, and media reach remains high. News media also seem to be even more aware of their unique role as watchdogs, seriously shouldering the responsibility of upholding investigative journalism, albeit with a lack of resources. Public service media have upcoming challenges regarding their presence in digital media, but have so far survived the ideological attacks of the 1990s and 2000s and, according to our data, mostly contribute to enhance the overall quality of media performance.

Also, in a highly digitalised world, democracies need media monitoring, because news media still play a pivotal role in the information ecosystem. The flaws of the news media can be harmful to a democratic society, by entrenching power relations, sustaining inequality, and restricting freedom. Normative theories of the news media's role in democracy provide conditions for countering these harms, and, in the best of cases, news media can instead nurture freedom, equality, and accountability. The application of these theories allow for the assessment of media performance, and this chapter presents theoretical and methodological frameworks to carry out such monitoring. In the following chapters, we provide journalists, managers, academics, policy-makers, and civil society as a whole with an up-to-date picture of developments in leading news media according to this normative framework. By doing so, we expect to contribute to the discussion and implementation of policies, regulations, and practices that improve the quality of our information ecosystem and, ultimately, our democracies.

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## Appendix 1.1

**Table 1.1** 2021 MDM Indicators and chapters with cross-country findings

Dimension	Indicators	Chapter
<b>Freedom / Information (F)</b>	(F1) Geographic distribution of news media availability	–
	(F2) Patterns of news media use (consumption of news)	6, 9
	(F3) Diversity of news sources	9, 13
	(F4) Internal rules for practice of newsroom democracy	9, 14
	(F5) Company rules against internal influence on newsroom	8, 9
	(F6) Company rules against external influence on newsroom	8, 9
	(F7) Procedures on news selection and news processing	9, 13
	(F8) Rules and practices on internal gender equality	4, 9, 15
	(F9) Gender equality in media content	4, 9, 13
	(F10) Misinformation and digital platforms (alias social media)	2, 9
	(F11) Protection of journalists against (online) harassment	3, 9
<b>Equality / Interest Mediation (E)</b>	(E1) Media ownership concentration: national level	7, 9
	(E2) Media ownership concentration regional (local) level	7
	(E3) Diversity of news formats	9, 16
	(E4) Minority/Alternative media	9, 13
	(E5) Affordable public and private news media	–
	(E6) Content monitoring instruments	9, 11
	(E7) Code of ethics at the national level	10
	(E8) Level of self-regulation	11, 15
	(E9) Participation	–
	(E10) Rules and practices on internal pluralism	13
<b>Control / Watchdog (C)</b>	(C1) Supervising the watchdog “control of the controllers”	11
	(C2) Independence of the news media from powerholders	–
	(C3) Transparency of data on leading news media	12
	(C4) Journalism professionalism	15
	(C5) Journalists’ job security	15
	(C6) Practice of access to information	–
	(C7) The watchdog and the news media’s mission statement	5, 9
	(C8) Professional training	15
	(C9) Watchdog function and financial resources	5, 9

Source: Trappel &amp; Tomaz: 2021a

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PROMINENT ISSUES  
ON THE PUBLIC AGENDA



## Chapter 2

# Countering misinformation in and from the newsroom

## *How digital platforms redefine journalistic practice and the democratic role of news media*

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### Abstract

Based on evidence from the 18 countries included in the 2021 Media for Democracy Monitor (MDM), this chapter provides the first comparative analysis of whether and how the issue of online misinformation is being interpreted and dealt with in newsrooms around the world. We analyse to which degree news media view online misinformation as a challenge that needs addressing and what measures they take to avoid relaying online misinformation. Moreover, we study how news media form part of broader societal and regulatory initiatives to counter misinformation. The chapter identifies different national approaches to the news media’s ways of addressing online misinformation, and we discuss potential future avenues for research and regulatory action.

**Keywords:** misinformation, newsroom, journalistic practice, fact-checking, platformisation

## Introduction

Online mis- and disinformation – that is, the unintentional or deliberate spread of false and misleading information – has been identified as a crucial threat to democracy in the digital age (e.g., European Commission, 2021b). Even though concerns for misinformation have always accompanied the relationship between information and news sources, the fact that news production, dissemination, and consumption increasingly rely on online and social media platforms have reinvigorated these concerns (e.g., Gulyas, 2017; Hermida, 2016; Newman et al., 2019; Van Dijck et al., 2018). Most recently, during the Covid-19 pandemic, the concern for widespread misinformation circulated on digital platforms has reached a truly global scale (Nielsen et al., 2020). For the purposes of this chapter, we refer to the broader phenomenon of misinformation as false or

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Mayerhöffer, E., Belluati, M., DeCillia, B., d’Haenens, L., Fubini, A., Lo, W. H., Núñez-Mussa, E., Ólafsson, J. G., & Rega, R. (2022). Countering misinformation in and from the newsroom: How digital platforms redefine journalistic practice and the democratic role of news media. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 35–58). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-2>

misleading information, irrespective of intent.

So far, public and scholarly debate on online misinformation has mainly focused on the affordances of social media platforms, the role of alternative news media, as well as automated bots and trolls, with the role of leading news media receiving less attention. We argue in this chapter that leading news media is a critical actor in both the proliferation and the containment of online misinformation. Put differently, any societal attempt to counter misinformation must acknowledge the critical role of leading news media as a part of the problem *and* the solution.

Thus, leading news media are critical in understanding online misinformation, but the reverse argument is true, as well: An understanding of how news media adapt their routines and redefine their role in response to misinformation is needed to fully grasp the role of news media in the digital age. It is against this background that the Media for Democracy Monitor (MDM) has been extended in its 2021 edition (see Trappel & Tomaz, 2021b, 2021c) to include an indicator on how leading news media protect and defend produced content against misinformation on digital platforms and social media. It has also become clear during our data collection and analysis that the impact of online misinformation on the news media's contribution to democracy is not limited to the question of protecting news content alone. Indeed, when talking about the news media in democratic terms, the specific question of how news media avoid relaying misinformation almost immediately raises the question of how news media more broadly seek to counter the spread of misinformation. As we argue in this chapter, both aspects are premised upon the overarching question of whether news media accept online misinformation as a challenge to their work in the first place.

MDM Indicator and related research question addressed in this chapter:

**(F10) Misinformation and digital platforms (alias social media)**

How do leading news media protect and defend their content against misinformation delivered through digital platforms and social media? (Trappel & Tomaz, 2021a: 29)

Based on evidence from the 18 countries included in the 2021 MDM, this chapter provides the first comparative analysis of how newsrooms around the globe view and address online misinformation. We analyse whether news media view online misinformation as a challenge that needs addressing, whether measures are taken to avoid relaying misinformation online, how news media seek to contribute to countering online misinformation more broadly, and news media's role in regulating misinformation. We conclude by identifying different national approaches to the news media's role in countering online misinformation and discussing potential future avenues for research and regulatory action.

## News media in an age of information disorder and platformisation

Modern democracies face what has been described as a state of information disorder, resulting from the complexity and scale of available information in an increasingly digitally connected world. According to Wardle and Derakhshan (2017: 5), this information disorder is characterised by three distinct types of potentially harmful information: misinformation (false information shared unintentionally); disinformation (false information intentionally distributed to cause harm); and malinformation (genuine information distributed to cause harm, for example, by making private information public). While these types of information are not new, they are exacerbated by social media, whose functioning mechanisms (i.e., selection, monetisation, and commodification; see van Dijck et al., 2018), technological features, and affordances provide fertile ground for the spread of misleading or false information. Misinformation has been found to be disseminated more than factual content on social networks (Del Vicario et al., 2016).

Research on information disorder often focuses on types of actors assumed to be particularly involved in the dissemination of false, misleading, and harmful information, including extremists, radical political groups, anonymous networks, social bots, trolls, as well as alternative and hyper-partisan media (Guess & Lyons, 2020). Yet, the journalistic practices of leading news media are also being challenged by this emerging information disorder. This challenge is exacerbated by the fact that leading news media themselves have experienced fundamental changes in their distribution and production practices. In addition to the increasing platformisation of news, contemporary journalism is challenged by increasingly scarce economic resources, a more participatory media environment, a round-the-clock global news climate, an expectation of journalistic multitasking and multitasking, a rise in churnalism, and not least, an alleged state of post-truth politics (Davies, 2008; Pickard, 2020). These multiple and interconnected challenges amount to a situation in which adherence to the journalistic core tasks of source verification and fact-based reporting becomes increasingly more difficult – including in established quality news media organisations.

The rise of the Internet and the growing importance of social media as a platform for journalistic research and dissemination has changed traditional news production routines and practices, posing new challenges for legacy media organisations. Media industries have begun to rethink their publishing activities by adopting new measurements of values and success, based primarily on web analytics. The shift of readers to social networking sites is forcing the media to look for new business models and to identify editorial growth strategies that enable more substantial use of new digital platforms. While the traditional

editorial model was based on the idea of providing quality information to the public through original reports and background research, today a different model, based on the number of clicks, has been established (Christin, 2020). Unlike the editorial model focused on providing content, the click-based model is built on the idea of journalism as an act of communication in dialogue with online readers: A news item can spread quickly in a network if many users (nodes) share (distribute) it (Welbers & Opgenhaffen, 2019).

The most critical issue is how the platformisation of news has influenced the quality of journalism and its fundamental principles and criteria, such as journalistic independence and the value of accurate and comprehensive news coverage. The realisation of such values in journalistic activities has been put under pressure by the influence of algorithms. In the platform ecosystem, algorithms shape the process of curation and selection of news, and the imperatives in this context are publishing more, publishing faster, and attracting the engagement and participation of users. The visibility of news organisations' content is highly dependent on audience activation, and the number of clicks received from each article has emerged as the new criteria with which to evaluate the content's success. The highly digitalised mediascape thus offers favourable conditions for the circulation of misleading content (Himma-Kadakas, 2017).

The vital role of news media to fact-check stories and produce quality and in-depth news reports is moreover challenged by increased resource constraints. The traditional business model of news is weakened as the funding model of commercial news media is being replaced (Phillips & Witschge, 2012). More readers migrate online, and so too does advertising revenue, of which global companies such as Google and Facebook claim increasingly larger shares of at the expense of legacy news outlets (Ohlsson & Facht, 2017).

Developing adequate measures to address misinformation under scarce resources can be a particular problem in smaller media markets and for smaller news outlets. Puppis (2009) highlights how small media systems lack resources compared with larger systems, resulting in various limitations on the production side. Research has shown that resource constraints at small news outlets mean that journalists often have little to no time to investigate and fact-check their stories, resulting in "superficial, shallow and reactive" reporting (Ólafsson, 2021).

## Online misinformation as an issue of concern in the newsroom

The platformisation of news and increasingly scarce resources put news media arguably at greater risk of contributing to the dissemination of misinformation. Within the newsroom itself, the issue of misinformation not only presents a challenge of maintaining journalistic quality in the digital age, but more fun-

damentally pushes journalists and editors to rethink their working routines, as well as their role in a democratic society.

As for working routines, online misinformation becomes relevant as a question of journalistic sourcing practices. The growing importance of social media not only motivates news media to publish on these platforms, but also to use social media to identify and contact sources, as well as to relay and cover information circulated on these platforms (e.g., Van Leuven et al., 2018; von Nordheim et al., 2018). Here, we propose that the journalistic answer to online misinformation can be described as reactive: When journalists rely on social media content, for which sources are often not easily identifiable and verifiable, they are met with the task of figuring out ways to safeguard themselves from disseminating false and misleading information while remaining attentive to the important issues and debates increasingly found on social media.

The phenomenon of online misinformation also affects the democratic role of news media. First, journalists and editors are faced with a question of trust, given that increasing misinformation and the concern for fake news threatens to affect audience trust in leading news media (Newman et al., 2019; Ognyanova et al., 2020). Second, in line with the countering of misinformation being identified as one of the fundamental societal challenges of our times, addressing such challenges becomes a question of democratic responsibility for the media. Consequently, news media may seek to contribute proactively to countering misinformation at a societal level – through creating awareness and educating their audiences about the existence and perils of misinformation, on the one hand, and through publicly fact-checking and debunking potential misinformation, on the other.

Indeed, the fact-checking of (third-party) information has become a normative demand posed to the media on par with classical roles of serving as a watchdog of the powerful or serving as a neutral disseminator of information (Blach-Ørsten et al., 2019). Yet, the scholarly evidence about fact-checking's efficacy in restoring audience trust and correcting factual misconceptions remains mixed. Plenty of research (Barrera et al., 2019; Garrett et al., 2016; Nyhan & Reifler, 2010; Walter et al., 2020) questions the effectiveness of fact-checking. Notably, Walter and colleagues' (2020: 367) meta-analysis of fact-checking concludes that “the effects of fact-checking on beliefs are quite weak” or “negligible”. While fact-checking can improve an audience's factual knowledge after being exposed to inaccurate and misleading information, it does not have a real effect on policy conclusions or support for political candidates (Barrera et al., 2019), whether due to biased reasoning or mere laziness (Pennycook & Rand, 2019). Research is likewise inconclusive on whether fact-checking can even backfire, leading audiences to believe incorrect information (Nyhan & Reifler, 2010; Wood & Porter, 2019). Finally, research has also suggested that overt fact-checking does not necessarily help to reinstate the audience's trust in

news content. For example, Clayton and colleagues (2020) found that tagging news article headlines with “rated false” lowers the perceived accuracy of the article in the audience’s mind more than a “disputed” label.

In this light, so-called second-generation fact-checkers – such as Africa Check, Latin American Chequeado, and UK-based Full Fact – have moved beyond just simply producing fact-checks (Full Fact, 2019). These organisations, in collaboration with political actors and civil society, go further by pressing for corrections, using regulatory mechanisms to stop the spread of misinformation, and attempting to change systems and cultures that allow misinformation to spread. This type of fact-checking has transformed from information and education transmission to advocacy, directly challenging the actors and organisations that peddle misinformation.

## Comparing MDM misinformation scores and contextual factors

In this chapter, we provide the first comparative analysis of how newsrooms around the globe view and address online misinformation. To do so, we draw on interviews with journalists and editors from leading news media in the 18 countries participating in the 2021 MDM (Trappel & Tomaz, 2021b, 2021c). Interviewees were asked to report how their news media outlet protects and defends their content against misinformation delivered through digital platforms and social media. Interviews were conducted in an open manner, and many interviewees also commented on their perception of online misinformation’s role for their work beyond specific protection and defence mechanisms. The information obtained through interviews has been supplemented with and qualified through external document research, expert interviews, as well as relevant research literature (for methodology, see Trappel & Tomaz, 2021a).

Interviews and field research were conducted in early 2020, that is, immediately before or during the early stages of the first wave of the Covid-19 pandemic and the ensuing concerns for a so-called infodemic, defined by the World Health Organization as a state of “too much information including false or misleading information in digital and physical environments during a disease outbreak” (World Health Organization, 2021: para. 1). Thus, our chapter is not able to systematically account for whether the concerns for an infodemic have led to a changed and renewed take on the challenge of online misinformation in newsrooms around the globe. We will, however, address potential implications of Covid-19 in the final discussion of the chapter.

The individual country teams have rated the obtained information for each national context, based on the following point scale (Trappel & Tomaz 2021a: 29):

- 3: control by specially trained experts is in place, algorithm-based tools are also used
- 2: information from doubtful platform sources must undergo specific checks
- 1: there are regular internal meetings to discuss potential misinformation
- 0: single journalists decide on their own when including content originating from digital platforms

The country score, as well as important contextual information for each of the 18 countries can be found in Table 2.1.

The reported MDM country score corresponds most directly to what has been described as reactive strategies to online misinformation in the newsroom. The interviews and additional research reveal further important aspects pertaining to

**Table 2.1** 2021 MDM misinformation scores and contextual factors

Country	MDM score (0–3 points) <sup>a</sup>	Social media as source of news (% used in the last week) <sup>b</sup>	Audience concern for “fake news” (% concerned or very concerned) <sup>c</sup>	Orientation of governments’ anti-misinformation actions <sup>c</sup>
Australia	1	45	62	soft (awareness)
Austria	1	45	40	–
Belgium	3	40	44	soft (awareness)
Canada	3	50	61	soft (awareness; monitoring in connection with election)
Chile	2	71	67	hard (sanctions planned)
Denmark	2	45	39	soft (awareness, monitoring)
Finland	2	39	52	–
Germany	2	34	38	none targeting online misinformation; hard sanctions for hate speech
Greece	1	67	61	–
Hong Kong	2	57	45	hard (sanction)
Iceland	1	–	–	–
Italy	1	47	52	hard (awareness, sanction)
Netherlands	2	39	31	soft (awareness)
Portugal	2	57	75	–
South Korea	2	26	59	hard (sanction)
Sweden	2	46	47	soft (awareness)
Switzerland	2	45	44	–
United Kingdom	2	40	70	soft (awareness)

Comments: Orientation of governments’ anti-misinformation actions includes all identified government actions with a clear misinformation focus – based on raw data (Poynter, 2021 and authors’ research).

Source: <sup>a</sup>Trappel & Tomaz, 2021c; <sup>b</sup>Newman et al., 2019; <sup>c</sup>Poynter, 2021

the question of how news media approach the issue of misinformation, which we present in a qualitative and exploratory manner in the following sections. First, we explore how aware journalists and editors are of the problem of misinformation in the first place. We then discuss which reactive strategies are employed to safeguard newsmaking from online misinformation. Lastly, we consider the role of leading news media in the societal attempt to counter misinformation.

## Countering online misinformation in the newsroom

### *Awareness and problem definition*

Countering online misinformation in the newsroom starts with problem awareness. The first part of our analysis thus addresses the question of whether and how leading news media in the different countries perceive online misinformation in the first place. One parameter in this regard is whether the problem has been identified as a crucial threat in public and political debate in the respective countries. In most of the 18 participating countries, public awareness of and concern for misinformation exist to a large extent (see Table 2.1), a sentiment that is also felt among journalists.

In connection with specific trigger events, broader concerns for misinformation translate to a more imminent problem awareness and subsequent action in the newsroom. Such events can be recent examples of coordinated efforts to misinform the population, as it has been the case for Finland in the aftermath of the annexation of Crimea by the Russian Federation (Standish, 2017). Elections are another typical example of a heightened awareness for misinformation in the newsroom. In the run-up to the 2019 Canadian federal election, a national poll found that nine in ten Canadians thought they had fallen for fake news (Thompson, 2019), and Canadian journalists and news organisations appeared to share these concerns and acted accordingly (Taylor & DeCillia, 2021). As a veteran Canadian journalist interviewed for the MDM stated:

Most news organisations, the CBC and I think The Globe and Mail and The [Toronto] Star and some others thought that misinformation and disinformation would be a big issue in the [2019] election campaign. And so, we had someone assigned to that beat. And I think other publications did, too. But I think we discovered that there, in fact, wasn't very much. And the studies I've seen have shown that there wasn't an awful lot and that the biggest distributors of disinformation and misinformation are political parties and candidates. And so, they [journalists] didn't really have an awful lot to do.

Concerns for widespread misinformation are also high in countries experiencing a polarised political climate and social unrest. In our sample, two cases stand out: the 2019 anti-government protests in Hong Kong (Lo & Wong, 2021), as well

as the 2019 social protests in Chile (Núñez-Mussa, 2021), where news content has been found to be particularly vulnerable for disseminating misinformation about the protests. As one interviewed Chilean journalist said:

We started to take fake news seriously during the 2019 protests. After a few days, we created a fact-checking team, which not only produces publishable articles, but also verified any dubious information received in the newsroom.

Yet, the concern for online misinformation is not equally present in all the countries under study. In countries where the public (at least pre-Covid-19) is less concerned about misinformation, the matter is also considered less urgent by journalists and editors. In Iceland and Austria, the interviewed journalists believed that misinformation on digital platforms was currently of minor relevance and importance. They said that misinformation could be a problem and cause potential harm, but most did not see it as much of an issue in their countries. To them, developing mechanisms to prevent, identify, and avoid misinformation was not considered a priority. In Iceland, several editors and journalists highlighted the smallness of the society as a factor that makes fact-checking a manageable task, providing a more positive view on the previously mentioned vulnerability of smaller media markets and outlets (Jóhannsdóttir et al., 2021). As one interviewed Icelandic editor put it: “It is not necessary to have any guidelines on this with local reporting since it is so easy to fact-check everything you do. It is easy to reach everyone”.

While many journalists and editors interviewed for the MDM project are aware of the specific danger of misinformation arising from online and social media communication, others are more reluctant to accept it as a new or specific problem. As an interviewed editor at a Danish public service station put it:

Misinformation – what is that in the first place – is this not something that has always existed? [...] We should also be careful to not blow up some kind of monster that maybe isn't a monster after all, but just a condition that always has been there.

Similarly in Greece, an interviewed journalist stated: “Ever since the advent of journalism, misinformation has always existed”. Whether online misinformation is seen as a specific and new challenge for journalism or just a continuation of the old problem of propaganda, spin and public deceit is consequential for the ways that newsrooms choose to tackle the issue. The Greek journalist quoted above continued by saying:

So, we follow the basic principles of the code of conduct. We make sure to double-check a piece of news, and carefully choose our sources, etcetera. We haven't made any changes because fake news is in fashion.

In the next section, we take a closer look at how leading news media react and adapt to the problem of misinformation.

*Everyday actions to check and validate information:  
Reactive strategies*

Most newsrooms of leading news media in the countries included in the 2021 MDM project are on a high-alert level when it comes to acting against misinformation. Yet, in most countries, specific defence mechanisms have not been institutionalised nor seen as a priority. The measure of choice against misinformation is rigorous journalistic work, and many of the interviewed journalists and editors are confident that it is still possible to rely on their established journalistic skills to identify misinformation. As a Danish editor put it in an interview: “Misinformation can be fought with precisely what journalism is all about – to check and validate incoming information, before you proceed with this information in your reporting”. Experience is cited as one reason for this approach, as an interviewed Italian newspaper editor stated:

Over the years we have gained so much experience that the alarm bell rings and then a more in-depth verification is carried out, and this often allows us to eliminate the risk of publishing a false news story, without any particular support in terms of tools and expertise.

Still, many journalists and editors acknowledge that traditional journalistic methods must be adapted to the digital era, and that an extra layer of caution is needed when information originates from social media. A rather defensive strategy that some apply is to avoid adopting information stemming from social media, whenever possible. As one interviewed Danish newspaper editor said:

We are aware about misinformation in the respect that we are careful about simply adopting information coming from social media into our reporting – but sometimes, we still need to, especially if it concerns politicians’ statements on social media.

In an alternative, more offensive manner, editors and journalists instead acknowledge the need for extra verification when information originates on social media. In the words of a Canadian journalist who was interviewed: “I think there’s double, more double- and triple-checking going on, especially stuff that appears on social media that appears real, to not just assume it’s real”.

There seems to be widespread confidence that fact-checking of social media content is still within the realm of the individual journalist. This is also backed by a 2018 survey of journalists’ working practices in the United Kingdom, which revealed that a large majority of journalists felt they had the necessary skills to verify social media sources (Spilsbury, 2018).

While many interviewees were rather defensive about the appropriateness of their skills, some acknowledged the fragility of relying on individual journalists for fact-checking. Two recurring problems hindering verification and accuracy were mentioned: a lack of skills alongside a resistance to change, especially among older journalists, and time pressure. In the words of an interviewed Italian editor-in-chief:

We have an enemy to fight against, which is not only disinformation, but also time, because the biggest mistakes, at least in the mainstream media, are made on the assumption of lack of time to make verifications.

Most media outlets do not have specific guidelines for verifying information originating from social media. Exceptions can be found in the editorial guidelines of the British BBC and the Canadian CBC, which contain a series of guidance notes outlining the corporations' policies on online newsgathering, social media, and Internet research (Moore & Ramsay, 2021; Taylor & DeCillia, 2021).

### *Internal fact-checking: Specialisation and automatisisation*

Several countries, such as Belgium, Canada, Germany, South Korea, and the United Kingdom, appear to have a more systematic approach to internal fact-checking of digital and social media content than the remaining countries in the 2021 MDM project. In Germany (Horz-Ishak & Thomass, 2021) and the United Kingdom (Moore & Ramsay, 2021), this approach at least partly stems from dedicated fact-checking efforts introduced to newsrooms in a pre-digital era, especially within investigative journalism. Respondents in, for example, Canada (Taylor & DeCillia, 2021) and Australia (Dwyer et al., 2021) highlight the introduction of training courses in social media reporting and verification that can be offered by the media organisation itself, by industry organisations, or by professional associations dedicated to data and investigative journalism. These courses denote the individual skills and responsibilities of individual journalists rather than sophisticated organisational policies. In many cases, internally appointed fact-checkers are seen as either too expensive or dispensable, given that fact-checking is seen as a central task of the journalist. As one senior columnist from an Australian media outlet put it while being interviewed:

There is training on how to detect misinformation. But logic and experience provide more effective [screenings]. Internal fact-checkers are too expensive for most media organisations. This must be done by the journalist.

In other countries, specific training of individual journalists is still largely absent. As one Icelandic journalist summed it up in an interview: "In general, I don't think online journalists fact-check their stories well enough. We have not received any training in how to fight false or misleading information".

For countries with a more systematic approach to fact-checking and social media verification in the newsroom, we identify different types of strategies, applied to varying degrees. Most frequently reported is the introduction of small teams or task forces for fact-checking content from digital platforms. Many German newsrooms have specialised – although small – teams for this task (Horz-Ishak & Thomass, 2021). More institutionalised fact-checking in the shape of special internal units can also be found in most editorial offices in Switzerland (Bonfadelli et al., 2021). Two specific kinds of events appeared to be particularly relevant for the choice to introduce dedicated fact-checking teams and specialists. One was times of social unrest, with an associated risk for increasing misinformation. An example comes from Chile, where some media in 2019 made temporary changes to their teams so more journalists could do fact-checking (Núñez-Mussa, 2021). The other kind of event that might require specialised teams is elections. As an editor at a Danish morning newspaper stated in an interview:

We had a task force in connection with last year's national election that should have an eye on cases of misinformation in connection with the election, because one could be concerned that this could become a problem. It became clear, however, that misinformation was not a problem and the task force ended up spending their time with other things.

Moreover, fact-checking task forces seem to be most common among public broadcasters. In Flanders, Belgium, for example, the public broadcaster's Data Disinformation and Technology unit supports their journalists, specifically regarding misinformation and data journalism (Hendrickx et al., 2021). In Greece, where the institutionalisation of the verification process by experts or special units is still emerging, the public broadcaster ERT takes the lead in this development (Papathanassopoulos et al., 2021). Perhaps surprisingly, this is not the case in the Netherlands, where privately owned news media have been seen to invest more time and staff in fact-checking than public broadcaster NOS, where specific fact-checking is more often done by individual journalists (Vandenberghe & d'Haenens, 2021). A second approach to internal fact-checking is to bring specially trained verification experts, such as data scientists and programmers, into the newsroom. In our sample, it is particularly South Korean media that report this as an emerging tendency (Kim & Lee, 2021). The use of algorithmic solutions for automated detection of potentially false and misleading information, on the other hand, does not seem to have caught on in newsrooms yet, at least not beyond the stage of initial testing. While many interviewees expressed curiosity and interest when asked about such solutions, some also expressed doubt, for example, an editor at a Danish newspaper:

I want to say, the more tech-giants' platforms are run based on algorithms, the more I come to believe that our place in democracy is a different one, and that is the human assessment of a story's validity, as well as the human responsibility to treat the story in an ethical and professional manner.

Where algorithm-based detection tools are used, they are often implemented for other purposes, for instance, screening user comments. The automated detection of potential misinformation is thus still mostly in the hands of certified fact-checking organisations and networks. Some media organisations, for example, in Switzerland and Germany, do, however, collaborate with these external fact-checking organisations in a more institutionalised manner to fact-check incoming information.

Interestingly, collaboration with external fact-checkers appears more profound, where it is about covering instances of online misinformation rather than protecting news content from being based on misleading or false information. This will be elaborated in more detail, as we turn to more proactive, society-oriented approaches to counter online misinformation.

## Countering misinformation at the societal level

### *A proactive approach*

“Our whole business is built on fighting misinformation”, said one interviewed Australian online editor. The 2021 MDM researchers interviewed journalists and editors about the reactive strategies outlined above, that is, their organisations' attempts to safeguard newsmaking from increased misinformation found on digital platforms. Yet, the interviews also revealed that journalists and editors did not necessarily think only in reactive terms when the term “online misinformation” was mentioned. Where the relevance or novelty of the phenomenon wasn't entirely dismissed (which was commonly the case in Iceland, Italy, and Austria), the interviewees' reactions were frequently not only about protecting newsmaking, but also about contributing to protecting society from misinformation. One example in this respect is a focus on audience awareness and literacy, that is, efforts to inform and educate audiences about the existence of online misinformation. The Finnish public broadcaster Yle, for example, has invested in new ways of increasing audience awareness and understanding of troll tactics by developing an online game which lets you play the role of a hateful troll. *Trollitehdas* [Troll Factory] was first released in Finnish in May 2019 and turned out to be so popular that an international version in English was released only a few months later (Ala-Fossi et al., 2021). During Canada's 2019 federal election, the Canadian Broadcasting Corporation's news service developed a chat bot to help news consumers spot so-called fake news (Taylor & DeCillia, 2021).

In the following part of our analysis, we extend the original MDM focus by pointing to two other aspects that address leading news media's role in societal efforts to combat misinformation: news media's participation in fact-checking initiatives and news media's role in regulatory ambitions to counter misinformation.

### *News media's role in fact-checking initiatives*

The number of fact-checking initiatives has been steadily and rapidly increasing worldwide over the last few years. In its 2021 edition, the annual census of fact-checking projects by the Duke Reporter's Lab confirmed 290 active fact-checking projects around the globe (Stencel & Luther, 2020a), a number that was updated four months later to 300, almost double the number of projects registered in 2016. A particularly significant increase occurred in Asia, South America, and Europe (Stencel & Luther, 2020b).

While fact-checking initiatives might seem ubiquitous, the participation of news media in them varies substantially. At a global level, most initiatives are carried out by non-profit organisations dedicated mainly to producing verification articles (64.3%), whereas for-profit media outlets (28.6%) and academic projects (7.1%) are in the minority (Funke, 2018). These numbers are coherent with Graves's (2016) thesis, which understands fact-checking as a genre by itself. Fact-checking initiatives have matured to develop a specific method for reporting and presenting information, for example, with polygraphs and verdicts, and more relevant, a code of principles. Moreover, as the Poynter Institute – a critical player in the spread and standardisation of ideal practices for fact-checking projects – argues, “the low cost of online distribution, the increasing availability of open data and growing distrust in mainstream media has meant many fact-checking projects originate from outside traditional journalism” (Mantzaris, 2016: para. 9). Empirical research on the professional self-understanding of fact-checkers points to a shared ethos of producing journalism centred on its civic mission (Galarza-Molina, 2020; Graves & Konieczna, 2015; Martínez-Carrillo & Tamul, 2019; Núñez-Mussa, 2019; Singer, 2020).

The journalists and editors from the MDM sample of leading news media mainly agree that fact-checking is a fundamental practice in their reporting. However, the different media vary in the degree to which they carry out specialised fact-checking projects themselves or join efforts with independent or academic fact-checking initiatives. In addition to differences in awareness of misinformation and budgetary and human resources, the maturity of a country's broader fact-checking ecosystem is a decisive factor. If there are several or more developed projects and high awareness, it is more likely that leading news media will establish a partnership or create a fact-checking project. Where there are

strong independent actors, mainstream media will likely collaborate with them. An example is found in Portugal, where the Portuguese fact-checking website Polígrafo started a partnership with the leading television channel SIC on a 30-minute weekly programme on prime time (Fidalgo, 2021). Moreover, in countries with strong public service media, their fact-checking units are frequently among the most prominent media-driven initiatives in the country, for example, German ZDFheuteCheck and ARDFaktenfinder (Horz-Ishak & Thomass, 2021), or Danish Detektor (Blach-Ørsten et al., 2021). In emerging fact-checking ecosystems, the partnership between fact-checkers and news media is less developed. An interviewed Greek journalist described the collaboration with fact-checking organisation Greek Hoaxes: “The burden [of fact-checking] rests upon ‘Hoaxes’ here in Greece. It is a credible source in my opinion, rather than a partnership”.

Based on MDM interview material, as well as external data provided by Poynter/IFCN and Duke University’s Reporters’ Lab, we can roughly divide the countries included in the 2021 MDM into four groups, based on the involvement of leading news media in national fact-checking ecosystems.

The first group is comprised of weakly developed fact-checking ecosystems with a low-level of involvement of leading news media. Fact-checking is done on a small-scale (e.g., student-driven) basis, and registered fact-checking projects are either non-existent (Iceland) or conducted by international news agencies, so the news media organisations do not have internal fact-checking units, nor do they collaborate with external fact-checking initiatives (Hong Kong and Austria).

The second group is emerging fact-checking ecosystems with one or few independent fact-checking projects, where collaboration with selected leading news media is mostly temporary or through funding (Belgium, Greece, and Finland). In Finland, for example, leading newspaper *Helsingin Sanomat* collaborates with the fact-checking initiative Faktabaari.

The third group is made up of well-established, small- and medium-sized fact-checking ecosystems, in which most fact-checking initiatives were originally founded or are currently run by leading (frequently public service) news media (Switzerland, Denmark, Sweden, Australia, and Canada).

Finally, the fourth group has fully developed fact-checking ecosystems with several projects, collaboration between independent initiatives and established leading news media, and a focus on both political and social media misinformation (Germany, the Netherlands, Chile, South Korea, the United Kingdom, Italy, and Portugal).

In the United Kingdom (FullFact), Germany (Correctiv), Italy (PagellaPolitica), Denmark (TjekDet), and Greece (Greek Hoaxes), we moreover find so-called second-generation fact-checkers, which also emphasise educational, collaborative, and research-oriented activities.

## *News media's role in regulatory ambitions to counter misinformation*

It has been widely acknowledged that an effective regulatory approach to misinformation requires the adoption of a multi-level and multi-stakeholder perspective. This implies the adoption of a regulatory strategy that first, integrates different geographical levels (supranational, international, national, and local), and second, builds on a networked perspective that includes all public and private actors that are and should be involved in the fight against misinformation. Examples of such an approach can be found in the CEPS policy paper for the European Parliament that highlights the need for a transition from self-regulatory options to co-regulatory ones, the empowerment and the support of end users, and finally the implementation of artificial intelligence in media and journalistic practices (CEPS, 2018). A second example is the report prepared by Wardle and Derakhshan (2017) for the Council of Europe, which recommends the adoption of a multiple and interdisciplinary framework to contrast information disorder: The different perspectives should be technological, social, media-centric, educational, and normative. Likewise, the expert group on fake news created by the European Commission has pointed out several interconnected and mutually reinforcing responses that aim to provide long-term actions adopting a multi-level and multi-stakeholder strategy, specifying the importance of matching media literacy with the role of platforms, news media, and fact-checking organisations (European Commission, 2021a).

Media organisations and journalists are regularly addressed as key stakeholders in these approaches, next to platform providers, academic researchers, fact- and source-checkers, and civil society organisations. As such, the European Commission expert group's recommendations include several responses directly or indirectly targeted at news media, including the development of tools for empowering journalists to tackle misinformation, the enhancement of transparency of online news, as well as measures to safeguard the diversity and sustainability of the European news media ecosystem.

However, the policy and regulatory measures currently in place in the countries under study do not yet put a particular emphasis on news media organisations (Poynter, 2021; see also Table 2.1), but primarily target citizens and audiences (especially through media literacy campaigns, but also through online reporting portals, such as in Italy), and to a lesser degree platform providers. Only a few countries (South Korea, Hong Kong, Chile, and to an extent, Germany) have laws against and sanctions for the dissemination of false, misleading, or otherwise problematic content online in place or are planning to do so (Poynter, 2021). While such laws and sanctions are often proposed and designed with other groups in mind, they also apply to leading news media.

The role of leading news media in tackling misinformation has received somewhat more attention in the wake of the Covid-19 pandemic. The most

recent UNESCO social media campaign to combat the spread of conspiracy theories in connection with Covid-19 not only targets users, but also specifies specific guidelines for journalistic reporting (UNESCO, 2021).

### Commonalities and differences between countries

Our analysis represents an exploratory endeavour into how the issue of online misinformation has had an impact in newsrooms around the world. With a few exceptions, leading news media are aware and concerned about the issue and the dangers online misinformation poses to the journalistic profession, as well as to society at large. Our analysis also shows that this increasing awareness has not been translated into a coherent and systematic approach to tackling misinformation in most countries. Across countries, many journalists and editors have been hesitant towards or even actively resisting the idea that traditional journalistic routines and skills may fall short when it comes to the fact-checking of social media content. As such, the fact that algorithmic solutions for detecting problematic content (as they are used by professional fact-checkers) have not found their way into the modern newsroom is not necessarily a result of lacking awareness, knowledge, or resources, but of the shielding of conventional journalistic fact-checking as a professional core skill.

Still, our analysis has revealed different national approaches to online misinformation in newsrooms around the globe. The differences appear rather unsystematic when considering potential explanatory factors. For one, the size of the media system is not irrelevant, as the relatively more-developed approaches in Canada, Germany, and the United Kingdom and the lack of systematic approaches in small states like Iceland show. Yet, a more individual and “old-school” approach to online misinformation also prevails in larger countries, such as Italy, and some of the more innovative takes on the matter can be found in smaller media systems, such as the Netherlands.

In some countries, for example, Finland, Chile, and Hong Kong, a perception of outside interference as well as political turmoil has emerged as a decisive factor in a change of attitude towards online misinformation in the newsroom, which may also be decisive in mustering awareness and resources for more systematic approaches to internal and external fact-checking. Yet, whether the leading news media have started to take active measures to tackle online misinformation does not always mirror the level of concern for fake news and misinformation in the general population, as the comparison with the Reuters Institute Digital News Report data shows (Newman et al., 2019; see Table 2.1). One example in this respect is Australia, where journalists and editors, in line with the general population, acknowledged the severity of the problem, but where specific measures and strategies appear more elusive.

Finally, reactive and proactive strategies vis-à-vis online misinformation do not necessarily go hand in hand. Indeed, when asked about their take on the importance of misinformation for newsmaking, some journalists and editors were more prone to think in lines of safeguarding their own reporting, while others immediately “jumped” to a more proactive understanding of safeguarding society from misinformation. Especially in countries with a heightened concern for political misinformation (such as Canada, Chile, or Hong Kong), news media may indeed be more focused on developing fact-checking as a journalistic genre than on integrating automated fact-checking and social media verification in journalistic processes.

## Conclusion

We set out to interview journalists and editors associated with leading news media in 18 countries around the globe in early 2020, that is, before and in the early stages of the Covid-19 pandemic. Our continuous observation of and dialogue with news media organisations in the participating countries suggest that the global concern for an infodemic in connection with Covid-19 has not left newsmakers unaffected – both in what regards a reactive and proactive stance on online misinformation. In a reactive fashion, the concern has led to renewed awareness that online misinformation during the pandemic poses an immediate risk for news coverage of Covid-19. In a proactive fashion, the concern underlines the need to reflect on news media’s role in societies characterised by information disorder. How are news media to report on instances of false or even conspiratorial information flourishing online? Should news media avoid giving this type of information a platform? Should they inform and educate their users about the dangers of unverified information or actively seek out problematic material to debunk? In their recent overview, Tsfati and colleagues (2020) point out that there has not been enough focus on how leading news media might be a key culprit in spreading misinformation. By covering false and misleading information in their reporting, journalists can greatly expand its dissemination, even though the purpose is, in fact, to counter it.

Time (and the next edition of the MDM) will tell whether this heightened focus on online misinformation will lead to a more profound change in how leading news media tackle the phenomenon. Our results show that disruptive events (such as political turmoil or suspected foreign campaign interference) certainly have the potential to redefine how aware journalists and editors are of misinformation in the first place, and how they interpret their internal procedures, as well as their societal role, in the wake of this challenge. Covid-19 has pushed this concern to a truly global level.

Our results also show that the capability for news media to implement adequate routines and procedures to address the issue of online misinformation remains highly contingent on structural constraints, such as resources, time pressure, or the offer of specialisation and training – not least in small media markets and outlets. Still, we argue, a general heightened sense of awareness for the issue is a *sine qua non*. Such heightened awareness also includes the fact that it is indeed the reactive approach that needs addressing. It is perhaps not entirely surprising that it is easier for journalists and editors to resort to more proactive, societally oriented strategies – which speak to journalistic role perceptions connected to the news media’s democratic role in society – rather than pointing to potential deficiencies in the newsroom.

Finally, the fear of an infodemic has intensified the debate about the need for more regulatory intervention. While most countries in the MDM project (pre-Covid-19) used only soft regulatory measures, if any, to address the problem of misinformation, harder measures – such as increased transparency requirements for platform providers and sanctions for the dissemination of false or hateful content – are now introduced in several countries. One example in this respect is Switzerland, where the government has recently started to discuss introducing a law targeting online misinformation and hate speech. While multinational actors, particularly the European Commission, have been rather active and visible in the fight against online misinformation, a truly multidimensional and networked strategy in which leading news media play a central part is still missing. How the regulatory perspective continues to develop, not least the adoption of a multi-level and multi-stakeholder approach, will be an important element to monitor in future research, particularly in the next MDM project.

So far, individual news organisations largely seem to address this challenge in isolation, and collaboration within the media sector, as well as with other stakeholders, is only emerging. Yet, leading news media have a crucial role to play in the fight against online misinformation, also outside times of turmoil and crisis.

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## Chapter 3

# Protecting journalists from harassment

## *Comparing existing protection mechanisms and the effects on democracy*

Alice Baroni, Leen d’Haenens, & Wai Han Lo

### Abstract

There is a quickly increasing body of studies and reports on harassment and intimidation of journalists around the world. These series of acts have a chilling effect on media freedom and journalists’ freedom of expression. The research literature on the topic has mostly focused on intimidation and harassment of journalists – particularly sexual harassment of women journalists – or journalists’ experiences of online harassment, and the impact on press censorship. In this chapter, we contribute to the debate by exploring the nexus between the harassment of journalists and the protection mechanisms adopted by leading news media organisations, professional journalism associations and other institutions, and national governments. We then discuss the effects on democracy in the 18 countries participating in the 2021 Media for Democracy Monitor (MDM). Our findings indicate how legal support and protection mechanisms might enhance journalists’ capacity to realise the news media’s democratic role in practice.

**Keywords:** online harassment, safety of journalists, violence against journalists, press freedom, anti-harassment mechanisms

## Introduction

Journalists consider the incidence of online harassment of journalists (especially, for example, of women and ethnic minorities) and death threats targeting investigative journalists as one of the greatest threats to journalism and democracy. As outlined in Chapter 1 (Tomaz & Trappel) the performance of democracy and media often go hand in hand. According to the *Global Satisfaction with Democracy Report 2020*, democracies around the world are in a “state of malaise” (Foa et al., 2020: 2). 2019 had the highest democratic discontent and lowest index on record (The Economist Intelligence Unit, 2020). The worst scores are noted in media freedom and freedom of expression worldwide. The malicious use of social bots to spread disinformation and target journalists, and patterns

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Baroni, A., d’Haenens, L., & Lo, W. H. (2022). Protecting journalists from harassment: Comparing existing protection mechanisms and the effects on democracy. In J. Trappel, & T. Tomaz (Eds.) *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 59–77). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-3>

of abuse to control, influence, distort, or weaken news production, must be overcome for the news media to fully realise its role in democracy. That role is to provide citizens with credible information, to provide a forum for active public debate, and to function as a watchdog (Trappel et al., 2011). Amid the Covid-19 pandemic, this role has become even more critical, as the contagion has been used by some authorities as an excuse to crack down on the news media (Funk et al., 2020; Jacobsen, 2020). UN High Commissioner for Human Rights Michelle Bachelet made a clear statement on the situation of journalists during the Covid-19 pandemic, during which several states imposed restrictive measures, culminating in over 130 alleged media violations and arrests (United Nations Human Rights, 2020; Wiseman, 2020).

MDM Indicator and related research question addressed in this chapter:

**(F11) Protection of journalists against (online) harassment**

How do leading news media support and protect their journalists in case of harassment, particularly online? (Trappel & Tomaz, 2021a: 30)

In this chapter, we explore the level of harassment in the 18 participating countries of the 2021 Media for Democracy Monitor (MDM) (Trappel & Tomaz, 2021b, 2021c), focusing particularly on online instances and the extent to which the harassment of journalists is threatening democracy. In what follows, we first provide an overview of the international discussion on violence against journalists. We then focus on the extent of harassment and intimidation of journalists in the MDM participating countries and the normative frameworks and support mechanisms adopted by leading news media and journalists' professional bodies to protect and support journalists against harassment. Finally, we discuss how harassment against journalists threatens democracy.

## The state of journalists' safety worldwide

UNESCO's *Director-General's Report on the Safety of Journalists and the Danger of Impunity* (UNESCO, 2020) indicates worrying trends with regard to the killings of journalists worldwide. Despite the 14 per cent drop in the total number of deaths (from 182 to 156 killings in the previous two-year period and the present, which refers to 2018–2019) (UNESCO, 2018), the fatal attacks against journalists are shifting from countries experiencing armed conflicts to countries considered to be enjoying peace in the past four years. In general, journalists reporting on corruption, human rights, environmental crimes, drug trafficking, and political wrongdoing are the most at risk. Whereas the majority of victims of fatal attacks are male, female journalists face disproportionate abuse and attacks, both on- and offline: “from harassment, trolling and dox-

ing to physical and sexual assault” (UNESCO, 2020: 2). The UNESCO report defines doxing as the practice of collecting and sharing personal, sensitive, and identifiable information with the intent to cause harm:

At its 44th session in June and July 2020, the UN Human Rights Council adopted a resolution (A/HRC/RES/44/12) on Freedom of Opinion and Expression which calls on all States to take active measures to protect the safety of journalists, media workers and human rights defenders so that they can practice their right to freedom of expression. (UNESCO, 2020: 3)

Additionally, the Council of Europe has commissioned a number of studies and reports to assess the state of journalists’ safety in the Council of Europe’s 47 member states and shed light on what is preventing them from fully exercising their watchdog function. These studies report on a series of acts threatening media freedom: physical attacks, intimidation and imprisonment, judicial harassment, abuse of financial levers, and psychological violence. Furthermore, disproportionate gender-based violence, discrimination against women journalists, and consequent self-censorship have been documented in the Council of Europe’s member states and worldwide (Andreotti et al., 2015; Clark & Grech, 2017; Clark & Horsley, 2020; McGonagle & Andreotti, 2016). Violence against journalists – in itself not a new phenomenon – is exacerbated by the interventions of artificial intelligence and social media. International media freedom organisations have expressed concerns regarding the proliferation of smear campaigns against journalists across Europe (Taylor, 2019), and to rising numbers of on- and offline harassment, abuse, and threats directed at media professionals.

These quantitative reports have shown that violence against particularly women journalists nears epidemic proportions. A study by the International Federation of Journalists, including almost 400 women journalists in 50 countries, found that 48 per cent had suffered violence and 44 per cent had experienced abuse online while working (IFJ, 2018). In two additional global surveys – conducted by the International News Safety Institute and the International Women’s Media Foundation, including 977 women media workers in 2014 (Barton & Storm, 2014), and an update to the report, co-authored with *TrollBusters.com* (Ferrier, 2018), including 597 women journalists in 2018 – nearly two out of three journalists surveyed had been threatened or harassed online, and slightly more had experienced physical threats or harassment. More recently, a global survey of online violence against journalists, with 714 women respondents from 125 countries, conducted by UNESCO and the International Center for Journalists (Posetti et al., 2020), corroborate those findings. It indicates an exponential increase in online attacks on women journalists, particularly in the context of the Covid-19 crisis, and a recurring behaviour pattern of women journalists to not report or make public the attacks and abuses they experience

while working. In addition, it points to journalists' reluctance to acknowledge the seriousness of online violence and highlights the fact that online violence has a deadly potential if transitioning offline.

The Organization for Security and Cooperation in Europe (Mijatović, 2016; OSCE, 2020) and Reporters Without Borders (2018) have conducted a qualitative investigation addressing the international occurrence of online abuse and bringing awareness of the issue to authorities of different countries. These reports highlight that journalists worldwide are under threat, but women journalists disproportionately face discrimination, threats, and attacks. For example, the 2019 deepfake (media synthetically created by artificial intelligence, for example, audio, video, or images) landscape map indicates a fast-growing phenomenon with disturbing figures about the circulation of non-consensual pornography targeting women celebrities and news and media professionals (Deeptrace, 2019). To counteract this situation, the European Commission (2020) has presented the European Democracy Action Plan, specifically addressing the issue:

The Commission will propose in 2021 a recommendation on the safety of journalists, drawing particular attention to threats against women journalists, and an initiative to curb the abusive use of lawsuits against public participation (SLAPPs). The Commission will also work closely with Member States [through a] structured dialogue and provide a sustainable funding for projects on legal and practical assistance to journalists in the EU and elsewhere. (EFJ, 2020: paras. 4–5)

So far, the scholarly literature has mostly focused either on intimidation and harassment, particularly sexual harassment, of journalists (Adams, 2018; Flatow, 1994; Hardin & Shain, 2005; Lemke, 2020; Löfgren Nilsson & Örnebring, 2016; Matloff, 2007; McAdams & Beasley, 1994; North, 2007, 2015, 2016); journalists' experiences of online harassment (Binns, 2017; Chen et al., 2018; Edström, 2016; Martin, 2018; Waisbord, 2020); and the impact on press censorship. This chapter contributes to the discussion by exploring the nexus between harassment of journalists and the protection mechanisms adopted at the level of news media organisations and professional journalism associations, and discusses the effects on democracy in the 18 MDM participating countries.

### The extent of intimidation and harassment of journalists

In the opening chapter of *The Media for Democracy Monitor 2021*, Trappel and Tomaz (2021a) set the theoretical framework of the MDM's dimensions and indicators by building upon McQuail's (2009) four roles of journalism: the monitorial, facilitative, radical, and collaborative roles. In McQuail's view, in order for journalism to best serve democracy, it should collect, process, and

disseminate credible information of all kinds; promote the development of a shared moral framework that is inclusive and plural; expose abuse of power and raise awareness with regard to wrongdoing and inequality and promote social change; and, finally, foster collaboration between the news media and the state. Regarding the controversial collaborative role – as collaboration with the state can potentially jeopardise media freedom – McQuail (2009: 130) argues that this “is often only a more transparent and accentuated case of what goes on much of the time”. Based on this understanding, Trappel and Tomaz (2021a: 16) argue that a democratic media system should be based on three pillars: “1) a guardian of the flow of information; 2) a forum for public discussion of diverse, often conflicting ideas; and 3) a public watchdog against the abuse of power in all its various forms”.

In this chapter, we examine the nexus between the magnitude of harassment of journalists in the MDM participating countries and the protection mechanisms adopted at the level of leading news media organisations and professional journalism associations. We do so in light of the MDM’s theoretical framework, which is translated into the indicator on the protection of journalists against (online) harassment (F11). This being said, in what follows, we look at the relative incidence of harassment and intimidation of journalists. Country reports and interviews conducted by MDM teams in the 18 participating countries of the 2021 MDM regarding the indicator F11 are our main source of information (Trappel & Tomaz, 2021b, 2021c). It should be mentioned that the various terms used to frame instances of online harassment, such as “shitstorms” or “cyberstalking”, were not defined in the unpublished *MDM Research Manual 2020* that was provided to country teams conducting the national research:

This performance indicator F11 – protection of journalists against (online) harassment – refers to the increasing number of cases where journalists are threatened or harassed by other people for their reporting. Repeatedly, journalists (often female) were reported of becoming targets of shitstorms, cyberstalking, verbal or even physical attacks and harassments. (Unpublished MDM Research Manual, 2020)

As a consequence, different country teams might interpret these terms differently and frame violence-related issues according to their national contexts. Thus, our aim in this chapter is to present the highlights indicated by the teams rather than re-interpret their findings. Additionally, MDM country teams followed specific criteria to score their countries in relation to indicator F11, most of which concerned legal and other forms of protection mechanisms adopted at the level of news media organisations to protect journalists from harassment, particularly online (Trappel & Tomaz, 2021a).

As expected, the picture turns out to be very different from country to country due to various interpretations of the issue, as well as different levels and forms

of violence experienced by journalists in their societies. Generally, harassment occurs mainly online, and women journalists and journalists from ethnic minority groups appear to be victims of harassment more often. An increasing number of threats come from the political extreme right or are directed at investigative journalists. This harassment, consisting of insults as well as outright death threats, is considered by journalists as one of the greatest threats to journalism and democracy today. Based on the country reports produced by local research teams, we divided the countries into three categories: low-risk countries with harassment on the rise (Austria, Belgium, Denmark, Finland, Iceland, Portugal, Sweden, and Switzerland); medium-risk countries (Germany, Hong Kong, the Netherlands, and South Korea); and high-risk countries (Australia, Canada, Chile, and Italy). This categorisation does not necessarily correspond to the scores the countries received in relation to indicator F11, because the scoring criteria focus mainly on the protection mechanisms adopted at the level of leading news media organisations to address different forms of violence against journalists.

### *Low-risk countries with harassment on the rise*

In the group of countries categorised as low risk, but with harassment on the rise, including, for example, Austria and (Grünangerl et al., 2021) and Portugal (Fidalgo, 2021), few cases of harassment or massive online attacks were reported. Another country in this category is Iceland, where overt threats and harassment of journalists are rare, but do happen occasionally in a non-violent manner, usually in the form of a phone call, an e-mail, or posts and comments on social media (Jóhannsdóttir et al., 2021). In Switzerland, two cases of personal attacks on journalists in 2019 received public attention, as well as an incident of a woman journalist experiencing cyberstalking (Bonfadelli et al., 2021).

However, the problem is on the rise in these countries, according to the MDM data: Flemish journalists, for example, mention a rise of online harassment and intimidation. In a nationwide 2018 survey, 15.3 per cent of Flemish journalists indicated having experienced harassment or intimidation in their function as a journalist by political sources, advertisers, companies, media publishers, and citizens, mostly about their gender (46.7%), age (30.3%), ethnicity (5.7%), or sexual orientation (2.5%). Notably, women journalists reported having experienced harassment or intimidation much more regarding their gender than their male counterparts (67.2% vs. 4.3%) (Van Leuven et al., 2019; see also Hendrickx et al., 2021).

In Denmark, too, online harassment is perceived as an increasing problem, especially but not exclusively aimed at women reporters. The fear that not all cases are reported to the police has shown to be well-founded (Østergaard, 2019; see also Blach-Ørsten et al., 2021). In Finland, an increase in online

harassment and intimidation of journalists was associated with the media coverage related to the 2015 refugee crisis, bringing it to the public's attention. According to a survey conducted in 2017, 60 per cent of Finnish respondents reported having experienced verbal abuse in their work, with 15 per cent facing it regularly (Hiltunen, 2018). An editor in-chief of a leading news media organisation stated that both male and female journalists had been targeted, especially online, but that women reporters are harassed more often and more severely (Ala-Fossi et al., 2021).

In Sweden (Nord & von Krogh, 2021), a special cybersecurity team established within the public service media company SVT handles some 35 cases per day of journalists being threatened or harassed – including hate-mail, digital and physical threats, and acts of violence. In some instances, newsrooms had to be evacuated after threats. After investigative reporting on issues such as money laundering in the eastern parts of Europe and violations of human rights in China, Swedish journalists have been victims of cyberattacks and political attacks from other countries (Stjärne, 2020).

### *Medium-risk countries*

Included in the category of medium-risk countries is Germany (Horz-Ishak & Thomass, 2021), where online harassment of journalists is increasing rapidly. A recent survey among 322 German journalists revealed that over 60 per cent of the respondents had experienced harassment online during the last year, and that experiencing coordinated and targeted attacks on social media platforms like Twitter belong to the daily journalist routine (Pappendieck et al., 2020). The figures rose by 20 per cent when compared with a 2017 study (Preuß et al., 2017), and researchers observe a radicalisation of assaults, mainly from the political extreme right, with 16 per cent of the journalists reporting offences or even death threats, as well as physical assaults, while at work. Particularly women are the focus of online hate, as indicated by an interviewed female editor-in-chief:

You have hundreds of comments on some topics within minutes. And that is when you write as a woman, and even more so when you have an immigrant background, [...] that is really ugly. There is practically no topic that I can write about [...] where you don't get sexist comments, no matter what you write about [...] and here we have to protect our colleagues.

There are several examples from Germany of journalists experiencing harassment. A well-known female football reporter for the German public service television provider ZDF, Claudia Neuhaus, experienced online harassment when commenting the football World Cup for men in 2018 (Bau, 2018). Journalists with a minority background are also threatened: Dunja Hayali, a presenter for

ZDF, represents various diversity characteristics and speaks out against hate, making her a target of right-wing extremists, and experiencing online harassment on Twitter is part of her daily life. Georg Restle, an investigative journalist for WDR, received a death threat via mail which, according to the police, was linked to the extreme-right murderer of a politician (Huber, 2019).

Dutch journalists are also harassed, especially online, and the online platform *Persveilig* was launched so journalists could report instances of harassment and threats. Offline, an attack against the building of *De Telegraaf* in 2018 was directly linked with the newspaper's coverage of organised crime, and as a result, the reporter in question and his family were put under security agents' surveillance at all times (Vandenberghe & d'Haenens, 2021). During the Covid-19 pandemic, physical attacks against journalists and hostility towards the press in the Netherlands increased. The International Federation of Journalists (IFJ) and the European Federation of Journalists (EFJ) joined forces with their affiliate in the Netherlands, the NVJ, to condemn physical attacks against journalists who were covering the riots that occurred after a curfew was imposed to reduce infection. The IFJ General Secretary Anthony Bellanger made a clear statement on the alarming escalation of violence against journalists: Over 100 assaults were reported to *Persveilig* in just one year (IFJ, 2021). The IFJ and EFJ also condemned the attempted murder of the renowned Dutch crime reporter Peter R. de Vries, who died on 15 July 2021 in the hospital after being shot in broad daylight on the streets of Amsterdam following a media appearance for the programme *RTL Boulevard*. The EFJ and IFJ understand this shocking event as another "tragic blow to press freedom in Europe" (EFJ, 2021: para. 1).

Looking outside Europe, harassment of Hong Kong journalists, both physical and verbal, has occurred frequently since the anti-government movement broke out in June 2019 (Lo & Wong, 2021). Cyberstalking has also emerged as a problem in South Korea, where journalists' e-mail addresses are included in their article bylines, and violent comments and e-mails, often with personal threats, are common in the polarised political environment (Kim & Lee, 2021).

### *High-risk countries*

Among the countries categorised as high risk is Australia (Dwyer et al., 2021), where online harassment has become part of a journalist's everyday life, with broad reports of harassment on social media, news comments, and e-mail (Koskie, 2018; Wolfgang, 2018), with women disproportionately targeted (Media Entertainment and Arts Alliance, 2019). In Canada, a 2019 survey of Canadian journalists conducted by the Committee to Protect Journalists (Westcott, 2019) documents a worry among journalists about becoming an online target as a consequence of the need to use social media for work. Seven in ten Canadian journalists called online harassment the biggest threat they

face in their profession. Also here, particularly women journalists face harassment, including death threats and unsolicited sexual messages through social media. In interviews for the MDM research project, male journalists referred to “nightmare stuff” they have heard from their female colleagues (Taylor & DeCillia, 2021: 64). Most of the journalists and newsroom leaders interviewed expressed concern about online harassment, and they described it as one of the biggest threats to Canadian journalists’ safety (Taylor & DeCillia, 2021; see also Westcott, 2019).

In Chile, the World Press Freedom Index from Reporters Without Borders (2020) ranks journalists as “vulnerable” (51<sup>st</sup> out of 180 countries in 2020) when it comes to protecting their sources and reporting on issues such as political corruption or Mapuche (Indigenous inhabitants) protests against the Chilean state, where several journalists were targets of attacks in 2019 during the protests (see also Núñez-Mussa, 2021).

Turning to Europe, Italian journalists face an upsurge in threats and intimidation, representing a huge challenge to freedom of expression. According to a 2014–2018 study with 3,000 surveyed, among European countries, Italy is where journalists’ safety is most threatened, with 83 cases of online harassment, personal assaults, and intimidation reported, often connected to reporting related to the mafia (Mapping Media Freedom, 2018). At present, about 20 Italian journalists “receive round-the-clock police protection” (Reporters Without Borders, 2021). Geographically, the most dangerous areas in Italy for women media professionals are the Lazio region (34% of reported cases) followed by the Southern regions of Puglia, Calabria, and Campania. In the 2021 World Press Freedom Index (Reporters Without Borders, 2021), Italy maintains the score of the previous year (41<sup>st</sup> of 180 countries). Intimidation and verbal and physical attacks against journalists, perpetrated especially by the mafia or neo-fascist groups, are still on the rise. A new consideration in the 2021 World Press Freedom Index is reported attacks on Italian journalists perpetrated by “no mask” activists and Covid-19 deniers (Reporters Without Borders, 2021).

In 2019, the National Federation of the Italian Press, in collaboration with other media bodies, launched the first nationwide quantitative study to assess the extent of sexual violence and harassment of women journalists. The sample included 1,132 women professionals working in radio, television, news agencies, and printed press. The results indicate that 85 per cent of women journalists interviewed had experienced some form of sexual harassment or abuse during their careers – 42.2 per cent had experienced abuses in the last 12 months (see also Padovani et al., 2021).

The extent of harassment and intimidation of journalists varies significantly across the 2021 MDM participating countries. As the following section shows, the same can be said of the protection mechanisms adopted at the level of leading news media organisations and professional bodies to counter harassment.

## Guidelines and support mechanisms to protect journalists

Worldwide, journalists generally rely on the support and protection of their employers in cases of harassment. However, employers' support mechanisms for protecting journalists differ significantly. In some countries, journalists enjoy a range of comprehensive support measures, including detailed guidelines, regular meetings, legal support, special units for abuse and harassment, and psychological support. For example, media organisations in the United Kingdom have implemented detailed guidelines for journalists and editors to follow in the event of harassment and have also implemented preventative measures, privacy protection, blocking policies, and threat-reporting mechanisms for employees' social media use. In some cases of sustained online harassment campaigns, news organisations have specific social media teams for liaising with platforms (Trionfi & Luque, 2019). Some newsrooms provide voluntary trauma risk training and mental health training and have regular meetings between social media editors and news teams to observe potential abuse cases. However, freelance journalists, an increasing proportion of the workforce, are left on their own and have no access to the support networks and mechanisms of media companies (Moore & Ramsay, 2021). In contrast, interviews in South Korea show that employers offer therapy to harassed journalists and cover other medical costs related to harassment (Kim & Lee, 2021).

In some countries, newsrooms instead help their journalists on an ad hoc basis when they become targets of harassment, and newsroom leaders generally show support and understanding. Iceland, Chile, Italy, Canada, and Hong Kong are examples of such newsroom dynamics. In Germany, some media organisations lack a special unit to support journalists being harassed, though *Der Spiegel* and *Stern* have made efforts towards such units or ombudspersons. No relevant provisions are included in work contracts, and harassment that happens in the grey area between private and work life is left unaddressed by companies. Adding to the complexity is the fact that the detection rate of law enforcement agencies when it comes to the harassment of journalists generally is low (Horz-Ishak & Thomass, 2021). In Italy, a journalist from *Sky Tg24* claimed that “there is no support policy active in this sense. [...] If attacks [on social media] happen, it is a matter that is independently managed by you and the platform” (Padovani et al., 2021: 344). Similarly, a journalist from *la Repubblica* said: “We have full legal coverage with respect to menaces, for example, or libel lawsuits. It is normal. No other kinds of protection are provided” (Padovani et al., 2021: 344). The interviews conducted for the 2021 MDM project indicate that harassment as an issue continues to be overlooked, and there is broad resistance against reporting harassment by individual women journalists.

In other places, newsrooms have established special teams to tackle the issue of harassment, for example, the specialised cybersecurity team at Swed-

ish public service media. In Sweden, incidents are reported to the police, and security consultants are involved in protecting reporters and their families. The financial cost of security measures in Sweden has quadrupled over the last five years (Nord & von Krogh, 2021).

Media organisations sometimes have legal departments or specialised services dedicated to social media issues, including harassment. Switzerland is such a case, Austria another. In Austria, though media companies generally lack a special legal division dedicated to protecting journalists, when harassment happens, specialised lawyers are employed to defend the journalists. In the case of the Austrian Broadcasting Corporation ORF, their Editorial Statute obligates management to defend their journalists against any type of assault (ORF, 2002: §4; Grünangerl et al., 2021). In Belgium, however, none of the interviewed journalists knew of any specialised legal service provided by employers in the case of harassment, and they lacked knowledge of what to do if harassment occurs. In the same vein, no specific entities to address instances of gender-based harassment were reported by Belgian respondents (Hendrickx et al., 2021).

Some media organisations provide resources and training to help journalists safely confront harassment. For example, Belgian journalists have mandatory training on how to respond to physical, verbal, and online abuse and aggression, although reporting varying degrees of satisfaction with the system (Hendrickx et al., 2021). In Hong Kong, interviewees reported that their media companies invested in safety gear to protect them as a result of the violence against journalists during the anti-extradition bill movement in 2019, with one company even procuring bulletproof jackets (Lo & Wong, 2021).

In addition to protection mechanisms, some media organisations have implemented prevention measures. For example, the interviewed editors and journalists in Chile corroborated that they take actions to avoid being identified as reporters, for example, using mobile phones instead of microphones and cameras, not wearing anything to identify their outlet, and parking their cars away from the events they are covering (Núñez-Mussa, 2021). In Hong Kong, interviewees said they had been reminded by their companies to ensure their social media accounts were private to avoid doxing, and *Apple Daily* (ceased to exist in 2021) successfully applied for a court order to protect their journalists from doxing activities. Going further, some outlets have avoided using bylines or have chosen to not show reporters' faces when covering sensitive issues (Lo & Wong, 2021).

Some news organisations, for example, in Australia (Dwyer et al., 2021), struggle to balance the protection of their journalists, readers, and sources with the determination to uphold freedom of speech (Koskie, 2018). Some journalists and editors expressed a desire for audience engagement, but encounter hostility (Anderson et al., 2014). Navigating this balance, Australian news organisations have inconsistent results from their initiatives to protect journalists (Domingo,

2014; Løvlie et al., 2017). Similarly, while some editors in Chile actively defend journalists who are being harassed online, two editors simply disabled the comments section on their news websites. One of them explained: “We used to have a journalist dedicated to moderating comments, but a few years ago we decided to close comments altogether” (Núñez-Mussa, 2021: 109–110).

Going beyond the organisational level, journalist associations in some countries work to protect journalists against harassment by helping members report instances, for example, with the *Persveilig* platform in the Netherlands. *Persveilig* is a collaboration between the Dutch Association of Journalists, the Association of Editors-in-Chief, the police, and the public prosecutor’s office. Despite good intentions, only a few of the journalists interviewed for the MDM project had heard of the initiative (Vandenberghe & d’Haenens, 2021). In Switzerland, the Swiss Press Council runs a centre for complaints, with a similar ambition as the Dutch one (Bonfadelli et al., 2021), and in Denmark, the Danish Union of Journalists “provides ample guidelines and assistance for its members (including freelance journalists)” (Blach-Ørsten et al., 2021: 159). The Hong Kong Journalists Association and other news worker groups in Hong Kong have issued numerous statements and written an open letter to the Hong Kong Special Administrative Region Chief Executive urging the police to stop the harassment of reporters, and reporters protested police brutality at a police press conference in 2019 (Lo & Wong, 2021).

In Italy (GAMAG, 2020), journalists are beginning to work with other professional bodies, such as universities, to tackle the issue of harassment. An interesting example is a research project conducted by The University of Padova (2019–2021), exploring the complex interplay between online harassment and offline aggressive behaviour and physical attacks against women journalists. Some project activities (survey and dissemination) were performed in collaboration with the National Federation of the Italian Press. The research project also developed guidelines for comprehensive policies on collecting data and providing evidence-based understandings of three types of abuse: gender-based hate speech, image-based abuse, and digital attacks. In recent years, a meaningful collaboration has developed between the above-mentioned commissions and women’s professional associations, such as GiULiA Globalist, to organise training opportunities, join forces to highlight and report ongoing problematic issues, and develop and disseminate tools to address specific problems. GiULiA Giornaliste has also begun a collaboration with VOX: Italian Observatory on Fundamental Rights to develop a project to monitor hate speech against women in the media.

There are some countries where journalists need specific types of protection from the police and security agents at the national level. This is the case of journalists reporting on organised crime or mafia issues in Italy and in the Netherlands, as mentioned before, who live under round-the-clock police protection.

The United Kingdom has various laws which provide protection for journalists from malicious and offensive communication and harassment, though “there is some lack of clarity in these pieces of legislation and their application to journalism” (Moore & Ramsay, 2021: 473). And Finland plans to reform existing legislation to criminalise online harassment and threats (Ala-Fossi et al., 2021).

In most 2021 MDM participating countries, national penal codes do not address the online or offline harassment of journalists. To date, Canada’s legal system has not dealt with cases involving harassment or disinformation campaigns aimed at journalists, though in 2016, a jury cleared a man of criminal harassment charges he faced due to Twitter interactions with two women’s rights activists. The judge “dwelled on both the nature of Twitter and freedom of expression in a ruling that is among the first in Canada” (Csanady, 2016: para. 2; Taylor & DeCillia, 2021). In South Korea, the only legal protection provided to journalists are libel laws applicable to online comments (Kim & Lee, 2021).

## The effects of harassment of journalists

Despite the cultural differences and situations, harassment and intimidation of journalists is an increasing problem in most MDM participating countries. The few exceptions lie in countries such as Austria, Portugal, and Iceland, where harassment of journalists is rare or unknown, but journalists can rely on legal support and protection from their employers in case it occurs. The general increase of harassment echoes the findings of previous reports, conducted by UNESCO and the International Center for Journalists (Posetti et al., 2020; Posetti, 2017; Posetti & Storm, 2019) and the International Women’s Media Foundation (Barton & Storm, 2014; Ferrier, 2018), which indicate that online violence against women journalists has become a “frontline in journalism safety” (Posetti et al., 2021: 5), particularly during the Covid-19 pandemic. Harassment of professional journalists is also changing, as the attacks are moving offline with potentially deadly consequences. However, there is still reluctance from journalists, especially women, to report incidents of harassment and, as the 2021 MDM interviews show, there is a lack of awareness or even acknowledgment of gender and power (in)equalities inside newsrooms and in the digital media environment that might exacerbate the exposure of women (see Padovani et al., Chapter 4).

The harassment and intimidation of journalists have implications for journalists’ mental health, risk increasing self-censorship when news gathering and reporting, and influence future professional prospects. Some interviewed journalists considered leaving the profession altogether. Harassment, physical attacks, and death threats directed at journalists violate freedom of expression and media freedom, and affects “the right of society to access a plurality of

information” (OSCE, 2020: 13) and hence threatens democracy. Harassment threatens the news media’s performance at the three levels of a democratic news media system (Trappel & Tomaz, 2021a): the production and dissemination of quality and diverse information by removing women or dissenting voices from the public debate; the role of the news media as mediators of the public debate by jeopardising online discussions that may affect people’s lives; the watchdog function by targeting investigative journalists with death threats, judicial harassment, and abuse of financial levers. The protection of journalists against harassment is of paramount importance to safeguard the ability of journalists to perform the news media’s democratic role and fulfil their right to the freedom of expression, in the MDM participating countries and elsewhere.

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## Chapter 4

# Gender inequalities in and through the media

## *Comparing gender inequalities in the media across countries*

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### Abstract

Issues of women's underrepresentation and invisibility in news content and limited access to managerial and decision-making positions, as well as a gendered division of labour in news covering, have been on the international agenda since the mid 1990s, raising concerns about news media diversity and accessibility. More recently, gender pay gaps, discrimination, and harassment in newsrooms and in the online environment – and the limited extent to which media policies and self-regulatory measures have addressed these issues – have also been highlighted, signalling that basic democratic principles of freedom of expression and participation are at stake if women's views and concerns are not acknowledged nor structural aspects of gender inequality addressed. Gender equality in and through the media is crucial for democracy. This chapter provides a gender-aware analysis of the democratic performance of leading news media using data from the 2021 Media for Democracy Monitor (MDM). Similarities and differences among the 18 participating countries are highlighted, and several dimensions of inequality are discussed. We call for sustained commitment to overcoming inequalities through gender-responsive research and media practices.

**Keywords:** media gender equality, gender-responsive media policies, gender pay gaps, women's underrepresentation in media content, gender inequality in media management

## Introduction

The importance of gender equality in and through the news media is crucial for democracy. This has been restated by civic organisations and scholarly works as well as by international agencies over the past decades.<sup>1</sup> In 1995, the Fourth United Nations World Conference on Women was held in Beijing and adopted a Platform for Action (BPfA) (United Nations, 1995), which included a dedicated section on “Women and Media” (Section J), which established two major

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objectives: “Increase the participation and access of women to expression and decision-making in and through the media and new technologies of communication” (objective J.1); and “Promote a balanced and non-stereotyped portrayal of women in the media” (objective J.2). Section J called upon governments, media industries, and the research community to take action to foster more gender-balanced media content and structures. Furthermore, it made explicit the nexus between communication, gender equality, and democracy, and it became a normative reference for the international community and all interested stakeholders.

Twenty-five years later – in a context profoundly transformed by digital developments that deeply affect news media’s production and consumption (see Tomaz & Trappel, Chapter 1) and raise new challenges for gender equality across the media sector – it is both desirable and necessary to take stock of the progress made and deepen our understanding of the democratic wager brought by persisting inequalities, as reported by the 2021 Media for Democracy Monitor (MDM) project (Trappel & Tomaz, 2021b, 2021c). Following this context, we explore several topics in this chapter in order to determine the overarching questions of the news media’s contribution to democratic developments from a gender perspective. We explore the extent to which gender (in)equality issues in media and their contribution to democracy are recognised by media companies, journalists, and media professionals, as well as by institutional actors and policy-makers; and we consider the unequal presence of women and men as subjects in the news, as well as their limited roles as experts, spokespersons, and people with authority (GMMP, 2015, 2020). Furthermore, we look at the slow pace at which the media sector reflects – in content and practices – those social, economic, and political realities where progress *is* happening, and where women *do* enjoy better opportunities in education, leadership, and governance than in the past (Djerf-Pierre & Edström, 2020). We also discuss the role of public service media (PSM) with respect to issues of diversity and inclusion of different voices and perspectives, particularly those of women, given PSM’s mandate to support democratic societies (EBU, 2020). Lastly, we explore the nexus between media, democracy, and gender after activist campaigns such as #metoo and #timesup brought the systematic abuse of women media workers to public attention (Castle et al., 2020; Pavan, 2020), in consideration of online abuses that disproportionately affect women – seldom addressed by newsrooms and not adequately dealt with by media companies (IFJ & INSI, 2019; IWMF & INSI, 2018; OCSE, 2018).

MDM Indicators and related research questions addressed in this chapter:

**(F8) Rules and practices on internal gender equality**

To what extent do media outlets acknowledge and address challenges to gender equality in their own operations and internal functioning? (Trappel & Tomaz, 2021a: 26)

**(F9) Gender equality in media content**

To what extent do media outlets acknowledge and address challenges to gender equality in media content and promote free expression and inclusion of diverse voices? (Trappel & Tomaz, 2021a: 28)

*Of gender, democracy, and the media*

Addressing these issues through the analysis of the related MDM indicators, we acknowledge that gender equality – a multidimensional concept that includes equal opportunities, redistribution of benefits, women’s participation in associative and political life, but also challenges to gendered power relations – is crucial for democracy (Beer, 2009; Inglehart et al., 2002; Inglehart & Norris, 2003). Gender inequalities are still debated in relation to democratic advancements in many countries, as reported by the Varieties of Democracy Institute’s 2019 report: “Exclusion is a challenge to democracy in many ways. [...] When democracy is strong, inequality tends to be reduced and vice-versa” (Lührmann et al., 2019: 44).

Notwithstanding some achievements over the past years (see EIGE, 2021; World Economic Forum, 2021), gender equality is yet to be realised globally across societal domains and economic sectors, including the media. This would require recognition and formal adoption of fundamental principles of equality and non-discrimination, as well as political will and adequate policy measures to implement those principles. It would also require profound cultural change, educational efforts to train future generations of journalists and media professionals, and open societal debates. Since the media influence our perceptions of ourselves and our place in society, they thus have a crucial role to play in changing the stereotypes of gendered roles and in eliminating gender-based discrimination (Williams, 2000). On the one hand, “improving women’s presence in media(ted) (political) discourse [has been indicated as a] means of strengthening women’s symbolic and substantive [democratic] representation” (Adcock, 2010: 135; see also Ross, 2010). On the other hand, it is unlikely that the media can contribute to fostering gender equality, and therefore strengthen democratic practices, unless they assume gender equality as a guiding principle in their own functioning (Byerly, 2013). In the end, media and editorial freedom, media pluralism, and gender equality should be conceived of as intersecting principles and appreciated for their capacity to advance one another (Council of Europe, 2021).

We propose a gender-aware reading of the role of news media in democratic theory (see Tomaz & Trappel, Chapter 1), in order to gain a more articulated understanding of why, where, and how gendered relations and gender issues intersect and affect the democratic potential of the media.

Following McQuail (2009), news media has a monitorial role to provide information to the general public, but “when media outlets fail to represent

the diversity of their communities, [including gender diversity,] the chasm between journalist and reader widens” (Roy, 2019: para. 20), leading to the risk of amplifying popular distrust in the media.

According to the news media’s facilitative role (McQuail, 2009), media are expected to provide a deliberative public space where citizens can participate. Yet, according to most scholarly works, the extent to which the experiences and voices of women, alongside minorities and marginalised groups, are actually reflected in and mediated by the media is insufficient and often stereotypical. A lack of platform for women to voice their concerns on their own terms is a threat to the full realisation of democratic life.

In the role of news media McQuail (2009) names radical, the media are supposed to expose abuses of power while raising popular consciousness of wrongdoings by those in power. But if media are not gender-sensitive, they are unlikely to expose gaps in the development of policy frameworks and in the implementation of policies that should support and promote diversity and equality in society and, as a result, strengthen democracy.

Finally, the news media’s collaborative role (McQuail, 2009) “refers to the collaboration between the media and the state, for example during times of crisis or states of emergency” (Trappel et al., 2011: 20). The media’s communication regarding the Covid-19 pandemic has highlighted that a lot more could be done by the media in order to offer the general public a full understanding of implications of the current crises, and to integrate gender-aware perspectives in policies addressing such crises (GMMP, 2020).

In the end, the fundamental principles of democracy are freedom, participation, and transparency for all domains of society, including media and communication. Different stakeholders, including the media, should recognise and nurture diversity and contribute to overcoming inequality. A precondition for doing so is acknowledging how power is constituted, distributed, and practised. Therefore, when researching gender in its relation to media and democracy, we should keep in mind,

researching gender is always political [... and] will often provoke criticism, as much for simply asking the question as for what it may reveal. [...] Researching gender is inherently about understanding the axes of patriarchy, power, and privilege, who has it and who wields it. (Ross et al., 2020a: i)

### *Gender equality in the Media for Democracy Monitor framework*

The MDM research project offers an unprecedented opportunity to take stock of the achievements with regards to gender equality across the news media and to focus on contemporary realities in a number of countries, thus asking, once more, the core question: What is the media’s contribution to democracy from a gender perspective?

This question was addressed by explicitly mentioning gender equality amongst the criteria that characterise democratic media practices in the 2021 MDM project framework. Two new indicators were included which specifically reflect the rationale of the BPfA Section J and the intersecting dimensions of inequality at play in media content and operations. In addition, the MDM framework adopted a gender-mainstreaming transversal approach through the insertion of gender-sensitive criteria into other indicators.

The indicator for rules and practices on internal gender equality (F8) relates to BPfA strategic objective J.1 about women's participation in the news media. It assumes a positive relationship between a media organisation's institutional commitment to gender-responsive practices and their internal democratic organisation. This indicator has been elaborated in national reports by investigating and critically analysing elements such as employment conditions and benefits allocation to women and men; the existence of media companies' internal rules or guidelines to support and promote career advancement of women professionals and access to decision-making positions; and the existence of mechanisms aimed at removing obstacles to equal opportunities, such as a gender equality advisor or department dedicated to promoting gender equality and inclusion. Contextual factors have also been considered, such as the presence of a national legal framework regarding gender equality in the workplace, alongside the presence of journalist associations created by women in different countries to monitor media's commitment to gender equality and promote good practices.

The indicator for gender equality in media content (F9) links to BPfA strategic objective J.2 on gendered representation in media content, addressing the following question: "To what extent media outlets acknowledge and address challenges to gender equalities in media content and promote free expression and inclusion of diverse voices?" (Trappel & Tomaz, 2021a: 28). It assumes that diversity- and gender-aware editorial content is crucial in order to reflect the plurality of voices in society and to foster women's freedom to express their diverse knowledges and experiences. This indicator has thus been elaborated, taking into consideration a plurality of aspects related to gender equality, including media commitment in the selection of news sources that reflect societal diversity in terms of gender, age, and ethnicity; newsrooms' efforts to monitor the gender balance in news subjects and to cover gender- and diversity-related issues (Napoli 1999), particularly in relation to gender-based violence; and the existence of internal rules or guidelines regarding the promotion of gender equality in and through media content. Also in this case, contextual factors, such as national legal frameworks concerning gender-balanced and transformative media content and the presence of women's alternative media, both offline (such as feminist bulletins, zines, and flyers) and online (such as e-zines and blogs) have been taken into consideration.

In developing and analysing these indicators in the MDM participating countries, an effort was made to overcome limited approaches to gender inequalities in the media that tend to focus exclusively on numbers and counting (how many women and men work in a particular workplace, their position or type of content they produce) through a binary perspective that has been referred to as “add women and stir” (Noddings, 2001). Instead, the MDM looks more broadly at gendered relations. Furthermore, an attempt was made to move beyond a potentially misleading “fixing the women” perspective (as phrased by Londa Schiebinger in her work on gendered innovation), according to which solutions are offered by providing women professionals tools, knowledge, or training, rather than removing structural barriers to women professionals (Burkinshaw & White, 2017; Chant & Sweetman, 2012). Moreover, these gendered relations must be analysed with respect to an intersectional framework in order to gain insight into overlapping and different modes of discrimination and privilege. A critical diversity concept could be helpful when analysing configurations and representations in media content and encounters of diversity at the workplace (Horz, 2016).

The 2021 MDM project provides detailed accounts from 18 countries – all consolidated democracies according to international standards (Trappel & Tomaz, 2021b, 2021c). The country teams were provided with the research questions developed for both indicators addressed in this chapter. In the following paragraphs, we reflect upon the data of the country reports, as well as the considerations proposed by the respective authors. In the next section, we analyse similarities and differences among countries in due consideration of their geocultural and political differences. We also highlight several dimensions as thematic categories where inequality manifests itself by comparing countries’ performance across representational as well as structural issues. In the concluding remarks, we reflect on the main findings and suggest directions to integrate into the next edition of the MDM research project, with particular attention to broadening the scope of (in)equality beyond gender and addressing issues of diversity, pluralism, and inclusion through an intersectional perspective.

### *Epistemological approach and caveats*

In line with the tradition of feminist scholarship, we understand gendered relations in and through the media as a transversal element rather than a specific topic to be investigated in isolation (Ross et al. 2020b). Our goal is therefore to provide a critical picture of gender inequalities through a synthesis that bridges the 2021 MDM project’s core dimensions: freedom, equality, and control. This requires a holistic understanding of the issues at stake at the intersection between journalists’ freedom of expression and professionals’ capacity to voice specific concerns; between equality of treatment and opportunities, and women’s participation in

making media and creating meanings; and through the possibility of exercising control by fostering transparency and guaranteeing safety, and also through the adoption of adequate (self-)regulatory mechanisms and policy provisions.

What should be highlighted is that the 2021 MDM country reports, and indicators F8 and F9 therein, have been elaborated adopting different wordings and frames to deal with gender issues, and they suggest different priorities and paths for finding solutions. In this chapter, we attempt to make sense of such diverse elements while not superimposing interpretations onto the country teams' contributions. Whenever possible, we let the texts speak for themselves, while identifying trends in the ongoing struggle to achieve gender equality and make democracy thrive.

## Dimensions of inequality in a quali-quantitative perspective

This section focuses on findings in the 2021 MDM related to how the leading news media of the 18 participating countries address challenges concerning gender equality (for an explanation of country selection and project rationale, see Tomaz & Trappel, Chapter 1). To this end, we implemented a correspondence analysis based on a wide range of data concerning each national media ecosystem separately. Correspondence analysis is a multivariate statistical technique that provides a means of displaying or summarising a set of data in two-dimensional graphical form (Hjellbrekke, 2019). It reveals the relative relationships between and within two groups of variables, based on data given in a contingency table. In this case, different gender inequality aspects are considered for each of the countries considered in the MDM research project. The data were derived from 2021 MDM indicator-based empirical evidence referring to the rules and practices of the media companies ensuring gender equality, either internally (Indicator F8) or within their content (Indicator F9).

The correspondence analysis reveals key differences and similarities between the countries, and the results provide useful insights about persisting gender inequalities in terms of employment conditions in the leading news media organisations and the extent to which good practices for combating gender gaps are in place.

The process of data selection and analysis was based on the scrutiny of the relevant indicators, leading to the definition of a number of thematic categories, that is, relevant issues that could be traced across all countries:

- the presence (or absence) of gender equality policies in the media sector
- the extent of unequal career opportunities to access managerial positions
- the degree of gender pay gaps
- the positive role of the public service media in serving gender equality

- women's mis- and underrepresentation in media content
- online media as gender-sensitive working environment

The categories refer to recurrent gender issues – known from the literature and made explicit in the relevant indicators of the 2021 MDM project framework – and, taken together, they provide an overview of major inequality trends. The core variables upon which the correspondence analysis was carried out emerged from the above categories. Furthermore, the correspondence analysis revealed some illuminating findings on gender (in)equality issues related either to specific clusters of countries or to individual countries.

### *Lack of significant gender equality policies in media organisations*

The need to combat inequalities in the media sector through normative and regulatory tools has been addressed by various cross-country initiatives in the past (UNESCO/IAMCR, 2014). However, the research findings of the 2021 MDM project reveal that established policy measures aimed at safeguarding gender equality in workplaces are still rarely found within media organisations. This weakness had already been emphasised by previous research showing that gender equality issues are marginalised in media policy (Ross & Padovani, 2017), with many media organisations in Europe having neglected the development of gender equality policies or codes of conduct related to gender equality (EIGE, 2013).

According to the 2021 MDM findings, an explicit yet solitary example going against the above trend is that of the public broadcaster ORF in Austria. ORF has elaborated an articulated gender-balance plan based on specific legal provisions related to gender equality in employment conditions (Grünangerl et al., 2021). However, the existence of gender-related internal regulations does not ensure implementation in practice, as shown, for example, in Flanders, Belgium (Hendrickx et al., 2021). Even if gender equality is protected by law, as in Finland (Ala-Fossi et al., 2021), or gender-supportive policies and reforms have attempted to establish gender balance in terms of employment and career progress, as in Australia (Dwyer et al., 2021), stereotypes and patterns of discrimination may still persist in practice.

Media industries showing a lack of interest in or limited attention to the adoption of gender-sensitive rules at the organisational level can be found around the world – in Chile, Germany, Portugal, Switzerland, Italy (with the exception of the public service broadcaster RAI; Padovani et al., 2021), and Iceland (with the exception of public broadcaster RÚV and private organisation Sýn; Jóhannsdóttir et al., 2021). That the adoption of internal policies for gender equality is not regarded as a priority by most media organisations, confirms the results of previous international studies (IWME, 2011; Padovani & Bozzon, 2020).

However, in some countries, even when rules and provisions are incomplete or non-existent, the overall situation has improved over the last few years, according to MDM data. This seems to be the case in Canada (Taylor & DeCillia, 2021), Denmark (Blach-Ørsten et al., 2021), Iceland (Jóhannsdóttir et al., 2021), and South Korea (Kim & Lee, 2021), though these positive trends do not entail the complete elimination of discrimination patterns in newsrooms. Some rules fostering gender equality have recently been adopted even in countries where gender inequality has characterised the media industry for years, signalling that positive change may be coming. This is the case of KBS in South Korea, which adopted rules to promote gender equality in 2019, supplementing its previous guidelines against sexual harassment in the workplace (Kim & Lee, 2021). The media industry in Hong Kong is also an interesting case, where, although there are no formal rules for equal standards between men and women in newsrooms, measures are in place to ensure women journalists have equal representation in leading positions within the legacy media companies (Lo & Wong, 2021).

Overall, despite signs of improvement – such as the public service media confirming a more explicit effort in the adoption of gender equality policies and an increase of women professionals in the media sector – gender inequality in media industries exists on a wide scale. This implies that media organisations' internal policies are still unable to decipher and solve unequal, gendered power relations (Byerly, 2013; Sarikakis & Shade, 2008). As has been observed, one reason for this may be the lack of suitable support measures, such as monitoring mechanisms, or ad hoc structures, such as dedicated departments or ombudspersons, within media companies (Ross & Padovani, 2017).

### *Internal gender imbalances in leading positions of media organisations*

The gender inequality characterising most media industries was recently restated in a study focusing on the media and entertainment industry, conducted by McKinsey and Company. According to this study, the two biggest challenges are the lack of women in top-level positions and a culture of biased behaviour that impacts women's work environment (Beard et al., 2020).

According to the 2021 MDM findings, internal gender imbalances in leading positions are found in most media organisations, with some exceptions in public service media, both in European countries (like Portugal, Austria, Switzerland, and Denmark) and in non-European countries (such as South Korea and Chile). It can also be stressed that even where an overall gender balance has been achieved in media organisations in terms of professional staff, top-level managerial positions are rarely occupied by women (e.g., Austria and Switzerland).

Few media organisations can be considered best-practice models. Amongst these are Swedish media, where gender equality in the workplace is a highly

respected principle, and women have come to occupy high-ranking positions in media organisations. According to journalist respondents within the 2021 MDM project, special programmes to increase the number of women in high-ranking roles, run by the biggest news media organisations in the country, have contributed to amplifying this trend (Nord & von Krogh, 2021).

### *Gender pay gaps*

In the last decades, the number of women employed in the media sector has increased in several countries, paving the way for an increasingly inclusive working environment. However, such development has not eliminated patterns of gender inequality. A typical unequal pattern remains, with a gender pay gap in several media markets (e.g., in Denmark, Portugal, Switzerland, South Korea, and Chile), a phenomenon perpetuated by the indifference of media organisations towards monitoring mechanisms in terms of equal opportunities, including equal pay.

Clear examples of this tendency are the public service television RTP and the news agency Lusa in Portugal, which pay female staff less than men (Fidalgo, 2021). Similarly, research shows a gender gap in Austria, particularly in the case of highly paid positions (Kaltenbrunner et al., 2020). The same goes for Switzerland: Women are paid less than men, and the higher the position, the wider the pay gap. According to journalists interviewed for the 2021 MDM, the gender pay gap remains, despite the fact that professional unions supposedly guarantee equal payment for all (Bonfadelli et al., 2021). In Italy, the gender pay gap in the media exists from the early stages of a media career (Padovani et al., 2021). And in Sweden, despite having more women in managerial positions than most other countries, there is still an imbalance in journalists' earnings (Nord & von Krogh, 2021). Worth mentioning is the BBC in the United Kingdom, that in 2017 was forced by a new law to publish the pay of senior professionals, creatives, and presenters. As the scrutiny revealed stark gender-based pay differentials, the BBC began to address them, though slowly (Moore & Ramsay, 2021).

There are, however, a few cases of large media organisations where progress has been made in reducing the pay gap (e.g., in Denmark and the Netherlands). Equal pay seems to be a practice in the Netherlands, although part-time work is more common among women than among men (Vandenberghé & d'Haenens, 2021). The situation also seems to be improving in Finland, where equal pay, working conditions, and opportunities for career progression can be found. However, representatives from trade unions, interviewed by 2021 MDM researchers, claim that women earn on average slightly less than men (Ala-Fossi et al., 2021).

*The positive role of the public service media in serving gender equality*

Public service media (PSM) have made several efforts to protect normative journalistic standards in media services, adapting the public service remit to the technological developments of the communication field (Hujanen & Ferrell Lowe, 2003). Their role in mitigating the internal gender imbalance has been meaningful both in European countries with a long tradition of public service broadcasting, such as the United Kingdom, Italy, and Germany, and in countries beyond the European region. Hence, in media markets like Germany (Horz-Ishak & Thomass, 2021) or Canada (Taylor & DeCillia, 2021), PSM have become more committed than in the past to ensuring gender equality in the composition of the media staff. As noticed above, gender balance in high-ranking positions remains a challenge also for PSM, but compared with commercial competitors, they often do better (see also Ross & Padovani, 2017).

A distinctive example is the Canadian broadcaster CBC, which is reported to achieve a higher level of gender equality than other media organisations in the country, with half of its staff consisting of women and being led by a female president (the first in CBC's history) (Taylor & DeCillia, 2021). In Iceland, both the public service broadcaster RÚV and the private media company Sýn showcase on their websites their internal rules for equal treatment of male and female employees. However, in the upper managerial positions – that is, the executive board – only RÚV lives up to the promise of equal representation of men and women (Jóhannsdóttir et al., 2021). Similarly, in Germany, the percentage of women working in leading positions in PSM is higher than the corresponding figures of commercial broadcasters (Horz-Ishak & Thomass, 2021).

In Denmark, the public broadcaster DR has established a minimum quota of 40 per cent women in managerial positions. Additionally, both DR and the commercially funded broadcaster TV2 incorporate mechanisms for monitoring the internal gender distribution of working positions and payrolls in order to avoid gender pay gaps (Blach-Ørsten et al., 2021). In Flanders, Belgium, the public service broadcaster VRT committed to an equal gender representation in managerial positions and in the voices heard on air in order to counter male dominance (Hendrickx et al., 2021).

Promising steps to battle gender inequality in the media sector are being made by the public broadcaster RAI in Italy; its recent training project, titled “LeaderShe”, aims to empower women media professionals and is accompanied by seminars focused on preventing harassment in the working environment, according to an interviewed editor-in-chief of RAI TG1. Similarly, the South Korean public broadcaster KBS adopted gender equality rules for the first time in 2019, introducing disciplinary measures for sexual misbehaviour (Kim & Lee, 2021).

### *Misrepresentation and underrepresentation of women in media content*

According to the 2021 MDM findings, women are still mis- or underrepresented in media content. Women are frequently excluded from “hard news” – those pertaining to economics and politics – and hardly feature as expert voices.

This general trend can be observed in most countries. In Portugal, the news media content is dominated by men, and a clear gender bias is observed (Fidalgo, 2021). In the Austrian news coverage, women are clearly underrepresented (Grünangerl et al., 2021). Research findings mentioned in the MDM country reports from Chile (Hudson, 2016, as cited in Núñez-Mussa, 2021) and Canada (Informed Opinions, 2021, as cited in Taylor & DeCillia, 2021) reveal the existence of unequal representation in these countries as well.

In some countries, monitoring mechanisms and projects are set in place to address the situation. For instance, the public service broadcaster RÚV in Iceland is the only media organisation in the country monitoring the level of gender balance in its content on a regular basis. Despite the fact that Icelandic media shows more gender-balanced content in general compared with other countries, it still demonstrates a certain degree of imbalance. The public service broadcaster VRT in Flanders, Belgium is the only news corporation in Belgium that adopts a gender quota to ensure equal representation (Hendrickx et al., 2021). In Switzerland, women are still underrepresented in news reporting, but gender balance in media coverage has improved over the last decade (Bonfadelli et al., 2021). Also, in Australia, the representation of women has improved over time, particularly in the sports sector. Nevertheless, women who belong to the minority groups remain strongly underrepresented in media content (Dwyer et al., 2021).

Turning to the United Kingdom (Moore & Ramsay, 2021), there are significant imbalances in the appearance of women’s voices as experts in news coverage, and in the exposure of women generally in specific media organisations. Major broadcasters have made attempts to address the problem, including internal policy changes. The Royal Charter of the BBC, renewed in 2017, incorporates the need to better reflect the diversity of communities, and the BBC has developed initiatives like a Diversity Commissioning Code of Practice, articulating “the steps the BBC will take when commissioning content to ensure that such content accurately represents [...] the diverse communities of the whole of the United Kingdom” (Ofcom, 2017: 24). Furthermore, the BBC has established 50:50 – The Equality Project, with the aim of creating journalism and media content that represents the world in a fairer manner (BBC, 2021). Also, a series of “Expert Women” events was part of a campaign intended to enhance the presence of women presenters and contributors. Moreover, all major British broadcasters (BBC, ITV, Channel 4, Channel 5, and SKY) apply a monitoring process mapping diversity on programmes they

commission, through an online system. Although on a voluntary basis, these external evaluations of content diversity measures can be seen as important tools for establishing a sustainable change process for inclusive workplaces in the media sector. However, the prerequisite is that PSM become more open and share their internal data for further analysis and scientific research.

### *Online media as a favourable working environment for women?*

A topic meriting discussion is whether online media constitute a potentially favourable sector for women's careers in the media. Such discussion should take into account that, as of today, online media represents a rather unstructured field, where the precariousness related to working conditions is often higher – and the earning less secure – compared with legacy media companies. The interviews conducted within the 2021 MDM project seem to confirm a dual gender discrimination effect when it comes to online media: On the one hand, women (and young women particularly) often occupy positions that are less appreciated by men, and on the other, men have more choices at their disposal and are less likely to accept the precarious role of online media work. This systemic bias risks intensifying as legacy media are expected to play a decreasingly crucial function in the information space going forward. In relation to precarious positions, an intersectional perspective emerges, raising a gender and generational clash in the media employment sector. (In no case did inequalities based on ethnicity become noticeable through the monitoring process; no MDM country teams reported inequalities related to ethnicity). It should also be restated that a major concern is the disproportionate manner in which women journalists are exposed to sexual assaults, harassment, and hate speech in an online environment, in a situation where no adequate safety and redress mechanisms have been put in place by media companies (see Baroni et al., Chapter 3).

### *Major cross-country trends from a correspondence analysis*

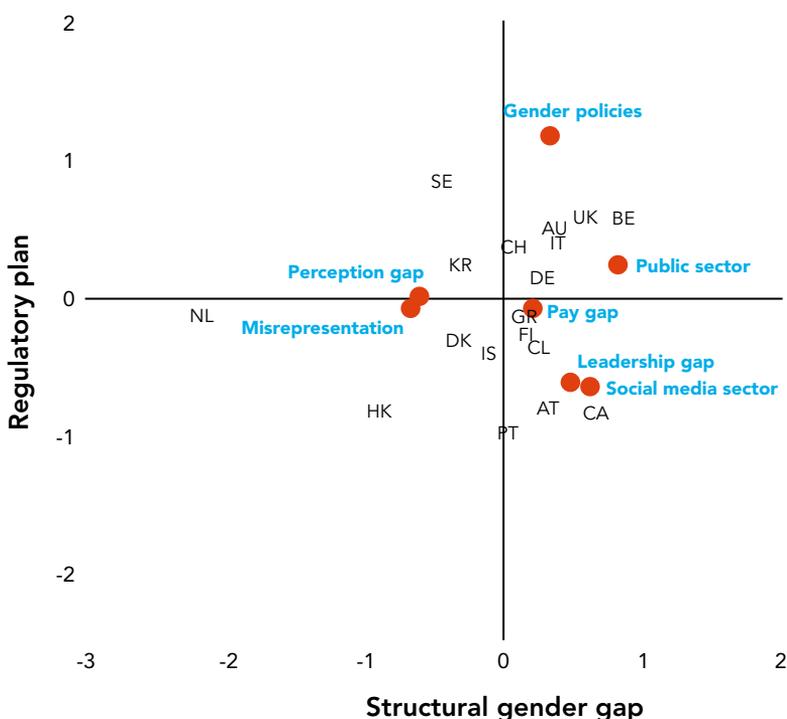
We now move beyond identifying gender inequalities in each country's context based on specific dimensions, and instead highlight similarities and differences amongst countries. We identify clusters of countries within the 2021 MDM sample based on their positioning in relation to the thematic categories described above.

Different variables related to the thematic categories, measured on an evaluation scale resulting from our analysis of the country reports, are incorporated in Figure 4.1. The analysis generates a general map that permits the assessment of the distance and proximity of different countries in relation to the qualitative data included in the national reports.

The use of correspondence analysis is appropriate, as it allows us to bring together the qualitative and quantitative dimensions of content analysis. Values for each country were inserted into a matrix by assigning the numerical value (elaborated with SPSS software) to each thematic category (variable). As the classification derived from qualitative indicators, it could only be based on the manifest content of the text in each country report (Altheide & Schneider, 2013; Berelson, 1952). After assigning each variable a simple scale, we estimated the variance using a three-dimensional range: low, medium, and high. The weight attribution was derived from the explicit elements of the text, and in cases where there was a lack of classification, we opted for the missing value. In this way, we managed to compare different situations combining the structural and cultural perspectives, as emerged from the 2021 MDM country reports.

The analysis of the gender equality indicators relating to rules and practices (F8) and media content (F9) shows some significant differences, but also points to some underlying trends common to all countries.

**Figure 4.1** Correspondence analysis of gender (in)equality issues in 2021 MDM countries



Comments: Symmetrical normalisation.

Source: Data are from an evaluation scale resulting from analysis of the 2021 MDM country reports (Trappel & Tomaz, 2021b, 2021c)

Three main findings emerge from the correspondence analysis: First, a regulatory approach that combines the awareness of the public service broadcasting sector with policy intervention by media organisations characterises a first cluster of countries (upper-right sector in Figure 4.1). This cluster includes Australia, Belgium (Flanders), Germany, Italy, South Korea, Switzerland, Sweden, and the United Kingdom. The data and interviews collected through the 2021 MDM research project seem to confirm that policy interventions and the commitment of public service broadcasters combined promote a set of good practices, even if this does not always translate into a fully balanced and more inclusive environment for women working in media organisations.

Second, the persistence of structural gender gaps, both in leadership positions and salary, alongside an enhanced presence of women producing online media content (mid- to lower-right sector in Figure 4.1), does not emerge as a clearly defined result. However, the combination of the two indicators supports the hypothesis that the social media environment may increase gender inequality: Growing job insecurity, particularly in the case of social media workers, implies the amplification of an already present structural vulnerability for women in the media sector (e.g., in Austria, Canada, Chile, Greece, and Portugal).

Third, gendered mis- and underrepresentation is generally a common aspect, as revealed by the data reported from most countries (in the centre of Figure 4.1). Yet, some of the interviewed journalists described the situation in their country in a more optimistic way. This may signal a lack of awareness about gender-unbalanced representations, especially among male senior journalists (as in Denmark, Finland, Iceland, Hong Kong, and the Netherlands).

Our analysis confirms that it is relevant and productive to look at gender gaps through a holistic perspective, including regulatory, structural, and cultural elements, as they may either counterbalance or reinforce one another, either hindering or fostering gender equality.

## Concluding remarks

The analysis based on the 2021 MDM indicators regarding rules and practices on internal gender equality (F8) and gender equality in media content (F9) clarifies and confirms the multiple dimensions of gender inequalities in the media across the participating countries. The findings invite further analyses, consideration of the persisting obstacles, and possibly actions towards overcoming such inequalities, in relation to regulatory, structural, and cultural conditions.

We can now go back to our initial question: What is the media's contribution to democracy from a gender perspective? We argue, on the basis of the presented findings, that all media roles as identified in the 2021 MDM research project – the monitorial, facilitative, radical, and collaborative roles – are limited

and put at stake when the media do not formally commit to and implement fundamental principles of equality and participation; when they do not allow women and men, as well as the diverse voices that compose our societies, to contribute to content production and media operations equally; and when limited awareness and understanding of the multiple implications of inequality still characterise most media systems, institutions, and processes, as made evident by the MDM interviews.

Concerning the regulatory element, the research findings of the 2021 MDM project have shown that gender inequalities are scarcely addressed by media organisations through the adoption of internal rules or codes in most media markets. This is an evident weakness of news organisations which, if seen in conjunction with the finding that “women – at almost every level – leave their companies at higher rates than men” (Beard et al., 2020: 10), points to the limited capacity or will to address issues of gender inequality. In this context, it is problematic that in some countries (e.g., Germany and Italy), journalists’ perceptions concerning the existence of internal rules promoting gender equality contrasts with a widespread reality of lacking provisions. There are signs of improving internal gender equality in some countries; however, there are also cases where the issue either remains overlooked (e.g., South Korea, Chile, and Greece) or depends mostly on the (limited) awareness of individual professionals (e.g., the Netherlands and Italy). Efforts to reverse the situation are likely to remain ineffective unless more emphasis is placed on the promotion of gender equality and, more broadly, diversity principles on a permanent basis. This requires formalised regulatory arrangements, both at the level of media organisations through the adoption of self-regulatory codes and guidelines, and at the national level through media policies that explicitly embed diversity and equality principles, as well as in the operations of media-independent authorities that are expected to provide oversight so as to guarantee that media systems respond to the public interest.

With respect to structural conditions, signs of improvement have been observed in some countries. In Australia – despite the fact that the media are still characterised by gender-based pay gaps and a lack of women in the upper positions of management, framed by phenomena of harassment or bullying (Media Entertainment and Arts Alliance, 2019) – the government has promoted initiatives to address some of the vulnerabilities related to gender equality within the sector (Dwyer et al., 2021). Other examples are Canada (Taylor & DeCillia, 2021) and Germany (Horz-Ishak & Thomass, 2021), where most news organisations seem to have developed greater sensitivity for gender equality principles compared with the past, making efforts to reduce internal gender inequality. First steps to transforming the media sector and addressing structural constraints for women would be well-thought-out operational interventions (Gallagher, 2015), such as the adoption of supporting tools and

ongoing assessment processes to achieve gender equality. Interventions may also include the creation of specialised departments or the activation of training projects centred on the needs of women professionals, so as to make clear that pursuing a career in journalism on equal terms should be the norm – a move that would benefit the whole system. Finally, gender-transformative efforts in today’s context ought to take into account the structural repercussions of digital technologies on the working environment of the media organisations, and on all those working therein (Padovani et al., 2019).

Finally, analysis shows that gender imbalances in media content remain overlooked in the newsmaking process in most countries, apart from the Nordics and, more recently, the United Kingdom and Germany. Where interventions are made, according to the interviews with journalists and editors-in-chief, issues of diversity in terms ethnicity or age at the intersection with gender are being discussed within newsrooms. It has also been noticed that, as institutionalised mechanisms to monitor the representation of diversity in media content are scarce, the gap seems to be mostly filled by private entities. In addition, relevant stakeholders – including policy-makers, media ownership, media professionals, and unions – must consider the relevance of the gender equality norms set out in Beijing 25 years ago and adapt them to the digitalised context of today. At the same time, it would be a fallacy to believe that gender equality in and through the news media is feasible unless a full understanding of media’s contribution to democratic practices is achieved and shared. The cultural challenge remains crucial: It requires issues to be put and kept on the agenda, with public debates to facilitate the dialogue amongst interested actors, individuals, companies, and citizens. It also demands an explicit effort to integrate the findings from gendered critical analyses of the media sector into higher, as well as vocational, education. Such integration would cultivate a new generation of media professionals inspired by democratic principles of equality, pluralism, and participation and knowledgeable about the many ways in which those principles can be operationalised in and through the media.

## Note

1. Scholarly reviews of the various dimensions of media inequality and their democratic implications can be found in Djerf-Pierre and Edström (2020); Byerly and McGraw (2020); Carter and colleagues (2019); Gallagher (1995, 2001); IFJ & UNESCO (2009); Macharia (2020); Made (2004); Montiel and Macharia (2018); Padovani and Pavan (2017); and Ross and Padovani (2017). Recent institutional contributions on the topic come from the *Gender Equality and Media – Analytical Report* (Council of Europe, 2020) and the *Gender Equality and Public Service Media* report (EBU, 2020).

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## Chapter 5

# Investigative journalism and the watchdog role of news media

### *Between acute challenges and exceptional counterbalances*

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#### **Abstract**

This chapter investigates to what extent leading news media advocate investigative journalism and perform appropriately their watchdog function, assuming that in various media markets these core journalistic practices are currently adapting to an austere (compared with the past) media ecosystem, as well as to a differentiated newsroom role against a background of digital revolution in the media field. By means of digital tools, journalistic investigation has been facilitated to a great extent. However, the acute crises afflicting the media industries have operated as a severe deterrent to costly investigative journalism. Given the prevalent financial constraints in media markets, testified to by journalists in most countries participating in the 2021 Media for Democracy Monitor (MDM), investigative reporting seems to have become a luxury process, despite it being a journalistic bulwark against fake news narratives and unethical standards in media organisations. We conclude the chapter with a discussion of the existence of investigative reporting being proportional to the financial strength that characterises the media organisations at the national level, and that targeted public subsidies, where applicable, seem to have proved effective during times of economic recession.

**Keywords:** investigative journalism, newsroom watchdog role, in-depth reporting, power control, fourth estate

## Introduction

Investigative journalism and the newsroom's watchdog role have traditionally been considered instrumental to the healthy functioning of democracy, since journalism and the democratic process are highly interconnected (Donsbach & Patterson, 2004). By fulfilling the watchdog role, journalists act as the fourth estate, disclosing wrongdoing and scrutinising elites in order to hold

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the powerful accountable (Waisbord, 2000). Worldwide, the professional newsmaking process is characterised by research and investigation. These are core journalistic practices that do not remain static, but evolve following the evolutionary course of the media markets and communications technologies. They take new forms based on the emergence of new digital tools (Broussard, 2015; Carlson, 2015; Stray, 2019) – for example, the artificial intelligence algorithmic processes converting data into narrative news texts. At the same time, they are being challenged within the participatory media culture where the speed of journalists in releasing the news has become a top priority (Ali & Hassoun, 2019).

These transformations intensify the questions being raised as to whether journalism constitutes a profession based on conventional professional criteria (Anderson & Schudson, 2019; Meyers et al., 2012) and bring to the fore the discussion which relates journalism to tendencies of professionalisation (Aldridge & Evetts, 2003) and deprofessionalisation (Witschge & Nygren, 2009) or with professional competencies being at stake (Eide, 2010). However, despite the challenges encountered by contemporary media professionals across the various media systems, journalism has been associated with a great variety of values (such as truth and accuracy, independence, impartiality, and accountability) at a cross-national level. Particularly, the provision of political information and the monitoring of government actions and decisions have been identified as widely accepted elements of journalism's role around the world (Hanitzsch et al., 2011).

Based on that perception, traditional and contemporary discourse about journalism conceptualises investigative journalism as a distinct part within the field of news media (Bjerknes, 2020) and even as the spearhead of the journalism profession. Journalists engaged in this special strand of news reporting are portrayed as elite explorers or hunters of important news issues, whose experience gives rise to feelings of unquestionable trust. Working as an investigative journalist is usually identified with having a more intrusive, critical, or sceptical mindset, compared with the mentality or outlook adopted by professionals working in conventional or routine reporting (Lanosga et al., 2017). These special attributes of investigative journalists set them apart from ordinary journalists and provide the practice of news coverage with prestige. Investigative journalism seems to embody the watchdog role of journalism and, despite current economic constraints, it is still viewed as having an important role in democratic governance (Carson, 2019).

In theory, investigative journalism benefits democracies by notifying citizens of wrongdoing and holding political actors accountable for their actions (Carson, 2019; Chambers, 2000). However, this type of journalism is not always defined in opposition to officials (Protest et al., 1991). Moreover, while quality investigative journalism is usually associated with the provision of benefits

to democratic governance, its financial value is uncertain. It is no coincidence that the restricted budgets devoted to investigative journalism has led to the weakening of watchdog reporting worldwide (Houston, 2010; Li & Sparks, 2018; Munoriyarwa, 2018; Saldaña & Mourão, 2018) as well as to reduced numbers of staff members (Knobel, 2018). However, research focusing on the watchdog function of journalism has revealed broad support from audiences, at least in the US, related to the concept of media organisations as scrutinisers of powerholders against a background of divergent evaluations among voters regarding the extent to which journalists are currently performing their watchdog role (Jurkowitz & Mitchell, 2020).

This chapter addresses the extent to which the leading news media in 18 countries around the globe advocate investigative journalism and, in particular, the extent to which they appropriately perform their watchdog function. We aim to provide a comparative portrait of the dynamics of media newsrooms performing their watchdog mission and infer the impact on their democratic role. Our investigation is based on secondary data derived from individual country studies and from interviews examining attitudes and perceptions among journalists and editors-in-chief working in leading news media in the different national media markets (Trappel & Tomaz, 2021b, 2021c). These data are part of the 2021 Media for Democracy Monitor (MDM) research project, leading us to comparative findings which are based on two indicators (C7 and C9), referring to the sufficiency of means available to leading news media in order to efficiently exercise investigative reporting.

MDM Indicators and related research questions addressed in this chapter:

**(C7) The watchdog and the news media's mission statement**

Does the mission statement of the media company or the newsroom contain provisions for playing an active role as watchdog, for investigative journalism, or for other forms of power control? Does the mission statement have any relevance in practice? (Trappel & Tomaz, 2021a: 50)

**(C9) Watchdog function and financial resources**

Are there specific and sufficient financial resources for exercising investigative journalism or other forms of power control? (Trappel & Tomaz, 2021a: 52)

The perceptions relating to investigative journalism among scholars and media practitioners are not identical, as the practice of investigative reporting is experienced differently in various parts of the world, depending on the special characteristics of the media environment (Adibah et al., 2014). Moreover, while digital tools have greatly facilitated data investigation, the financial crises afflicting the media industries have operated as a deterrent to costly investigative journalism.

## Defining the watchdog function of journalism and investigative reporting

Journalists, as watchdogs and investigators, perform similar – but not identical – tasks when trying to detect and describe corruption and abuse of power. The watchdog function of journalism was already present when the concept of a more thorough examination of facts – investigative reporting – began to evolve in the beginning of the twentieth century. Traces of the watchdog ideal are even found in the records of a libel trial against a journalist in Massachusetts in 1822 (Dicken-Garcia, 1989). Watchdog journalism has been defined as “(1) independent scrutiny by the press of the activities of government, business, and other public institutions, with an aim toward (2) documenting, questioning, and investigating those activities, in order to (3) provide publics and officials with timely information on issues of public concern” (Bennett & Serrin, 2005: 169).

But watchdog journalism does not need to be investigative. The most important ingredient, according to Bennett and Serrin (2005), is the mindset of the reporter, exemplified by veteran *Washington Post* reporter Murray Marder (1919–2013):

It starts with a state of mind, accepting responsibility as a surrogate for the public, asking penetrating questions at every level, from the town council to the state house to the White House, in corporate offices, in union halls and in professional offices and all points in between. (Marder, 1998: para. 8)

William Thomas Stead, exposing child prostitution in London in the 1880s, muckrakers in the US at the turn of the century, and Ester Blenda Nordström, working undercover in Sweden as a maid on a farm in 1914, are pioneers in what is called – since at least the 1960s – investigative journalism. The term depicts reporting that goes further than routine gathering and evaluation of facts. Investigative reporting differs from daily news reporting in terms of the topics covered, the information-gathering techniques employed, and the degree of research depth leading to the final output. Investigative reporting embraces issues of public importance about wrongdoing, “affecting the citizenry” (de Burgh, 2003: 806), or “the public interest” (Waisbord, 2002: 277), usually topics that the authorities seek to keep in obscurity. When disclosed, these topics are presented in more extensive texts than other issues (Tong, 2011; Wang, 2016).

Definitions of investigative journalism vary over time and by origin. A widely accepted definition is the one stated by Robert William Greene, reporter and editor at *Newsday* and one of the founders in 1975 of the American organisation Investigative Reporters and Editors (IRE), emphasising the component of revealing secrets:

It is the reporting, through one's own work product and initiative, [of] matters of importance which some persons or organisations wish to keep secret. (Greene, 1983: foreword)

This definition, inspired by IRE, was by and large adopted by the pioneering associations of investigative journalism, set up 30 years ago in Denmark, Finland, Norway, and Sweden.<sup>1</sup> The focus on secrets soon vanished, since neglected structural problems were also important to examine.

Some scholars add a moral dimension to their definition of investigative journalism, incorporating the task of journalists to express moral judgment about potential misdoing or malefaction (Coleman & Wilkins, 2002). David Protess (1991: 5) called it “the journalism of outrage [...] that probes the boundaries of America's civic conscience” and felt kinship with the muckrakers from 100 years ago. Ettema and Glasser (1988) describe investigative journalism as being characterised by a moralising impact, supporting virtues such as the value of justice by exposing news stories of terrible villainy with journalists often being in the context of “tensions between detached observation and active moral agency” (Glasser & Ettema, 1989: 15).

The Flemish-Dutch association for investigative journalism started in 2002 and declared that “investigative journalism is critical and in-depth” (van Eijk, 2005: 22). The association wished to avoid discussions “on who is a ‘real’ investigative journalist and who is not” and shied away from the IRE definition (van Eijk, 2005: 22). They preferred a broader approach, adaptable to different cultures and countries and including the examination of institutions and changes in societal trends.

This orientation can also be found in latter-day international organisations that cooperate in analysing vast amounts of data. The Global Investigative Journalism Network assents to “systematic, in-depth, and original research and reporting” (GIJN, 2020: para. 2). Moreover, investigative journalism has been conceived of as a means for media professionals to exert control over the mistakes and arbitrariness of those in power or the excesses of influential private interests. Disclosing infringements, namely wrongdoing or irregularities, that otherwise would remain unknown is a key practice of investigative reporters (de Burgh, 2000, 2008; Ettema & Glasser, 1998; Schudson, 2008). Investigative journalists, compared with journalists as a whole, are more inclined to maintain the view that media should be more influential on public opinion and that policy reforms are more often feasible through a cooperation plan between journalists and policy-makers, rather than through public mobilisation tactics implemented by journalists (Lanosga et al., 2017).

Although Robert William Greene and IRE have proved influential in terms of how investigative journalism is traditionally perceived, there is no holistic model reflecting common practices in developed and developing democracies

(Waisbord, 2000). However, what is widely acknowledged by academics and practitioners, among others, is the systematic and time-consuming nature of this special type of journalism (Anderson & Benjaminson, 1976; Ettema & Glasser, 1998), which is considered to bear significant contributions to democratic governance monitoring the performance of the democratic institutions.

## The sociocultural context permitting journalists to act as watchdogs

In theory, media in democracies, especially in emerging ones, are in charge of bridging the gap between citizens and governments. This is reflected in their so-called social accountability role that includes adequately holding public officials to account through the timely coverage of relevant news stories. Fulfilling this role presupposes the provision of information to citizens that will enable them to become active citizens (Malila, 2019).

The watchdog role of journalists (Drüeke & Weber, 2016) is widely recognised as a structural function of the journalism profession; nevertheless, its concrete implementation requires certain socioeconomic conditions. For instance, dramatic changes in digital technologies and the rise of new constraints on journalism have resulted in collaborative approaches to investigative work (Carson & Farhall, 2018; Wahl-Jorgensen et al., 2016). Traditionally, the performance of the watchdog role has prerequisites journalists' limited dependence from political or economic interests, as well as the detachment of journalists from their political orientation with the view to applying certain criteria of news values (such as monitoring the powerholders and presenting the deficiencies of democracy), depicting professionalism (Gerli et al., 2018; Hallin & Mancini, 2004). Additional conditions, necessary for watchdog reporting, are journalistic autonomy and assertiveness. The first one refers to the organisational and institutional independence permitting journalists to scrutinise any public official, public body, or business player, while the second one concerns journalists' capacity to investigate and bring to light information that would otherwise remain unearthed (Pinto, 2008).

According to Nord (2007), several factors influence the development of investigative journalism. For instance, in a country where the media sector is characterised by a strong market mechanism, the press industry may be prone to softer and less serious news stories that are inexpensive to cover. Equally important is the level of journalistic professionalism, which affects the allocation of resources among the news content options (i.e., mainstream news or investigative reporting). Relevant research has also proved that the performance of investigative journalism is influenced by the overall robustness and stability

of the media market. This is obvious in Central and Eastern Europe, where this genre of journalism has a stronger presence in rich and more stable media markets, such as Poland, Estonia, and the Czech Republic, where commercial media organisations appear more efficient in providing investigative reporting (Stetka & Örnebring, 2013). The size of the news media outlets constitutes another important determinant to how investigative reporting is conducted. In the context of regional news organisations, this is reflected in how constraints, such as economic pressures or the close attachment of journalists to the community, have proven to make news outlets less prone to investigative projects (Berkowitz, 2007).

Investigative journalism represents the essence of news media organisations' fourth estate role, but unfortunately, it seems to be traditionally plagued by weaknesses. The major challenges impeding the performance of investigative journalism vary, but include clientelism (Yusha'u, 2009), lack of resources and autonomy, and various legal and political constraints (Waisbord, 2002).

The mainstream news media in Argentina is indicative of this. The Argentinian media market exemplifies a series of common difficulties encountered in the watchdog role of journalism when it is practised in feeble political, economic, and business environments. The leading news media in Argentina is framed by low levels of journalistic autonomy and professionalisation within newsrooms as well as by internal news production mechanisms under the influence of pressures, derived from business interests and from government strategies on news management (Pinto, 2008). Another deterring example is Australia, where investigative journalism in the printed media sector (both prior to and during the global financial crisis) has been unable to adequately perform its role of scrutinising and revealing transgressions of the corporate and financial sector on behalf of the public. This weakness was attributed to the inability of the Australian press to challenge the commercial model of the market, based on advertising, in the context of a precarious economic environment (Carson, 2014). Overall, this imperfect kind of investigative journalism is what Stetka and Ornebring (2013) have called "pseudo-investigative journalism" (see also Gerli et al., 2018) as an existent practice in the media field, which is really concerned with generating profit for publishers and the interests that they represent.

Despite the threats afflicting watchdog journalism in democracies – such as the transformation of truth into a "despised notion" (Leigh, 2019: 1), the instrumentalisation of the media, as well as the decline of the print press and the low level of professionalism (Gerli et al., 2018) – there is also optimism with regards to this particular strand of journalism (Lanosga & Houston, 2017).

## Factors affecting investigative journalism and the watchdog function in news media

Based on the previously discussed factors affecting investigative reporting, and hence the performance of the watchdog role of journalists, we provide an outline of country groups derived from the 2021 MDM research findings. Our aim is to provide insights into the key trends, differences, and similarities of how this special journalism genre is treated by the various leading news media organisations of the 18 MDM participating countries (see Table 5.1 in the Appendix).

### Journalism as the fourth estate and the role of money

Arguably, there is a lack of criteria for defining investigative journalism, which takes on many forms (Drüeke, 2018). The leading news media in some countries of the 2021 MDM research sample that belong to the so-called Mediterranean type of media system (Hallin & Mancini, 2004) do not have, for example, a consolidated tradition of journalism perceived as fourth estate; they interpret their role in a different way with respect to the standard of providing a full, impartial, and accurate account of news as a vital part of democracy (Newton, 1995). This is the case in Italy, where, with a few exceptions, various forms of “pseudo-investigative” journalism may be found (Padovani et al., 2021), and Greece, where “investigative journalism is the exception rather than the rule” (Papathanassopoulos et al., 2021: 224). This is also the case in Switzerland, where the role of watchdog is understood as “reporting things as they are” (Bonfadelli et al., 2021: 444), rather than being proactive and critical.

Among the participating countries, there are a few cases where watchdog journalism is a central feature and editorial offices attribute significant value to it (e.g., in Austria, Belgium, and Denmark). In others, this commitment of journalistic work seems quite implicit, dictated by the consideration and self-consideration of journalists as watchdogs (e.g., in Australia, Canada, Belgium, Greece, the Netherlands, and the United Kingdom). Distinctive is the case of the United Kingdom, where the long tradition of watchdog journalism (Wahl-Jorgensen & Hanitzsch, 2008) remains unchanged and is treated as a major obligation, despite the economic crisis that has afflicted the media sector. The importance of the watchdog role is often specified in the mission statement of British newspapers; and even when only implicit, it is taken into particular account. As a result, the news media in the United Kingdom are committed to investigative journalism, and broadcast newsrooms invest significant resources in in-depth reporting despite the financial constraints adversely influencing particularly the commercial media sector (Moore & Ramsay, 2021).

In the general European context, the role of journalism as the fourth estate is mainly acknowledged, explicitly or implicitly, as an objective of the leading news media organisations. However, only in few countries do media organisations possess a combination of features such as the availability of financial resources and the tradition of investigative journalism. Indicative cases are Sweden and Denmark, where editorial offices often have at their disposal specific task forces dedicated exclusively to investigative journalism, and at the same time, considerable resources intended for assignments of in-depth reporting (e.g., up to 10% of the annual budget on average in Sweden; Nord & von Krogh, 2021). In Denmark, media representatives state that “investigative journalism is highly prioritised, even more than in the previous years”, since most leading news media (such as the editorial department of the tabloid *Ekstra Bladet*) have created regular task forces engrossed in investigations (Blach-Ørsten et al., 2021: 170–171). Moreover, in Sweden, editors even see a growth in allocated resources and estimate, for example, that about 10 per cent of the reporters working in the leading tabloid *Aftonbladet* and the leading morning daily *Dagens Nyheter* are now members of special units dedicated to investigative reporting. In the public television broadcaster SVT, it is estimated that as much as 20–25 per cent of reporters’ resources are devoted to in-depth investigations (Nord & von Krogh, 2021).

Beyond Europe, and particularly in Hong Kong, journalists recognise the centrality of the watchdog role of journalists and consider it an objective of their profession. Media companies invest considerably in investigative reporting, a trend indicating that these news stories have a strong appeal for their (paying) readers. The example of Hong Kong implies that investigative journalism might be recognised by media professionals as important, even if there are no specific or explicit references to this type of reporting in news organisations’ mission statements. Hong Kong journalists participating in investigative reporting projects are provided with time and funds for travelling abroad, have at their disposal more flexibility and resources to work on their stories – compared with those engaged in conventional reporting – while, at the same time, they are not under pressure to provide content on a daily basis (Lo & Wong, 2021).

Decreasing advertising revenues for commercial media have afflicted newsrooms for many years and have led to less resources for quality journalism and investigative reporting in many countries (Kurtz, 1994; Squires, 1993; Underwood, 1995). However, there are some exceptions where shifted priorities and redirected revenues have instead increased funds and possibilities for investigative journalism. It is not only tradition or a particular journalistic culture that favours investigative journalism. In Germany, for instance, where virtuous newsrooms, such as *Die Zeit*, produce up to 50 investigative reports each year, only 24 per cent of journalists perceive themselves as watchdogs (Weischenberg et al., 2006). However, the particularly favourable financial situ-

ation of some media companies allows investments in specific teams dedicated to investigations. Combating the lack of financial resources in Germany are media organisations resorting to outsourcing investigative reporting to special units (Horz-Ishak & Thomass, 2021).

A similar situation is found in Austria, the only country in the 2021 MDM research sample where both media organisations' personnel and financial resources seem to have increased in the last ten years (Grünangerl et al., 2021). Another exceptional case is the Netherlands, a country experiencing positive trends in the field of investigative journalism due to favourable conditions of the information market, summarised in the description of one of the journalists interviewed: "The profession is considered at its best phase". This allows more than half of the publishing companies to establish ad hoc funds for the creation of task forces engaged in investigative journalism. This is feasible thanks to a system of subsidies in place from the Fund for Special Journalistic Projects (Vandenberghe & d'Haenens, 2021).

In Finland, the financial constraints faced by the media organisations have increased compared with the past; however, there are media outlets allocating provisions to investigative reporting according to ad hoc processes. Public service broadcaster YLE is an exceptional example in carrying out investigative journalism, investing many resources in documentaries and current affairs broadcasts (Ala-Fossi et al., 2021). Ad hoc resource allocation to investigative journalism is also applied in Icelandic media organisations (Jóhannsdóttir et al., 2021).

A special case in the fight against the lack of resources is Chile, where investigative news articles have been given a less prominent status by being replaced by a system of outsourcing to production companies or by purchasing investigative articles from freelancers. Alternative models of financing investigative journalism are also in place here, such as the website *Interferencia*, which employs a financial strategy based on long-term subscriptions. Similarly, the Centre for Investigative Reporting operates a crowd-funding process aimed at financing in-depth reporting (Núñez-Mussa, 2021).

Job stability is also an important factor in fostering investigative reporting. The crucial role played by stable employment conditions is accentuated in countries in which investigative journalism and the role of fourth estate is in early stages. Competing flows of information and digital transformations afflicting most Western countries (excluding the already mentioned exceptions) have led to profound changes in the editorial production routines of newsrooms. Since the 2008 global financial crisis, many editorial offices have suffered cuts in staff, reduction of long-term contracts, and increased use of external collaborators, such as freelancers and trainees (Reinardy, 2012). These changes have caused a shortage of personnel qualified to do investigative journalism and has weakened the job security and stability of journalists in general.

## Redundancies and job insecurity at the cost of investigative journalism

The downsizing of editorial offices and a general reduction in positions are often associated with a decline in job performance and satisfaction (Kim, 2003; Reinardy, 2012). Moreover, cuts in staff lead to an increase in tasks and responsibilities for the remaining news workers, a trend particularly evident in many newsrooms. As a result of digitalisation, more tasks are assigned to journalists, while, at the same time, they are required to cultivate new and more elaborate skills. In general, the key trend prevailing in the editorial offices of most of the participating countries is to “do more with less”. This situation naturally risks disadvantaging investigative journalism, which requires time, money, and qualified personnel. The issues brought to light by interviewees in the 2021 MDM project confirm that this is the case. The reduction in newsroom staff has afflicted a wide range of countries – both those with a good state of financial health (such as Iceland or Switzerland), and those where the 2008 financial crisis had harsher implications (such as Greece, Portugal, Italy, and Chile).

In Switzerland, a study on the working conditions of journalists reveals a very low level of satisfaction among print journalists and an even lower one for online journalists (Wyss, 2012). In Canada, an interviewee summarised the condition of the news workers with the emblematic phrase, “everyone’s kind of trying to stay alive and keep their job” (Taylor & DeCillia, 2021: 75). Similar narratives depicting job insecurity are provided by media professionals in Australia, Chile, Belgium, Iceland, Portugal, South Korea, and Italy, as well as in Hong Kong and the United Kingdom, countries in which, however, investigative journalism is still strong.

In several countries, the uncertainty that dominates leading news media and the decline in job security are reflected in the increase in freelancers or journalists hired on a fixed-term basis. These working patterns are adopted in countries with different labour market contexts. While, for instance, in Germany, journalists and freelancers with fixed-term contracts have come to represent an important and recognised part of the media system (Horz-Ishak & Thomass, 2021), Icelandic media do not invest in freelancers and denounce the job insecurity associated with temporary contracts for media professionals (Jóhannsdóttir et al., 2021). While in the Netherlands there is a fierce battle over the fees paid to freelancers (Vandenberghé & d’Haenens, 2021), the National Federation of the Italian Press frames the issue as labour exploitation of the “information riders” (Padovani et al., 2021). Another key trend in the media sector is the policy of replacing experienced journalists with younger ones – for example, in Hong Kong (Lo & Wong, 2021) and Greece (Papathanassopoulos et al., 2021). Junior professionals in general cost less money for the media organisations and, at the same time, are more familiar with new digital technologies.

Notable exceptions are Austria, where journalists enjoy a high level of job security (Grünangerl et al., 2021), and the United Kingdom, where journalists are more likely to have stable rather than temporary employment contracts (Moore & Ramsay, 2021). It seems like no coincidence that in these countries, investigative journalism and the watchdog function of journalism are features treated with greater importance.

The possibility of journalists to attend training courses can play an important role in promoting investigative journalism. In some countries, such as Portugal and the Netherlands, such courses are organised by investigative journalism networks, while in others, such as Denmark and Sweden, investigative journalism associations provide such courses in the context of annual conferences and, at the same time, these are mandatory in journalism studies within universities. The countries where these courses are most available are the same countries where investigative journalism is more productive (e.g., the United Kingdom, Germany, Denmark, Sweden, and Hong Kong). However, in all participating countries – with the exception of Italy, where refresher courses on investigative journalism, among other topics, are mandatory for members of the Order of Journalists (Padovani et al., 2021) – participation in training courses, whether organised by editorial offices or other types of organisations, remains optional. In reality, the lack of time and resources often prevent journalists from attending them.

In conclusion, the main obstacles to the full implementation of the fourth estate function of the leading news media are a lack of adequate financial resources and personnel. These conditions in turn increase the workload of journalists and decrease the quality of journalistic work. In addition, they result in job insecurity, which endangers professionalisation within editorial offices. However, the overall image is not as negative as it may seem. Practices of investigative journalism exist in many national contexts, mainly related to the operational status of the public service media (for more on public service media, see Thomass et al., Chapter 9). This is the case, for example, in Australia, Finland, Iceland, Germany, Chile, and Italy.

## New patterns of news consumption

Media scholars identify an “audience turn” in journalism in the last decade – that is, journalists have become greatly attentive to audiences, a feature reflected in their journalistic practices. This partly results from public reactions in the form of web metrics having become more visible to editors (Coddington & Lewis, 2020; Costera Meijer, 2020). The importance attached to public preferences is also highlighted by interviewed media professionals in the 2021 MDM country reports. With advertising expenditure in decline, editors turn to media users as a potentially alternative source of revenue (Newman et al., 2020a). Journalism

needs to be “distinctive” against a backdrop of large volumes of free content (Vandenberghé & d’Haenens, 2021: 292) and “an asset in an overall highly competitive market” (Horz-Ishak & Thomass, 2021: 245). Journalism also must be able to turn into “a strategic asset when the business model changes” (Padovani et al., 2021: 375). Interviews with editors and executives in the United Kingdom, Denmark, Italy, and Sweden show that quality journalism is considered the best asset for getting media users to pay for editorial content online. As one editor said, “readers often convert after reading long-form pieces and investigations that force politicians to resign” (Suárez, 2020: 19).

Leading Swedish daily newspaper *Dagens Nyheter* is often referred to as a successful example in studies of strategies with regard to conversion from payment for printed journalism to payment for digital journalism. *Dagens Nyheter* has no fixed paywall, but offers several flexible options (Veseling, 2020). One strategy that has proven successful is to publish an article that attracts the attention of a large audience, at first available for free, but set behind a paywall after a few hours. The decision to turn a free-access article into subscription-based is made by an editor with the support of an artificial intelligence algorithm. Documentation related to which kind of articles may lead to the highest number of conversions from free-of-charge content to paid subscriptions shows that unique, investigative articles are at the top of the list.

Two factors that may have contributed to increasing investigative reporting in Denmark and Sweden are combined patterns of news consumption and a renewed tradition of investigative journalism. Denmark and Sweden belong to the top four countries in the European Union regarding daily consumption of written press and the top three countries regarding daily use of the Internet (Eurobarometer, 2020). They also score high on the list of countries where media users are most willing to pay for news, with the average for the four Nordic countries included in the 2021 MDM being 26 per cent, whereas the average for France, Spain, Portugal, Italy, and Greece is 11 per cent (Newman et al., 2020b). In the Nordics, associations for investigative journalism were established 30 years ago, emerging from the bottom up by practising reporters aiming to build a tradition through education, sharing methods, and holding national seminars for students as well as veteran reporters (Sørmo Strømme, 2020). After 10–20 years of operation, these associations are accepted in the media ecology, receive funding from media organisations, and are institutionalised parts of the media system.

## Conclusions

The watchdog role of journalists is widely recognised as a cornerstone of the journalism profession in the majority of the countries participating in the 2021 MDM research project, and it is mostly considered an important objective of

the journalistic mission by journalists themselves (e.g., in Australia, Austria, Belgium, Canada, Denmark, Finland, and Sweden). The research data confirm that investigative journalism requires a considerable number of resources and time, as well as the opportunity to attend training sessions, combined with general job security.

In today's legacy media organisations, the watchdog role played by investigative journalism is challenged by the declining revenues (e.g., in Australia, Belgium, Canada, Chile, Finland, Germany, Greece, Iceland, and Italy) coupled with a shrinking number of journalists working within newsrooms (e.g., in Canada). Financial strain and staff shortage detract journalists from conducting investigative reporting; on the other hand, investigative reporting seems to be prioritised by media organisations in a context where democratic, professional, and commercial values converge. Distinctive cases include the United Kingdom (Moore & Ramsay, 2021) and Canada (Taylor & DeCillia, 2021), where many news organisations' editors-in-chief maintain that they are committed to investigative journalism and, at the same time, acknowledge a lack of resources that makes it harder to produce quality journalism. Among the countries that seem to retain a commitment to investigative reporting are Sweden (Nord & von Krogh, 2021) and Denmark (Blach-Ørsten et al, 2021).

Overall, the MDM research findings reveal that investigative reporting – based on extensive procedures of conceiving ideas, in-depth research, and reporting results thoroughly – seems to be an exception rather than the rule. Nevertheless, in an era where fake news are gaining ground, and public trust in the media is in a state of flux, the watchdog function of journalism remains critical. Despite the challenging context, the 2021 MDM research project, as well as previous studies (e.g., Lanosga & Houston, 2017), show that there is still reason to be optimistic regarding the watchdog role of journalism.

The journalists interviewed in Sweden stood out as those that most strongly endorsed the independent scrutiny of powerholders, the collection and distribution of information to citizens aimed at informed decision-making, and giving voice to the voiceless within democracies (Nord & von Krogh, 2021). Other positive examples are initiatives implemented in countries where ad hoc resources for investigative reporting is preferred as an alternative to systematic resources (in Finland, Iceland, and the Netherlands) or where subsidies policy has been set in place (in Belgium and the Netherlands) with the aim of strengthening the investigative function of newsrooms and promoting journalistic projects of a special quality. Last, but not least, there are distinctive cases in Australia (Dwyer et al., 2021) and Finland (Ala-Fossi et al., 2021) where, although journalism-related research investments have been reduced, public service media undertake initiatives to promote investigative journalism.

Generally, the 2021 MDM research project reveals that the existence of investigative reporting is proportional to the financial strength that characterises

the media organisations at the national level, with targeted public subsidies – where applicable – proving efficient during times of economic recession.

Digitalisation of newsmaking, framed by disinformation, misinformation, and hyper-provision of news through social media, has induced opportunities as well as challenges for investigative reporting. The adoption of new digital tools for finding sources, analysing data, and disseminating news is indeed an asset (Hahn & Stalph, 2018). In this context, the watchdog function of journalism can continue to be carried out through an innovative and modified model of investigative journalism adapted to the digital age. This may entail large-scale synergies between media outlets and media platforms, crossing national borders and even including collaborations with non-media bodies. This adaptation process is further enhanced by the orientation of the media to data journalism and crowd-sourcing, with news workers placing emphasis on multimedia and digital engagement (Carson & Farhall, 2018).

Also, despite having been accused of giving rise to a type of sloppy or fake news production, new technologies have likely offered opportunities for evidence-based journalism (Carson & Farhall, 2018). Therefore, enhancing the investigative reporting capacity can be assumed to be a primary aspiration of journalists, and new technologies, based on artificial intelligence software systems, can add value to investigative reporting practices (Broussard, 2015) and improve news production efficiency (Newman, 2021).

It is advisable that sustainable investigative journalism be sought in alternative, but achievable, business models. Such is the case of the emerging digital investigative journalism non-profit start-ups, whose aim is to produce public interest journalism by means of support derived from subscribers, motivated mainly by their belief in the social and democratic benefits of investigative journalism (Price, 2020). Similarly, legacy media need to find alternative models of financing investigative reporting; otherwise, in many media markets, the watchdog role of journalists runs the risk of slowly disappearing.

Moreover, in 2020, the media sector was characterised by a favourable trend towards increasing subscription-based content, since publications based on a membership or subscription model proved more successful than those provided to the audience free of charge (Newman, 2021). The successful examples of American media outlets (such as the *New York Times* and *Washington Post*), as well as European media outlets (*Helsingin Sanomat* in Finland, *Bild* in Germany, and local newspapers owned by Amedia in Norway), have been argued to have paved the way for other media organisations to seriously consider the transition to a subscription model (Newman, 2018). Based on these findings, it is likely that in the future, high-quality news reporting will increase subscriptions from audience members prepared to pay for independent and trustworthy journalism.

In view of these trends, the adaptability of the media industry to new particularities of the media market seems to be the only sustainable way forward

for investigative journalism, considering the backdrop of declining levels of this particular type of journalism in the leading news media. Acting as true watchdogs – rather than lapdogs – of power, journalists should not be content with sharing a general appraisal of investigative journalism, but should strive to implement this type of quality journalism in practice. Given that investment in quality investigative reporting has proved to be an efficient means of television stations' enhancing their audiences (Abdenour & Riffe, 2019), and meaningful watchdog reporting has been regarded by newspaper editors as a considerable motivator for the audience to buy newspapers (Knobel, 2018), this type of journalism is worth being part of the journalistic normality.

In theory, investigative journalism is exercised with the aim of serving the public interest (Goddard, 2006). In practice, its performance might not be successful or complete unless certain conditions are met; those are, apart from available resources, the existence of a journalistic culture free from undermining features such as clientelism. The importance of investigative journalism within a democratic system lies in its potential to increase political accountability, inform the citizenry, and encourage public dialogue by disclosing information to the public (Waisbord, 2002). This contribution is infeasible unless news organisations and journalists enjoy a working environment characterised by autonomy. Journalists must be free to conduct their reporting practices, based on an effective right to access public information, ensured by law. Another indispensable quality is the right to keep sources secret, safeguarding a journalist's credibility against their sources (Waisbord, 2002). Practising investigative journalism presupposes that news organisations be financially viable and independent from government subsidies or government advertising. They should also employ sufficient staff, part of which may be devoted to the task of investigative reporting, incorporating ample time for research and newsroom autonomy, features that permit journalists to produce quality news disclosures.

It is not sufficient for investigative journalism to be recognised as important by only the journalists; an established culture is needed, free from the bureaucratic routines or any other constraints that might affect the operation of the media organisations as a whole. Investigative reporting in the form of ad hoc special projects based on targeted funding and a team-building process – as implemented, for instance, in the Netherlands (Vandenberghe & d'Haenens, 2021) and Austria (Grünangerl et al., 2021) – may serve as an example for other countries. Moreover, the stable financial condition of the public service media sector can be perceived as a valuable asset for public broadcasters in times of crises, enabling them to play their role as servants of democracy through investigative news reporting. As for commercial media, given that investigative journalism is mainly undermined by the lack of financing and time in newsrooms, ad hoc resources – as implemented, for instance, in Iceland (Jóhannsdóttir et al., 2021) – may operate as a workable counterbalance.

Maybe a redefinition of investigative journalism unrelated to the traditional ideals with which it is being associated, but adapted to the requirements of digital times, would mitigate or reverse the weakness of some media organisations in conducting investigative journalism. After all, democracy and investigative journalism are mutually interdependent: Democracy is served by well-implemented investigative journalism, which incorporates the accountability role of watchdog news workers, while, at the same time, the proper functioning of democratic institutions is a prerequisite for journalists engaged in the demanding task of investigative reporting.

## Note

1. Transparency remark: One of the authors, Torbjörn von Krogh, took an active part in this process as a reporter some 30 years ago.

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Appendix 5.1

Table 5.1 Summary of key issues related to investigative journalism and newsroom's watchdog role

Country	Sufficient resources for investigative journalism <sup>a</sup>	Watchdog function specified in mission statements or policy documents	Negative economic pressures on investigative journalism and watchdog function	Ad hoc financing or team's establishment for watchdog function	Investigative journalism is part of public service media mission	Public service media actively support investigative journalism
<b>Australia</b>	✓	Part of journalists' self-perception	✓	n.a.	PSM organisations have an implicit obligation to provide IJ based on their respective charters (ABC charter, sub-section 6 (2)(a) (iii), 6(2)(b) & SBS charter). Both charters also claim an obligation of PSM to inform their audiences	PSB ABC has a special unit dedicated to IJ
<b>Austria</b>	n.a.	Part of journalists' self-definition	✓ Limited funds	Established task forces for IJ in several media. Ad hoc establishment of teams and financing of investigative reporting	PSB ORF operates a small but effective task force on IJ	PSB ORF is collaborating with other news media in investigative reporting
<b>Belgium (Flanders)</b>	n.a.	Part of journalists' self-perception	✓	Specific task forces on IJ only in some media organisations	✓	n.a.
<b>Canada</b>	n.a.	Integral part of journalists' identity & self-perception	✓	n.a.	CBC News is characterised by a long history of IJ, although investigative reporting is not specified in the PSB's legislated mandate	PSB CBC has a special investigative unit dedicated to IJ, which is an integral part of the news service
<b>Chile</b>	There are not enough resources for IJ and thus there is a system of outsourcing to production companies or freelancers	n.a.	✓	Decrease of specialised journalists devoted to the watchdog role	n.a.	n.a.
<b>Denmark</b>	✓	Part of journalists' self-perception	n.a.	Ad hoc resources (in addition to the fixed funding)	n.a.	PSBs DR and TV 2 have specific IJ groups

Table 5.1 Cont.

Country	Sufficient resources for investigative journalism	Watchdog function specified in mission statements or policy documents	Negative economic pressures on investigative journalism and watchdog function	Ad hoc financing or team's establishment for watchdog function	Investigative journalism is part of public service media mission	Public service media actively support investigative journalism
<b>Finland</b>	Fewer resources available compared to the past	✓ Part of the Guidelines of Journalists to which media professionals show obedience	✓	✓	PSB YLE is obliged to produce IJ (according to the law Article §7a), a duty which is carried out	✓ PSB YLE has specific investigative group
<b>Germany</b>	Fewer resources available compared to the past	n.a.	✓	Outsourcing to special units	n.a.	n.a.
<b>Greece</b>	Fewer resources available compared to the past	Part of journalists' self-perception	✓	✓	n.a.	IJ is set in practice occasionally by the PSB ERT
<b>Hong Kong</b>	✓	n.a.	✓	n.a.	n.a.	n.a.
<b>Iceland</b>	n.a.	Part of journalists' self-perception, at least in the national media	✓	✓	n.a.	✓ PSB RÚV has specific investigative group
<b>Italy</b>	n.a.	Not considered a priority in mission statements. Explicit reference in the service contract stipulated by PSB RAI	✓	n.a.	Typically specified in the Service Contract of the PSB RAI, but actually not set in place	IJ is not so widely applicable in the daily practice of the PSB RAI
<b>Netherlands</b>	✓ Since 2019, the Dutch government has ensured extra funds (5M annually for 5 years) earmarked for IJ. The Stimulation Fund for Journalism has spent yearly approx. 2.75M in the last 3 years (2019-2021) on projects aimed at strengthening the infrastructure for IJ	✓ Media decide if and to what extent watchdog role is part of the mission statement	"Economic pressures" (i.e., the collapse of the advertising market in the previous period may have influenced the willingness to spend money on IJ)	✓	Several PSB associations under the NPO umbrella have their own investigative editors: VPRO (Argo), KRO/NRCV (Pointer), and BNNVARA (Zembla). IJ practice is an inseparable part of the PSB, although not explicitly described in the mission statement	n.a.

Table 5.1 Cont.

Country	Sufficient resources for investigative journalism <sup>a</sup>	Watchdog function specified in mission statements or policy documents	Negative economic pressures on investigative journalism and watchdog function	Ad hoc financing or team's establishment for watchdog function	Investigative journalism is part of public service media mission	Public service media actively support investigative journalism
<b>Portugal</b>	Fewer resources than expected (and required) by the newsroom	✓ Indirect references	✓	Specific (but small) teams devoted to IJ exist in some media organisations	n.a.	PSB RTP has specific teams focusing on IJ, although they are small ones
<b>South Korea</b>	n.a.	✓ Only some major media organisations specify financial support for IJ in code of ethics	✓ Decrease in foreign correspondents	n.a.	n.a.	n.a.
<b>Sweden</b>	✓ 10% of the editorial resources, as estimated by editors in leading media organisations	✓ Part of journalists' self-perception, at least in the national media	✓ Mainly in regional privately owned media organisations	✓ Established task forces or departments for IJ in national media organisations	✓ The watchdog function is implicit in the steering documents	✓ Very active in supporting and performing investigative reporting
<b>Switzerland</b>	Fewer resources available compared to the past	Part of journalistic self-image, but no distinct culture of IJ exists	✓	n.a.	✓	✓
<b>United Kingdom</b>	✓ True for broadcasters	✓ True for many newspapers	✓ In the commercial media sector, in the local and regional press	n.a.	In the BBC's constitutional documents, the watchdog function of journalism is implicitly defined	n.a.

Comments: PSM = public service media; PSB = public service broadcaster; IJ = investigative journalism; n.a. = not applicable.

<sup>a</sup>Sufficient resources for investigative journalism refer to cases of leading news media where a reasonable standard of investigative reporting is ensured.

Source: Trappel & Tomaz 2021b, 2021c



# CRITICAL ISSUES OF CONTINUITY



## Chapter 6

# Comparing news media reach

## *Exploring effects of asymmetric news media consumption*

Heinz Bonfadelli, Valgerður Jóhannsdóttir, Lars Nord,  
& Hanne Vandenberghe

### **Abstract**

This chapter addresses the topic of whether news media in different countries are still able to reach the general public and generate a shared public sphere as a prerequisite of democratic countries. The empirical part of the chapter focuses on the extent to which the different segments of society use news media like newspapers, radio, television, and social media, comparing the results from 18 countries participating in the 2021 Media for Democracy Monitor (MDM) research project. We conclude that most people in most countries still use the news media regularly, although country-specific gaps exist related to sociodemographic factors like age, gender, and especially education and income. Most conspicuous is an intergenerational gap insofar as young people are increasingly using social media as their main news source.

**Keywords:** news media use, news consumption, audience research, intergenerational gap, comparative research

## Introduction

This chapter focuses on the extent to which news media in different countries manage to reach the public. News media penetration in society is considered to be crucial for democracy and for the population to be informed about and mobilised in current political debates. At the same time, the expanding digital media landscape offers new possibilities for participation and deliberation. In this chapter, news media reach for newspapers, radio, television, and online media is compared across time and between the 18 countries participating in the 2021 Media for Democracy Monitor (MDM) research project (Trappel et al., 2011; Trappel & Tomaz, 2021c, 2021d).

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MDM Indicator and related research question addressed in this chapter:

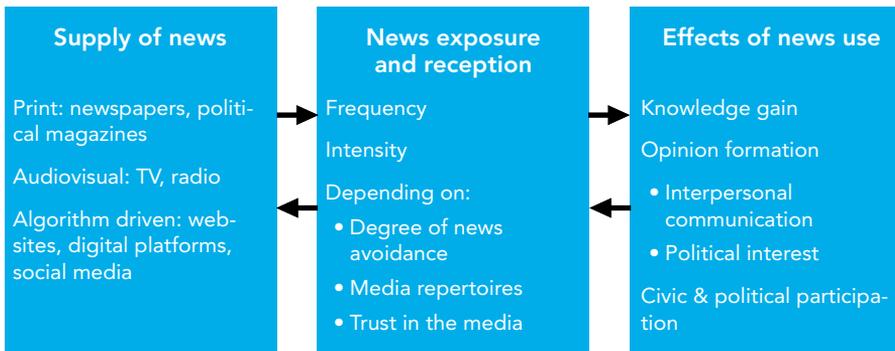
**(F2) Patterns of news media use (consumption of news)**

How well do news media in general reach the population? [...] What is the reach of the main news broadcasts? (Trappel & Tomaz, 2021a: 20)

Our analysis is based on the MDM indicator addressing the patterns of news media use and consumption of news, which investigated patterns of news media use in the 18 countries, with a particular focus on how well news media in general reached the population. The 2021 results for single countries were published in two volumes (Trappel & Tomaz, 2021c, 2021d), whereas this chapter makes a cross-country comparative analysis of one indicator. We supplement this chapter with additional empirical data from the Eurobarometer and the *Reuters Institute Digital News Report*. Possible effects of widening media use gaps related to age, gender, and socioeconomic factors are discussed as well as the increasing number of “news avoiders” and the role of social media as a substitute for or complement to news media. With our comparative analyses, we intend to shed light on important factors that influence news media reach and gaps in news media use.

Figure 6.1 displays the dimensions of news media use and the circular nature of how supply, consumption, and effects of news influence each other. The figure illustrates the process-oriented relationship between exposure and reception of news with the supply of news by traditional media like printed newspapers,

**Figure 6.1** The cycle of supply, consumption, and effects of news



audiovisual media like television and radio, or news mostly selected by hidden algorithms from, for example, social media platforms (Napoli, 2015). Furthermore, the figure highlights the asymmetric effects of news use on knowledge gain, opinion formation, and civic and political participation. Although the supply might be rather similar within a media context, the exposure and reception of news, both in terms of frequency and intensity, will vary substantially within the population, as will the effects of news use, such as knowledge gained and

opinions and activity generated by consuming news. The resulting effects of news use in turn influence consumers' practices such as news avoidance and trust in the media, and these practices and choices affect which supply channels media organisations prioritise. Moreover, factors such as age, gender, level of education, and socioeconomic status further influence the consumption and effects of news.

## Media and news consumption: Review of literature

Historically, there is an “inseparable connection between democracy and the media” (Nieminen & Trappel, 2011: 138). In 1787, Thomas Jefferson, one of the founders of the American Constitution and former president, wrote in a letter to Edward Carrington about how important a free press is for keeping the government in check:

Were it left to me to decide whether we should have a government without newspapers or newspapers without a government, I should not hesitate a moment to prefer the latter. But I should mean that every man should receive those papers and be capable of reading them.

Thomas Jefferson (Ford, 1786–1789/1904–1905)

The former sentence in this quote has been cited frequently to this day – but the latter much less so. Yet, the relevance of the news media for democracy hinges on the extent to which it actually reaches people. Digital technology, in particular, has profoundly changed the ways people access and interact with the media in general and news in particular.

Research has shown that what the media report has a profound impact on people's knowledge and perceptions of the world and consequently has an impact on the shaping of public debate (Curran et al., 2010; Jensen & Mortensen, 2016b; Mellado, 2015; Strömbäck & Karlsson, 2011). In a well-functioning democracy, people should have access to – and moreover receive a diverse range of – opinions about political and societal issues (Helberger, 2015), which the literature refers to as exposure diversity. This term “is used to refer to the content that the audience actually selects, as opposed to all the content that is available” (Helberger et al., 2018: 193).

As Jensen and Mortensen (2016) remark, legacy media no longer enjoy the privileged position of attention it once did. In 2020, the frequency of news sources on a weekly basis was ranked as follows within the 79 countries of the Reuters Institute sample (Newman et al., 2020): 82 per cent online (not including social media); 65 per cent television; 52 per cent social media; 30 per cent radio; and 20 per cent print. Although television news is still the second-most important news source, it has become less popular over time. For instance, the

British, Danes, and Germans used television as a news source less in 2020 in a given week compared with 2013 (24%, 23%, and 12% less, respectively) (Newman et al., 2020). Bergström and colleagues (2019) similarly note that the environment in most Western countries has been transformed into high-choice media environments, and that this transformation of the media environment “has triggered increasing interest in the antecedents of and mechanisms explaining news media use” (Bergström et al., 2019: 177).

People’s news consumption differs according to demographic factors such as age, sex, education, and socioeconomic status, as demonstrated by a long line of research (e.g., Bakker & de Vreese, 2011; Blekesaune et al., 2012; Boulianne, 2015; Dimitrova et al., 2014; Holt et al., 2013; Newman et al., 2017). Especially higher educated people use political news, as well as men in comparison with women. Empirical studies also indicate that media use is influenced by the structural and institutional context in which it takes place, as well as individual factors and technological affordances (Adoni et al., 2017; Boomgaarden & Song, 2019; Hallin & Mancini, 2004; Helles et al., 2015; Horowitz & Napoli, 2014; Meilán & Wu, 2017; Peruško, 2017). One of the general findings is that youth worldwide are shifting to social and online news media as primary news sources. Asked about their news sources, 76 per cent of individuals aged 18 to 24 used online and social media, whereas only 30 per cent used legacy media (radio, television, and print) (Newman et al., 2020).

In the last two decades, researchers have paid attention to the possible democratic implications of this shift in news consumption patterns and caution that the way people use news media are likely to widen gaps in political knowledge, participation, and interest (Aalberg et al., 2010; Bergström et al., 2019; Blekesaune et al., 2012; Jensen et al., 2016; Napoli, 2011; Prior, 2007; Strömbäck et al., 2013; Wolf & Schnauber, 2015). There is no consensus in the literature of whether narrowing media use to mainly online and social media has overall positive or negative effects (Bonfadelli, 2002; Helberger, 2015; Horowitz & Napoli, 2014; Jerit et al., 2006; Ksiazek et al., 2010; Newman et al., 2020; Prior, 2007; Trilling & Schoenbach, 2013; van Dijk & Hacker, 2003; Webster & Nelson, 2016; Yang & Grabe, 2011). On the one hand, in today’s news context people have access to news from many different points of view and have opportunities to widely discuss news via online platforms and social media. On the other hand, a main concern is that narrowing media use to mainly online and social media could have negative effects on democracy, namely by filtering crucial information and creating echo chambers or filter bubbles, and having a severe impact on the quality of the public discourse. Such tendencies may contribute to fragmentation by pushing communities apart or creating and increasing information disparities.

Ksiazek and colleagues (2010: 552) note that as people have more platforms and content to choose from, “they also have more non-news media competing for their attention [and] as a result, they are free to seek out large amounts

of news, or avoid it entirely”. This “has triggered a concern that people are increasingly turning away from news and news media to other, less informative, genres and types of media”, which, according to Bergström and colleagues (2019: 175–176), will have negative consequences for democracy.

And indeed, empirical evidence suggests that news avoidance is growing. An early comparative analysis by Blekesaune and colleagues (2012) shows an increase of news-disconnected citizens across Europe, but large differences between the three analysed countries. And a longitudinal study between 1995 and 2012 comparing Norway and the US found that over time, more respondents disconnected altogether from news in both countries. This was more noticeable in the US; the authors argue that this could be because Norway is in an earlier phase of the transition towards news avoidance or, alternatively, it could be ascribable to the different media systems (Elvestad & Shaker, 2017). In 2017, on average, 26.6 per cent of the respondents within 17 countries of the MDM sample (only Iceland was not included) said they often or sometimes avoided news, ranging from 14 per cent of Danes to 57 per cent of Greeks (Newman et al., 2017). Studying news consumption in Sweden, Strömbäck and colleagues (2013) concluded that over time, differences in news consumption had become more accentuated “and that political interest has become a more important determinant of news consumption in today’s high-choice media environment” (Strömbäck et al., 2013: 414).

A literature review by Van Aelst and colleagues (2017: 3) identifies six concerns of the changing media environment in advanced post-industrial democracies: “(1) declining supply of political information, (2) declining quality of news, (3) increasing media concentration and declining diversity of news, (4) increasing fragmentation and polarization, (5) increasing relativism and (6) increasing inequality in political knowledge”. The authors find that some trends represent “a serious challenge for democracy” and conclude the following:

[Although] direct warnings are not warranted, [...] several political communication trends in high-choice media environments do represent a challenge for democracy. [...] And] the most important seems to be increasing fragmentation and polarization, epistemic relativism and growing inequalities in political knowledge. (Van Aelst et al., 2017: 19)

However, research findings have also indicated that people not inclined to seek out news often come across news content through their use of social media (deSilver, 2014; Westlund, 2016). Holt and colleagues (2013) also found that younger people use social media for political purposes more than older generations, which may compensate for less attention paid to news in legacy media. The findings “suggest that there are perhaps fewer reasons to worry than suggested by many accounts lamenting the declining use of traditional news media” (Holt et al., 2013: 32).

Not all trends affect all countries to the same extent, and there seems to be little evidence to support the notion of polarisation or that people are increasingly self-selecting into echo chambers of the like-minded. Most people still get news from a number of different sources and platforms. Newman and colleagues (2017) posit that although filter bubbles and echo chambers may be a reality for some, social media users on average experience more diversity than those who do not use social media. Webster and Nelson (2016) note that while partisans do spend time reading news from outlets they agree with, they also use mainstream media, and are hence exposed to opposing views and ideas. The findings of a study in Austria points in the same direction, and the authors concluded that “despite all possible fragmentation in the long tail, the use of mainstream news media is largely independent from people’s attitudes and hardly polarized” (Trilling & Schoenbach, 2013: 948; see also, e.g., Tammi, 2016; Webster & Ksiazek, 2012).

In addition, trust in news media still seems to be quite high: 38 per cent said in the January poll of *Reuters Institute Digital News Report* that they trust most news most of the time, and 46 per cent trust the news they use themselves. And in April 2020, trust in the media’s coverage of Covid-19 was also relatively high in all countries, and about 60 per cent agreed, that “media has helped me understand the crisis” (Newman et al., 2020).

The *Reuters Institute Digital News Report* (Newman et al., 2020) analysed people’s preferences for news sources that share or challenge their views or are neutral in nine countries (Germany, Japan, the United Kingdom, Denmark, Spain, Italy, the US, France, and Brazil). The majority in each country preferred news with no particular point of view or “objective news”, with only small differences between the age groups. In Germany, the preference for neutral news was the highest (80%) and in Brazil the lowest (51%). In the US, although politics and media have become increasingly partisan over the years, 60 per cent of Americans still prefer news reported without a particular point of view, although 30 per cent prefer news sharing their point of view, which is an increase of 6 per cent compared with 2013. Moreover, younger people are more interested in news challenging their point of view than older people, disproving the assumption that younger people tend to live in filter bubbles. However, there is some evidence for polarisation: People with extreme political views are significantly less attracted to objective news, which are the same people who distrust legacy media. Although the polarised news coverage in European media seems to have increased, an up-to-date literature review of the effects of news use on polarisation across Europe concludes the following:

Across Europe there is as yet little evidence to support the idea that increased exposure to news featuring like-minded or opposing views leads to the widespread polarisation of attitudes. However, given that only a handful of

studies have addressed this issue directly, there are large gaps in our knowledge concerning the situation in different European countries. (Fletcher & Jenkins, 2019: 1)

Scholars have noted that the increasing media offer “increases the importance of individual-level motivations [which could] result in increasing inequalities in news media use” (Bergström et al., 2019: 176). Research also indicates that the “interplay between technological affordances and cultural, political, and social factors in part reinforce existing participatory inequalities” (Kalogeropoulos et al., 2017: 8; see also Trappel, 2019). Kalogeropoulos and colleagues (2017: 8) also find that the participatory possibilities of digital media give the already engaged “more opportunities to engage”. At the same time, “digital media also helps counter long-standing inequalities as younger people are more engaged here than elsewhere” (Kalogeropoulos et al., 2017: 8).

In their cross-national comparative analysis, Kalogeropoulos and colleagues (2017: 9) explain the following:

Our results do indicate that sharing and commenting on news online may be characterized by two different self-reinforcing spirals, one positive (in the sense of leading to more participation) and the other negative. The positive spiral consists of the interplay between ideological strength (people who are more partisan participate more), interest (those who are more interested in news comment and share more), and social media use (those who use social media more, both for news and generally across sites, participate more). Digital media make it easier for the already motivated to engage more, and they do just that. The negative spiral that one can infer from this is between political moderates (who participate less), the less interested (who share and comment less), and those who are less active online. Thus, the less motivated have equal access to the potential for participation, but in practice use it less.

Since use of news media is a necessary precondition and requirement for well-functioning democratic societies, the widening gap raises several subsequent questions. From the uses and gratifications perspective: What are the underlying needs and motives like information and entertainment or social utility for the selection and use of news media? And from media effects theory: How will differential news media use result in varying levels of political knowledge and political participation as forms of civic engagement?

In general, news consumption tends to have positive effects on political knowledge and participation or civic engagement (Aalberg & Curran, 2011; Bergström et al., 2019; Kobbernagel & Schröder, 2016; Shehata & Strömbäck, 2021). But empirical studies add nuance: There are differences between media used, insofar as newspapers enhance knowledge levels, whereas most studies show no correlation between use of television news and knowledge (Jenssen,

2012; Yang & Grabe, 2011). In addition, Tichenor and colleagues (1970: 159–160) formulated their so-called knowledge gap hypothesis:

As the infusion of mass media information into a social system increases, segments of the population with higher socioeconomic status tend to acquire this information at a faster rate than the lower status segments, so that the gap in knowledge between these segments tends to increase rather than decrease.

They identified five underlying factors driving this development: communication skills, prior knowledge, relevant social contacts, selective use and learning of information, and structure of the media system. Later, the knowledge gap hypothesis was applied to the new medium of the Internet in the form of the so-called digital divide hypothesis, stating that better educated people adopted the new medium at a faster rate and used the Internet for more information-oriented purposes (Bonfadelli, 2002).

### Empirical evidence of news media consumption

In the 2021 MDM research project, the indicator addressing the patterns of news media use and consumption of news (F2) investigated patterns of news media use in each of the 18 participating countries, with a particular focus on whether news media in general reached the entire population. The country teams analysed the reach of different news media outlets such as newspapers, radio, television, and generic online media, paying specific attention to differences in news consumption between younger and older generations. The calculations were based on existing data sources as international comparisons and national statistics and were scored on a 0–3-point scale.

All countries participating in the 2021 MDM scored 2 or 3 points on this indicator (mean score = 2.44). The common observation of news media use was that it reached most people in the given country or the entire population. No case was reported where news media only reached minor segments of the population (1 point) or were of minor importance compared with other forms of media content (0 points). The following countries scored 2 points (Trappel & Tomaz, 2021b), meaning that “a considerable majority of the population is reached by news media; some gaps between young and old” (Trappel & Tomaz, 2021a: 20):

- Australia
- Austria
- Chile
- Finland
- Greece
- Portugal
- South Korea
- Sweden
- Switzerland
- United Kingdom

Scoring 3 points (Trappel & Tomaz, 2021b), meaning that the “entire population, young and old, watches, reads, listens to, or uses news regularly” (Trappel & Tomaz, 2021a: 20), were the following countries:

- Belgium (Flanders)
- Canada
- Denmark
- Germany
- Hong Kong
- Iceland
- Italy
- Netherlands

Despite the fact that media supply has increased in every country and that competition for audiences has become even tougher, news media are in most cases still very important in peoples’ media diets. Countries like Canada, Italy, and the Netherlands report that about 80 per cent of the entire population follow news media every day and that television remains an important source of information for most people. For example, on average, eight out of ten Dutch people follow the news on a daily basis: 69 per cent of 18–34-year-olds use news on a daily basis, whereas this is the case for 80 per cent of 35–54-year-olds and as high as 91 per cent of the 55+ age group (Vandenberghe & d’Haenens, 2021). In Germany, news consumers are supplied with information from several sources (Horz-Ishak & Thomass, 2021), and Iceland reports a high general consumption of news among people, irrespective of age, gender, and education (Jóhannsdóttir et al., 2021). Denmark reports a widening gap between age groups, but notes that most people still use different news platforms every day (Blach-Ørsten et al., 2021). In Italy, twice as many young people are uninformed compared with the general population (Padovani et al., 2021).

There are no large differences between countries when comparing the data for indicator F2 on patterns of news media use, but in some cases, there are observations of a slight decrease in news media use, at least among younger generations. Austria, Finland, Sweden, and the United Kingdom are countries with a relatively high general level of news media reach. Simultaneously, there is a trend everywhere that a younger generation migrates to digital platforms of different kinds, in particular to social media. Printed newspapers generally face major problems with declining revenues and market penetration, and they hardly function as classical mass media anymore in any country participating in the MDM research project.

In the United Kingdom, the above-mentioned age divide is pronounced within traditional platforms such as television evening news bulletins. Demographic breakdowns of audience profiles for the respective timeslots show that younger viewers only account for a tiny percentage of the audience (3% of BBC One audience between 17:30 and 20:00; 3% of ITV audience; and 6% and 3% of Channel 4 and Channel 5 audiences, respectively). Radio news continues to reach significant audiences, with 72 per cent of British adults using BBC radio

and 59 per cent using commercial radio for news; younger audiences obtained news from BBC Radio 1 (53% of adults 16–24) and commercial stations Heart (28%) and Capital (38%) (Moore & Ramsay, 2021).

In Sweden, an increasing generational difference in media use is noted as young people aged 16–29 have social media as their main news source – 69 per cent in this age group regularly consume news on social media platforms, compared with 16 per cent of media users among senior citizens (Nord & von Krogh, 2021).

In Austria, there is a widening gap between those following news on quality channels, such as newspapers, television newscasts, and websites thereof, and those who watch news online, preferring short news or even headlines, or soft news provided by free-sheets, on- and offline (Grünangerl et al., 2021). South Korea reports polarised patterns in news media use habits across different age groups. Most of the news audience in their twenties, namely 77.7 per cent, obtain news predominantly from the Internet, but 89.5 per cent of those older than 60 years get news from television. In this age group, only 4.6 per cent use the Internet to access news. Use of television for news in South Korea is significantly lower in the younger groups, with only 10.1 per cent of those in their twenties and 25.4 per cent in their thirties watching television news (Kim & Lee, 2021).

Half of the countries participating in the 2021 MDM project also took part in the 2011 MDM project (see Table 6.1; see also Trappel et al. 2011; Trappel & Tomaz, 2021c). The comparison across time of the two editions show small differences in perceived news media reach, but four out of nine countries report that news media do not reach the entire population as well as they did ten years ago.

**Table 6.1** *Patterns of news media reach, 2011 and 2021*

Country	2011	2021
Australia	3	2
Austria	2	2
Finland	2	2
Germany	2	3
Netherlands	3	3
Portugal	2	2
Sweden	3	2
Switzerland	3	2
United Kingdom	3	2
Mean score	2.6	2.2

Source: Trappel et al. 2011; Trappel & Tomaz, 2021b

Australia, Sweden, Switzerland, and the United Kingdom are countries where news media were perceived to reach the entire population in 2011. Ten years

later, a considerable majority of people are still reached by news media, but some gaps do exist, particularly between younger and older people. Germany reports an opposite development, but the overall impression is that news media’s reach is gradually decreasing.

The 2021 MDM findings on news media use patterns are to a large extent confirmed by other data sources. For example, news media use is regularly analysed in the Eurobarometer survey (EU, 2019), where the respondents are asked where they get most news about national political matters.

The Eurobarometer from 2019 clearly indicates that television is still the single most important news source for national political matters in European Union countries (see Table 6.2). Three out of four respondents in the survey consume television news in order to get information about current affairs in their country. Traditional media such as radio and printed press are followed by slightly more than one-third of the respondents. 22 per cent say that online social media networks are used as news sources for national political matters.

The results also confirm large differences in the use of news sources between generations. Age correlates with television consumption, as television becomes more important as a news source the older people become. The same pattern can be observed for radio and printed press. On the other hand, younger generations are more frequent users of digital platforms such as websites and social media networks when they want to be informed about national political matters.

**Table 6.2** Main news sources of information about national political matters (by category)

	TV	Internet	Web-sites	Radio	Printed press	Social net-works online	Other	None
Men	74	52	45	42	38	22	5	5
Women	77	46	37	38	33	21	8	7
15–24 years	54	76	61	19	19	47	4	11
25–39 years	65	69	58	33	26	34	5	7
40–54 years	78	55	46	45	35	20	5	5
55+ years	88	24	21	46	46	7	9	4
Low-level education	85	19	15	38	34	8	15	8
Mid-level education	80	46	36	41	33	21	6	6
High-level education	73	60	53	44	43	22	4	3
Still studying	52	77	65	21	22	45	4	10
EU28	76	49	41	40	35	21	6	6

Comments: Question asked (multiple answers possible): “Where do you get most of your news on national political matters? Firstly? And then?”

Source: EU, 2019

Similar patterns as above are noted when people with different educational backgrounds are compared. Respondents with a higher level of education more often use Internet websites and social media networks as news sources, while people with lower education more often follow television news, other sources, or do not follow any news about national political matters at all. The Eurobarometer 92 survey does not confirm any significant gender gap in news consumption patterns. Men and women seem to follow both legacy media and digital media in rather similar patterns.

Finally, the data in the Eurobarometer survey provide little support for the idea of a growing number of news avoiders in European Union countries. In general, only 6 per cent of the respondents say they do not follow any news about national political matters at all. The share of news avoiders among younger people and people with a low level of education is slightly higher than in other groups, but the overall picture confirms that an overwhelming majority of people in European Union countries consume news – offline, online, or both.

Based on the observations from the 2021 MDM research project and the Eurobarometer survey from 2019, it may be possible to draw some general conclusions about recent developments. First, news media still seem to fulfil their democratic function by informing most people about what is going on in society. Despite the digital transformation during recent decades, news media hold their position as a main source of information in all countries analysed, partly because news media have successfully managed to expand their activities to new platforms. Even though increasing time spent on online services and social media platforms may have changed media use patterns, basic media habits seem to remain largely the same.

Second, it is important to note that at the same time, signs of increased gaps in news consumption are observed in many countries. Younger generations are migrating to digital media, and older generations are the heaviest consumers of legacy media.

These gaps have not yet dramatically influenced overall news media use patterns, but the trend may become a possible threat to the democratic function of the media in the future, if accelerating. If news media only reach specific groups within the population, and some other groups almost never consume news, knowledge gaps and filter bubbles are likely to occur and bring negative implications for democracy.

However, increasing gaps in news consumption patterns is not necessarily a democratic problem. All kinds of media offer different mixtures of informative and non-informative content, as well as varying options for participation and deliberation. Legacy media have no monopoly on democratic functions, and newer media outlets may contribute to democracy by engaging citizens who were previously less interested in politics. But if already well-informed and less well-informed groups in society continue to deviate in terms of news media use,

there is definitely a risk that increasing knowledge gaps and selective exposure trends will result in less sustainable and more vulnerable democracies.

## Summary and conclusions

Legacy news media like television, newspapers, radio, and magazines have long filled important functions in the everyday life of most people, and for society as well – and they continue to do so. Since 2000, the Internet has become more important as a source of news, especially with social media becoming an increasingly popular source of news. In addition to their role as advertising channels, mass media perform a variety of functions for their audiences, who use them not only for information, but additionally for entertainment or interpersonal communication.

So, it is not surprising that the reach of news media has been and continues to be an important topic within communication research. This is particularly true with regard to patterns of information diffusion and formation of opinions by news media in pluralistic democratic societies. In addition to posing questions about general news media usage (Who uses the news media how often and how intensively? Who is acquiring how much and what kind of knowledge from which news media channel? How is this information influencing opinions and political engagement?), many studies have analysed the diffusion of media stories such as the Kennedy assassination or, today, the reception and knowledge acquisition of media stories about Covid-19. In addition, scholars have studied how the various media complement each other or how the Internet and social media compete with legacy media. The possible dysfunctional effects of social media in the form of filter bubbles, echo chambers, and mistrust in news media are still discussed (Dubois & Blank, 2018; Flaxman et al., 2016). Such questions on the micro level of individual media users are often complemented by comparing the media offerings, uses, and functions on the micro and macro levels in different societies, like the liberal market-oriented media systems in the US compared with democratic corporatist media systems in the Nordics or Germany, Switzerland, and Austria (Hallin & Mancini, 2004). As a consequence, there are still many questions to be answered.

In the empirical part of this chapter, we analysed the extent to which news media in different countries manage to reach the public, comparing the country data available in the 2021 MDM country reports (Trappel & Tomaz, 2021c, 2021d). The analysis is also complemented with data from other sources, such as the Standard Eurobarometer 92 from 2019. The data do show various gaps in news media use related to sociodemographic factors like age, gender, and income. These differences exist in all of the analysed countries, and the differences between countries are not big. Most disturbing is an intergenerational

gap insofar as young people are using more and more social media as their main news source. As a consequence, the age gap between the generations is increasing, not least since the most-used media for news by older people are still television, radio, and printed press.

The existing gaps in use of old and new media raise the question, especially for younger media users, of how to achieve more exposure diversity in today's high-choice media environment; to enhance young people's communication skills (e.g., through media education at school); to achieve a more critical handling of especially social media as consistently misleading news sources; and to appreciate news from quality sources as the basis for civic engagement. Here, particularly, public service media should promote and stimulate more proactively diverse exposure. And it is the task of media policy to promote and support pluralism and diversity of media content (Helberger, 2015), and "to create conditions under which users can actually find and choose between diverse content" (Helberger et al., 2018: 199; see also Napoli, 2015).

To conclude, more comparative research across both time and space is needed, since most existing studies are still single-country studies (Van Aelst et al., 2017). And future research should differentiate between media pluralism and diversity in different media systems, together with the plurality of media types like public service versus commercial media, and different media genres like online journalism versus user-generated content (Gálik & Vogl, 2015).

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## Chapter 7

# Soaring media ownership concentration

## *Comparing the effects of digitalisation on media pluralism and diversity*

Josef Trappel & Werner A. Meier

### Abstract

This chapter addresses the evolution of media and communication concentration, its causes, and its consequences. The political relevance of this perennial problem has amplified over the past decade, but it is still largely ignored by politics. The scholarly social science discourse has determined time and again how media ownership concentration controls editorial boards and newsrooms, curtails content diversity, marginalises less popular and consequently expensive content, and commodifies cultural industries altogether. Despite this, the concentration of media ownership remains one of the least-regulated media policy issues of the last three decades. Metrics undeniably demonstrate continuous growth of ownership concentration at the global, national, and local level. Digitalisation has not counterbalanced power relations in society at large; rather, digital communication platforms reflect and replicate dominant media structures. Lately, however, policy initiatives have emerged to address the negative effects of ownership concentration in the media sector.

**Keywords:** media ownership concentration, oligopolistic media structures, media pluralism, commercial imperative, public interest

### Introduction

In 2022, the European Commission *could* celebrate the thirtieth anniversary of its “Green Paper on Pluralism and Media Concentration in the Internal Market” (European Commission, 1992). It is common knowledge that Internal Market regulations take time in Brussels, and controversial issues take even more time, but 30+ years is unusual, if not spectacular. But there is not really a *reason* to celebrate. Media ownership concentration remains a largely unregulated, although pressing, issue. In the literature, scholars seem to be losing hope that European policy will ever be able to harmonise adequate ownership rules and go beyond only discussing the problem (Iosifidis, 2007; Papathanassopoulos, 2018).

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Trappel, J., & Meier, W. A. (2022). Soaring media ownership concentration: Comparing the effects of digitalisation on media pluralism and diversity. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 147–164). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-7>

The latest wake-up call originates from the US. Over the last two decades, ownership concentration in the field of media and communication accelerated at an unprecedented speed, as digital platform companies conquered global communication networks, first and foremost the Internet. The “big five” – labelled GAFAM (Google, Apple, Facebook, Amazon, and Microsoft) – all originate from the US. This ownership concentration in the digital sphere did not replace the old structures of “big media” (a term borrowed from McChesney, 1999), but rather constitutes a parallel power structure.

Scholars have frequently, and meticulously, addressed the troubled relationship between media ownership concentration and democracy (Baker, 2007; McChesney, 2008; Meier & Trappel, 1998, to name just a few). Subsequently, the Media for Democracy Monitor (MDM) research project (Trappel et al., 2011; Trappel & Tomaz, 2021b, 2021c) dedicates two analytic indicators to media concentration (at the national and the regional or local level), thus granting prominence to this problem.

MDM Indicators and related research questions addressed in this chapter:

**(E1) Media ownership concentration national level**

What is the degree of ownership concentration at the national level?  
(Trappel & Tomaz, 2021a: 32)

**(E2) Media ownership concentration regional (local) level**

What is the degree of ownership concentration at the regional (local) level?  
(Trappel & Tomaz, 2021a: 33)

In this chapter, we discuss the continuities and discontinuities of media ownership concentration against the background of dominant digital platforms and in the light of the contemporary scientific debate, the findings of the 2021 MDM, as well as other relevant sources. We are interested in the evolution of ownership concentration in the decade of communication digitalisation (2010–2020), its causes, and its consequences. In the second part of the chapter, we turn to possible reactive media and communication policy measures and regulatory options available to policy-makers.

## Media concentration in 2021: Little has changed in ten years

The MDM press release of 15 April 2021 on the status and impact of current legacy media ownership concentration reports troubling conclusions regarding the future of democracy in the 18 participating countries:

The high level of media concentration, both at the national and the regional and local level, is critically challenging news diversity. At the national level, not a single country reports concentration levels below 0.40 (concentration ratio), and in about one-third of the countries, competition appears weak, with very few media conglomerates controlling the news media markets. Despite earlier hopes and the vested optimism by some media companies, digitalisation has not delivered much to balancing media ownership concentration at the regional and local level. (EMRG, 2021)

This conclusion does not come as a surprise, as media concentration findings were similar in the 2011 MDM. At that time, commercial logic and pressures were identified as main problems for contemporary news media and a threat to the news media's democratic functions (Trappel et al., 2011). In many countries, globalisation of the media business together with deregulated media policies exacerbated this development. New commercially oriented providers were successfully challenging national legacy media companies. The constant battle for reach and advertising revenues stimulated cheap journalism at the expense of quality journalism. As a result, fact-based news journalism was superseded by attention-oriented journalism.

In addition, in 2011, there were signs that the balance of power within media organisations was shifting, with business and market divisions gaining influence on strategic decision-making processes. Media mergers and various modes of cooperation between media companies reduced news diversity, and media power accumulated in the hands of a few business groups, especially at the regional and local level. Structural changes in media markets were driven by economic imperatives, and media policy-makers were either indifferent or unsuccessful in their attempts to reduce undesired consequences for democracy. In short, the 2011 MDM results can be summarised as follows:

- strong commercial pressure on legacy media from within and from outside
- high levels of media ownership concentration as a structural feature in national media landscape
- media policy willingly and unwillingly endorsed high ownership concentration levels of national legacy media

Ten years later, in 2021, 18 countries participated in the MDM project, nine of which were also part of the 2011 sample, allowing for longitudinal comparison (Trappel & Tomaz, 2021b). The other half of the sample participated for the first time in 2021 (Trappel & Tomaz, 2021c), and hence no comparison over time is possible.

Before we discuss the MDM findings in detail, we account for the scholarly debate on media ownership concentration in contemporary social sciences.

## Media ownership concentration in contemporary social sciences

Parallel to the above-mentioned policy proceedings at the European Union level, the issue of media ownership concentration turns out to be a lasting theme in social science literature as well. Nonetheless, one would expect variations in the scientific debate, caused by media digitalisation on the one hand, and recurrent crises affecting the media (from the financial crises in 2008, and again in 2018, to the 2020–2021 Covid-19 pandemic), on the other.

Concentrated ownership characterises the media industries in many countries (Doyle, 2015), and the history of ownership concentration is long and contentious. According to Noam (2016), concentrated media ownership is one of those fundamental issues of power and wealth distribution that every generation must resolve with its own means. Van den Bulck and colleagues (2016: 100) conclude the following:

In recent decades, the media sector [...] has witnessed recurring waves of cross-media concentration, and the consolidation of corporate power. [...] Media mergers and acquisitions always ignite critical discussions by opinion makers and academics, creating challenges for media-policy makers, regulators and competition authorities.

Private owners are primarily economic actors, pursuing economic profit, which in turn governs day-to-day editorial work and marginalises less popular and consequently expensive content (Korbiel & Sarikakis, 2017). Underproduction of content relevant to democracy can lead to market failure (Sjøvaag & Ohlsson, 2019). According to Doyle (2015), economies of scale is a prevalent characteristic of media industries, as are economies of scope. Furthermore, “enlarged, diversified and vertically integrated groups appear well suited to exploit technological [innovation]” in media and communications (Doyle, 2015: 299). Thus, a multiplatform distribution strategy that uses various formats and platforms to share content allows further economies of scale and scope to be reaped (Doyle, 2015).

According to Doyle, highly concentrated firms that can take advantage of wider product and geographic markets to spread out production costs stand to benefit from natural economies of scale. Combined with high fixed costs and low marginal costs, these economic characteristics naturally gravitate in the direction of oligopoly and monopoly in the media industry (Doyle, 2015). Market forces are unlikely to cope with this harmful dynamic.

Media ownership concentration “has been both a market reality and a public concern” (Iosifidis, 2014: 461). Therefore, as digitalisation enables a global media market, questions about the consequences of media concentration for pluralism and diversity are being raised (Iosifidis, 2014). There are few industries

whose ownership and control are more important than those of media, given their central role in social, cultural, economic, and political life (Noam, 2016).

In the literature (among others, Meier, 2007), media ownership concentration threatens national democracy for the following reasons:

- Media concentration is likely to diminish voices and to eliminate journalistic and opinion diversity.
- Fewer corporate and public media limit competition in the field of investigative journalism.
- Corporate control commands editors to follow the media owner's agenda, rather than the public interest.
- Strong (conglomerate) media companies become powerful political actors beyond democratic control.
- If economically or politically beneficial, concentrated media might decide to provide one-sided political support, thereby influencing or even distorting election results.
- "Concentrated media ownership creates the possibility of an individual decision maker exercising enormous, unequal and hence undemocratic, largely unchecked, potentially irresponsible power" (Baker, 2007:16).
- Strong media ownership power increases the risk of corrupting politics for mutual benefit.
- Strong (conglomerate) media companies manage to influence or even determine their own regulatory framework by influencing political decision-making through editorial bias in their own corporate interest.
- Editorial and economic power of strong (conglomerate) media might convert into political power (e.g., Silvio Berlusconi in Italy, Andrej Babiš in Czechia).
- In case of conglomerate ownership, topics and issues affecting the strategic interests of the owners are excluded from journalistic observation and scrutiny.

There are a few arguments in favour of media concentration as well:

- Strong (conglomerate) media can raise and make available sufficient funds for effective investigative journalism about political powerholders.
- Strong (conglomerate) media can withstand economic and political pressure and shield their newsrooms from undue interventions from outside.

Given this list of potentially harmful effects, media ownership concentration is considered to be antidemocratic: "It restricts [political and] cultural diversity [and] it undermines the ability of citizens to acquire and exchange the information and ideas necessary to take informed decisions about public life" (Freedman, 2014: 170). Moreover, "it further commodifies the cultural industries

themselves, transforming them from vehicles of symbolic interaction to engines of capital accumulation that foster the exploitation of creative labour” (Freedman, 2014: 170). Media pluralism is, in contrast, one of the pillars of a healthy media environment and contributes to a well-functioning democratic system.

The new millennium has modified the rules of the “media monopoly” game considerably. On the one hand, the digitalisation of the entire media and communication environment – from news production along the value chain to distribution and consumption of news – has not only transformed the incumbent media industry, but also enabled digital platforms to emerge on a global scale. On the other hand, severe and frequent crises have disrupted the news industry (Trappel et al., 2015). From bursting dot-com bubbles in 2001, to the financial market crises in 2008 and 2018, to the Covid-19 pandemic in 2020–2021. Sjøvaag and Ohlsson (2019) point out that most of the critical media concentration research occurred during the profitable years of media business; thus, a revision under these new and precarious conditions of the media and communication industry is required.

### Digital platform concentration and democracy

Initially, the Internet provided high hopes for media pluralism, with the potential to create new players in the media and communication markets that would challenge powerful legacy media and create media freedom and diversity of opinion around the world, despite efforts by governments and global tech platforms to control the Internet. However, the Internet has proven to be part of the problem – a force for concentration – rather than part of the solution (Noam, 2014, 2016). Never has there been so much wealth created through the ownership of media. This wealth leads to various manoeuvres to perpetuate control, with such firms seeking market power through concentration or regulatory protection (Noam 2016).

There are similarities and differences between legacy mass media and digital communication platforms. Like legacy media institutions, digital platforms enable public communication, give voice to citizens, allow for the establishment of many public spheres, and provide means for citizens to network on a large variety of causes, but digital platforms usually do not produce news content themselves. Rather, they exercise their extremely large influence to disseminate all kinds of content (including, at times, mis- and disinformation). Under the shield of freedom of speech, digital platforms developed their dominant business model without much regulatory intervention: “The proliferation of dis/misinformation is symptomatic of an unregulated media monopoly governed solely by profit imperatives” (Pickard, 2020: 126). While it took establishment media decades to build up national oligopolies, digital platforms have operated

as global oligopolies almost since their inception. They constitute global oligopolistic and anti-competitive monoliths, unprecedented in economic history.

With regard to the role that global digital communication platforms play for democratic societies, digital platforms may do the following:

- give and amplify voice indiscriminately to all kinds of groups, among them undemocratic groups;
- enable and amplify undesired and illegal content such as misogynistic and racist hate speech;
- decide to take down content, thereby accepting the risk of over-blocking legitimate content;
- determine communication flows by non-transparent (confidential) algorithmic selection;
- define communication rules on their platforms centrally and without democratic control;
- follow the platform owner's agenda, not the public interest (see Kergueno, 2021);
- and transcend nationstates and operate globally, thereby exploiting and profiting from weaknesses of democratic control and jurisdiction.

Furthermore, continuities from the mass media era to digital platforms become visible with regard to the possibility of exercising enormous media and platform power, the risk of corrupting politics, influencing political decision-making through algorithmic selection, and algorithmic selection manipulating communication content in the owner's strategic interests.

There are arguments in democratic favour of conglomerate digital platforms, as they may give voice to people regardless of their status and power, and enable indiscriminate social networking among citizens regardless of time and space. Thus, digital communication platforms largely reflect and replicate legacy media power structures. In this respect, they are not fundamentally different, but they represent additional and modified challenges to democracy compared with prevailing threats by legacy news media.

## Trends in global media ownership concentration

To quantify the degree of ownership concentration, two measurements are commonly used. First, the concentration ratio (CR) sums up the market share of companies; thus, CR4 indicates the concentration ratio of the four largest companies in the industry, with 0–40 per cent representing low concentration, 40–70 per cent representing medium concentration, and anything above 70 per cent representing high concentration. This method does not show the dif-

ferences in market structure due to variations in company size that affect the level of competition. Second, the Herfindahl-Hirschman Index (HHI) provides a more complete picture of concentration because it looks at the entire market by summing the squares of the market shares of all players (Naldi & Flamini, 2014). The concentration level based on the HHI is divided into three groups: An index value of 0–1,500 represents an unconcentrated market; a value between 1,500–2,500 represents a moderately concentrated market; and a value above 2,500 is considered evidence of a highly concentrated market. Thus, the higher the value of the HHI, the higher the owner concentration. Of course, even this limited informative value is dependent upon comprehensive and precise industry data. Methodological problems associated with the indices used in this chapter are discussed in detail elsewhere (e.g., Pavic et al., 2016).

Based on country case studies and world statistics, Eli Noam (2016) analysed media ownership concentration around the world. Expressed in terms of the HHI, he found that the weighted world average for the overall media sector has increased from 3,125 in 2004–2005 to a very high 3,253 in 2012. For content media, the world average weighted HHI is lower at 2,219 (1,999 without Internet search engines and online news). The search engine industry is the most concentrated among the media industries.

When it comes to news media, Noam found that concentration is very high in most countries, with a world average of 5,194 when measured by attention time. Even without China, the HHI concentration scores at 3,089. On average, the national pooled CR4 for the world is almost 60 per cent; thus, on average, four companies control over half of national media industries combined, a strikingly high percentage largely based on the large size of platform media and their high concentration. According to Noam (2014, 2016), such high figures characterise oligopolistic markets.

## Trends in national media ownership concentration

All nine countries participating in both the 2011 and 2021 MDM projects had high ownership concentration rates in the traditional sectors of newspapers, radio, and television in 2011 and 2021. In addition, all of the experts involved reported growing ownership concentrations in the emerging online sector. There is no mention of a decline in any of the countries studied.

All 18 participating countries of the 2021 MDM project are in a similar situation, with thirteen countries scoring 2 points and five countries only 1 point for indicator E1, regarding ownership concentration at the national level (Trappel & Tomaz, 2021c). In this respect, there are no differences between larger countries (with more than 20 million inhabitants) and smaller ones (less than 20 million inhabitants).

Against the backdrop of the previous scholarly debate on the ownership concentration of leading news media, a comparison of the 2011 and 2021 data reveals a number of peculiarities, which are nonetheless discussed in the relevant literature (see Trappel et al., 2011: 354–355; Trappel & Tomaz 2021c: 452–453). In all nine countries, oligopolies still prevail in various legacy media, regardless of the quantitative assessment made in the country reports. According to the Dutch experts, the situation has clearly worsened: “Ownership concentration on a national level is remarkably high, with only five large media companies sharing the market among them” (Vandenberghé & d’Haenens, 2021: 277).

In order to provide additional information to the assessments of the MDM scholars, we compare the MDM findings with the study on the implementation of the revised Audiovisual Media Services Directive (AVMSD) by the European Commission, carried out by Deloitte and SMIT (2021) on a set of 29 countries. For our comparison, we chose a list of eleven countries covered by both the MDM and the AVMSD studies (see Table 7.1). The comparison is limited to television markets, as this has been the sole object of the AVMSD study.

**Table 7.1** CR4 and HHI in the selected eleven countries

Country	CR4 2014 (%)	CR4 2018 (%)	HHI 2014	HHI 2018	Number of regulations
Austria	78	74	2,183	2,009	5
Belgium	83	80	2,776	2,561	2
Denmark	89	94	2,631	3,061	0
Finland	88	86	3,066	2,049	1
Germany	87	86	2,035	1,978	7
Greece	62	57	1,405	1,390	8
Italy	81	78	2,717	2,375	5
Netherlands	76	72	2,163	2,004	1
Portugal	74	66	1,751	1,528	4
Sweden	92	94	2,461	2,659	0
UK	79	78	2,226	2,104	5

Source: Deloitte and SMIT, 2021

The AVMSD study investigated whether there is a correlation between the degree of regulation and the degree of concentration. The researchers divided the member states into four groups, based on the number of media ownership rules identified: 0 rules corresponds to a completely deregulated market; between 1 and 3 rules represents a low level of regulation; between 4 and 6 rules is considered a medium level of regulation; and between 7 and 11 rules is considered a high level of regulation.

In a next step, the audience market shares for 2014 and 2018 have been matched with the degree of concentration of the television market for each country, calculated as the concentration ratio for the four largest television groups (CR4 and HHI).

Based on these indices, it can be seen that, with the exception of Denmark and Sweden, all countries show slightly declining concentration values for the national television market. Measured by CR4, all countries covered – except Greece – have highly concentrated markets. According to the HHI in 2018, only the television markets in Belgium, Denmark, and Sweden are highly concentrated, and only the television market in Greece is low. In contrast – but including the print media market – the Greek MDM authors state that “the level of ownership concentration is dangerously high. The main reason for this is the vulnerable media legislation, whose limitation on horizontal concentration in broadcast media and newspapers permits a specific *modus operandi* of the market” (Papathanassopoulos et al., 2021: 199).

The AVMSD report focused empirically on the density of regulation and found that, from the selected eleven countries, Denmark and Sweden have no regulation with regard to mergers and acquisitions in place, while Belgium, Finland, and the Netherlands have light regulation of the television market. Austria, Italia, Portugal, and the United Kingdom have a medium level of regulation. In the selected eleven countries, only Germany and Greece appear to be highly regulated, with seven and eight different regulations, respectively. Of course, neither the existence nor the effectiveness of regulations is decisive for the extent of the measured concentration. However, based on their full country selection, the authors of the AVMSD study conclude they “can confirm that from a quantitative point of view, there is a strong correlation between the two variables, so that the higher the number of media ownership rules, the lower the market concentration level based on the HHI index score is” (Deloitte and SMIT, 2021: 181). Thus, using the example of the Netherlands, it can be shown that deregulation – in 2011 all media and cross-media ownership restrictions were abolished – has not reduced concentration, but rather promoted it (Papathanassopoulos et al., 2019).

Regulation or non-regulation of excessive ownership concentration is only one of many factors that may influence the market result; country size, location, languages, GDP per capita, extent of public and government subsidies for various media genres, and the business potential of the leading news media may or may not play a role. After all, it is not enough to consider the number, but also the diversity of participants in the markets. In addition, the diversity of reporting in the broadest sense is of central importance for democratic political decision-making processes. The MDM research project seems to confirm that democratic political quality cannot be maintained solely by imposing competition policy, but it must be approached more holistically, taking into account recent developments in platform media.

The television markets of the Nordic countries are among the most concentrated in Europe, as the figures based on the HHI index and CR4 showed in Table 7.1. On the one hand, the Nordic countries have a liberal economic orientation and show deregulated markets, while at the same time, they try to stabilise public broadcasting – which has long been institutionalised – and to anchor it in society. For example, public broadcasters are the largest players with the highest audience market shares: Swedish SVT has a 35 per cent market share; Finnish Yle has 44 per cent; and Danish TV2 and DR have a combined 76 per cent (Deloitte and SMIT, 2021).

The situation is somewhat different in the smaller countries and markets in continental Europe. In the Netherlands, for example, public and commercial broadcasting coexist, as the state and the media authority play an active policy role. The CR4 is high, with an audience market share of 72 per cent and a median HHI of 2,004. Here, too, the public broadcaster NPO has the highest national audience market share (32%), followed by the German Bertelsmann Group (RTL station) (21%), and media groups from the US (12%). In contrast to the Nordics, foreign television groups have a strong presence in terms of audience reach.

In 2007, the existing Dutch rules were relaxed and the maximum concentration was set at very high levels, primarily to allow domestic media companies to grow and operate in foreign markets. As of 2011, rules were completely abolished and regulation was left to the leading corporations themselves. Instead, the competent authority started its annual monitoring (see van Dreunen, 2016). However, systematic monitoring could not prevent the newspaper market from being controlled by two foreign corporations as a result of the removal of ownership limits. The radio market suffered a similar fate.

In 2017, the Dutch media company Talpa Media acquired three major television stations, while also owning four major radio stations and the nation's largest press agency, ANP. In competition with large international corporations, the domestic media industry has grown in the Netherlands, but the market is highly concentrated, and liberalisation has led to ownership concentrations across media. The extent to which this leads to a journalistic and democratic deficit in terms of diversity and pluralism is likely to be far more difficult to monitor than the few media owners.

Not only in the Netherlands, but also in other states or regions with large neighbours speaking the same language, such as Austria, Ireland, Luxembourg, Switzerland, or Wallonia, foreign media groups play a major role. These smaller countries generally only have a few domestic broadcasters and publishers, however, with high reach and audience shares for their products and programmes. The sectoral concentration figures are correspondingly high. At the same time, linguistic proximity leads to widespread overspill, and the presence of foreign stations is not only competition, but also part of a welcome quality offer. For

example, the German-speaking populations in Austria, Belgium, and Switzerland benefit from public and commercial broadcasting services from Germany, and the French-speaking populations in Belgium, Switzerland, and Italy from those in France. At the same time, the authorities in these regions are motivated to keep the local media industry alive (e.g., with public and state support measures) in order to ensure a minimum of local diversity. This balancing act is necessary, because commercial as well as public broadcasters from France and Germany are neither mandated, nor interested in, nor willing to provide journalistic services for the benefit of the democratic political decision-making processes in their neighbouring countries. In any case, the data show that foreign groups have larger shares in smaller television markets than in larger markets. This can be exemplified by the case of Austria (Grünangerl et al., 2021).

Austria has a high concentration: 74 per cent in CR4 and an HHI of 2,009 in 2018. Austria does have restrictions to prevent horizontal and cross-media concentration, but the merger of the two largest private television stations, ATV and PULS 4, nevertheless took place and increased ownership concentration. In terms of audience share, this group is the second-largest broadcaster after the dominant public broadcaster ORF (see Seethaler & Beaufort, 2020). The antitrust law regarding media diversity and media pluralism did not prohibit the merger. Thus, the four largest players in the German market are also among the five largest broadcasters in Austria, with an audience market share of 47 per cent.

Greece has a comparatively highly regulated media market with clearly defined thresholds to prevent horizontal and cross-media concentration. The Greek state owns and covertly regulates the media to a large extent. As a covert regulator, it seeks to control and limit the power and influence of the media in politics (Deloitte and SMIT, 2021). From this perspective, it is hardly surprising that the public (state) broadcaster ERT has a market share of only 9 per cent. The four leading groups are domestic private-commercial television groups, which claim an audience share of 57 per cent, a medium level of concentration. The HHI of 1,390, on the other hand, indicates a low level of concentration (see also Papathanassopoulos et al., 2021).

The large European countries of Germany, Italy, and the United Kingdom have high CR4 figures for television broadcasters. In these countries, too, governments promote their leading domestic companies so they can position themselves nationally and globally.

The United Kingdom corresponds to the liberal model, which is characterised by the dominance of largely unregulated commercial media – some with performance mandates. The British market is dominated by nationally based operators, with the three largest players accounting for 69 per cent of total audience market share, followed by US-based groups Comcast, Viacom, Discovery, Walt Disney Company, and Warner Media (AT&T), which together account for

20 per cent of the audience market share (Deloitte and SMIT, 2021). Despite all media-specific rules and bodies, the United Kingdom shows a concentration of 78 per cent among the four largest companies and an HHI of 2,104 (see also Moore & Ramsay, 2021).

In Germany, 86 per cent of the audience share is concentrated among the four largest companies, and the HHI is just under 2,000 (a medium concentration). Also in Germany, the public broadcasters achieve the highest audience market share of 48 per cent, making the German public broadcasters the second-largest in terms of audience market share after Denmark. The private-commercial company Bertelsmann, which is active in ten European Union member states, and ranks second in Germany (RTL Group) with an audience share of 21 per cent on the domestic market, is the only European company to achieve a higher audience market share abroad than at home (Horz-Ishak & Thomass, 2021).

Finally, Italy has a law to limit cross-media sector ownership. Nevertheless, according to the CR4, the Italian television market is highly concentrated (78 per cent). The public broadcaster RAI and the commercial Mediaset group form a strong duopoly with an audience reach of 66 per cent (Padovani et al., 2021).

Over and above this number-crunching of market shares, CR4, and HHI measures, structural reasons for why ownership concentration is prevalent in these countries should not be ignored or forgotten. Differences in the measurement of ownership concentration also arise due to the choice of methodology, and because of multilayered factors that come into play to a greater or lesser extent in individual countries. It is, however, clear that whatever measurement is used, media ownership concentration has undesired effects for the economy, journalism, competition, and democracy. Both media policy and communication studies are all too often content with quantitative measurement, instead of asking about the current forms, reasons, and consequences of ownership concentration. Thus, we should not stop at describing the indices, but should contextualise the quantitative results.

## Media ownership regulation

There are no European-wide ownership rules in place to counter harmful media ownership concentration: “Each member state has treated the issue separately, mostly with a deregulatory trend” (Iosifidis, 2014: 468). The reasons for dismantling or abolishing ownership regulations include concerns about the competitiveness of domestic media providers. The deregulation trend in Europe favours the mitigation or reduction of existing regulations (Arnold, 2014). This regulatory absence “has left a few large communications conglomerates unhindered to expand their activities across the Continent” (Iosifidis, 2014: 468). According to Doyle (2015), an economic “crisis” in newspaper publishing

has resulted in many publishers calling for the deregulation of cross-ownership restrictions, claiming that they impede the sector's ability to adapt to changing market conditions.

However, multiplatform expansion is no guarantee of greater diversity of content or editorial pluralism, and increasing Internet use poses complex challenges for policy-makers (Doyle, 2015). According to Doyle (2015: 304), "the rise of search and intermediation have introduced powerful new players". Because of economic characteristics, such as economies of scale, high fixed costs and low marginal costs, and customer lock-in and switching costs, network effects are widespread in search engines; thus, the "industry is highly prone to monopolization" (Doyle, 2015: 304).

The business design of search engines to use algorithms to direct already popular content to audiences is obviously a threat to diversity. And for smaller countries and minority languages, this information selection practice is potentially more harmful than for larger states: "Google's dominance across the globe creates many possibilities for abuses of gateway monopoly power and of market power" (Doyle, 2015: 304).

In addition, "the question of how to regulate ownership of media is always a site for controversy" (Doyle, 2015: 297). Despite consistent support from the European Parliament for legislative intervention to protect media pluralism, the member states' diverse approaches to protecting media pluralism, and their economic and cultural differences, will likely prevent the EU from harmonising media ownership rules in the foreseeable future (Craufurd Smith, 2013).

So far, however, the European Union's media policy can be regarded as a "lever to promote market liberalization that would nurture European champions" (Iosifidis, 2014: 463). In Europe, technological advances have allowed a proliferation of communication channels and modes of content delivery, which challenge the rationale for strict regulation. The European Commission, with the goal of competing globally, has allowed the formation of large European corporations (Iosifidis, 2014).

Observers point out that the European Commission has been neither willing nor able to achieve pan-European solutions, and there has been no interest among European decision-makers to raise the issue. A clear policy is lacking, and the European Union has been unsuccessful in implementing a harmonised framework of media ownership to guarantee the public's right to know who owns the media (Korbiel & Sarikakis, 2017).

Lately, however, there are indications that the European Union is seeking to play an enhanced monitoring role in the future (Craufurd Smith et al., 2021). While the European Commission's Action Plan, "Europe's Media in the Digital Decade" (2020a), does not mention media ownership concentration as an issue, the Action Plan "On the European Democracy", released on the same day, stipulates that "transparency of media ownership is essential for assessing the

plurality of media markets” (European Commission, 2020b: 16). Furthermore, the European Commission announced the effort to improve the public availability of media ownership information by co-financing a pilot project to establish a media ownership monitor, prone to be expanded to cover all member states (European Commission 2020b).

In addition to monitoring ownership, governments might consider enacting policy tools in order to ensure pluralism of ownership and content beyond simply curbing clear misuses, for instance, by encouraging alternative media, protecting access, and promoting interconnection. Not only governments, but also academics, public-policy analysts, NGOs, and media and platform companies must be creative when determining new approaches to these issues, balancing the public interest, technological innovation, and financial investment (Noam, 2014, 2016). According to Iosifidis (2014: 472), “the role of content regulation remains crucial in the converged media age. [...] Such rules should aim increasingly at ensuring that public interest content reaches users in the multichannel era”. In addition, “a more mixed media system with different mandates as well as different modes of ownership and financing is necessary” (Picard & Dal Zotto, 2015: 63; see also Picard & Pickard, 2017).

## Conclusions

The emergence and dominance of highly concentrated platform companies has pushed the problems stemming from ownership concentration in the legacy media sector into the background. Over the past 30 years, despite all economic and political ownership regulations and transparency demands, media policies in the European Union and in individual European countries have not succeeded in dismantling oligopolistic media structures that are harmful to democracy. On the contrary, challenged by digital platforms, national governments seek to protect and promote their legacy media without obliging them to refrain from potentially undemocratic business models and practices.

This structure-preserving media policy ties up many public resources and averts the sustainable transformation of legacy media and enlightened journalism into a platform-dominant environment (see KEA, 2021). In an attempt to replicate the practices of the “big five” global communication companies (GAFAM), successful legacy media companies appear to prefer investing in profitable digital e-ventures rather than loss-making journalism. Such a digital strategy may be successful from an entrepreneurial point of view, but democratic, diverse, and power-critical information for the public is lost along the way. Politically and economically captured that way, media companies are at risk of losing their autonomy and being used by vested interests (see Schiffrin, 2017).

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## Chapter 8

# Commercial influence in newsrooms

## *Comparing strategies to resist pressure from owners and advertisers*

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### Abstract

The news industry in most democratic countries faces increasing commercial pressure. According to critical normative theories, this brings the risk of owners and advertisers influencing coverage and undermining the independence of the editorial staff, and thus the contribution of news media to democracy. In order to reduce commercial influence in newsrooms, several measures have been developed, both through theoretical analysis and journalistic practice. This chapter discusses two of them: the separation of the newsroom from ownership, management, and the sales department; and the diversity of revenue streams to ensure independence from single advertisers or sponsors. We assess to what extent these structural factors are upheld in leading news media across the 18 countries of the 2021 Media for Democracy Monitor (MDM). Our analysis shows that internal separation is still a reality in most news media, but economic pressure makes boundaries more porous. Some media reduced their dependence on single advertisers, but most outlets have become more susceptible to commercial interests as the advertising-based business model is proving to be less efficient.

**Keywords:** news media, newsroom, commercialisation, media ownership, ad-based business model

## Introduction

The history of commercial news media is also a story of the permanent struggle to serve two different, very often considered antagonist, goals: serving the public interest and generating private profit. Whereas professional norms, public and internal regulations, and the existence of public service media do add some resistance against unchecked commercial power, the media are clearly becoming more market-oriented in most democratic societies. As such, the risk that private interests gain privilege over the public interest in the information ecosystem increases.

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This chapter contributes to the question of the extent to which news media can actually uphold the public interest. We do so by assessing two structural factors that critical normative theories deem important for circumscribing the influence of commercial interests on privately owned news media: the separation of the newsroom from ownership, management, and the sales department; and the diversity of revenue streams to ensure independence from single advertisers or sponsors. These factors refer to the most direct implications of commercialism in news media, as summarised by Sjøvaag and Ohlsson (2019: 15): “Commercialism entails shaping stories to suit advertisers and owners”. If newsrooms can operate freely both from the *internal* influence of profit-seeking managers and from the *external* influence of advertisers looking for friendly coverage, news media can cope with pressure from unleashed commercialisation and are better equipped to serve the public interest. Utilising the data and results of the 2021 Media for Democracy Monitor (MDM), we address these structural factors by comparing leading news media across 18 countries. Data come from secondary sources and interviews with stakeholders conducted both in the 2011 and 2021 MDM projects. Individual country reports were published both in 2011 (Trappel et al., 2011) and in 2021 (Trappel & Tomaz, 2021c, 2021d), and here appear for the first time in a cross-country comparative study. (For a complete explanation of the methodology, see Tomaz & Trappel, Chapter 1).

MDM Indicators and related research questions addressed in this chapter:

**(F5) Company rules against internal influence on newsroom/editorial staff**

What is the degree of independence of the newsroom from the owners, management, and advertising sales department? Are there rules regarding this separation? Are these rules implemented? (Trappel & Tomaz, 2021a: 23)

**(F6) Company rules against external influence on newsroom/editorial staff**

What is the degree of interference by external parties (in particular advertisers and sponsors)? Do news media receive revenue from a multitude of sources? (Trappel & Tomaz, 2021a: 24)

This chapter is organised in the following parts. First, we narrate past relations between news media, on the one hand, and markets and commercialisation, on the other. Second, we discuss a normative basis for critiquing the commercialisation of the media, drawing on literature about the risks this poses for democracy. We then discuss the measures adopted along the way to counter the deleterious effects of news media commercialisation, focusing on the two structural factors previously mentioned. Finally, we analyse developments of both aspects according to the data provided by the 2011 and 2021 MDM projects.

## Public interest expectations of news media and the rise of commercialism

The media have historically made commitments that “give rise to persistent expectations” about serving the public interest (Christians et al., 2009: 135). The landmark report of the US Hutchins Commission, published in 1947, argued that “the media have also a duty [...] to serve the public good” (Curran, 2011: 9). Several scholars have provided their own accounts of which responsibilities should be assigned to these companies, or their professionals in general, from the classical *Four Theories of the Press* (Siebert et al., 1956) to more dynamic models such as Denis McQuail’s media roles (see Christians et al., 2009: 114–220). These accounts all recognise that news media are endowed with some responsibility to protect and harness democratic processes, and that a functional media system is a crucial aspect of a successful liberal democracy.

At the same time, while surrounded by these expectations – very often fed by the media themselves – news media have always existed within markets. Modern press began as a relatively individual activity, dominated by partisan publishers and media moguls, but early in the nineteenth century, and more decisively in the US, the press evolved into a professionalised, capitalist business sector, owned by shareholders providing capital in exchange for profit. Expanding readership became a priority, and operational costs increased, requiring ever greater levels of commercialisation, increasingly subsidised by advertising (Murdock, 2008a; Winseck, 2016). The media turned out to be, in the literal sense, a good deal.

But a profit-oriented business favours private interests, suggesting a contradiction with the requirements of public service. The liberal idea that markets are synonymous with freedom has been the instrument used to reconcile this commercial logic with democratic responsibilities, consecrating the concept of a “free marketplace of ideas” (Pickard, 2020). According to this conception, “only the market and the laws of supply and demand should govern what is published” (Christians et al., 2009: 124). Granting media the freedom to do business would automatically mean upholding freedom of expression and democracy.

Despite such an ideological justification, commercialisation in media systems has always been met with resistance. Since the end of the nineteenth century, an early generation of European and North American critics rang the bell on how the influence of commercialism on the media and communication industries could entrench the power of economic elites, and they called for state intervention. Among them, the Frankfurt School acquired special visibility, employing the Marxist tradition to develop systematic criticism of the profit imperative and instrumental rationality in the media industry. But critique was not limited to this perspective and was also being voiced by scholars, politicians, journalists, and activists within a broad range of theoretical backgrounds (McChesney,

2003; Winseck, 2016). In fact, even after entering its highly capitalised phase, media outlets never operated in absolute market freedom. In the US, for example, governments actively subsidised the printing and distribution of newspapers in the early nineteenth century (McChesney, 2003). Antitrust and pro-competition policies were introduced in many countries, imposing limitations for companies and influencing capital accumulation in businesses for most of the twentieth century (Pickard, 2020; Winseck, 2016). Public alternatives – and sometimes even public monopolies – emerged in many media sectors to insulate news producers and distributors from commercial pressure and to harness the public, not the private, interest (Baker, 2004; Picard, 1985), despite the fact that more often than desired these public alternatives have also been instrumentalised by governments to favour a particular political interest (Hallin & Mancini, 2004).

As a result, the influence of the market in media industries assumed varied roles around the world. Following the categorisation by Curran and colleagues (2009), media systems in rich countries ended up evolving into three different models concerning the penetration of commercialism: the public service model, in which the principles of public service largely dominate both public and commercial media enterprises, exemplified by the Nordic countries; the market model, in which supply and demand rules are considered the only legitimate means of distributing communication resources, as in the US; and a dual system, combining both strong public service broadcasting organisations and deregulated media, which is the case in Britain and most countries in continental Europe.

Within these systems, further nuances emerged. Print media turned out to be mainly a private, commercial enterprise in almost every country, even in those following the public service model. Broadcasting, on the other hand, displayed a more diverse arrangement, with both commercial and public offers. Public intervention has often been justified on the basis of scarcity (of spectrum, in the case of broadcasting) and market failure, as reporting in the public interest tends to be underprovided in market relations (Baker, 2004; Hamilton, 2016). However, even commercial players self-reportedly rely on values of public service and democracy (Kovach & Rosenstiel, 2007). The dominant paradigm in news organisations does not acknowledge that the market might be structurally flawed in providing sustainable journalistic quality (Brüggemann et al., 2016).

But capitalism relies on ever expanding commodification and market relations, and the forces to liberate cultural industries, particularly the media, to more commercial exploitation have never been absent (Murdock, 2008a). From the 1980s, in the wake of the consolidation of neoliberal ideology, media systems in most liberal democracies began to face unprecedented pressure towards commercialisation (Curran et al., 2009; Hardy, 2014). Media and communication industries entered a phase of significant deregulation or, as some argue, re-regulation. Lines of business separation eroded, increasing cross-sector

competition. Public monopoly over broadcasting was gradually dismantled in Western European countries. Cable television created a new environment for competition among privately owned broadcasters for fragmented audiences. In the 1990s, the Internet began to accept commercial interconnections and, especially after the bubble burst at the turn of the century, introduced further commercial choke points in the public information environment, such as news aggregators, search engines, and social networks provided by global digital platforms. Hence the argument that most media systems in Western countries are under stronger commercial pressure than during the majority of the past century. The question is to what extent this creates a problem for democracy.

### Risks and shortcomings for democracy

According to neoliberal ideology, individual self-fulfilment is the highest desired goal, and this can be best achieved in the market. In this sense, the tendency to commercialise media is not a problem: The marketplace is a prerequisite for a well-functioning democratic society.

However, scholars have long pointed out the shortcomings of these assumptions and, consequently, of the idea that unrestricted commercialisation in the media industries facilitates democracy. First, there are theoretical shortcomings in this neoliberal ideology of the press. It assumes an idealised social ontology of equal and autonomous individuals and ignores that the competition imperative of the capitalist market is prone to creating inequalities. Moreover, this ideology fails to address other structural exclusions, such as racism and sexism, which also undermine the existence of a level playing field. Finally, it prioritises individuals' private property rights over the collective needs of society, privileging at the end of the day not a diversity of voices, but the voices of those who own valuable goods in society (Karppinen, 2013; Pickard, 2020).

Furthermore, the troublesome consequences of commercialism on the media in general and media content in particular have been deeply researched. An early culmination of this critique occurred in the 1980s, with Herman and Chomsky (1994), Robert Picard (1985), and Ben Bagdikian (1987) developing basically four arguments.

Following up on considerations in the 1970s raised by Raymond Williams, who viewed commercial press systems as being subject to undemocratic control, Picard (1985: 17f) claimed that developments after World War II made it clear that not only state control over the press can restrict freedom and democracy: The competition imperative in the market equally imposes restraints and pressures, restricting editorial freedom and thus democracy.

Second, commercialisation of the media system leads to media ownership concentration. In *Manufacturing Consent*, Herman and Chomsky claimed that

commercialism in the guise of media advertising would become the “second filter” for editorial news choices. Advertising, they argued, plays a “potent role in increasing concentration even among rivals that focus with equal energy on seeking advertising revenue” (Herman & Chomsky, 1994: 15). Media ownership concentration has become an issue of constant concern for critical scholars ever since. Bagdikian (1987) argued that “concentrated power over public information is inherently anti-democratic”. McChesney (2008: 427) later pinpointed commercialisation as a core tendency of a profit-driven, advertising-supported media system and the resulting concentration as a “poison pill for democracy”.

Third, critics argue that commercial media refrain from critical reporting and disturbing controversies as they protect the interests of advertisers, rather than defending the public interest. Such critique represents an additional facet of Herman and Chomsky’s (1994: 17) second filter, as advertising and commercial media only rarely engage in “serious criticism of corporate activities, such as the problem of environmental degradation”. Thereby, advertising changes the form and content of information provided by commercial media (Bagdikian, 2004).

Fourth, advertising-based media strive to address consumers with sufficient purchasing power, thereby neglecting large chunks of the entire population (Bagdikian, 2004). Such segmentation is inherently undemocratic, even if advertisers are interested in addressing large numbers of affluent consumers: “The idea that the drive for large audiences makes the mass media ‘democratic’ thus suffers from the initial weakness that its political analogue is a voting system weighted by income!” (Herman & Chomsky, 1994: 16).

More than 30 years later, after digital media and communication infrastructures have developed further, it is clear that the early critiques are still accurate and relevant and, in many cases, necessary. First, what has been called “restricted freedom” in commercial media has returned as growing inequalities in the digital sphere. Almost all popular digital applications are highly commercial, with zero revenue coming from sales of services. Digital platforms like Facebook, Instagram, and YouTube are entirely financed by advertising revenues, thereby converting their users into products in their business models. As users do not pay any cover price, their influence on product specificities is close to none.

Ownership concentration, the second theme of critique voiced in the 1980s, has increased into a major concern for communication scholars, but also in communication politics. In their *Media Manifesto*, Fenton and colleagues (2020: 104) argue that digital giants constitute the “largest concentration of power that the world has ever seen”. The digital giants’ enormous power raises “difficult questions about their governance, regulation, and accountability” (Barwise & Watkins, 2018: 21). Their purely commercial operations aggravate democratic control over media and constitute a problem for contemporary democracies.

Picard and McQuail have developed the third theme of critique about commercialism changing form and content of the media. In 2004, Picard reflected

upon the relationship between commercialism and newspaper quality, concluding that “newspaper and journalistic quality are recognized as central elements in achieving the social, political and cultural goals asserted for journalism in democratic societies” (Picard, 2004: 60). Commercialism infringes on news quality and thereby challenges democracy. McQuail (2010) asserts that commercialisation of the media leads to over-reliance on advertising and a loss of editorial independence, as well as content trivialisation and tabloidisation. Most recently, Victor Pickard (2020) develops the argument further by framing the permanent crisis of commercial journalism as a threat to democracy.

The fourth argument also retains its relevance in contemporary media systems. Advertising-financed news media still primarily address affluent consumers, following a commercial imperative rather than that of the public interest. As the news media’s focus on affluent target groups precedes the algorithmic filtering used by digital communication platforms, only such targeted news items are seen by the growing number of users who rely primarily or even entirely on these platforms for their news. Thus, the structural deficit has survived the digital transformation.

In summary, literature points out structural problems of commercial media in fulfilling the public interest, and there is no indication that digital infrastructures in general have mitigated these risks. On the contrary, the early optimistic hopes of participatory and democratic digital communication structures have vanished, and technological developments have brought additional concerns (Ghosh, 2020). The question remains of how to address these problems and increase the chances that news media will resist commercialising forces. In the following, we discuss some factors that, according to normative theories and empirical research, make media more prone to public-oriented reporting or, at the least, to counter the deleterious effects of commercial pressure.

### Structural conditions for countering negative effects of commercialisation

As mentioned, common strategies for countering the predominance of private interests in the public information ecosystem include strong professional norms, regulation to counter media ownership concentration, and the establishment of public alternatives. Some of these structural conditions are addressed in other chapters of this book (see Trappel & Meier, Chapter 7, for regulation on media concentration; Thomass et al., Chapter 9, for public service media; and Ruggiero et al., Chapter 15, for a discussion on the journalistic professional ethos). This chapter focuses on two specific factors which directly impact the production and distribution of news in commercial settings: the separation of the newsroom from management and the sales department to ensure editorial

independence from owners; and the diversity of revenue streams to ensure editorial independence from single advertisers or sponsors.

With regard to the first factor, normative theories of journalism have historically maintained that newsrooms must have the freedom to decide independently on editorial matters. In order to secure this independence, newsrooms and journalists must be insulated from the influence of management and the sales department. Historically, this has been an organisational, and often physical, separation between news-related activities and business-oriented functions within media companies. For Coddington (2015: 67), among all boundaries that delimit the values and practices of journalistic discourses, this one – “often known simply as ‘the wall’” – is the single most “fundamental to the self-understanding of professional journalism”. While this separation can also be understood as rhetoric – even useful for the business model of commercial news media (Coddington, 2015; Nerone, 2013) – it managed to establish itself as an important shield from commercial influence, according to normative accounts on the matter.

The separation is justified exactly by the fact that “owners of media operations may exert influence over content and distribution in a variety of ways” (McAllister & Proffitt, 2009: 331). This influence of ownership has been heavily documented. Studies in diverse journalistic cultures confirm that newspapers give more attention to their owners’ companies and subsidiaries in comparison with competitors (Lee et al., 2020; Panis et al., 2015). When editors feel pressured by owners and management, positive coverage of people and companies related to parent organisations is even more prominent (Saffer et al., 2021). Internal regulations or a strong professional culture that prevents management from interfering with newsroom work might relieve this pressure and increase the chances of serving the public interest. Therefore, it is necessary to assess whether newsrooms are able to make decisions independently from management, countering commercial pressure that comes from the profit-orientation of the company, and to what extent the changing technological, political, and economic conditions of the last decade have affected this separation (see also Trappel et al., Chapter 14).

The second factor analysed in this chapter is independence regarding revenue sources. Following the critique addressed above, most normative narratives of journalism utterly reject not only internal, but also external interference from advertisers, news sources, and organised pressure groups. It is generally accepted that diverse and stable funding predicts external independence, a principle already present in the Hutchins Commission report more than 70 years ago (The Commission on Freedom of the Press, 1947). On the other hand, when the financial resources of a media outlet originate mostly from a single large advertiser or sponsor, it is difficult to claim independence (McQuail, 1992).

Indeed, research in the US and Europe has confirmed that dependence on specific industries or companies for advertising revenues is conducive to posi-

tive coverage, questioning the independence of editorial content in news outlets that are not able to diversify their revenue sources (Rinallo & Basuroy, 2009). Considering this, current conditions do not seem to inspire optimism. Literature reports that increased competition for attention, related to the proliferation of news media both by political-economic deregulation and technological development, represented the loss of monopoly over audiences, leading to declining advertising revenues (Noam, 2016; Picard, 2010b; Winseck, 2017). This suggests increasing pressure on advertising-based outlets, leading to the rise of hyper-commercialised practices such as sponsored content and native advertising (Murdock, 2008b; Serazio, 2020). At the same time, there are accounts of alternative developments, such as the increase in direct sales and subscriptions (Jenkins, 2020; Winseck, 2020), which might counterbalance the pressure from declining advertising revenues. These developments justify monitoring how leading news media cope with a changing revenue structure and whether they are able to secure their independence regarding financial sources.

### *Measuring editorial independence*

Each structural factor was codified in an MDM indicator. Indicator F5 addresses company rules and practices against *internal* influence on the newsroom and editorial staff. The research question posed is: “What is the degree of independence of the newsroom from the owners, management, and advertising sales department?” (Trappel & Tomaz, 2021a: 23). We answer this question by seeking out formal rules regarding this separation and whether they are implemented in the daily practice of media organisations. In addition, we are interested in finding out whether the formal leader of a newsroom also performs the role of publisher, which may indicate more direct pressure for commercial results.

Indicator F6 refers to company rules and practices against *external* influence on the newsroom and editorial staff. Here, the research question is: “What is the degree of interference by external parties, in particular advertisers and sponsors?” (Trappel & Tomaz, 2021a: 24). Empirically, we seek evidence of whether there are multiple and balanced income streams in commercial news media (such as sales, subscriptions, and advertising). The existence of sponsoring agreements with influence on content (such as “infomercials”) is also a matter of concern.

In the MDM research project, these indicators were applied to all countries in our sample, both in 2011 and 2021. Our data come from secondary sources (such as reports of local media commissions or imprints) and interviews with reporters, editors, and editors-in-chief in leading media outlets of the analysed countries. We deal, therefore, with qualitative data, even though the MDM instrument also prescribes scoring media performance in each country on a scale from 0 (few or no requirements met) to 3 (all or almost all requirements

fulfilled) to facilitate cross-country comparison. This scoring has occurred in sessions with the participation of all country teams, in order to ensure the highest comparative potential of the MDM instrument.

The quantitative scoring of indicators F5 and F6 already offers some general insights (see Table 8.1). Considering the countries surveyed both in 2011 and 2021, stability stands out. After one decade, only Austria showed any change: on the one hand, improvement in conditions against influence of management and the sales department; on the other, deterioration of protection against influence of advertisers. The other eight countries participating both years remained stable overall in their scores, suggesting that, despite new digital-related commercial pressures, leading news media do not face a more challenging time than a decade ago.

**Table 8.1** Internal and external influence on newsrooms, 2011 and 2021

Country	Internal influence 2011	Internal influence 2021	External influence 2011	External influence 2021
Australia	1	1	3	3
Austria	2	3	2	1
Finland	2	2	2	2
Germany	2	2	2	2
Netherlands	2	2	2	2
Portugal	2	2	1	1
Sweden	2	2	3	3
Switzerland	2	2	1	1
United Kingdom	2	2	2	2
Belgium (Flanders)	n.a.	2	n.a.	2
Canada	n.a.	2	n.a.	3
Chile	n.a.	2	n.a.	2
Denmark	n.a.	2	n.a.	3
Greece	n.a.	1	n.a.	1
Hong Kong	n.a.	2	n.a.	1
Iceland	n.a.	3	n.a.	3
Italy	n.a.	2	n.a.	1
South Korea	n.a.	2	n.a.	1

Comments: Scale: 0–3 points. The only country showing a trend from 2011 to 2021 is Austria, with an increase of 1 point in internal pressure, and a decrease of 1 point in external pressure.

Source: Trappel et al., 2011; Trappel & Tomaz, 2021c, 2021d

A cursory evaluation of performance variation among countries for each indicator also allows some preliminary observations. The 18 countries surveyed in 2021 display different patterns in both indicators. Performance regarding the

influence of management and the sales department seems relatively balanced – fourteen countries have 2 points, two have 3, and two have 1 – while dependence on revenue sources exhibits more diverse scoring – seven countries have 1 point, six have 2, and five have 3. Indicator F5 relies more on the internal functioning of companies and is therefore more subject to professional narratives and established practices. Indicator F6, in turn, is highly dependent on the external conditions of the whole market economy in which a certain media system is located. As economic conditions in different countries are expected to vary more than the profession itself (and are in themselves more volatile), there is more room for various realities regarding influence of single advertisers. If a cursory analysis already provides some general insights, in-depth analysis of the qualitative data helps to better understand how media professionals in private media around the world experience these two structural factors, and how the factors have evolved in the last decade.

### Laws, rules, and professional culture still maintain some separation

Media professionals in almost all countries in the 2021 MDM sample present strong discourses in favour of the independence of the newsroom vis-à-vis ownership, reinforcing the rhetoric of the wall (Coddington, 2015). In general, these discourses do reflect actual practice; separation of editorial staff from business-related departments is a reality, even if not perfect. There are some differences worth noting, however. We can group all countries that perform well into two large clusters: those with strong rules at the national or organisational level against intervention of management or sales departments, and those with fewer or no legally binding rules (Trappel & Tomaz, 2021b).

#### *Strong laws or rules against commercialisation of media*

In the first cluster, Iceland stands out with very good performance. The Icelandic Media Act obliges all media to issue statements on editorial independence and publish them on the Media Commission's website. Accordingly, all Icelandic media in our sample have strong and specific measures for the separation of newsrooms from management. Newspapers such as *Morgunblaðið* and *Stundin* establish rules for cautions and layoffs, and only editors are endowed with this power. The media company Torg even determines procedures to ensure the reporting staff's independence when covering issues related to a board member or owner. In Icelandic media, staff from the advertising and sales departments are not allowed to participate in editorial meetings and, in general, have no influence in the performance of the newsroom (Jóhannsdóttir et al., 2021).

In other countries, editorial staff can rely on laws and rules, but have to concede some erosion of independence in practice. This is the case in Italy, Portugal, Sweden, and the United Kingdom. Portugal and Sweden enshrine the independence of editorial staff in their respective constitutions (Fidalgo, 2021; Nord & van Krogh, 2021). Italy also has an overarching regulation issued by the National Journalistic Employment Contract, stating that the publisher can appoint the editor-in-chief, but cannot have contact with the editorial staff (Padovani et al., 2021). Additionally, most private media in these countries have some internal rules in this regard. For example, the Guardian Media Group in the United Kingdom has a so-called constitutional separation of editorial and commercial arms of the organisation (Moore & Ramsay, 2021). However, the economic pressure in these countries has led to less distinct boundaries, the most visible manifestation of which is the increase of sponsored content (we address this issue in the section “Deterioration of the advertising-based business model”).

### *Weaker laws and rules, but strong professional culture*

The second cluster of countries refers to those which do not exhibit strong laws or rules for shielding newsrooms from business-related activities, but still enforce separation in practice, which is usually explained by a prevalence of professional editorial culture over commercial interests. Austria performs especially well in this cluster. In spite of the absence of internal rules, its leading news media often succeed in sustaining the wall. As an example, the sales department and the newsroom of *Salzburger Nachrichten* are located in opposite sides of the building, giving editorial staff a sense of independence regarding the profit-seeking objectives of the publisher. As usual, the sales department still has some influence in news sections such as travel, leisure, and cars, but the autonomy of newsrooms has improved overall in the last decade (Grünangerl et al., 2021).

The largest group of countries is where a professional culture of independence has played a meaningful role in safeguarding the newsroom from business-related interference, but economic pressure is making the boundaries more porous. This is the case in half of the analysed countries: Belgium, Canada, Chile, Denmark, Finland, Germany, the Netherlands, Switzerland, and South Korea. Although news media in these countries still uphold the value of separation – also in the absence of formal rules – their newsrooms are more subject to interference by owners or sales departments. Many of them report some attempts of direct intervention, but these are the exception, not the rule. Most common is the increase of indirect influence in the hiring and promotion of editorial staff. Another specific issue of concern has been the involvement of editorial staff with financial-managerial functions. News media in Chile, Germany, the Netherlands, and Switzerland systematically report some form of involvement. In many cases, editors-in-chief become part of the management board or even

the publishers themselves, an organisational merger of both positions. The reasoning behind this model is to give newsrooms a higher sense of financial responsibility, whereas the other side of the coin is even stronger commercial pressure penetrating editorial work. Finland features a telling reversal case. In 2011, three relevant news media had just combined the posts of editor-in-chief and publisher; since then, they realised that the model did not work and abandoned the experiment (Ala-Fossi et al., 2021).

### *Poor practices for separating owners and newsrooms*

Finally, there are countries that fall outside the two clusters, as they struggle to maintain any separation standards, namely Greece, Australia, and Hong Kong. These countries perform poorly because of the continuous interference of ownership in the daily work of journalists. In Australia, hands-on owners such as Rupert Murdoch and the late Kerry Packer have ensured that media outlets follow their stance (Dwyer et al., 2021). In Greece (Papathanassopoulos et al., 2021) and Hong Kong (Lo & Wong, 2021), control is rather exerted by the owners' choice of a subservient managerial class, staff decisions, and allocation of resources. If this is true in other news media across the world, the degree of interference reaches a much higher scale, undermining any serious claims of newsroom independence.

### *Porous boundaries against external pressures*

Our second structural factor, which deals with pressure coming from revenues and advertisers, displays more complex results. Media organisations from all participating countries reported a decline in advertising revenues, which historically represent most of the income of the commercial news industry. This predicts an increasing risk of interference from single advertisers. Interestingly, however, several countries in our sample present a low or inexistent risk, namely Australia, Canada, Denmark, Sweden, and Iceland. Despite losses, Danish and Swedish private media do not depend on advertisements as much as their counterparts in other countries do. In Denmark, private media are mostly foundation-owned and financed by a mix of public media subsidies, sales, and advertisements (Blach-Ørsten et al., 2021). Swedish media have lost one-third of their advertising revenue since 2008, when it represented 65–70 per cent of morning newspaper revenues. However, a relatively high willingness to pay for news (27% of the Swedish population pay for at least one online service and 55% of newspaper revenues come from subscription) and the existence of a strong public subsidy system for the media attenuate commercial losses (Nord & von Krogh, 2021). Australia, Canada, and Iceland are more market-oriented media systems, all of

them experiencing sharp declines in advertising revenues (41% in Iceland between 2007 and 2019; Jóhannsdóttir et al., 2021). However, the nonexistence of dominant advertisers (in Canada and Iceland) or the strong economic power of the ownership (in Australia) diminishes external influence.

The countries in the middle range are Belgium, Chile, Finland, Germany, the Netherlands, and the United Kingdom. Despite vanishing advertising income, most of them still have various advertisers to ensure that news media are less subject to boycotts or other forms of financial pressure. But there are clear signs of erosion. In some of these countries, such as the Netherlands and Finland, regional media struggle to maintain independence from advertisers. In very small markets, such as the Belgian language communities and Chile, maintaining good relations with some advertisers is a matter of subsistence for most media.

Then there are the countries where news media face a high risk of advertising interference, namely Austria, Greece, Hong Kong, Italy, Portugal, South Korea, and Switzerland. In some countries, such as Greece and Portugal, media organisations must operate within small markets, making competition for advertising burdensome. Italian, Korean, and Swiss media are based in stronger economies, but which are dominated by a few huge conglomerates, making the media dependent on single advertisers.

The problem, however, that impacts news media in almost all countries in our sample is the increase of sponsored content. Denmark, Iceland, and Portugal report a rise in paid content, but which is produced by dedicated staff that, at least in theory, reduces harm to the newsroom's independence. On the other hand, editorial staff in Belgium, Chile, Italy, South Korea, Sweden, Switzerland, and the United Kingdom have been involved in the production of sponsored content, such as native advertising. DPG Media, the biggest private media group in Flanders, Belgium (and also increasingly important in the Netherlands), clearly states that both journalistic and branded content can be created at the request of advertisers (Hendrickx et al., 2021). In Chile, one-fourth of journalists have covered stories related to advertisers (Núñez-Mussa, 2021), and in South Korea, paid awards and coverage are considered an ordinary part of the business model (Kim & Lee, 2021). Investigative reporting has revealed the infiltration of business lobbying in British commercial media news content through paid advertising or the juxtaposition of industry advertising alongside editorial content (Moore & Ramsay, 2021). If separation from owners and sales departments is the rule, most media in our sample must concede some degree of interference by advertisers. And this trend is increasing.

### *Deterioration of the advertising-based business model*

The rise of sponsored content may be understood in the context of the growing competition for advertisers in a shrinking market (Ferrer-Conill, 2016; Lewis,

2016; Serazio, 2020). A central theme in the media discourse over the last ten years has revolved around the crisis of the advertising-based press and news media in general (Brüggemann et al., 2016; Franklin, 2014; McChesney, 2016; Picard, 2010a; Trappel et al., 2015).

Our findings concur with this literature. In almost every country, circulation of print media is rapidly decreasing. In the United Kingdom, for example, print circulation has halved since 2011. Decreasing print circulation has been accompanied by a decrease in advertising revenues in all countries surveyed for the MDM project. As aforementioned, advertising has played a crucial role in the history of commercial media. Subscription and direct sales have been an important revenue for alternative press (Pickard, 2020), but never became a sustainable business model. The advertising-based model was sustained by specific economic and technological conditions, allowing newspapers to extract profits “3 to 5 times above the average for all industries in the 1980s and 1990s” (Picard, 2010b: 75). However, market segmentation, the emergence of the Internet, and the diminishing growth of developed economies have dramatically reduced advertiser demand in legacy news industries.

The Covid-19 pandemic seems to have accelerated this crisis. Sales of print newspapers fell sharply during recurrent societal lockdowns. Advertising declined dramatically as well, with loss figures ranging from 30 to 50 per cent in countries such as Denmark, Finland, the Netherlands, and the United Kingdom. Newspapers in Chile had 67.5 per cent less advertising revenue in May 2020 compared with the year before, radio advertising declined by 42.3 per cent, and television lost over 20 per cent (Núñez-Mussa, 2021). Advertising in Greek television declined 40 per cent in the first months of the crisis (Papathanasopoulos et al., 2021). Correspondingly, most countries in our sample report closures, ceased print distribution, and staff layoffs, with highly commercialised media systems, such as those in Australia and Canada, being hit the hardest. Since the demand for credible information rose during these months of doubt and insecurity, news consumption in television remained high, and people also moved to online news consumption, including an overall rise in subscriptions (offered at competitive prices). Still, the global financial balance of these changes did not improve the economic situation of most media companies, which continues to deteriorate.

A remaining question is the role of digital platforms in the erosion of the advertising-based business model of the news industry. Many scholars acknowledge how news media are being challenged by the digital global media platforms. Advertising is moving to platforms such as Facebook and Google, and these companies have acquired more than half of the digital advertising revenues in the US and Europe in the last few years (Ohlsson & Facht, 2017). However, it is important to keep in mind that, while dominant in the digital world, Facebook and Google have a more moderate share of advertising rev-

enues in the overall media economy, accounting for 31.6 per cent (Winseck, 2020). In addition, according to Picard (2010b), the advertising-based news industry has enjoyed an unusual rise in advertising expenditure in the second half of the twentieth century and, in this way, found a subsidy for a business whose demand and willingness to pay never corresponded to its costs. This allowed expansion beyond economic sustainability. With the stagnation of spending on advertisements in the twenty-first century and more competition for attention, advertising-based news media face the reality of the unsustainability of their business model.

### *Public intervention to relieve commercial pressure*

We have portrayed a dramatic picture of news media trying to live up to the normative expectations of independence from advertisers and sponsors. To escape this commercial pressure, one possibility would be to seek funding from outside the traditional advertising-based model. As Winseck (2017) argues, advertising was a circumstantial means of financing something that actually is a public good – news – and it does not need to be this way forever. In this sense, our sample provides some interesting data. Denmark and Sweden have already loosened their dependence on advertising revenue thanks both to increasing digital pay and public funding (Blach-Ørsten et al., 2021; Nord & von Krogh, 2021). In Germany, direct sales went from 46.2 per cent (2008) to 64.4 per cent (2018) of total newspaper income, while advertising reduced its share from 45.2 to 31.1 per cent (Horz-Ishak & Thomass, 2021). Subscription revenues are higher than advertising income in Switzerland (Bonfadelli et al., 2021). Covid-related increases in online subscriptions in many countries signal a possible way forward for digital-only outlets. As Jenkins (2020: 5) discovered, local and regional newspapers in Europe are adopting digital strategies that aim at “building lasting relationships with readers who will pay for online content in the form of subscriptions, memberships, access to premium articles, donations, or micropayments”.

However, these are only a few glimpses of success; the bigger picture is still of an industry unable to find a way out of the crisis. This raises again the legitimate question of whether market relations are adequate means with which to provide the extent of journalism and news media that a healthy liberal democracy needs (Pickard, 2020). In the wake of the Covid-19 debacle, governments have strongly come to the rescue. In the countries of our sample, the most widespread strategy was to provide general subsidies to media companies. Austria, Denmark, Finland, Germany, Iceland, the Netherlands, Sweden, and Switzerland report this kind of support, with amounts ranging from EUR 2.6 million in Iceland – a small country with no history of public subsidy (Jóhannsdóttir et al., 2021) – to over EUR 50 million in Sweden (Nord & von Krogh, 2021). Another approach we identified was raising public expenditure

in advertising with campaigns in response to the Covid-19 pandemic. Greece spent between EUR 12 and EUR 20 million (Papathanassopoulos et al., 2021), Portugal around EUR 15 million (Fidalgo, 2021), and the United Kingdom at least EUR 41 million in Covid-related advertising (Moore & Ramsay, 2021).

These circumstantial strategies raise concerns of their own, but also spark the debate over legitimate models for long-term public funding of news production, distribution, and consumption, framed as the responsibility of the state to guarantee that information, as a public good, is supplied in abundance and in adequate terms. It is not always an easy task, as Svensson and colleagues (2016: 9) suggest: “The market pressure on media financing models and market-driven ideas that suggest the state should not ‘interfere’ in the media ecology makes journalism more vulnerable and less independent from commercial interests”. But, as we have argued since the beginning of this chapter, “journalism’s public service mission and its commercialism have always been in tension”, and, consequently, “de-commercialization” seems to be “an important first step toward democratization” (Pickard, 2019: 157).

## Conclusion

The relationship between media and markets has no linear history. Far from representing a natural development, commercialisation of the media is rather a result of explicit policy choices, subject to intervention and political dispute. Furthermore, these tortuous developments are not neutral with regard to democracy, and different societies have developed multiple strategies to shield news production and distribution from commercial interests. In order to contribute to this discussion, we analysed two structural factors that should assist in countering commercial pressure in the private media: the separation of the newsroom from ownership and the sales department; and the diversity of revenue streams and independence from advertisers.

The large majority of news media surveyed for the 2021 MDM uphold a strong ethos of separation, whereby laws, internal rules, or professional culture – or a combination of these – create a significant barrier against interference from ownership, management, and sales departments. This wall of separation succeeds most of the time. However, economic pressure is already making these boundaries more porous, as the analysis of the second structural factor clearly indicates.

In fact, some countries still perform quite well regarding independence from external commercial interference. Public subsidies play a role in the stability of some, but others are more subject to market forces, yet even so managing to navigate pressure from outside. Nonetheless, news media in most countries are in danger of interference by advertisers. In almost every case, the decimation of the advertising-based business model can be pointed out as the main reason. But here

lies another complex situation. In itself, the erosion of this business model also provides an opportunity for news media to be less reliant on advertising, reducing the risk of external interference in editorial work. In fact, in some countries, news media have been successful in finding alternative revenue sources. The problem is that this does not guarantee non-interference, as sponsored content continues to increase even in those fortunate contexts. Additionally, the majority of news media have so far been unable to find a sustainable alternative revenue source, leading to the shrinking advertising market simply meaning more competition for advertisers and, as such, exposure to their commercial interests. The ethos of independence remains strong, but the risk of interference is increasing due to the fragility of the advertising-based business model.

A final remark must still be made regarding the scope of our research. We assumed that the prevalence of professional and organisational standards – such as “the wall” or a diversity of revenue streams – measure to a certain extent news media’s independence from direct commercial pressure. This is not to say that the media would not be affected at all by commercialisation if they perform well regarding these structural factors. As indicated above, the main influence of commercialism is likely systemic. Some scholars even argue that professional and organisational standards actually respond to the reproduction needs of the economic power in liberal democracies: “Professional norms and practices of journalism result in news that maintain and legitimise the existing political order” (Sjøvaag, 2013: 160). Explicit interference may be more harmful for the advancement of market-driven media and society than eventual bad coverage of some businesses, as this would undermine trust in commercial media, an important echo chamber of economic elites and their ideologies. In this radical critique, insulating professional journalism from commercial pressure through organisational measures is not enough, because the notion of professional journalism might be structurally flawed and biased towards the status quo (McChesney, 2003; Nerone, 2013). Our findings contribute to a better understanding of the current status of some of those standards that normative theories consider important for constraining commercialisation. But our results also suggest that, if we are genuinely interested in shaping media for democracy, we might need more profound changes at a systemic level.

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## Chapter 9

# Public service media

## *Exploring the influence of strong public service media on democracy*

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### Abstract

This chapter examines the extent to which public service media can constitute a countermeasure to ongoing developments in the media market, media regulation, and journalism professionalism, some of which threaten the ideal role of the media in a democracy. Within the concept of a media ecology and with respect to the overarching dimensions of the Media for Democracy Monitor (MDM) project – *Freedom / Information, Equality / Interest Mediation, and Control / Watchdog* – we ask whether public service media make a difference for democracy. The findings are related to the question of whether strong public service media have an influence on the performance of other media. We consider this question – if the media sector is characterised by convergence or divergence – and compare countries with robust public service media with countries that have traditionally weak public service media. From this, we conclude that public service media are relevant for democracy due to their performance and their impact on the general media ecology.

**Keywords:** public service media, role of media in democracy, media ecology, audience shares, democracy indices

## Introduction

Media markets, media regulation, and journalism professionalism are developing in a direction that possibly threatens the role media plays in a democracy. Specific issues include ownership concentration, deregulation, or a lack of media regulation, and the threatening of journalistic quality standards and deterioration of journalistic working conditions. Public service media (PSM), secured by public funding to a certain degree from market forces and subject to public control over a public remit, could be considered a countermeasure to these developments. If PSM perform as strong institutions, they could potentially have a positive influence on the performance of other media. With the key dimensions of the Media for Democracy Monitor

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(MDM) project – *Freedom / Information (F)*, *Equality / Interest Mediation (E)*, and *Control / Watchdog (C)* – it is possible to evaluate the contribution of PSM in a specific media ecology and answer the question of whether strong public service media can make a difference for democracy.

This horizontal chapter addresses a variety of MDM Indicators and applies the findings to the performance of public service media (for related research questions, see Trappel & Tomaz, 2021a: 20–52):

- (F3) Diversity of news sources
- (F4) Internal rules for practice of newsroom democracy
- (F5) Company rules against *internal* influence on newsroom/editorial staff
- (F6) Company rules against *external* influence on newsroom/editorial staff
- (F7) Procedures on news selection and news processing
- (F8) Rules and practices on internal gender equality
- (F9) Gender equality in media content
- (F10) Misinformation and digital platforms (alias social media)
- (F11) Protection of journalists against (online) harassment
- (E1) Media ownership concentration national level
- (E3) Diversity of news formats
- (E4) Minority/Alternative media
- (E6) Content monitoring instruments
- (C7) The watchdog and the news media's mission statement
- (C9) Watchdog function and financial resources

## Commercial and public service media: Challenges and disputes

The term media ecology is most often associated with Marshall McLuhan and the Toronto School. It was first introduced as a concept in his book *The Gutenberg Galaxy: The Making of Typographic Man* (McLuhan, 1962). In this chapter, we give media ecology the following meaning: the study of the relationships between actors in the media, including individuals acting in the roles of either citizens or consumers in mediatised societies. We use the concept of media ecology to understand the connections between commercial media producers and PSM providers, the logic of their *modus operandi*, the jurisdictions that define their duties and opportunities, and the resulting media climate and power structures.

Dahlgren (2006) describes the evolution of a multitude of different public spheres that arise in society, with different purposes. One of these public spheres is provided by the PSM, which should ideally function as an intermediary be-

tween the state and society, providing a channel between “an informed elite discourse and a responsive civil society” (Habermas, 2006: 411). Separating the roles of the state-owned PSM and the market’s commercial media serves to maintain an interrelationship between the media and public opinion. This relationship is also one basic tenet for a successfully maintained “Nordic media welfare state” (Syvertsen, 2014).

The main obligations of PSM to “promote social cohesion, [serve] needs related to cultural diversity and the demands of democratic process, [and attend to] the needs of special groups and individual users” (Bardoel & Lowe, 2007: 16) contribute to “a healthy balance in commerce versus culture” – and all this pursued with a public service ethos that Bardoel and Lowe (2007: 16) define as “communication in the public interest”.

We agree that a healthy balance between PSM and the commercial media is fundamental to achieving a well-rounded public discourse. Both actors are indispensable. However, we aim to show that recent developments demonstrate how the roles and duties of PSM and commercial media are somewhat out of synch and disordered.

Three competing approaches frame the debate about public service media and its relationship with the market, according to Jakubowicz (2007b): one that prioritises the market as “the proper mechanism for the satisfaction of individual and social needs” (in which no public service broadcasting is needed) (Jakubowicz, 2007b: 115); one that regards PSM as a supplement for what the market does not supply (with a place for a kind of “niche” public broadcaster); and one that argues that “whatever the market may offer, the community still has a duty to provide broadcasting services free from the effect of the profit motive” (Jakubowicz, 2007b: 116). Jakubowicz (2007b: 116) comments further that “the future of [public service broadcasting] will depend on the resolution of the growing conflict between these three approaches”.

The main critics of competition in the broadcasting market argue that it is unnecessary, either because nowadays there is no scarcity in supply (as there was in the beginning of the public service media) or because they have a similar programming profile to the private generalist channels. Secondly, commercial actors feel harmed by what they call “unfair competition”, because PSM has public funding and, in addition, competes with them for advertising revenues, in a time when advertising for television channels (and media in general) is shrinking dramatically. Finally, commercial channels accuse public service broadcasting of trying to get high audience rates by using popular programmes (e.g., quiz shows or football transmissions), thus preventing private competitors from getting better shares and the corresponding revenues in terms of advertising.

Those who defend the importance of some kind of PSM with a specific position and a differentiated role suggest, on the contrary, that PSM is necessary,

because although supply is not scarce, neither is it diverse. In a time of clear “ascendancy of marketization policies” (Jakubowicz, 2007b: 122), the increasing competition among commercial channels tends to lower the level of quality, resulting in a similarity of use (and abuse) of popular programming genres in order to attract larger audiences. Diversity in supply is, therefore, more illusory than real. A public service operator, less dependent on market-driven criteria, is expected to offer some variation and pay attention to the people as citizens (not just consumers) – in terms of content or in terms of procedures.

As for competition between public and private actors, it must be stressed that these are not so easily compared. In every country participating in the 2021 MDM project, PSM is bound by a contract with the state that imposes obligations (to present a pluralism of opinions, represent diversity, pay attention to minorities, implement specific measures for accessibility, support national audiovisual production, and defend the national language and culture, to mention a few), while commercial channels have more freedom to manage their programming options. Furthermore, public operators are influenced by some kind of public control in a way that private operators are not.

As for advertising, PSM and private companies follow different rules, and there is variation between countries. In recent years, some limitations were imposed on public operators (e.g., in Portugal, the first public channel is allowed to have only 6 minutes per hour in advertising, while the commercial operators have a limit of 12 minutes per hour, and the second public channel has no paid advertising at all; Fidalgo, 2021). Furthermore, recent research suggests that the coexistence of public and commercial broadcasters does not harm the revenues of the latter and may even benefit them: Some studies show that “the higher a country’s per capita public service media revenues, the higher the per capita commercial broadcaster revenues” (Sehl et al., 2020a: 11). These findings reinforce the idea that the negative effect of PSM on commercial media is treated more as “an article of faith”, while a concrete evaluation in the field suggests that competition does not crowd out commercial media. On the contrary, it “produces benefits of increased consumer choice, lower prices, increased quality and better service” (Sehl et al., 2020a: 2).

Finally, the idea that PSM seek high audience rates (with the corresponding ability to get more advertising) needs nuance too. Public service media are expected to attract viewers, taking into consideration its purpose, mandate, and costs. PSM that are too niche – only devoted to fringe audiences and to content that commercial operators find unattractive, demanding, or expensive – cannot be expected to meet the general needs of the community it intends to serve and fulfil its mission. This is a paradoxical situation, as suggested by Bardoel and Lowe (2007: 16): “When public service broadcasting companies are successful, the commercial sector calls that market distortion, but when public service broadcasters aren’t successful enough, the commercial sector says

[public service broadcasting] lacks legitimacy and is a waste of public money”. Programmes from public service media are expected to be of good quality as well as attractive to viewers. As Jakubowicz (2007a: 186) points out,

[a proper public service] perceives its audience as composed of whole human beings, with a full range of needs and interests (as citizens; members of different social groups, communities, minorities and cultures; consumers; and seekers of information, education, experience, advice and entertainment), also seeking to broaden their horizons and enrich their lives.

The following paragraphs, discussing the performance of PSM, unfold against this background.

### Performance of public service media

As the sample of countries participating in the 2021 MDM research project are all mature democracies (for a discussion about the inclusion of Hong Kong, see Tomaz & Trappel, Chapter 1), they rank relatively high in the relevant indices, such as the World Press Freedom Index or the Freedom of Expression Index (Trappel & Tomaz, 2021b, 2021c). The situation of the public service media cannot be ranked as easily, but it is possible to categorise countries into groups according to the audience share that their PSM reach. According to Schneeberger (2019: 2), “audience market shares of European public service broadcasters have generally decreased with an average contraction of 10 percent over a six-year period from 2012 to 2017. This negative trend was less pronounced among PSBs in the EU (-5.5%)”. However, irrespective of these trends, there are substantial differences between countries. In the following, we consider PSM with higher audience shares to be stronger than PSM with lower audience shares (the amount of public money granted to PSM might also be an indication of strength, but the relation to strength and influence is less clear; therefore, it is not used here). Table 9.1 shows the ranking of the studied countries in the World Press Freedom Index 2020 and in the Freedom of Expression Index 2019, as well as the strength of their PSM according to audience share. We identified the upper third, with an audience share of 35 per cent and higher, as having a strong PSM sector and the bottom third, with an audience share under 20 per cent, as having a weak PSM sector. These flank the middle range, with a 20–34 per cent audience share.

**Table 9.1** Democracy indices and strength of the PSM sector

Strength		Audience share of PSM (%) (TV)	World Press Freedom Index 2020 <sup>a</sup>	Freedom of Expression Index 2019 <sup>b</sup>
<b>Strong</b>	Austria	48.1 <sup>c</sup>	18	38
	Belgium (Flanders)	40.1 <sup>d</sup>	12	9
	Finland	43.5 <sup>e</sup>	2	8
	Germany	47.3 <sup>f</sup>	11	23
	Iceland	65.0 <sup>g</sup>	15	14
	Italy	35.7 <sup>h</sup>	41	20
	Netherlands	35.5 <sup>i</sup>	5	21
	South Korea	37.98 <sup>j</sup>	42	13
<b>Medium</b>	Australia	27.2 <sup>k</sup>	26	29
	Denmark	33.0 <sup>l</sup>	3	2
	Sweden	34.9 <sup>m</sup>	4	10
	Switzerland	31.0 <sup>n</sup>	8	1
	United Kingdom	30.6 <sup>o</sup>	35	12
<b>Weak</b>	Canada	6.8 <sup>p</sup>	16	19
	Greece	9.6 <sup>q</sup>	65	47
	Portugal	14.16 <sup>r</sup>	10	16
<b>n.a.</b>	Hong Kong	n.a.	80	80
	Chile	n.a.	51	36

Comments: Audience share for Denmark only reflects DR, not TV2; and for the UK, only BBC, not ITV.

Source: <sup>a</sup>Reporters Without Borders, 2020; <sup>b</sup>Lührmann et al., 2019; <sup>c</sup>Grünangerl et al., 2021; <sup>d</sup>Var, 2021; <sup>e</sup>Finnpanel, 2020; <sup>f</sup>Horz-Ishak & Thomass, 2021; <sup>g</sup>Jóhannsdóttir et al., 2021; <sup>h</sup>AgCom, 2020; <sup>i</sup>SKO, 2021; <sup>j</sup>Korea Communications Commission, 2020; <sup>k</sup>oztam, n.d.; <sup>l</sup>Medieudviklingen, 2019; <sup>m</sup>TV 2, 2019; <sup>n</sup>Mediamätning i Skandinavien, 2021; <sup>o</sup>BFS, 2021; <sup>p</sup>Ofoam, 2021; <sup>q</sup>CBC/Radio-Canada, n.d.; <sup>r</sup>Nielsen, 2021; <sup>s</sup>CAEM, 2020

In the following paragraphs, we see how PSM perform with respect to the overarching dimensions of the MDM project: *Freedom / Information (F)*, *Equality / Interest Mediation (E)*, and *Control / Watchdog (C)*, and whether high scores in these dimensions correlate with a strong or weak PSM sector.

### *Performance of public service media with respect to Freedom / Information (F)*

The role public service media perform with respect to the diversity of news sources (Indicator F3) is quite diverse in the sample. They have an important impact, in cases where they strengthen as owners the national press agency (Austria, Belgium, Denmark, Germany, and South Korea), when they are running their own in-house news service (Finland), or when they (in a rather recent development) cooperate with privately owned quality media in complex investigations (e.g., *Panama Papers*, Germany). In the Nordic countries, PSM

participate in a network organised by Nordic public service broadcasters, and European countries participate in the European Broadcasting Union network, both relevant sources for audiovisual news material. Another important factor for diversity of news in a national context is the ability of media to deploy foreign correspondents to different countries. This is an asset which is very much dependent on the financial power of the media house, and it is mainly found within public service media that have enough resources to maintain a relevant network of foreign correspondents (Finland, Germany, and the United Kingdom). Others had to reduce their staff and offices abroad (Canada, Belgium, and Portugal), but some still have more foreign correspondents than any other news media in the market (like Portugal).

Turning to the legitimacy of PSM, trust in the news from public broadcasters is quite high in all countries. The lack of staff diversity is a problem within all public broadcasters. However, it is only a hot topic for debate in countries like Canada or Germany, where there is a general sensitivity to the issue of minority representation (see Núñez-Mussa et al., Chapter 13).

While written rules for newsroom democracy in the media (Indicator F4; see also Trappel et al., Chapter 14) are quite scarce in all countries of our sample, the ones that exist are found mostly within public broadcasters, where special editorial statutes can settle a conflict between the newsroom staff and editors-in-chief (Austria and Germany). In countries with a vital culture of informal internal newsroom democracy, this also applies to the public broadcasters, although they are not a beacon in this respect. In some countries (e.g., Italy, the Netherlands, and Portugal) there are provisions for establishing newsroom councils, which then apply to all media, including public service media.

When it comes to company rules against internal influence on newsrooms and editorial staff (Indicator F5; see also Tomaz et al., Chapter 8), much depends on the ownership structure of the media company, and public broadcasters may be subject to strict broadcasting laws regulating their independence. However, law and reality differ, and we find some examples where existing provisions are bent. We find strong newsroom independence in countries where PSM have a strong position or the culture of an independent public broadcaster has a long tradition (as in Austria, Germany, the Netherlands, and Sweden). The preparedness of the newsroom staff and the editors-in-chief to reject interventions by the board of trustees is a strong asset in guaranteeing independence in these countries as well. Nevertheless, confrontations of single journalists by politicians are reported in some countries (Hong Kong, Greece, Italy, and the United Kingdom). The legal position of a public service broadcaster does not hinder the police from raiding the home or headquarters of PSM staff, as happened in Australia (Dwyer et al., 2021). In countries with strong public service media, public broadcasters tend to be put under stricter control than in countries where PSM is weaker. The demands for control mostly come from

right-wing forces on the political spectrum, or – as is the case in Hong Kong – from forces that undermine independence in the political structure as a whole (Lo & Wong, 2021). Discussions about the funding of PSM seem to open up a flank for political interference, and new funding models were being discussed (Germany and Finland) or had taken place (the Netherlands and Denmark) in several countries. The MDM country reports show that the issue of PSM's independence is double-sided: On the one hand, legal provisions can build a strong bulwark against political interference, but on the other, such provisions – for example, when they are about government influence on the appointment of CEOs – may also create a gateway for further influence.

Legal provisions may be a barrier to influence from advertisers on public broadcasters (Indicator F6; see also Tomaz et al., Chapter 8), and we observed a strong professional ethos among journalists to resist attempts to exert influence. But as statistical evidence for the amount of money that is going into advertising is missing, we can only deduce that a high amount of public money, compared with the income of advertising, is a rampart against economic influence from advertisers.

Procedures of news selection and news processing (Indicator F7; see also Núñez-Mussa et al., Chapter 13) mostly – in PSM as in any other media – take the form of informal discussions and decision-making and do not encompass institutionalised means of criticising journalistic working habits. Only in the United Kingdom (Moore & Ramsay, 2021) and Sweden (Nord & von Krogh, 2021) did we find more formal guidelines for news selection and processing in PSM.

Although there are internal rules and practices on gender equality (Indicator F8; see also Padovani et al., Chapter 4) in many countries, women continue to be underrepresented in managerial roles (with the exception of Sweden), and a substantial gender pay gap remains. Public service media have less of a pay gap due to legal requirements, but are still male dominated. A similar situation applies to the representation of women in media content (Indicator F9; see also Padovani et al., Chapter 4; Núñez-Mussa et al., Chapter 13). We observe among journalists a growing sensitivity to gender equality in media content, but no formal rules apply. Only in Finland are PSM and newspapers now actively ensuring that the distribution of gender – both for journalists and consultants used in broadcasts – is equal (Ala-Fossi et al., 2021).

Many factors have led to a higher sensitivity to misinformation and digital platforms (Indicator F10; see also Mayerhöffer et al., Chapter 2). It is more the PSM which have the mandate to counter misinformation and that to a large extent introduced activities to counter them – mostly by teams dedicated to fact-checking (Germany and the United Kingdom). Although this is in most cases not done with the help of algorithmic or data-driven solutions (journalists often mistrust them), fact-checking and double-checking of information is seen as part of the job.

The degree of protection against (online) harassment of journalists (Indicator F11; see also Baroni et al., Chapter 3) is more dependent on whether journalists

have a contract or are freelancers than if the media house they are working for is private or PSM. While a special cybersecurity team to counter attacks against individual reporters and against the journalism produced is in force in the Swedish public broadcaster, journalists are mostly protected on an ad hoc basis (Nord & von Krogh, 2021).

To conclude, regarding the performance of the public media with respect to the dimension of *Freedom / Information (F)*, broadcasting regulation and relatively stable resources give PSM better conditions to establish the tools and procedures needed for better service. However, PSM do not seem to use these advantages to the full extent, as PSM do not always perform better than private media.

### *Performance of public service media with respect to Equality / Interest Mediation (E)*

In today's media field, media ownership concentration (Indicator E1; see also Trappel & Meier, Chapter 7) is a dominant feature that considerably affects the media market structure in several countries. Within the rather oligopolistic environment of the news media sector, it is striking that PSM, in terms of popularity, usually enjoy a distinctive position regardless of market size (e.g., in Austria, Finland, Iceland, the Netherlands, Sweden, and the United Kingdom).

Even in countries with linguistic diversity (e.g., Switzerland), where the emphasis is usually placed on the development of regional and linguistic markets with media content being produced to address the needs of different language groups, PSM stand out by providing highly competitive radio and television programmes compared with those aired by their private counterparts. Maybe the most distinctive example comes from Flanders, Belgium, where recent media outlet mergers have transformed the small and highly concentrated media market. However, the public service broadcaster VRT has maintained its dynamic position in the free-to-air radio and television field (Hendrickx et al., 2021). Additionally, in Switzerland, the public service broadcaster SRG SSR has succeeded by providing highly competitive radio and television programmes compared with those aired by its main counterparts, namely foreign channels (Bonfadelli et al., 2021). Resistance to the trends of media ownership concentration can also be found at local level, with public service media playing a key role in news content diversity, for example, the regional radio news services of ARD in Germany (Horz-Ishak & Thomass, 2021).

News provision (Indicator E3; see also d'Haenens et al., Chapter 16) is a field of fierce competition between the public service and commercial broadcasters (e.g., in Chile and Iceland) with most media markets presenting a great variety of news dissemination formats (e.g., in Iceland, Denmark, Sweden, and Italy). Austria is a distinctive case, with an increasing variety of news formats both online and in the broadcasting sector over the last decade (Grünangerl et al.,

2021). On the other hand, trends of decreasing diversity of news formats also exist (e.g., in Portugal, Switzerland, and Iceland, particularly at the regional and local level). But what stands out in some media contexts is the different orientation between public service and private media in terms of news topics and categories covered. For instance, the tendency of public broadcasters towards hard news reporting stands in sharp contrast to the preference Austrian private broadcasters have for sensationalist forms of news presentations (Grünangerl et al., 2021) and Swiss private companies' emotionalised and personalised patterns of news coverage (Bonfadelli et al., 2021). An exceptional case in news provision is the public service broadcaster VRT in Flanders, Belgium, which is the only news corporation in the region adopting a specific gender quota in its news services to promote equal representation (Hendrickx et al., 2021).

Public service broadcasters seem to present a high level of digital competency, with some of them standing out in the way they have adapted their content delivery to the digital environment by means of, for example, digital ventures incorporating a range of news genres in Denmark (Blach-Ørsten et al., 2021) and Finland (Ala-Fossi et al., 2021); highly visited websites in Canada (Taylor & DeCillia, 2021); or innovative digital tools, such as the mobile news apps and hourly updated news streams offered in Germany by the public service television format Tagesschau of ARD (Horz-Ishak & Thomass, 2021), the availability of various digital platforms in the Netherlands (Vandenberghe & d'Haenens, 2021), or the convenient and visualised news format of card news in South Korea (Kim & Lee, 2021).

In terms of media content addressing the needs of minorities (Indicator E4; see also Núñez-Mussa et al., Chapter 13), there are countries where the public service broadcasters are among the leading players in providing alternative content, in some cases legally obliged to do so (in Austria and Finland). A distinctive example is Finland, which, although it is still an ethnically homogenous country, the public service broadcaster Yle, instigated by the law, provides radio, television, and online flow in minority languages used in the country, such as Swedish, Sámi, Romani, Finnish sign language, English, and Russian (Ala-Fossi et al., 2021). In Austria, as well, the public service broadcaster ORF is legally obliged to provide programmes in the official minority languages (Grünangerl et al., 2021). Beyond the European continent, Hong Kong provides an example with the public service broadcaster RTHK producing programmes intended to promote cultural diversity and reflect the life of ethnic minorities (Lo & Wong, 2021).

Although the allocation of public subsidies to minority-language media is rare (with the exception of the Finnish media market), the preservation of the linguistic and cultural diversity is still usually a task for the public service broadcasters, which appear to be committed, often by law imposition, to providing programmes in the official minority languages (e.g., in Switzerland;

in Sweden particularly by the public service radio; in the Netherlands with NPO still aiming to have balanced representation of people with non-western migration backgrounds; and in Australia by the second-largest public service broadcaster SBS) (Bonfadelli et al., 2021; Nord & von Krogh, 2021; Vandenberghe & d'Haenens, 2021; Dwyer et al., 2021). In some cases, such as the United Kingdom (Moore & Ramsay, 2021) and Italy (Padovani et al., 2021), the need for information in minority languages is met both by public service and commercial media organisations. Canada is a unique case, since it is the only place where efforts in expanding the national media system beyond the dominating languages of English and French have been systematic over the last two decades (Taylor & DeCillia, 2021). In contrast, in Denmark, the public broadcaster DR no longer transmits programmes in minority languages, nor are there private alternatives (Blach-Ørsten et al., 2021). In media markets where sign language has been recognised as a minority language, it is employed in news broadcasts or other selected programmes produced by the public service broadcaster (e.g., in Austria and Iceland), while at the same time, increased Internet use has given rise to new, alternative flows of information managed by minorities (e.g., in Portugal and South Korea).

Media content monitoring processes and accountability mechanisms (Indicator E6; see also Thomass et al., Chapter 11) vary from country to country and are based either on public authorities or private entities. Public service broadcasters' news services are usually subject to monitoring procedures conducted by special authorities, whose task it is to examine that PSM compliance with the set of rules and obligations as defined in their mission statements. For example, in Italy, the Pavia Observatory conducts a significant monitoring process related to political pluralism in the news services of RAI (Padovani et al., 2021). In the United Kingdom, the BBC is monitored by the organisation News-Watch, emphasising news and current affairs programming related to the European Union and news output, and the remaining programming is regulated on the basis of the broadcaster's editorial guidelines, which are set out in the Royal Charter and Agreement (Moore & Ramsay, 2021). In several countries, PSM are obliged by law to adopt mechanisms of self-regulation or self-inspection of content (e.g., in Iceland, Finland, the United Kingdom, Switzerland, Austria, and Germany), forging a greater level of self-monitoring compared with private media. The momentum of public service broadcasters towards self-regulation mechanisms (e.g., in Finland, Iceland, Austria, and Germany) is reflected in their tendency either to incorporate, in a formal way, specific rules supplementing the general ethical rules (e.g., in Germany) or to adopt stricter rules than their private counterparts (e.g., in Austria). Additionally, where an ombudsperson – an alternative self-regulation mechanism – has been set in place in order to address media content and receive audience's complaints, it is usually applicable to both commercial media and PSM (e.g., in Denmark, Canada, and Portugal).

As to the pluralism of viewpoints being heard in the media content, the MDM research findings reveal that media organisations usually lack formal rules or standardised procedures for ensuring internal pluralism in newsrooms (Iceland, Germany, Flanders, and Chile) or show no respect for such rules (Hong Kong). The diversity of voices being heard is hence determined by editorial meetings or dictated by single measures derived from the management. Even in the case of PSM, obligations for internal pluralism as part of their mission statement (e.g., in Austria) or as part of a law imposition (e.g., in the Netherlands and Switzerland) are scarce. However, when there are no standardised procedures favouring internal pluralism, PSM, compared with their private rivals, appear to be more sensitive or dedicated to mechanisms safeguarding the plurality of opinions. This is exemplified by the Danish public service broadcaster DR incorporating a Director of Pluralism and Diversity, whose job it is to ensure a series of pluralism activities, related, for instance, to the recruitment of participants in popular programmes or to the positioning of journalists.

In relation to pluralism, it is interesting that some countries have rules mandating balanced coverage of political topics and officials, though media outlets do not always comply with them. For instance, in Portugal, the Regulatory Entity for the Media (ERC), which is in charge of monitoring the level of political pluralism in news content, has revealed the tendency of the public service broadcaster to give prominence to the government and its supporting party at the expense of the main opposition party, though this practice seems to be decreasing now compared with the past (Fidalgo, 2021). An extreme case is Italy, where the historical news programme TG1 (Telegiornale 1), broadcast on the RAI1 television channel, is obliged by service contract to devote time to all political forces in proportion to their parliamentary power, and at the same time the “*par condicio*” broadcasting rule aims to guarantee equal treatment of all political parties appearing on the news media during elections (Padovani et al., 2021).

To conclude, the increasing levels of media ownership concentration, either at national or local level, do not seem to prevent media market competition, with public service and commercial media coexisting in a continuously evolving media ecology. Public service broadcasters worldwide try to produce programmes addressing the needs of ethnic-cultural minorities, even when private media do not. The culture of self-monitoring is stronger in public service broadcasters, which are more actively dedicated to self-regulation mechanisms. Sometimes this is imposed by law. Pluralism in newsrooms, though rarely protected by official rules or by law imposition, is a goal that PSM show greater sensitivity to, compared with their private counterparts.

*Performance of public service media with respect  
to Control / Watchdog (C)*

The watchdog function of journalism has often been referred to as a cornerstone of a well-functioning democracy (Trappel et al., 2011; Weaver & Wilnat, 2012). The exercise of public power and political decisions – with great implications for citizens’ daily lives – must be regularly scrutinised by independent media. The quality of public debate increases if media are able to hold powerful offices, individuals, and groups in society accountable.

Theoretically, PSM seem to have a central role to play in society by producing investigative and independent journalism. The basic idea for PSM is to serve the citizenry with accurate, relevant, and reliable information about what is going on in society. Generally speaking, PSM are expected to be impartial in reporting and stand free from the pressure of powerful political and economic interests. However, public service conditions are not uniform, but vary from country to country with regard to regulatory frameworks, financial models, and links between media and political system (Arriaza Ibarra et al., 2015). It is reasonable to assume that the varying conditions influence the ability to fulfil the democratic watchdog role. This is especially true in illiberal political systems where the state captures PSM and transforms them into state media. But, while such state broadcasting is equivalent to state ownership of media, granting media little autonomy and submitting media to close supervision, PSM are antithetical to state broadcasting. PSM are in public ownership, perform a public mandate, and try – secured by a public control as, for example, broadcasting councils – to work autonomously.

This section focuses on the watchdog function of PSM in the 18 countries covered in the 2021 MDM project. We discuss the importance of public service media for investigative journalism, the ways in which public service media contribute to the control and accountability of political powerholders, and how investigative journalism in public service media has developed in recent years. Two specific indicators in the MDM project are analysed, one regarding the watchdog and the news media’s mission statement (C7) and one measuring the watchdog function and financial resources of media (C9). Both indicators applied to public and private media companies, but this chapter refers only to observations of PSM performances in the MDM country reports.

In most countries, the independent role of PSM is normally mentioned in the mission statement of the institution in question, stating that reporting should be in the public interest and independent from any kind of power. In the United Kingdom, the watchdog function is implicit, rather than explicitly set out in the BBC’s constitutional documents, while the company’s editorial values stress the importance of operating in the public interest, reporting stories of significance to audiences and holding the powerful accountable (Moore & Ramsay, 2021). Investigative journalism is also one of the missions of the public broadcaster

RAI in Italy (Padovani et al., 2021), and the Flemish public broadcaster VRT is obliged to invest time and money into investigative journalism (resulting in startling reports about corruption in politics and privacy issues) (Hendrickx et al., 2021).

Perhaps even more interesting than official mission documents is to analyse whether watchdog journalism is actually performed by PSM. The interviews conducted with PSM representatives for the MDM project give rather scattered answers. In some cases, public broadcasters report increased spending on investigative journalism. The Finnish public broadcaster Yle, which also has a specific investigative group, has exceptional resources for investigative journalism in the form of documentaries and other current affairs programming (Ala-Fossi et al., 2021). In Sweden, the PSM SVT reports that the budget for investigative journalism has increased significantly, and that practices and methods are implemented on regional levels (Nord & von Krogh, 2021). The Canadian public broadcaster CBC argues that “its investigative work sets it apart from the rest of Canada’s news media, highlighting its important journalistic contribution as part of its mandate and a justification for the taxpayer money spent on the public broadcaster” (EMRG, 2020: 5). In Iceland, the public service broadcaster RÚV constitutes a considerable exception to the general trend of media outlets’ inability to perform quality in-depth reporting, along with the paradigm of ad hoc resources (Jóhannsdóttir, 2021).

Still, the most common reflections in the interviews are based on the observation that resources spent on investigative journalism are too scarce, and not in line with editorial ambitions in public service media. In Germany, “austerity measures in public service [media] led to a hiring freeze, just when investigative reporting is seen as a way to counter fake news and foster trust in the media” (EMRG, 2020: 7). Public broadcaster ABC in Australia previously enjoyed a good reputation for its investigative reporting, but “it is now having serious limitations placed on its functioning due to funding cuts” (EMRG, 2020: 4). In Italy, investigative journalism in public media is not perceived as being sufficiently represented in news programmes (Padovani et al., 2021).

To conclude, PSM sometimes make important contributions to democracy by offering investigative programmes and spending considerable resources on watchdog journalism. In some countries, public service programmes are explicitly mentioned as flagships in the investigative journalism environment. At the same time, public broadcasters in most countries generally struggle with budget cuts and increasingly market-oriented media policies that risk weakening the vital democratic control function of PSM.

In most countries participating in the MDM research project, lack of resources and time are the major constraints facing news media when taking on the task of investigative reporting. The resistance to this trend, albeit scarce, is twofold, derived either from the public service broadcasters’ struggle or from

innovative media policies, adaptable to the current challenges of the media markets, with the aim of giving impetus to investigative journalism.

The significant role of PSM in defending investigative reporting as a vital part of the media's democratic function in a challenging context gives rise to an important conclusion: The stability in the watchdog role of media organisations can be ensured to the extent that quality in-depth reporting becomes an integral part of the self-definition of journalism, both informally as an individual culture of media professionals, and formally as a codified mission in line with an efficient media policy enhancing the watchdog culture in practice.

#### Public service media and commercial operators: Finland, a case study

As an example of the dynamic between PSM and commercial media, the empirical material from the Finnish interviews provides for an interesting case study. On 17 December 2020, the Finnish Government proposed an amendment to section 7 of the Act on Yleisradio Oy [Yle], the Finnish public service media (Finnish Government, 2020). The proposition is a result of a joint venture by the Finnish commercial media to change the legislation regarding what type of content the PSM can publish online. The initiative was taken by the Finnish Media Federation (Finnmedia) on behalf of the commercial media actors in Finland as a private complaint to the EU Commission in 2017. The response from the European Union has been a reference for the preparation of the law change, but the content is classified. The changes to the law are clearly stated in the suggested new version of section 7 in the law:

In this bill, it is proposed that the Act on Yleisradio Oy be amended so that the provisions on Yleisradio Oy non-profit activities are clarified. The proposed regulations constraint Yleisradio Oy's ability to publish content in text form, as a part of its assignment to provide for a public service [translated]. (Finnish Government, 2020: 1)

Thereby, if the law is accepted, Yle would be prohibited from publishing news articles on the web in text format only. All published textual content should relate to audiovisual television or video content published by Yle. The commercial media representative Finnmedia argues that Yle, by publishing journalistic content only in textual form, distorts the competition. Clearly, the competition in this case has nothing to do with public service media. The real competition – as also stated in the interview with the editor-in-chief of the main daily newspaper *Helsingin Sanomat* – is from the platforms, notably Facebook and Google, but not Yle.

Quite likely, the proposition will be approved by the parliament in 2022, where the populist party “The Finns Party” are opposed to strengthening PSM. This tendency has been shown to be common among right-wing parties on the whole (Schulz et al., 2019; Sehl et al., 2020b). Consequently, the new law would lead to a situation where, in order for PSM to report news rapidly, it

would have to take an artificial detour and translate the essential messages into video or spoken form. The reporters at Yle are currently preparing for this by, among other means, creating an AI-based synthetic voice that will read aloud the text that would otherwise be considered illegal.

This case clearly demonstrates the common misconception about the essence of public service. Public service media are, by definition, not a competitor: As they are not “on the market”, they cannot skew the competition. Users of PSM do so in their capacity as citizens, not consumers. The questioning of PSM is not unique to Finland; similar discussions and legislation changes are recent in Germany, Denmark, and Portugal. These changes are worrying from a media ecology perspective.

In the case of Finland, the arguments are poorly motivated, and to a large extent, deliberations happen behind closed doors. From a democratic point of view, the end results are, in the worst case, damaging to the citizens and thereby also to democracy in general. There have been many critical responses to the suggested new law, both from civil society and academia.

Following the suggested changes to the law in December 2020, a team of Finnish scholars were asked to give their expert opinions in a hearing arranged by the Transport and Communications Committee, which is part of the Parliament of Finland (Ala-Fossi et al., 2021). Their opinions will later be published on the parliament’s website (we present their core arguments here with permission). The proposed provisions as stated in the legislative proposal (Eduskunta Riksdagen, 2020) would restrict Yle’s ability to publish textual content as part of its public service remit. The main arguments presented by said scholars in the hearing on 12 March 2021 were as follows:

- The proposal will reduce the amount of freely and readily available quality journalism online, thereby undermining equal access to information available to the citizens.
- Definitions of the roles, duties, and regulation of the public service broadcaster are unquestionably and unequivocally a national issue and not something to be decided by the EU Commission.
- The suggested division of online content into textual and audiovisual categories is a technologically obsolete and artificial construct. Media content published in digital form is not tied to any one particular form of utilisation.
- There is no clear research-based evidence of market failures of the commercial media caused by a public service broadcaster providing news for free online.
- The suggested restrictions are not clearly motivated or justified in relation to the potential benefits for the commercial media. The bill is very open to interpretation and the proposed regulation is likely to result in a recurring complaint being issued by Finnmedia.

The scholars then proposed that a better way forward would be for no legislative reform to be made at this stage and that a parliamentary working group be assembled in order to consider the clarifying of section 7 of the Broadcasting Act, and the ways in which textual journalistic online content can be included in the PSM remit. Furthermore, they requested that Yle’s textual news and current affairs journalism would be defined as one of Yle’s new core services and that the law should be revised accordingly.

The legislation about the roles, duties, and autonomy of PSM warrant further studies with a larger European scope. Meanwhile, current research has rather clearly shown that there is little or no evidence of a negative market impact on European commercial media due to PSM publishing free content online (Nielsen & Sehl, 2016; Sehl et al., 2020a).

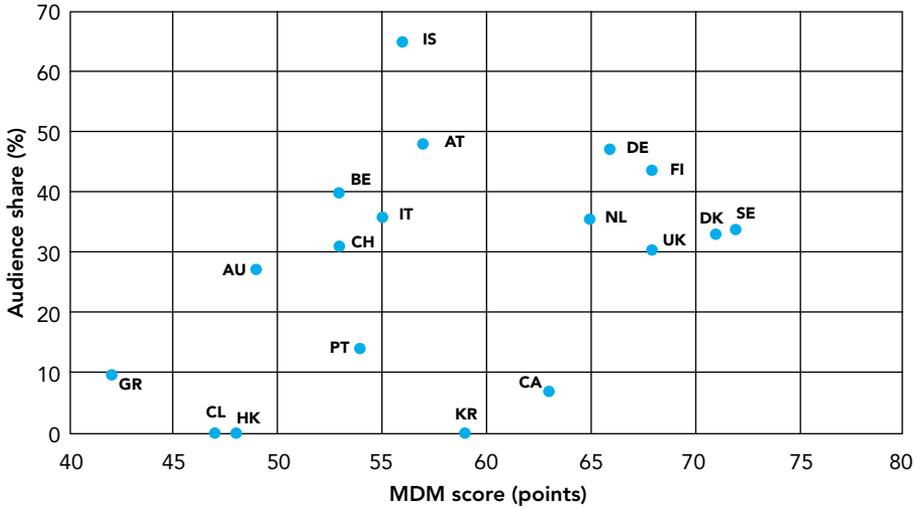
## Comparing the state of democracy and public service media across countries

In this section, we examine the indicators about the state of democracy and compare the findings to the results of the former sections in order to determine whether high rankings within the World Press Freedom Index 2020 (Reporters Without Borders, 2020) and the Freedom of Expression Index 2019 (Lührmann et al., 2019) correlate with high scores within the MDM project. We further analyse the possible relation between these scores and the strength of the PSM sector in each country. We stipulate that PSM, on the ground of their mandate, are obliged to serve democracy. Countries with a strong PSM sector are therefore expected to have high scores in the MDM indicators.

Most of the countries with a strong PSM sector also reach high ranks in the World Press Freedom Index and the Freedom of Expression Index; this is true for Austria, Belgium, Denmark, Finland, Germany, and Iceland. But there are also countries which rank high in these indices that have medium-strong PSM (Italy, Switzerland, Sweden, and the United Kingdom) or weak PSM (Australia, Canada, and Portugal).

Figure 9.1 shows the position of the various national PSM in terms of their audience shares and scores within the aggregated MDM indicators of the dimensions *Freedom / Information (F)*, *Equality / Interest Mediation (E)*, and *Control / Watchdog (C)*.

**Figure 9.1** 2021 MDM scores and strength of the PSM sector



Comments: Chile, Hong Kong, and South Korea are missing values for audience share.

As shown in Figure 9.1, strong PSM does not always correlate with high scores in the dimensions of *Freedom / Information (F)*, *Equality / Interest Mediation (E)*, and *Control / Watchdog (C)*. Looking only at the overall scores in relation to the position of PSM in the audience market, we find countries where a high audience share correlates with high overall scores in the MDM (Finland, Germany, and the Netherlands), and vice versa (Greece and Portugal). Two groups have either a high audience share in the market but only middle-ranging scores in the MDM (Austria, Belgium, Iceland, and Italy) or a middle position in the audience share but high-ranging MDM scores (Denmark, Sweden, and the United Kingdom). A similar division occurs in those countries of which the PSM have a middle position with regards to audience share, but low scores in the MDM (e.g., Australia) and where PSM enjoy a low audience share, but reach high scores in the MDM (Canada).

These data show the tendency for countries where PSM have a comparably strong position in the media ecology to perform better with respect to the overarching dimensions of *Freedom / Information (F)*, *Equality / Interest Mediation (E)*, and *Control / Watchdog (C)* than countries where PSM reach a low audience share and have a weaker position. We argue that the reasons for this tendency are found in the details of the MDM indicators. With respect to the performance of PSM in terms of *Freedom / Information (F)*, broadcasting regulation and relatively stable resources give PSM better conditions to establish tools and procedures for better performance, although PSM does not always use them to the full and expected extent.

The culture of self-monitoring is stronger in public service broadcasters. PSM appear to be more active or dedicated to self-regulation mechanisms than private media. Pluralism in newsrooms, although rarely protected by codified rules or law imposition, is a goal for which PSM show greater sensitivity, compared with their private counterparts.

PSM also play a significant role in keeping investigative reporting alive, constituting a vital part of the PSM democratic role. We also argue that the stability of the watchdog role of media organisations can be ensured to the extent that quality in-depth reporting becomes an integral part of the self-definition of journalism, both informally as an individual culture of media professionals, and formally as a codified mission in line with an efficient media policy enhancing the watchdog culture in practice. This is true for both PSM and private media. Strong public service media will enhance the chance that the media ecology is working to this aim, provided that PSM are using their resources and autonomy to reach that aim.

## Conclusion

Ongoing developments in the media market, media regulation, journalism professionalism, and related areas challenge or threaten the role the media ideally play in a democracy. This chapter provides evidence of the extent to which PSM can constitute a countermeasure. The chapter shows how PSM perform with respect to the overarching dimensions in the MDM: *Freedom / Information (F)*, *Equality / Interest Mediation (E)*, and *Control / Watchdog (C)*.

The overall MDM scores in relation to the position of the PSM in the audience market shows a quite complex picture: We find cases where a high audience share correlates with high MDM scores (Finland, Germany, and the Netherlands), and vice versa (Greece and Portugal). We can conclude that good performance with respect to our MDM indicators pays off in audience approval. But the question remains of why this is not the case with the two groups of countries that have either a high audience share in the market but only middle-ranging MDM scores (Austria, Belgium, Iceland, and Italy), or a middle position in the audience share but high-ranging MDM scores (Denmark, Sweden, and the United Kingdom). Here, the relation between market position of PSM and their performance is less clear-cut, and it would need deeper analysis not only of the single factors of the MDM indicators, but also of the contextual conditions, in order to find the reasons for these inconsistencies. A similar deeper analysis would be needed for those countries of which the PSM have a middle position with regards to audience share, but low MDM scores (e.g., Australia) and where PSM have a low audience share, but reach high scores in the MDM (Canada). Our assumption is that – beyond the MDM performance indicators – a reflection

of the sociocultural and historical development of PSM in the given country are underlying influencing factors, which would need still another approach than the one we employed here. Several additional questions could be asked: How has the longer tradition of acceptance of public broadcasting been? How have political actors related to public service broadcasting and media? Which cultural and social roles did public service broadcasting, and now public service media, play in the given countries? Questions like these cannot be dealt with in a snapshot picture like our indicators give.

Relating the findings to the concept of media ecology, where strong PSM influence the performance of other media, countries with PSM enjoying high audience shares, as opposed to countries with less influential PSM, better serve democracy. Those countries with a strong PSM sector rank in the upper regions of the relevant democracy indicators. From this, we can conclude that public service media do not only claim to be relevant for democracy, but do indeed deliver services within a media ecology with an impact on how media perform in general.

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## Chapter 10

# Ethical codes of conduct in journalism

## *Demands for a digitalising mediascape*

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### Abstract

Codes of ethics are one of the most widespread instruments of (self-)regulation for journalistic activity, pointing out the best professional practices and ethical standards to be followed and the need to allow some kind of scrutiny by the public. Such codes have different names, scope, authorship, range of action, and enforcement capacity, as can be seen in the various reports of the 18 countries participating in the 2021 Media for Democracy Monitor (MDM) research project. In this chapter, an historical overview of the evolution of journalistic codes of ethics in different national media contexts is given, as well as an analysis of the cornerstones such codes are built upon in various countries. We discuss the specific virtues and shortcomings of such codes, with a particular emphasis on the new challenges brought by the digital media environment. The role played by codes of ethics, compared with the laws that regulate media, is also addressed.

**Keywords:** journalists, codes of ethics, ethical standards, professional accountability, self-regulation

### Introduction

Journalistic codes of ethics are traditionally regarded as declarations that journalists will try to follow the best professional practices and ethical standards, meet their social responsibility obligations, and accept public accountability. Their commitment to do so on a self-regulatory basis helps to protect news media from political interference and, thus, to preserve freedom, independence, and pluralism. The country reports of the 2021 Media for Democracy Monitor (MDM) research project show a vast multiplicity of such codes, although with different origin or authorship, scope, range of action, and enforcement capacity, depending on the media context (Trappel & Tomaz, 2021b, 2021c).

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Fidalgo, J., Thomass, B., Ruggiero, C., Bomba, M., Sallusti, S., & von Krogh, T. (2022). Ethical codes of conduct in journalism: Demands for a digitalising mediascape. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 211–230). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-10>

MDM Indicators and related research questions addressed in this chapter:

**(E7) Code of ethics at the national level**

Does a code of ethics at the national level exist, requiring news media to provide fair, balanced, and impartial reporting? Is it known and used? (Trappel & Tomaz, 2021a: 38)

**(E8) Level of self-regulation**

Does a media self-regulation system exist at leading news media, requiring the provision of fair, balanced, and impartial reporting? Is it effective? (Trappel & Tomaz, 2021a: 39)

In this chapter, we give an historical overview of the evolution of journalistic codes of ethics in different media contexts, as well as analyse the cornerstones such codes are built upon. We then map the existing codes in the 18 countries participating in the 2021 MDM project and their underlying rationales. Subsequently, we discuss their specific virtues and shortcomings, particularly in what concerns the digital media environment. We pay special attention to the challenges deriving from social media in adapting and upholding media ethics. The interviews with editors and journalists conducted for the 2021 MDM project provide useful insights to enrich the debate, and are helpful in finding new ways of involving journalists, scholars, and the public in the reflexion of media ethics issues. Such issues will eventually require some revision of the existing codes of ethics, because the continuous changes in media and journalism bring new ethical dilemmas and challenges. This updating process is already happening in some countries, while still to be materialised in others. Provided the rapidly changing media context, the development of ethical codes is likely to accelerate in the near future.

## Press freedom and codes of ethics

The starting point for all codes of ethics for journalism is the concept of press freedom, a guiding principle for all democratic societies. Freedom of the press is fundamental for democracy, because it condenses a bundle of basic rights: freedom of thought, freedom of opinion, and freedom to obtain, disseminate, and receive information (see Article 19 of the Universal Declaration of Human Rights of 1948; United Nations, n.d.). In this function, freedom of the press includes active advocacy for public forums, defence against state intervention and censorship of the media, and institutional protection of these rights. On the other hand, discussions about how to best ensure these freedoms have been ongoing since the early debates about press freedom during the Enlightenment.

A central question within journalistic ethics is the demarcation between the freedom of journalism and the interests of those affected by it, be it the objects of reporting or the recipients to whom media content is intended or expected to reach (Thomaß, 1998). Who defines this balance and according to which criteria is just as much the result of an understanding of ethics in journalism and the role the media should play in a society as a question of who controls this boundary. Essentially, there are two models for attributing this responsibility: state regulation (through legal provisions) and professional self-regulation (through codes of ethics).

The press law of a country, valid for all journalistic areas, establishes indispensable prerequisites that are considered necessary in order to guarantee the functioning of media and to regulate the relationship between individuals, state, and society and their claims on each other within the communication conveyed by the media. However, the law is to be seen only as a minimum prerequisite for ethical standards: The law hinders negative ethics (and codes promote positive ethics). In other words, “what the law does not forbid, decency forbids” – this everyday saying expresses the complex relationship between law and ethics, especially in relation to the media.

On the other hand, there are ethical norms defined by the profession and, if necessary, laid down in codes. While laws only prevent negative things from happening, ethical rules can achieve positive results. Codes can correct, supplement, replace, or even contradict the law. Where legislation is insufficient, inappropriate, or unsuitable, journalistic commitment should take effect. The development and establishment of professional ethics rules have taken place in this tension between averting possible legal restrictions on the one hand, and offering a positive orientation framework for the profession on the other.

Three closely related explanations can be cited for the introduction of professional codes of ethics (White, 1989). First, a functionalist explanation sees the introduction of codes of ethics as a protective mechanism for potential clients or addressees of a profession who are to be protected from the danger of uncontrolled expertise. This interpretation takes on special significance in times of rapid expansion of new, unfiltered, or uncontrolled knowledge. The rapid introduction, deployment, and development of new communication technologies and the resulting concerns may explain the increasing interest in media ethics in recent decades. Second, a monopolistic or economic explanation argues that professional codes of conduct are part of a broader mechanism that is designed to restrict access to the profession so that the relevant professional competence can be traded as a scarce commodity in the marketplace. Third, a sociological explanation sees the establishment of professional codes of ethics as an attempt to secure the social status of a profession within society. This explanation is particularly valid for the introduction of press codes at the beginning of the twentieth century in the US. This introduction was based on the considera-

tion that professionalisation was an ideology intended to safeguard the social status and political influence of the new middle classes in the US at that time. In this endeavour, many professions introduced codes of ethics between 1900 and 1930. These codes were written to uphold the individual and community values that were seen as threatened by the introduction of the large bureaucratic, anonymous, and competitive forms of enterprise.

The introduction of codes of ethics at the beginning of the twentieth century soon gained attention from international bodies; in 1936, the Union Internationale des Association de Presse [The International Francophone Press Union] formulated ethical principles; in 1939, the Fédération Internationale des Journalistes (International Federation of Journalists) adopted a code of honour; and in 1950, the UN worked on an international code of conduct for the press, but never adopted it because professional organisations in various countries opposed interference from their governments in this way (Bertrand, 1991). Based on this, the International Federation of Journalists adopted the Declaration of Bordeaux in 1954. In its own terms, this Declaration “is proclaimed as a standard of professional conduct for journalists engaged in gathering, transmitting, disseminating and commenting on news and information in describing events” (Ethicnet, 2021). It is regarded as a kind of “bedrock” of commitment “in defence of a quality and ethical journalism” (Ethicnet, 2021).

## Issues of concern in a new media environment

As Bertrand (2000) pointed out, ethical codes in journalism are the conventional means by which media organisations establish the values that characterise their work, social role, and professional norms, and are closely related to the political and cultural system in which they are involved and the media system in which the code is written (Limor & Himelboim, 2006, 2008).

Four central aspects have been identified as necessary to include when putting media-ethical principles in writing (White, 1989): first, a media-specific application of general principles of humanistic ethics (e.g., truthfulness, service to the general public, objectivity, and preservation of the invocation secret); second, the respect of basic human rights (respect for privacy, freedom of information and freedom of thought for journalists, the right to fair payment for professionals, etc.); third, duties for media professionals (integrity of journalists, decency in obtaining information, solidarity towards colleagues, etc.); and fourth, duties for media companies (although rarely included in codes).

In a comparative analysis of ethical codes in more than 50 countries three decades ago, Cooper (1990) discovered that the codes share three basic media-ethical aspirations, which he claims to be universal. Cooper clusters these concepts into the following categories, which are given different weight in the

respective codes (for an overview of press codes of national and international provenance, see Ethicnet, 2018a; see also *Accountable Journalism*, n.d.): the search for truth – that is, objectivity and accuracy; the desire for social responsibility – that is, professionalism, accountability, justice, equality, loyalty, priorities (e.g., to the government, the public, one’s own profession or personal integrity), adherence to social customs (e.g., with regard to the protection of personality or the protection of informants), and items that refer to underlying motivations (e.g., conflicts of interest, corruption, and self-privilege); and the urge for freedom of expression – that is, free flow of information, regulation, freedom of the press, and freedom of speech. Although the categorisations of White (1986) and Cooper (1990) were put up independently from each other, they follow similar logics: The search for truth can be regarded as the core of duties (for media professionals and media companies); freedom of expression is at the core of basic human rights; and social responsibility is a core element of humanistic ethics, transferred to the media.

In principle, these central aspects and key concepts are just as relevant in a highly mediatised digital information environment, and they can be found in more recent codes as well. However, the online-based possibilities for information gathering, processing, and delivering, and new actors who have entered and now dominate the scenery, also create new areas of concern: “The emergence of digital technology and the evolution of the role of journalism – including much more active participation of the public – has intensified some of the traditional ethical challenges and created new ones” (Steele, 2014: viii).

McBride and Rosenstiel (2014: 2–3), who write for the influential Poynter Institute, present the following:

A new set of Guiding Principles for Journalists, which meld the core values of journalism with the democratic values of the digital era.

1. Seek truth and report it as fully as possible. [...]
2. Be transparent. [...]
3. Engage community as an end, rather than as a means.

Interestingly, a systematic analysis of 99 ethical codes from around the world showed that only 9 out of the 99 analysed codes include references to the Internet or information and communication technologies (ICTs) (Díaz-Campo & Segado-Boj, 2015). In the 1990s, the introduction of new information technologies was one of the main reasons for updating or reformulating existing codes of ethics in Europe (Laitila, 1995). Hence, Díaz-Campo and Segado-Boj (2015) ask if the further development of ICTs have had a similar effect. They find that only in nine countries (Bosnia and Herzegovina, Canada, Hungary, Luxembourg, the Netherlands, Norway, Poland, Romania, and the United Kingdom) do ethical codes refer to the Internet and ICTs, amongst which codes from Canada, the

United Kingdom, and Norway appear as most aware of Internet issues (Díaz-Campo & Segado-Boj, 2015). Apart from general principles applicable to the online environment, the main topics dealt with in the codes considering the new digital environments are uses of social media, linking, user-generated content, and journalists' use of the Internet. However, Díaz-Campo and Segado-Boj (2015: 15) lament “a widespread lack of interest and a lack of consistency [...]. There are no uniform trends as to how aspects specific to digital journalism are incorporated into the codes of ethics”.

In our analysis of the interviews with media practitioners conducted for the 2021 MDM project, we investigate if the situation since 2015 has changed and what place digital challenges have in the codes of ethics.

### Different models, similar purposes

An ethical code for journalists (referred to as Code of Practice, Ethical Guidelines, Charter of Duties, and so on) exists in all 18 countries participating in the 2021 MDM research project (Trappel & Tomaz, 2021b, 2021c), although differing in structure, scope, and degree of detail. The most common pattern associates the existence of a code with an organisation – a press council – that supervises the practical implementation of the code and deals with complaints from the public regarding breeches of the same. Such a complaint mechanism first appeared in 1916 in Sweden (Nord & von Krogh, 2021), but similar structures exist in Germany since 1956 (Horz-Ishak & Thomass, 2021) and in Austria since 1961 (Grünangerl et al., 2021). In 1968, Finland set up a broad Council for Mass Media (covering press, radio, and television), which is responsible for an ethics chart – Guidelines for Journalists (Ethicnet, 2018b) – which all leading news media in Finland have committed to following (Ala-Fossi et al., 2021).

Switzerland also has a national code of ethics (Declaration of a Journalist's Duties and Rights), adopted by the journalists' professional associations and supervised by a press council (Bonfadelli et al., 2021). The Netherlands has a similar structure where, alongside the guidelines coming from the press council, a second national code exists under the responsibility of the Editors-in-Chief Association (Vandenberghe & d'Haenens, 2021). Rather similar is the case of Hong Kong, where a code of ethics is elaborated by a press council, but does not involve all the news media (Lo & Wong, 2021).

The involvement of journalists' associations in the elaboration of codes of ethics is common to all 18 countries participating in the 2021 MDM project. In fact, in a number of them, the direct responsibility for this issue comes from the journalists' unions. This is the case of Australia (Dwyer et al., 2021), where the code was adopted in 1944 and where there is also a press council, as well as Iceland (Jóhannsdóttir et al., 2021) and Portugal (Fidalgo, 2021), where an

ethics council exists within the journalists' union itself, in order to take care of the code's observance. Journalists' associations are also actively involved in making the codes of ethics in Canada, where no national code exists, but rather a set of guidelines to help ethical behaviour (Taylor & DeCillia, 2021); in South Korea, where a Press Arbitration Commission receives and decides on complaints (Kim & Lee, 2021); and in Italy, where a set of different codes was assembled into a Charter of Journalists' Duties, supervised by an unusual "Ordine dei Giornalisti" [Order of Journalists] (Italy is the only country in the 2021 MDM project where there is an Order of Journalists, a kind of organisation usually associated with the so-called established professions, such as doctors, lawyers, or engineers) (Padovani et al., 2021).

Belgium has two codes, one for the French-speaking region and another for the Dutch-speaking part of the country (Hendrickx et al., 2021). The United Kingdom has five national codes of ethics addressing journalism in different media contexts (two of them are for broadcasters, two for editors, and one for journalists) (Moore & Ramsay, 2021). Greece also has several codes, resulting from the multitude of journalists' associations existing in the country (including an Internet Publishers Association with its own specific Code of Ethics) (Papaathanassopoulos et al., 2021). Finally, Chile has one code under the responsibility of the Journalists College and an Ethics Council associated with a Federation of Media, and most of the guidelines about journalists' ethical behaviour are also inscribed in a separate law (Núñez-Mussa, 2021).

## Comparing the scope of codes

Codes vary with regards to both length and level of detail. Some of them (in Iceland, Greece, Belgium, Australia, and Portugal) are short and synthetic, listing ten to twelve articles where basic ethical principles and duties are presented in a generic way, with no practical specifications. Other codes (as in Germany, Austria, Denmark, Finland, the Netherlands, and South Korea) present dozens of articles evoking the ethical principles but also detailing concrete situations that may require a specific action by professionals. A large set of "Guidelines for journalistic work" (Germany; Horz-Ishak & Thomass, 2021) or a long list of "Standards of practice under the Code of Press Ethics" (South Korea; Kim & Lee, 2021) are illustrative examples of this extensive model.

In terms of reach, some codes of ethics are directed explicitly at journalists, and journalists alone: This is the case when codes are developed by journalists' unions or journalist associations (as in Portugal, Greece, Australia, and Iceland). In a number of countries, however, the codes are also directed at editors and publishers (Germany, Belgium, Italy, and Hong Kong). Where this happens, editor and publisher associations have been involved in the elaboration or

approval of the texts, or there is an underlying assumption that journalism ethics also concerns those who are responsible for the working environment in which journalism is practised. This same assumption is equally present in the countries where codes are closely linked to the press councils that established them and which deal with complaints by the public (Austria, the Netherlands, Sweden, and Switzerland). In some countries, there are specific codes of ethics for editors, as is the case in the United Kingdom, with the IMPRESS Standards Code and the IPSO Editor's Code of Practice (Moore & Ramsay, 2021), or in Greece, with an innovative code of ethics from the ENED – Internet Publishers Association (Papathanassopoulos et al., 2021).

In some countries, there are several associations dealing with self-regulation, not all of which are recognised by media companies. Membership is often voluntary, and not all major media are members. In these contexts, self-regulation mechanisms are weaker, and many ethical guidelines rely primarily on oral tradition. For example, in Italy, the plurality of codes, charters, and norms has created a framework that is difficult to harmonise. Moreover, such standards – according to the Italian interviewees – may be known to professionals but are seldom considered in practice (Padovani et al., 2021). In Switzerland, on the other hand, the Swiss Press Council's code of ethics has little effect, as decisions “can be taken note of – or ignored [and] no sanctions are provided for”, while corporate and editorial guidelines are contractually binding (Bonfadelli et al., 2021: 426).

A trend in several of the countries participating in the 2021 MDM project is the proliferation of specific codes of conduct for a single company or a single medium. Such codes or internal guidelines exist in Finland, Portugal, Denmark, Australia, Italy, South Korea, the Netherlands, Hong Kong, Belgium, and Switzerland. Most of them are included in stylebooks that serve as guides for newsroom work, and they explain in more detail the principles that journalists (and the medium) are expected to respect.

As for public service media, with their specific status (in terms of ownership, norms of pluralism, and public accountability), specific codes or guidelines for ethical conduct also exist in various countries (Austria, Germany, Iceland, and the United Kingdom, among others).

The scope of most of the existing codes of ethics is strongly marked by the model of legacy media, with a clear prevalence of the press. Even in terms of naming, most of the councils that supervise the codes and their enforcement are named “press council”. Audiovisual areas are not always addressed as explicitly as the written press, and the same is true for the online media diffused through the Internet. Only a few countries refer specifically to online media in their codes.

In spite of these traditional marks, some updates are noticeable. For example, in Finland, the “Guidelines for Journalists” drawn up by the Council for Mass Media includes an annex specifically referring to “Material generated by the

public on a media website” – material that “should not be regarded as editorial material” and is therefore treated in an annex (Ethicnet, 2018b: Annex para. 2). This addendum was made in view of the fact that “the online environment is changing and developing extremely quickly”, as said by its authors (Ethicnet, 2018b: Annex para. 4). Another example is the Belgium code of ethics of the French-speaking region (Code de Déontologie Journalistique). This code deals with ethical challenges such as the presence of journalists on blogs, personal websites, and social media, and ways to inform about foreigners and refugees (CDJ, 2020). In Canada, the guidelines from the Journalists’ Association clearly state that “ethical practice does not change with the medium” and that journalists must “consider all online content carefully, including blogging, and content posted to social media” (CAJ, 2020: 6) There are even particular “guidelines for re-tweeting or re-posting information found in social media” (CAJ, 2010).

## The role of self-regulation

Media self-regulation refers to a process of setting, implementing, and sanctioning rules produced by media professionals applying to themselves (Puppis, 2009). Self-regulation has an important role to play in ethical codes, which are meant to protect both the integrity and the identity of the journalistic profession from external and internal pressures (Laitila, 1995).

In most countries of the 2021 MDM sample, the leading media can rely on self-regulation mechanisms and organisations for the implementation of journalistic ethics both at the national and local level – although the rules developed within individual media outlets at all levels tend to have an informal basis, linked to the oral culture of individual newsrooms. As Limor and Himelboim (2006, 2008) argue, codes of ethics differ in terms of authorship, sanctioning capacity and control bodies. Very often, self-regulatory organisations – such as press councils, associations, or trade unions that include publishers, journalists, and other stakeholders – both draw up the standards and codes of ethics and act as guarantors and judges for the resolution of disputes. The role and weight attributed to these bodies in the daily work of editors and professionals often indicate differences in journalistic culture, which sometimes translate into a formal written code of ethics and sometimes into an informal, oral tradition.

Analysing the MDM data reveals a sort of coexistence between the political or legal and the ethical approaches, with different spheres of influence. The former refers to the macro-level regulation of the journalist profession, specifically to the government laws and self-regulatory organisational practices that characterise journalism. The latter invests the profession in the micro-level of the media company or newsroom, with a difference between written codes and oral tradition – both rooted in journalistic professionalism. Finally, these two

approaches are not in any formal conflict, but they do depend on the journalistic culture of each country.

Investigating how journalists consider the impact of codes of ethics and self-regulation in their day-to-day work is related to the issue of media accountability. As Fengler and colleagues (2015) state in their comparative study of journalists from 14 European countries, this kind of recognition involves analysing the impact of different media accountability instruments. This can be done by referring to the “classic” influence model developed by Shoemaker and Reese (1996) and distinguishing – as suggested by Russ-Mohl (1994), Nordenstreng (1999), and Hafez (2002) – actors involved at the individual, professional, organisational, or extra-media level. The results that emerge from the MDM interviews refer, in the model outlined above, to the professional and the organisational levels: The former is in fact the ideal context in which to consider the impact of national codes of ethics, while the latter – which represents a very important point in Fengler and colleagues’ (2015) research, refers to the level of self-regulation.

As is inevitable when dealing with a subject of such complexity, both from the point of view of its definition and its effectiveness in journalistic work, interviews conducted with journalists and representatives of journalists’ unions paint a complex picture with respect to the consideration of codes of ethics and their relevance in everyday news reporting.

## Relevance and effectiveness of codes of ethics

In almost all of the countries participating in the 2021 MDM project, there is a widespread awareness of the existence of codes of ethics, but in many cases, one debates their relevance and their actual normative capacity. Self-regulation mechanisms, far from being a counterbalance to the system of rules codified at the national level, are more often an extension of it. This is in line with the results reported by Fengler and colleagues (2015), who already pointed out that the unanimous recognition of the importance of journalistic accountability (which coincides with the provisions of national codes of ethics) was matched by a much more lukewarm recognition of the effectiveness of self-regulatory mechanisms.

The most virtuous example of self-regulation mechanisms complementing strong national codes seems to come from Finland: Editors-in-chief, journalists, as well as both publishers’ and journalists’ associations uniformly attested that the code of ethics is well-known and followed within the profession. Not only that, but the rules issued by The Council for Mass Media in Finland have grown in importance, the director of The Finnish Media Federation states. Furthermore, media-house-specific rules, in some cases even more rigid than national ones,

exist and are implemented in the newsrooms of leading media, according to the president of The Union of Journalists in Finland (Ala-Fossi et al., 2021).

Another interesting case is that of Germany. All of the German journalists interviewed link respect for ethical codes to what seems to be a deep wound in their recent history (an example from which to draw inspiration so as not to make the same mistakes again): the case of the reporting about mass sexual offences that took place on New Year's Eve 2015–2016. Following ethical guidelines, journalists did not report the provenance of the offenders due to a lack of information from the police, but this led to public backlash and accusations of a cover-up. The journalists thus learned to consult more frequently the clause in the press code about the naming of ethnic or national provenance (Hora-Ishak & Thomass, 2021).

There is a significant shift regarding the perceived effectiveness of the different levels of accountability of journalistic activity when it comes to the southern European countries in the MDM sample. The very topic that has become a case study in Germany produces, in Italy, an opposite case, which leads the president of the Union of Journalists to doubt the effectiveness of existing ethical codes. On 13 November 2015, after terrorist attacks in Paris, the newspaper *Libero* used the front-page headline, “Islamic bastards”: “When a director [uses the title] ‘Islamic Bastards’ and is not accompanied to the door, all the Codes and Cards collapse”, bitterly concludes the president of the Union of Journalists. On the other hand, the Charter of Rome (established in 2008), a deontological protocol for providing correct information on immigration in a respectful way (for example, avoiding “dissemination of inaccurate, sketchy, or distorted information”), could be considered a sign of the vitality of the debate on journalistic ethics in Italy (Padovani et al., 2021: 355).

Even more critical voices are heard in Chile and Greece, specifically concerning two related topics. On the one side, they mention a general trend toward compliance, as one of the representatives of the College of Journalists [*Colegio de Periodistas*] in Chile (Núñez-Mussa, 2021) stated: “I would like to believe that the document is used in newsrooms. However, honestly, I know that it is not”. On the other side, a representative from the Journalists’ Union of Athens Daily Newspapers in Greece (Papathanassopoulos et al., 2021) mentions that specific abuses of codes of ethics are particularly widespread: “Often both media and journalists disregard the Ethics Code’s provisions, either in order to serve their personal interests or to serve their medium policy, or even to achieve higher [...] circulation, readership, viewership, etc.”.

In sum, the work to give ethical codes an active role in journalistic practice is far from finished. Two elements continue to deserve particular attention: On the one hand, the mechanisms of self-regulation – which are linked to the newsroom as the environment where journalists’ professionalism and identity are formed – can have greater effectiveness in their daily work. On the other

hand, attention should be paid to what Fengler and colleagues (2015) name the “extramedia level”: The transition of journalistic work, and of the ethical norms intended to guide it, in the digital age, remains extremely topical. The journalists interviewed for the MDM project maintain a position (well-summarised by García-Avilés’s 2014 study) according to which journalistic ethics as such should not have an offline and an online ethic. However, the scarcity of tools provided by the media outlets of reference to enact a code of ethics truly applicable to online environments calls into question, again, the need for a more convinced investment in the tools of self-regulation, whether it is the ethical codes or the practices of self-regulation developed by trade unions and professional bodies and by the newsrooms themselves.

### Material and moral sanctions for breeches

One of the most frequent debates about journalists’ ethical codes is the actual strength for deterrence of the codes, as they are not mandatory and nobody has the enforcement capacity to guarantee they are respected.

These codes are usually the result of a voluntary, self-regulatory commitment of the journalists towards ethical – not legal – requirements. Their norms are not legally binding (although the demand for a journalists’ code of ethics may be, in some countries, required by the media laws, e.g., in Denmark and Portugal), suggesting that the way is paved for impunity. However, that is not necessarily the case. If the codes are to function at a moral level, there is some consensus pointing to the fact that possible sanctions should also be moral, not material. The usual sanction when a journalist (and the medium they work for) disrespects an ethical norm or principle of the code is an obligation of the medium in question to publish the critical judgement made by the entity who receives and rules in complaints of code breeches. Some argue that this obligation has little or no effect at all, because it does not really hurt the offender (as would be the case of a cash fine, a disciplinary process, or a suspension at work). Others argue that material sanctions point to a legal context, and the so-called judiciarisation of moral norms is not acceptable in a rule-of-law society (Fidalgo, 2009). According to this perspective, the legal framework and the ethical framework should not be mixed together.

As Villanueva (2000) points out, there are crucial differences between legal and ethical norms: The former are “heteronomous”, “imperative-attributive”, “coercive”, and “general”, while the latter are “autonomous” (created by those who will follow them), “imperative” (appointing duties, not rights), “voluntary”, and “specific” (applied to a particular group of persons). Consequently, the disrespect of legal norms carries legal, material sanctions, while the disrespect of ethical norms should carry only moral sanctions. Public criticism of

a journalist's behaviour – made by their peers or a media council where peers are present – is the most common sanction for journalistic misconduct. This is actually a strong sanction, keeping in mind that a journalist's professional reputation is a most valuable asset. This makes self-regulation a difficult challenge: As written by Mañero (2000: 173–174), the success of self-regulation “demands a professional and social climate that adequately values the importance of moral judgments and that does not act only in the face of the imposition of what is endowed with coercion and external force”.

The effectiveness of a journalistic code of ethics is relevant in order to make it respected and valued both by those to whom it is directed and by those who believe in its value to produce quality news. However, turning the code into a legal set of rules would potentially compete with established laws (which also exist and have a particular role in regulating media behaviour), while the field of ethics and of voluntary self-regulation would be left aside as something without any real importance.

### Meeting the ethical challenges of online journalism

Online journalism and digital media undoubtedly imply ethical challenges for newsrooms. This section analyses how the codes of ethics of media organisations in the participating countries deal with these challenges.

One way to approach the question is to focus on ethical dilemmas of situations that only occur in a digital environment, like robot journalism. The example of robot journalism or news automation, which means that computer algorithms are fed with facts and construct charts and articles based on those facts, is not recounted as an ethical concern in the MDM interviews with reporters and editors. News automation has, however, been studied in a joint project between six press councils in Europe called “Media Councils in the Digital Age” (2019). The project's advice for press councils is to be prepared to handle complaints about robot-generated content (Haapaanen, 2020). The press council in Finland proactively issued a recommendation for transparency when publishing robot material in 2019. Inspiration for future codes can also be found in the Online News Association's project for ethical journalism online, which since 2013 has collected building-blocks for a code of digital journalism ethics (ONA, 2021).

A second approach is to note digital characteristics that amplify already well-known ethical dilemmas related to personal integrity, such as the wide reach and lasting nature of online (sensitive) information. In some MDM participating countries, like Sweden, the attitude so far has been that existing ethical guidelines already cover new digital grounds, hence no amendment is needed. But ethical in-house training for a wider group of journalists than before is necessary for live online reporting (Nord & von Krogh, 2021). In other countries, for

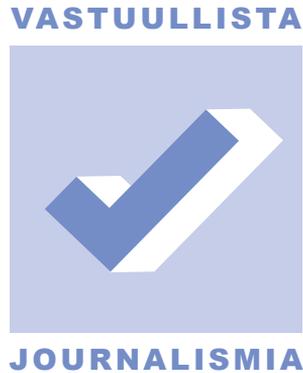
example, Austria (Grünangerl et al., 2021) and Australia (Dwyer et al., 2021), interviewees express wishes for new codes for online and digital media. In a third group of countries, including Canada and the United Kingdom, an earlier survey showed some clarification of codes stating that existing principles also apply online, regarding, for instance, respect for privacy and a high threshold for undercover activities in social media (Díaz-Campo & Segado-Boj, 2015).

A third approach is to be observant of whether the potential power of online practices might influence journalistic standards of verification before publication. In the Nordic countries, perhaps especially in Sweden, a culture of restraint has developed over the last hundred years regarding naming suspected criminals or wrongdoers before conviction. Then came the #metoo movement in late 2017, with a surge of previously suppressed statements of sexual harassments and assaults, primarily in social media. In Sweden, leading national news media reacted in two ways: The first was to publish petitions with signatures from at least 70,000 women in 40–50 different occupations with anonymised examples of abuse that illustrated the structural dimension of sexual harassment and abuse. The second was to name and shame alleged offenders. The Swedish Press Council reproached a record number of publications for bringing forth serious allegations without sufficient verification. Swedish editors have defended their editorial decisions, referencing the strong pressure from social media, the special atmosphere that prevailed, and the wish to contribute to a good cause. These arguments have not yet satisfied critics (von Krogh, 2020; see also Askanius & Møller Hartley, 2019).

A fourth approach is to acknowledge the existence of a new power structure regarding the dissemination of news, since the traditional monopoly journalists once had is long gone due to the expansion of social media. Established news media try to confront misinformation and earn public trust by transparent quality reporting, equally representing different perspectives, illuminating existing control mechanisms applied in newsrooms, and publishing columns explaining why specific news are chosen. Such measures are complemented by efforts to increase media and information literacy offered by media regulators (e.g., Ofcom in the United Kingdom), schools, educational programmes in public service media, and resources in public libraries.

One example from the 2021 MDM research sample is a media campaign developed by the Media Council of Finland in March 2018. The goal was to bring the general audience's attention to the differences between news organisations committed to following professional ethical guidelines and news from other sources. Editorial content in print, audio, video, and online were labelled with a logo for "Responsible Journalism" (see Figure 10.1). A majority of surveyed editors in Finland stated that they intend to continue using the label (Communication with the Media Council of Finland).

A fifth approach is philosophical in nature and suggests that since everyone

*Figure 10.1 “Responsible journalism” label*

*Comments:* This label has been used in Finland since 2018.

with a mobile device can now be a publisher, “ethics is no longer just the concern of professionals” (McBride & Rosenstiel, 2014: 217). This approach argues that media ethics cannot be based mainly on ideals of professionalism, but on “the precepts of common morality” (Elliott & Spence, 2018: 35). It might be time to talk more about ethical communication for many than about media ethics for a few (Fourie, 2017).

The fifth approach poses a question of what media ethics or communication ethics entail. Veteran ethics scholar Clifford G. Christians (2019) calls not only for media literacy, but for moral literacy. The technological changes from print and broadcast to digital “anytime-anywhere communication” have such vast implications that media ethics need not only be “updated, but re-theorized” (Christians, 2019: 32). It must be considered beyond journalism and in a global perspective, based on principles of truth, human dignity, and nonviolence, where the central view of technology emphasises “the common good rather than machine-like efficiency” (Christians, 2019: 29).

Press ethics evolved during hundreds of years into written codes of ethics and press councils. It remains to be seen how long the process of developing communications ethics for professional and social media will take.

## Conclusion

We cannot conclude that codes of ethics for journalism play an important role in strengthening journalism’s ideal role in democracy. We have found among the interviewed editors and journalists widespread support for ethical codes per se, but we do not know how much of this is an expression of rhetoric and how much of this support is transformed into practice. We have heard examples from reporters that indicate the real weight of codes in newsroom discussions

and in contacts with sources. But we have also heard comments that denounce the importance of codes completely.

What we can elaborate upon is what these codes represent and under what conditions they may be important. Many codes of ethics originate from times of media change that inspired strong media criticism and created a need for journalists and media organisations to respond to this critique. Examples of such periods are the 1920s in the US, the 1950s in the United Kingdom, and the 1960s in Northern Europe. Journalists and media organisations strived to strengthen their positions vis-à-vis lawmakers and the public, while at the same time formulating guidelines for quality journalism (Laitila, 1995). Codes were significant in both content and aspirations. The processes behind their elaboration can be analysed from a functional, economical, or sociological perspective.

The content of codes is of course of interest. Codes that are explicit and practical seem to be more useful as accountability instruments than lofty platitudes: “Hortatory codes insisting that journalists tell the truth, promote justice, act honourably, and keep faith with their readers are vacuous rhetoric”, according to Clifford G. Christians (2003: 61). Media accountability scholar Denis McQuail (2003: 284) has also raised a warning finger: “The existence of high-minded codes does not guarantee deep commitment, never mind enforcement”.

One cannot seek redress for journalistic shortcomings and lack of integrity in a piece of paper; a dialogue with individuals or organisations is needed to achieve that. Codes that do not stand alone in splendid isolation but are surrounded by some kind of institutional infrastructure – such as a media council or a leading publishing house on the national level and, for instance, a complaints department, editor’s blog, or union section on the company or local level – have potential to effectively enforce accountability. This is more likely to happen if the code was shaped through a transparent process by journalists and editors with input from sources and users, and not created from above (Christians, 2003; Smith, 2008).

These aspects of a functioning code are fruitful to consider when it comes to formulating a meaningful and forward-looking code of ethics for digital media and communication. Learning from the past and looking to the future – today.

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## Chapter 11

# Media accountability

### *A cross-country comparison of content monitoring instruments and institutionalised mechanisms to control news media performance*

Barbara Thomass, Francesco Marrazzo, Werner A. Meier,  
Gordon Ramsay, & Mark Blach-Ørsten

#### Abstract

This chapter focuses on media accountability. Because of the fundamental role that news media play in a democratic society, it is of high relevance for citizens that the performance of the news media is scrutinised, which is the overall goal of the Media for Democracy Monitor (MDM) research project. In this chapter, we investigate whether there are institutional mechanisms in place that hold the news media accountable to standards of performance. Following two MDM indicators, we look for the existence of content monitoring instruments and institutionalised mechanisms to control the performance of news media. We find that the use of content monitoring instruments is weak in many countries, while the use of institutionalised mechanisms fares better in most.

**Keywords:** media accountability, media performance, journalism and democracy, media monitoring, watchdog function

## Introduction

Public and political interest in the content and inner workings of the news media has increased dramatically in recent years. High-profile lapses in journalism ethics – such as the 2011 *News of the World* scandal in the United Kingdom where the tabloid performed large-scale telephone hacking, or the 2018 *Der Spiegel* scandal in Germany where a prominent journalist faked a series of reportages – set the agenda worldwide. At the same time, debates about fake news and political criticism of journalistic biases are part of everyday public discourse. In this context, greater transparency and accountability in media outlets is desirable in order to repair journalism's reputation. Unfortunately, the 2021 Media for Democracy Monitor (MDM) data shows that few media systems demonstrate a comprehensive commitment to the ideals of accountability and transparency. Based on a discussion of the concept of media accountability systems, we ana-

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Thomass, B., Marrazzo, F., Meier, W. A., Ramsay, G., & Blach-Ørsten, M. (2022). Media accountability: A cross-country comparison of content monitoring instruments and institutionalised mechanisms to control news media performance. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 231–252). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-11>

lyse the state of two established means of ensuring media accountability in the participating countries: the existence of content monitoring instruments and the presence of institutionalised mechanisms to control the performance of news media. Teams of researchers in 18 countries investigated the performance of leading news media regarding media accountability for the 2021 MDM project (Trappel & Tomaz, 2021b, 2021c). This chapter goes beyond these national assessments as we compare performance across countries. Our comparative analysis finds evidence of effective practices in some cases, but we conclude that the overall picture still leaves a lot to be desired.

MDM Indicators and related research questions addressed in this chapter:

**(E6) Content monitoring instruments**

Is there a regular and publicly available content monitoring instrument for news media? (Trappel & Tomaz, 2021a: 37)

**(C1) Supervising the watchdog “control of the controllers”**

Are there any institutionalised mechanisms to control the performance and role of the news media? (Trappel & Tomaz, 2021a: 43)

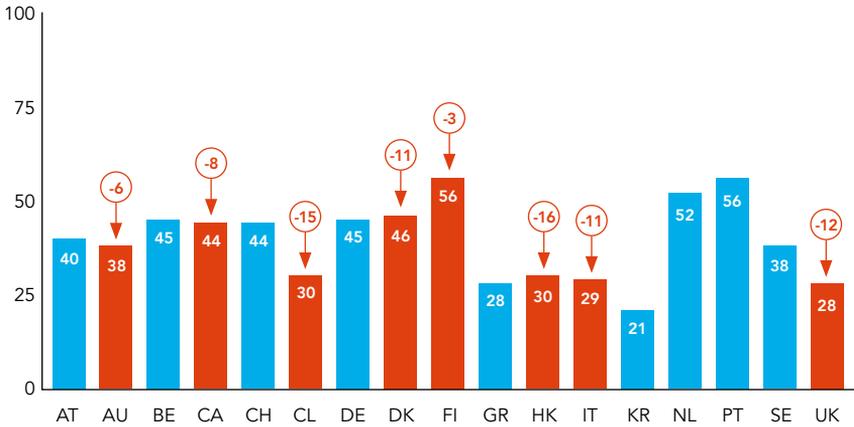
## The central role of media accountability in democracy

At a time when the role of news media and journalism is high on the public agenda and media criticism is in abundance, the question of media accountability seems more relevant than ever (Eberwein et al., 2017). In theory, a high level of media accountability would lead to a high degree of citizens trusting the news media. Thus, an indicator of the need for a focus on media accountability in a country is the level of trust people have in news and news media. The 2020 *Reuters Institute Digital News Report* (Newman et al., 2020) shows that 38 per cent of respondents in 40 countries trust news generally, whereas 43 per cent trust the news that they themselves use. Overall, this is a rather low number, but trust also varies a great deal between countries.

As Figure 11.1 shows, there are clear differences between countries. The Reuters study also shows that the willingness to pay for news is increasing in many countries, and other studies indicate that the Covid-19 pandemic has led to an increase in news consumption across media systems. In this context, the question of how the news media can preserve, expand, and continue to legitimise their role as a central arena for trustworthy information and public debate remains crucial.

To hold news media accountable is important for democracy, as journalism is unable to perform its central role as a democratic watchdog (see Karadimitriou et al., Chapter 5), unless news media themselves are held accountable.

**Figure 11.1** Overall trust in news, 2020 (per cent)



Comments: A direct comparison with 2019 data. The orange bars indicate a decrease in trust, with the negative numbers indicating the percentage point change. Sample: 2000 in each market. Iceland not included in the Reuters data. Question given to respondents: “Please indicate your level of agreement with the following statement: I think you can trust most news most of the time”. The decrease of trust in Chile was influenced by regular street protests and demonstrations about inequality; in Hong Kong by violent street protests over a proposed extradition law; and in the UK by a divisive election, Brexit, and attacks on the media. Decreases in trust were also found in Australia, Canada, Denmark, Finland, and Italy (Newman et al., 2020).

Source: Data from Newman et al., 2020: 15

## Content monitoring as a means for media accountability

Content monitoring plays an important role when considering the role and the place of media accountability systems (MAS) in the wider relationship between media freedom and media responsibility in democratic society. While there is a reciprocal relationship between government and citizens as well as between the media and government, this is not the case between media and citizens. The relationship between government and citizens is reciprocal, as citizens elect the government and must then adhere to laws made by the government. Accordingly, we can conceptualise the relationship between the media (consisting of owners, editors-in-chief, reporters, and journalists) and government as follows: The government produces the legal framework within which the media operate, while the media scrutinise the activities of government, which they report to citizens who have a limited capacity to hold the media accountable for their activities. This is where MAS have a role to play.

The very concept of media accountability systems was elaborated by the French communication scholar Claude-Jean Bertrand (1993, 1997, 2000, 2003), who, after outlining the concept in many publications, subsequently amended the original French acronym (MARS) to the English MAS.

In Bertrand’s (2003: 17) understanding, MAS encompass “any means of improving media service to the public that function independently from the government”, the “basic means” being training, evaluation, monitoring, and

feedback (Bertrand, 2000). Later on, the concept was enriched by emphasising accountability as a process between critics or victims and the media (McQuail, 2003, 2013; Pritchard, 2000). While the concept was initially rather static, it came to include a dynamic component with time. McQuail (2003) and Bardoel and d’Haenens (2004) elaborate on processes within or between four frames of accountability (market, professional, political, and public). In one of his first articles on the topic, Bertrand (1993: 22) wrote the following:

For the past twenty years or so, I have been studying media ethics issues. And it has become clear to me that the survival of humanity depends on it. More clearly: this survival depends on the generalization of democracy; there can be no democracy without freedom of the press; this freedom cannot survive without deontology. When media freedom is abused out of an exaggerated desire for profit and the public is then poorly served, user discontent can be used by governments to restrict freedom [translated].

Bertrand here points to the delicate balance of media freedom as a privilege as well as a responsibility. When the balance is disturbed, the capacity of media to support the political development of a country is at risk. This principle of freedom versus responsibility forms the basis of our conceptualisation of the MDM. The MDM project can in itself be understood as a means of media accountability through monitoring, by collecting data about whether media live up to the expectations of democratic theory (as outlined in Tomaz & Trappel, Chapter 1).

In the 2011 edition of *The Media for Democracy Monitor*, Trappel (2011) argues for the need to monitor news media in the context of the complex relationship of interdependency between news media and democratic societies. Because of the fundamental role that news media play in a democracy by bringing new and trustworthy information to citizens and scrutinising the activities of government, the performance of the news media themselves must also be subject to scrutiny. The concept of media accountability systems can be used to analyse media performance in terms of how this scrutiny is institutionalised and to compare accountability mechanisms across media systems. Bertrand (2003) had a rather broad understanding of how the observation of the media should take place and suggested the grouping of MAS according to their format, or – according to who is in charge – into internal, external, and cooperative MAS. Under these categories he listed a huge number of single means for which he had found examples from around the world. Some of them will appear later, when we discuss alternative classifications of MAS.

There has been some discussion about the pertinence of the wording media accountability *systems*. Bertrand (2008: 31) explained in one of his last articles that the MAS acronym was “derived by me from the famous sitcom M\*A\*S\*H” (Mobile Army Surgical Hospital, a television series that aired 1972–1983). In his books and articles, Bertrand enjoyed using asterisks in the same manner

for M\*A\*S in English, and for M\*A\*R\*S in French (Moyens d'Assurer la Responsabilité Social des medias [means to ensure that media will be socially responsible]). In French, the word "moyens" was handy; in English, it was the word "systems". Eberwein and colleagues (2011: 8) wrote in a footnote about media accountability systems that Bertrand's "use of the term 'system' seems inappropriate due to lack of theoretical foundation in systems theory", and that their MediaAcT project (Media Accountability and Transparency in Europe) would refer to "media accountability instruments" instead. However, rather than listing single instruments, as Fengler and colleagues (2014) name them, the interaction between individual measures is more significant than just their aggregation. Bertrand (2000: 154) therefore used the term networks:

Why a network? The reason is that while every existing M\*A\*S is useful, none is sufficient. None can be expected to produce great direct effects. They supplement each other, as they function at different levels and in different time frames. This supplementation – and, even more, effects that can derive from interaction of different means – make it justifiable to stick with the notion of media accountability systems.

Thomaß (1998) proposes another systematisation of media accountability, focusing on which factors have the most influence on media ethics. In a model that conceives of media ethics as a tiered endeavour, Thomaß (1998: 31) differentiates between the following six levels and considers appropriate means for pursuing media accountability in each one of them:

- at the personal level, the creative possibilities available to both the individual journalist and the individual recipient when participating in media communication;
- at the professional level, the normative demands on journalistic action and their implementation;
- at the organisational level, the actions of individual media companies as beneficiaries of press freedom;
- at the media-political level, the framework within which media systems and media companies are organised;
- at the sociopolitical level, the relationship between these principles and the context of their historical and social origins;
- and at the meta-ethical level, the principles of media ethics.

At the personal level, accountability mechanisms consist of any activity relating to individual morality, from education to internal awareness programmes that, though uncommon, can be found within media organisations.

At the professional level, there can be many instruments that promote media accountability: codes of ethics; press councils enforcing compliance with

codes; regulatory bodies monitoring media performance; reviews of journalism; scholarship summarising the quality and performance of media; and research by media-oriented groups, such as industry bodies or NGOs.

Media organisations themselves can assess and publicise their own accountability, through published corrections or retractions as well as the publication of letters of reply and the maintenance of online comments sections and fora. The publication of adjacent opposing viewpoints on contested public issues can illuminate public debate, while some media outlets use questionnaires on accuracy and fairness to survey how their performance is assessed by the public. Dedicated media sections in print publications or similar programmes on radio and television also scrutinise the performance of media, while critical depictions of the news media in film and television also represent a form of media scrutiny. Some media organisations employ personnel (such as readers, editors, or ombudspersons) who are responsible for the independent assessment of accountability and who monitor content and obligations to audiences, while newsroom employees, tasked with advising on ethics and the inclusion of citizen input at the editorial level, can help maintain accountability.

At the media-political level, media organisations operate within a framework of legal and financial constraints and incentives. Concrete examples of accountability mechanisms at this level include liaison committees set up by media and professional groups with whom they occasionally clash (e.g., the legal profession or the police), the promotion of consumer associations of media users, as well as the funding of non-commercial media research by NGOs.

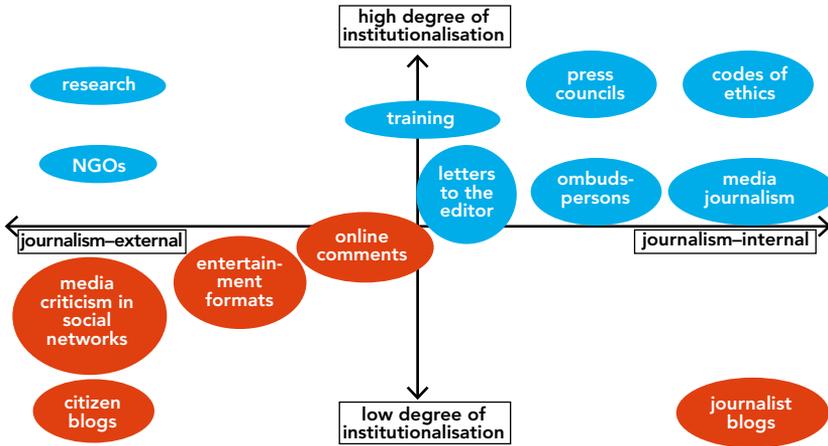
The sociopolitical level denotes specific political cultures that may influence the quality of information policy of officials, or levels of corruption, to determine the extent to which the media are held accountable.

Finally, on the meta-ethical level, scholarly analysis and debate interrogates the criteria, foundations, and justification for media accountability, both generally and in specific contexts.

The project consortium MediaAct (2012) systematises the manifold ways of institutionalising media accountability mechanisms according to a quadrant chart that locates media accountability mechanisms on two axes: the degree of institutionalisation and the location of the mechanism (internal or external to the media). Some of the aforementioned instruments are grouped in this chart (see Figure 11.2).

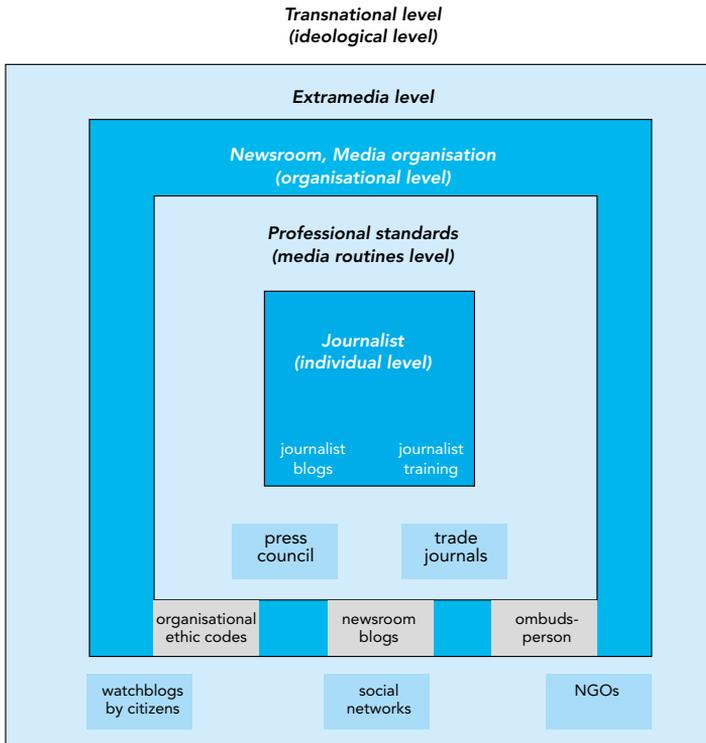
Fengler and colleagues (2014: 10) argue “that media accountability and the maturity of the media’s self-regulation infrastructures are another, so far neglected, key indicator of media freedom and pluralism”. They include in a further developed model (see Figure 11.3), which refers to Shoemaker and Reese (1996), new accountability instruments in online communication, including editorial blogs, websites monitoring news content, webcasts of internal critique sessions or team meetings online with ombudspersons, and criticism of media on Twitter and Facebook.

**Figure 11.2** Typology of media accountability instruments



Source: Adapted from MediaAct, 2012

**Figure 11.3** Classification of media accountability instruments



Source: Adapted from Fengler et al., 2014

They find that “the core aim of media accountability to stay independent from the state may well be undermined by the media industry serving their own rather than the public’s interests” (Lauk & Denton, 2011, as cited in Fengler et al., 2014: 11), and they indicate that media concentration poses a threat to the optimal functioning of media accountability. For this reason, the MDM project attributes high significance to media concentration (see Trappel & Meier, Chapter 7). Media monitoring as conceptualised in the MDM is an external mechanism, in the conceptualisation of Bertrand (2003), located on the meta-ethical level in the framework of Thomaß (1998), and within the quadrant between high institutionalisation and journalism-external (see Figure 11.2) or on the extra-media level (see Figure 11.3).

There is a great variety of means that in one way or another are associated with MAS. There are several MDM indicators that contain evaluations of accountability means like codes of ethics, media mission statements, self-regulation, press councils, journalistic professionalism, and professional training (Trappel & Tomaz, 2021b, 2021c). This chapter’s focus on the two MDM indicators related to content monitoring instruments (E6) and supervising the watchdog role of journalism (C1) to determine the quality of media accountability in a given media system is a conscious limitation.

The first indicator considered in this chapter is content monitoring instruments (E6) and relates to McQuail’s (2009) facilitative and collaborative roles of the media in democracy. McQuail (2009: 126) substantiates the facilitative role of the media with the prerogative that the media “promote inclusiveness, pluralism, and collective purpose [...] they help to develop a shared moral framework for community and society, rather than just looking after individual rights and interests”. In this conceptualisation, the consideration of minorities and marginalised groups and cultures promotes democratic equality. The collaborative role concerns the role of the media in supporting the state in times of crisis, and reflects media’s responsibility to provide information to the public. To fulfil this mission while staying independent and critical requires a delicate balance between independence and public obligation.

The facilitative and the collaborative roles translate into the dimension of *Equality / Interest Mediation (E)* in the MDM project, because media can fulfil these roles only when they serve society as a whole rather than audiences as customers. Only when news media are trusted across society as a whole can they fulfil their collaborative role. For both the facilitative and collaborative roles, the presence of regular and publicly available monitoring of news media – by independent institutions with a remit to ensure the maintenance of standards relating to content provision and the representation of women and minorities in news – is desirable.

The second indicator about supervising the watchdog role of journalism (C1) makes reference to McQuail’s (2009) monitorial and radical roles of the

media in democracy. While the monitorial role refers to “all aspects of the collection, processing, and dissemination of information of all kinds about current and recent events, plus warnings about future developments” (McQuail, 2009: 125), the radical role “focuses on exposing abuses of power and aims to raise popular consciousness of wrongdoing, inequality, and the potential for change” (McQuail, 2009: 126). We translate these roles into the *Control / Watchdog (C)* dimension and analyse control mechanisms that exercise a watchdog role with regard to the media themselves. In line with the concept of media accountability systems, the question is whether there are any institutional mechanisms in place that hold the news media accountable to standards of performance. This perspective is based on the assumption that external scrutiny leads to overall better performance (Foreman, 2010). It is important that not only the media scrutinise how they themselves perform their democratic duties, but also that news media engage in a wider debate on their role as democracy’s watchdogs. Independent observers play a key role in that process – news monitors, media blogs, professional journals, broadcasters, and newspapers – as does the openness of media to external evaluation.

The two MDM indicators regarding content monitoring instruments (E6) and supervision of the watchdog role of journalism (C1) show whether modern press in a specific country meet the democratic requirements for news media, adhere to key journalistic values, and are held accountable by external and internal monitoring instrument and oversight.

Commercial pressures are exerted on news media across the world, leading to “the ongoing economization of practical news work, manifesting itself in a transnational trend towards media concentration, an aggravated pressure for profits and, ultimately, an erosion of journalism’s financial basis” (Eberwein et al., 2017: 1). Scrutiny of media performance is hence more important than ever.

## Comparing results

In the following sections, we group data from the MDM into three categories based on geography: western and northern Europe; central and southern Europe; and states outside mainland Europe and around the world.

### *Western and northern Europe*

We start by looking at MDM countries in western and northern Europe (Austria, Belgium, Denmark, Finland, the Netherlands, Sweden, and Switzerland). These countries are traditionally grouped as part of the democratic corporatist media system in Hallin and Mancini’s (2004) media systems theory and are characterised by the development of an early written press, active state inter-

vention including media subsidies, and a mixture of private and public service television stations.

The content monitoring instruments indicator (E6) received a consistently low score of 1 point. The only exception is the Netherlands, which received 3 points. The stability of the scores over time is also remarkable: Austria, Sweden, and Switzerland have not improved between 2011 and 2021 and continue to receive a score of 1 point (performance is scored from 0 to 3 points for each indicator; see Tomaz & Trappel, Chapter 1, for a detailed explanation).

In 2011, the authors in the Netherlands rated content monitoring instruments as exemplary. Ten years later, the Netherlands still scores high on this indicator. The Dutch Media Authority [Commissariaat voor de Media] publishes an annual Media Monitor, which analyses ownership and pluralism in the news media, relying since 2018 primarily on the *Reuters Institute Digital News Report*. In addition, the Dutch Journalism Fund research and monitor news media, particularly focusing on local and regional news. In addition, the Journalism Fund provides continuously updated information on the Dutch news media under the heading “The State of the News Media” (Vandenberghé & d’Haenens, 2021).

The low scoring of indicator E6 for almost all European small states stems from the fact that, as a rule, there is no systematic external monitoring of content independent of the media industry. However, the low scores do not mean that there is no or little significant control. Media organisations themselves and stakeholders from business and government, including commercial agencies, continuously follow the reporting of leading news media. In other words, there is both corporate and political monitoring. In contrast to the activities of press councils, journalism associations, and academic institutions, such monitoring is not transparent and the activities of the stakeholders seem to have little or no influence on media policy and media practice.

When analysing the indicator for supervising the watchdog role of news media (C1), the focus is less on mechanisms of accountability that are internal to the industry than on external instruments of “control”. Incidentally, internal media control is diminished and distorted by ownership concentration, the frequent lack of institutional media scrutiny, and competition. Indicator C1 thus examines the existence of instruments that monitor the performance of news media. At the same time, it is based on the assumption that these instruments should lead to better media performance in favour of democracy. This can only happen if media workers and newsrooms are willing and able to act as watchdogs in favour of democracy and civil society and, if necessary, to challenge powerful political and economic interests.

In contrast to E6, the assessments for C1 are much higher. With the exception of Belgium and Switzerland, all small states scored 2 points in 2021, as they did ten years previously. The report from Austria mentions professional media

monitoring and the work of the Press Council, only listing internal industry mechanisms (Grünangerl et al., 2021). The report from Belgium mentions the regulatory authority VRM for Flemish audiovisual media and a number of institutions within the industry: the Council for Journalism (Press Council), GEP, and the Journalism Fund. In addition, the public broadcaster VRT and the quality newspaper *De Standaard* are mentioned as having institutionalised ombudspersons (Hendrickx et al., 2021). The report from Switzerland also focuses on the supervisory authority for public broadcasting and on the Press Council (Bonfadelli et al., 2021), while the report from Denmark shows that both broadcasters DR and TV2 are obliged to appoint ombudspersons (Blach-Ørsten et al., 2021). The report from Finland notes that “independent media criticism in Finland is weakly institutionalised” (Ala-Fossi et al., 2021: 181), although the performance of the media is subject to increased public scrutiny and criticism. Like almost all news media in small states, Finnish media enjoy a high degree of autonomy, successfully controlled and managed by the Council for Mass Media (Ala-Fossi et al., 2021). The Report from the Netherlands notes that there is no independent institution systematically monitoring or analysing the journalistic performance of the daily news media, and there is little openness to external evaluation. In general, experts, journalists, and the public trust the Dutch news media to fulfil their role as watchdogs (Vandenberghe & d’Haenens, 2021). The report from Sweden mentions the public broadcaster Sveriges Radio, which produces a daily programme on current affairs, including debates on media performance, and a weekly programme devoted exclusively to media issues. These debates generally involve only media professionals, academics, and other elite groups, rather than the general public (Nord & von Krogh, 2021).

### *Central and southern Europe*

Germany, Greece, Italy, and Portugal are characterised by different media systems, with Germany representing the democratic-corporatist model and the latter three corresponding to the Mediterranean or polarised-pluralist model in Hallin & Mancini’s (2004) media systems theory.

The content monitoring instruments indicator (E6) received a high score in Germany, Italy, and Portugal (though many differences can be found between the organisations carrying out these activities in each of these countries) and a low score in Greece. For Germany and Portugal, the only two countries analysed in the 2011 MDM project, the scores remain stable.

In Germany, various actors across the media industries, in particular television broadcasters and specialised academic institutes or private agencies, sometimes working for the supervising bodies of commercial broadcasting or for broadcasters themselves, provide content monitoring. In addition, independent

monitoring instruments have been established by unions and NGOs. Monitoring activity by the television broadcasting industry includes the production of a report to justify the public value of their content by the public service media (the so-called Public Value Test) (Horz-Ishak & Thomass, 2021).

While in Germany the monitoring and control of the media take place primarily through the media industry and some specialised research institutes, content monitoring in Greece (Papathanassopoulos et al., 2021), Italy (Padovani et al., 2021), and Portugal (Fidalgo, 2021) is primarily carried out by independent media regulatory authorities. The Greek NCRTV, the Italian AGCOM, and the Portuguese ERC have a legal responsibility to monitor radio and television content, assessing compliance with legislative and regulatory requirements and, if necessary, enforcing sanctions. In contrast, in these countries, no institution, independent authority, or public body has similar authority over the press sector. Some other types of organisations with media monitoring capabilities, such as the Italian Osservatorio di Pavia and the Portuguese OBERCOM, comprise independent research institutes working with the main national broadcasters, including public service broadcasters, and with some public and international institutions. In the Greek context, the National Council for Radio and Television (NCRTV) is the monitoring body for broadcasting media. NCRTV is a regulatory institution independent from, but supervised by, the government. Apart from monitoring broadcast content, NCRTV supervises compliance with a journalistic code of ethics including programme variation, plurality of views, and the protection of minors and of human dignity. The NCRTV committee can issue financial or other penalties and, in extreme violations, revoke a media organisation's licence (Papathanassopoulos et al., 2021).

In comparison with independent media regulators in other Mediterranean countries considered in this chapter, and taking into account the different ratings for indicator E6, questions have been raised by academics and journalists about the relevance and effectiveness of NCRTV's content monitoring activities.

Since indicator C1 is primarily concerned with the presence of mechanisms to assess how well the media perform its watchdog role, and given the different media system models to which selected countries correspond, we expected ratings to differ between Germany and the Mediterranean countries. However, both received a medium-high rating. Again, Germany and Portugal received the same scores as in 2011, indicating no improvement in the institutional assessment of the watchdog performance of the news media or by improved capacities of existing accountability mechanisms.

Despite receiving the same rating, Germany has a different media landscape than the Mediterranean countries with the same score. Media performance and content is publicly discussed in the media (for example, in *ZAPP* – the magazine of the regional public television broadcaster NDR – or in *@mediasres* from Deutschlandfunk), and during the last decade, initiatives like online fora and

critical journalism have emerged as additional monitors of the news media's watchdog function. In other words, there is widespread public debate about the role of the news media in Germany, involving actors from across media industries, media practitioners, regional authorities, and press councils. Public discourse on this topic has recently attracted populist and right-wing voices seeking not to constructively criticise and safeguard a pluralistic and democratic media system, but to criticise legacy news media (Horz-Ishak & Thomass, 2021).

In the Mediterranean countries, academic institutions are the most active in public debates about news media performance. For example, in Italy, one of the most relevant discussion fora for journalism and news media, the magazine *Problemi dell'Informazione* [*Information Problems*], has been recently characterised by a growing academic dimension, rising to the first tier in the national assessment of journals in a ranking made by the Italian National Research and University System Evaluation Agency (ANVUR) (Padovani et al., 2021). In Portugal, universities offering journalism courses (and hosting journalism and media research centres) have published, in recent years, extensive research and scholarship dealing with media issues (Fidalgo, 2021).

In accordance with a self-referential model of journalism typical of the polarised-pluralist media system (Hallin & Mancini, 2004), Mediterranean countries have no tradition of monitoring the watchdog function of journalism, and initiatives coming from journalists themselves are quite rare. Among those that do exist, the Italian association Article 21 (the name refers to the article of the Italian Constitution dedicated to freedom of expression) is one of the few organisations engaging in debates about the media's watchdog function in Italy. In addition, the journalistic association Oxygen for Information has established an "Observatory" for the monitoring of intimidations, threats, abuses, and undue pressures on journalists, as well as promoting the right of Italian citizens to be informed (Ossigeno per l'informazione, n.d.; Padovani et al., 2021). Another exception to the lack of monitoring is in Portugal, where the Portuguese Journalists' Club produces the bi-monthly magazine *Jornalismo e Jornalistas* focusing on the performance of the news media (Fidalgo, 2021).

Although the scores for indicator C1 in the four countries (Germany, Greece, Italy, and Portugal) is the same, there are significant differences between the media systems. In Germany, public debate about the role and performance of the news media is vivid, and its medium rating is based on the negative impact of interference by populist political movements. On the contrary, the medium rating assigned to this indicator in Greece, Italy, and Portugal is based on the demarcated reach of the discussion about the performance of news media, restricted to narrow academic channels rather than widely diffused across different groups in society.

### *Media accountability beyond mainland Europe*

A number of country cases from beyond mainland Europe offer a range of media accountability mechanisms, with some similarities and many differences. These cases include three majority–English-language media systems that broadly correspond to Hallin and Mancini’s (2004) North Atlantic model of media systems, albeit with significant public service broadcasting components (Australia, Canada, and the United Kingdom); two Asian media systems (Hong Kong and South Korea); a Nordic media system (Iceland); and a large South American media system (Chile). As such, a diverse selection of cases allows for an interesting series of comparisons between distinct media systems with tailored regulatory and accountability structures facing similar financial and technological pressures.

Five of the seven cases (Canada, Chile, Hong Kong, Iceland, and South Korea) are new additions to the MDM research project, leaving no scope for a trend analysis. In the cases of Australia and the United Kingdom, there have been some change in the scores for indicators E6 and C1, with the United Kingdom seeing a reduction in the scoring of its content monitoring instruments but an improvement in the scoring of the country’s oversight of news media performance. Australia, in contrast, sees no change in scoring for content monitoring and a reduction in scoring for media performance oversight.

Despite the differences in the British and Australian media systems, the similarities allow for a comparison. Almost all cases score 1 point for indicator E6 – content monitoring instruments – signifying that content monitoring was present in the media system, but performed irregularly, by one or more organisations. This score was registered for systems as disparate as Chile, Hong Kong, and Iceland. The only outliers in the group were Australia with 2 points and Canada with 0. As the analysis below illustrates, the low scores are largely due to the absence of continuous external monitoring. Most countries have a significant difference between the extent of monitoring for broadcasting and for legacy print media. The picture is more mixed for indicator C1 – supervising the watchdog – with South Korea and the United Kingdom scoring the maximum of 3 points – although with substantially different news media monitoring regimes – Australia, Canada, and Chile scoring 2, and Hong Kong and Iceland scoring just 1.

For the content monitoring instruments indicator (E6), the best performing media system was Australia, scoring 2 points due to the operation of monitoring functions by the Australian Communications and Media Authority (ACMA) – which has jurisdiction over broadcasting – and by the Australian Press Council. There is no change from the 2011 MDM project, and the reasoning for the score is the same (Dwyer et al., 2021).

Canada also stands out due to its score of 0 points for indicator E6. This score is registered because of the absence of external monitoring of the media. While there are some industry-operated accountability mechanisms, such as the

ombudsperson at CBC/Radio-Canada, the NewsMedia Council, and Conseil de Press du Québec, these are neither separate from the industry, nor do they provide systematic monitoring of media content (Taylor & DeCillia, 2021).

In the remaining cases, there is a range of justifications for a recorded score of 1 point for indicator E6. Often, the role of a broadcast regulator with some statutory underpinning is significant, as in the case of the United Kingdom (through the Office of Communications, Ofcom; Moore & Ramsay, 2021) and in Hong Kong (Lo & Wong, 2021) and South Korea (Kim & Lee, 2021). In these cases, a body with significant power to collect information to assist in its regulatory duties also releases information on certain aspects of media performance, including the adherence of media output to predetermined criteria, with periodic reports and data releases serving as content monitoring by proxy. In Chile, there are multiple external bodies which respond to media output, such as the National Council for Television and the Ethics Council for the Media. However, these organisations tend to deal with content on a case-by-case basis, and no continuous monitoring of media content is available (Núñez-Mussa, 2021). Iceland also does not benefit from continuous content monitoring for the benefit of the public; instead, media content is gathered by at least one private enterprise for commercial purposes, with occasional releases of information in collaboration with academic institutions (Jóhannsdóttir, 2021).

Though none of the selected media systems are served by continuous, external, and publicly available media content monitoring, they have a range of mechanisms in place for scrutinising media content. The partial exception is Canada, which at a minimum is subject to academic research covering aspects of the media's behaviour and output (Taylor & DeCillia, 2021). Periodic academic research on media content was cited as a mechanism by most of the country reports in this group, notably Chile, Iceland, and the United Kingdom (such research is not available in Hong Kong). Alongside academic research, some countries reported networks of NGOs providing periodic or sporadic analysis of media content. The Citizens Coalition for Democratic Media in South Korea conducts content monitoring of print and broadcast media as well as YouTube (Kim & Lee, 2021). The United Kingdom has various NGOs, such as the Media Reform Coalition and the Media Standards Trust, which generate occasional in-depth studies of the news media and news content (Moore & Ramsay, 2021).

Six of the seven media systems outside the European context (excluding Canada) saw some role for statutory broadcast regulators in regularly producing research on the basis of collected media content; ACMA in Australia and Ofcom in the United Kingdom are relatively prolific in releasing statistics or narrative reports using information derived from media content. Similarly, some governmental or statutory bodies release statistical data on the media for public consumption, such as Ofcom in the United Kingdom, Statistics Iceland, the National Council of Television in Chile, and the Communications Standards

Commission in South Korea. Some public service broadcasters, such as RÚV in Iceland and the BBC in the United Kingdom, have internal oversight functions that rely on self-monitoring of content. Those countries with significant self-regulatory systems (Australia, Chile, South Korea, and the United Kingdom) also see the collection of information on media content as a way to inform the responses of regulators, although this falls short of formal, public, and systematic media content monitoring.

The sampled media systems show a quite mixed range of scores for the indicator for supervising the watchdog role (C1), relating to the extent to which the watchdog function of journalism is subject to scrutiny and reinforcement. Two of the selected cases (South Korea and the United Kingdom) attain the maximum score of 3 points, indicating that there is a permanent, ongoing debate about the news media's watchdog role. For interesting reasons discussed below, these maximum scores are achieved by significantly different means. Three countries (Australia, Canada, and Chile) received 2 points, indicating that media performance of the watchdog function is subject to public discussion in the media and online, with some degree of self-coverage by the news media as a whole. The remaining systems (Hong Kong and Iceland) received a score of 1 point, denoting that the watchdog function of news is debated only on occasion, and often in the context of partisan or vested interests.

The highest-scoring systems (South Korea and the United Kingdom) are characterised by a situation where the performance of the news media is a topic of continuous and open public discussion. In South Korea, historical ties between the news media and authoritarian regimes have resulted in a culture of close scrutiny of how well journalistic organisations perform the watchdog role. The interest of ensuring that journalism serves to uphold rather than undermine democratic values has brought about a range of official bodies tasked with monitoring the performance of the news media. This includes the Korea Communications Commission for broadcasting, and for legacy print and online news media, the Press Ethics Commission, the Internet Newspaper Committee, and the Press Arbitration Commission. These official bodies are supplemented by a range of NGOs devoted to monitoring and evaluating news media, such as the Coalition for Democratic Media and the National Union of Media Workers. In addition, there is some tradition of periodicals providing dedicated coverage of the operation of the media, for example, *Media Today* (Kim & Lee, 2021).

In the United Kingdom, the various entities involved in monitoring the watchdog function of journalism have developed partly due to journalistic tradition, particularly in the case of public service broadcasting, and partly due to high-profile examples of collapsed press ethics. Broadcast journalism in the United Kingdom is subject to strict regulation by Ofcom, while the press regulatory landscape is subject to self-regulation and various internal accountability mechanisms in certain newspapers. There is also a tradition of self-reflection

by news media, with the BBC offering *Newswatch* on the BBC News Channel, *The Media Show* on Radio 4, and print publications such as *Private Eye* and *The Guardian*, which contain regular critical coverage of British journalism. As in South Korea, there is a strong tradition of NGOs monitoring journalism, including the National Union of Journalists, and academic research centres that regularly produce studies of media performance. The United Kingdom is also the only case where there has been a change in the score for C1 between the 2011 and 2021 MDM research projects, with a previous score of 2 points rising to 3. This can be accounted for by improvements in press self-regulation, as the troubled Press Complaints Commission was replaced in 2014 by a combination of a new industry-led regulator and a new independent regulator covering a wide range of smaller independent and digital-first publications, as well as some significant titles (Moore & Ramsay, 2021).

Of the media systems scoring 2 for C1, Australia is the only one with an unchanged score from 2011. A number of independent observing entities are listed in the Australia country report, including ACMA (overseeing broadcast standards) and the Australian Press Council (overseeing print). However, interview data suggest that these bodies are limited in their capacity to intervene, making the enforcement of standards unclear (Dwyer et al., 2021). Canada, too, has several significant bodies with some oversight of news media performance, such as the Canadian Broadcast Standards Council and the National NewsMedia Council, which oversee broadcast and print, respectively. Some major news organisations, such as the CBC/Radio-Canada and the Globe and Mail, have an internal ombudsperson or readers' editors to maintain standards (Taylor & DeCillia, 2021). In Chile, watchdog monitoring is best served by extensive work by academic institutions as well as publications and reports by the National Press Association and the National Council for Television (Núñez-Mussa, 2021).

Hong Kong scored a comparatively poor 1 point for C1 due to the lack of institutionalised mechanisms for watchdog monitoring. While there is a significant debate, including in public, on the role of the media – and universities, bloggers, and professional bodies scrutinise the news media – there is a lack of formal, systematic coverage of the performance of leading news media outlets (Lo & Wong, 2021). Iceland also scored 1 point, due to the episodic nature of self-observation by the media and a scarce public debate about the role of journalism. Debates usually occur in response to specific events or issues, and the main institutional mechanism for media oversight, the Media Commission, has limited scope and fails to command the full confidence of the main journalism union, the NUIJ (Jóhannsdóttir et al., 2021).

The higher scores for the selected media systems for indicator C1, in comparison with indicator E6, connote a relatively wide range of organisations that play some role in monitoring the watchdog role of the press. Broadcast regulators

play a varying role – Ofcom in the United Kingdom, ACMA in Australia, and the South Korean Communications Commission play a significant role, while the Icelandic Media Commission and Hong Kong Communication Authority have a more modest impact. In some cases, broadcasters themselves offer programming dedicated to evaluating media performance according to journalistic standards, such as the BBC's *Newswatch* (the United Kingdom) and ABC's *Media Watch* (Australia). Self-regulatory bodies tasked with maintaining standards are very active in Australia, Canada, South Korea, and the United Kingdom.

Internal accountability is ensured through mandates, which include journalistic standards in some cases: the Canadian CBC (Radio-Canada in Quebec) has an ombudsperson for this purpose, and newspapers in Canada (Taylor & DeCillia, 2021) and the United Kingdom (Moore & Ramsay, 2021) operate complaint-handling mechanisms. Outside the media outlets themselves, academia often takes an active role in monitoring media performance, and the role of NGOs focusing on media standards is acknowledged in most countries. The role of journalists' unions in Iceland, South Korea, and the United Kingdom is also noted as having a positive effect on watchdog monitoring.

## Conclusion

In this chapter, we considered the MDM project's indicators E6 and C1 to be important determinants of the quality of media accountability in a given country. The first indicator, E6, refers to existence of content monitoring instruments. This indicator relates to the news media's facilitative role as the arena of a democratic debate that promotes inclusiveness and pluralism. To be successful in this role, media requires the presence of regular and publicly available monitoring of the news media by independent institutions with a mandate to ensure the maintenance of standards relating to content provision and the representation of women and minorities in and through the news. The second indicator, C1, covers the mechanisms in place to ensure that the news media fulfil their role as the watchdog of democracy. In line with the concept of media accountability systems, this chapter investigated whether there are any institutional mechanisms in place that hold the news media accountable.

We grouped countries into three geographical clusters. In relation to indicator E6, we found that most of the western and northern states have received a low score for this indicator (1 point). In the case of Austria, Sweden, and Switzerland, who also participated in the 2011 MDM project, the 2021 scores show no improvement for this indicator. New countries joining the MDM project, such as Denmark, receive a low score. The Netherlands, however, stands out with various institutions monitoring media content. In the group of central and southern European countries, Germany, Italy, and Portugal all have various in-

stitutions and organisations that carry out media monitoring, whereas the same does not apply to Greece. In Germany, monitoring is provided by broadcasters, universities, and private agencies, whereas monitoring in the southern European countries is carried out by independent media regulatory authorities. In the countries beyond mainland Europe, differences are bigger. Despite the many different countries grouped in this section, the MDM data reveals a common low score for indicator E6. All in all, the chapter highlights that except for a few countries, most notably Germany and the Netherlands, content monitoring is done irregularly, and – in most cases – by a varying number of actors.

Regarding the second indicator, C1, the chapter shows that across the three groups of countries, scores are generally higher than for indicator E6. Hence, there is a relatively wide range of organisations in all countries that – in one way or another – participate in monitoring the news media’s watchdog role. In some countries, monitoring is carried out by media ombudspersons, for instance, in Denmark and in Quebec, Canada. In other countries, the monitoring is carried out by broadcast regulators, such as Ofcom in the United Kingdom or ACMA in Australia. In other countries, yet again, the scrutiny of the news media is mostly left to different types of programmes that regularly investigate and discuss news, such as *Zapp* in Germany and *Newswatch* in the United Kingdom. In Italy, this debate is most covered by the magazine *Problemi dell’Informazione*.

In sum, we find that content monitoring (E6) is weak in many countries, while most countries have a better monitoring of the media’s watchdog role (C1). While there are clear differences between the two indicators, it is interesting that these two means of holding media accountable do not seem to exist in all of the participating countries. This is especially interesting to observe in the countries who participated in both the 2011 and 2021 MDM research projects. Despite a worldwide and vitalised debate on news media and trust and accountability, very little has changed regarding systematic media monitoring in the ten years between the two MDM projects.

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UNDERRESEARCHED ISSUES  
OF GROWING RELEVANCE



## Chapter 12

# Media transparency

## *Comparing how leading news media balance the need for transparency with professional ethics*

Werner A. Meier & Josef Trappel

### Abstract

This chapter addresses the merits and limitations of media transparency, both theoretically and, on a case-by-case basis, empirically. The concept of transparency has become a universal solution in political discourse. Often, transparency is abused to prevent or replace effective policy-making. In this chapter, we discuss the complex norms and values of transparency and apply the concept to journalism and the media. Transparency in journalism is a paradox, as professional standards require journalists to protect their sources, while at the same time, source transparency is an indispensable prerequisite for journalistic inquiry. Media ownership transparency is ambivalent, as disclosure of more information on who controls the media does not necessarily imply more democracy in media and platform structures.

**Keywords:** media transparency, journalistic transparency, source transparency, ownership transparency, communicative transparency

### Introduction

Transparency is often treated as a panacea in the political process. As long as resources, revenues, investments, ownership, and so on, of public and private companies are transparent, the argument goes, state regulatory policy can be avoided because it is unnecessary. This applies both to the industrial and service sectors of the economy and to politics – for example, the pharmaceutical, agricultural, armament, or raw material industries, as well as political parties and lobbying organisations. News media are particularly affected by this ideal, because news and information are considered important for the well-being of democracy and democratic decision-making.

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Meier, W. A., & Trappel, J. (2022). Media transparency: Comparing how leading news media balance the need for transparency with professional ethics. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 255–273). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-12>

Thus, this chapter is about grasping the meaning and significance of transparency from different disciplines, namely from a political, public relations, journalism, and communication science perspective. Our research interest is to examine to what extent the concept of transparency can strengthen contemporary democracies, and to what extent it is abused to prevent, avoid, or replace effective policy-making. We base our theoretical analysis on the application of the concept of transparency to media ownership, which is one of the indicators of the Media for Democracy Monitor (MDM) project, both in 2011 and 2021 (Trappel et al., 2011; Trappel & Tomaz, 2021b, 2021c), and a core element in the Media Pluralism Monitor (MPM) (Bleyer-Simon, et al., 2021).

MDM Indicator and related research question addressed in this chapter:

**(C3) Transparency of data on leading news media**

How accessible is detailed information on leading news media for the citizens? (Trappel & Tomaz, 2021a: 45)

### What does transparency mean?

Three meanings of transparency are developed by Carolyn Ball (2009) in an essay, on the basis of political science studies. First, transparency is understood as a norm generally recognised by society to counteract corruption in various institutions and organisations. Transparency here stands for open decision-making by governments and for overall good governance. In this context, transparency is linked to accountability, and it should have both direct and indirect effects – on the one hand, through transparent behaviour of all state, public, commercial, and non-profit institutions and organisations, and on the other, through mutual controls at the institutional level. This also includes media companies, which have an important role to play in ensuring the transparency of politics, business, and civil society. Transparency is not only considered an antidote to corruption, but it also contributes to balancing the democratic deficits in powerful institutions, strengthening their legitimacy in the eyes of the public.

Second, transparency as a norm encourages openness, while at the same time reinforcing concerns about secrecy and privacy. Openness does not only mean open decision-making, but also the easy access and use of information for involved and affected persons and organisations in the context of participation and emancipation processes. The conflictual negotiation process for transparency leads to the determination of secrecy and the protection of privacy. Here, too, media companies and journalism play an ambivalent role for transparency, secrecy, and privacy (Ball, 2009).

Third, transparency can mean complexity, because it includes who decides, what decisions are made, and what information was available in the decision-making process. For example, political and economic decision-makers create transparency alongside accountability, trust, efficiency, and effectiveness, according to Ball (2009).

Vincent August (2019) points out that transparency has become a universal solution in political discourse. There is always a call for transparency when there is a high degree of threatening uncertainty. At first glance, the general demand for transparency as a norm and democratic value seems socially accepted.

While Ball shows from a postmodernist perspective how transparency is understood and used discursively in a subject- and context-specific way, August shows the ideological perspective of transparency as a concept and norm. For August, the demand for transparency since the 1970s has been a typically modern, utilitarian response strategy for dealing with uncertainty. Transparency develops a high attraction where, firstly, the problem of contingency or uncertainty arises; secondly, where this problem is interpreted or can be interpreted as threatening and dangerous; and thirdly, where transparency is regarded as a powerful instrument for problem-solving. The aim is – to put it bluntly – safety through visibility (August, 2019).

Transparency with the explicit aim of cost-efficiency promises permanent monitoring by corporate and political actors, a constant flow of information, and the minimisation of uncertainty and risks, while at the same time increasing legitimacy, efficiency, and effectiveness. The promises are one thing – achieving the goals another.

Over time, the demand for transparency, along with monitoring and quality assurance, has become one of the most popular instruments of liberal economic and neoliberal governance and regulation. Transparency brings light to the darkness, enables – at least superficially – a factual overview, creates an improved basis for decision-making through the accumulation of information, and controls seemingly powerful elites in their attempt to assert their own agendas at the expense of the general public. Seen in this light, transparency acts as a comprehensive, systemic check on power, while at the same time building trust in favour of affected and involved institutions together with their prominent actors. Transparency is intended to generate an appropriate degree of certainty without calling into question central structural parameters, according to the standard's objective. However, as soon as voluntary or involuntary transparency are embedded in factual and temporal power structures, the concept and norm prove to be complex and highly controversial.

In both day-to-day political and social science discourse, control and regulation by means of transparency are viewed rather ambivalently. However, in the context of public relations, Ebert and colleagues (2014) state that transparency as a problem-solving and prevention strategy has positive

connotations and is interpreted positively in principle. In the professional practice of public relations, in particular, transparency has found its way into the codes of ethics of organisations as a norm and target value, and today has sometimes taken on the character of a panacea (Ebert et al., 2014). At the same time, according to Ebert and colleagues (2014), a minimum degree of non-transparency is also postulated in day-to-day politics. Non-transparency ensures decision-relevant room for manoeuvring, prevents envy and hostile will, supports democratic cooperation, and promotes a peaceful public order. From a public relations perspective, communicative transparency becomes a strategic success factor and even a success-relevant value-creation factor for organisations. Communicative transparency ultimately contributes to social acceptance of organisational goals by building trust. For Ebert and colleagues (2014), both transparency and non-transparency measures by organisations are effective management tools.

In the German-language journal *Publizistik*, Manuel Wendelin (2020) recently made an attempt to discuss the ambivalence of transparency. Wendelin enters the debate with a definition of transparency from political scientist Ann Florini (2007: 5), according to whom “‘transparency’ refers to the degree to which information is available to outsiders that enables them to have informed voice in decisions and/or to assess the decisions made by insiders”. In other words, the management of commercial enterprises have much more reliable knowledge than persons and organisations such as regulatory authorities, which are structurally dependent on the transparency or lack thereof of information and communication behaviour and the entrepreneurial communication policy of the corporations. Therefore, according to Wendelin, a structural power imbalance exists between those who process and disseminate the information and those who receive it and, if necessary, must process it. This is regardless of whether the information is distributed voluntarily as corporate communication or involuntarily – and also regardless of whether any demands for transparency are part of the knowledge of domination or not. If any demands for transparency are part of the self-defined knowledge of power, they usually remain undesirable and enforced from the outside, and are accordingly treated defensively as legitimate, goal-oriented, regulatory-compatible lack of transparency. In this sense, knowledge of power and domination is part of the business model. The denial, concealment, and suppression of information, as well as misinformation, can be viewed as part of a toxic but non-justiciable professional information practice.

Even state-enforced transparency demands do not have to be accompanied by positive effects, such as the dismantling of social hierarchies and power inequalities or the building of trust and social acceptance – not to mention the absolute will for secrecy, a lack of observability, and a lack of will for systematic, reliable observations and monitoring.

The digitalisation of the past 20 years has given a great boost to transparency, above all in the opposite direction. Network corporations as well as legacy media today not only have much more entrepreneurially generated data and transparency, but have expanded the voluntarily or involuntarily created third-party transparency even more as a business model (Wendelin, 2020). At the same time, the highly developed digitalised institutions and organisations succeed in changing the relationship between external transparency (i.e., providing information about third parties) and self-transparency (i.e., information about oneself) in their favour. In other words, digitalisation enables a dramatic expansion of external transparency while at the same time massively reducing self-transparency and drastic expansion of lack of transparency within the framework of the market economy.

In particular, the massive spread of social media, the use of which is paid for with vast amounts of personal data, has massively increased the lack of transparency in organised interests, while at the same time greatly reducing the privacy of civil society. Since the structure of algorithms is not open knowledge, what happens to the acquired data, who is allowed to access it, and how this data aggregates, refines, and for what purpose it is reused, is also hidden from public inspection, opening up a strong possibility of structural violation of informational privacy. On the basis of so-called network products, the large platform operators have developed considerable market and gatekeeper power, which enables them to achieve their own rapidly growing lack of transparency and ensures extremely growing transparency for third-party data. The EU Digital Services and Digital Markets Acts under discussion aim to curb this rapidly increasing gap through comprehensive transparency reports.

Thus, the increase of self-transparency as well as that of external transparency open up possibilities of social and societal control (Wendelin, 2020). Who are the controlled and who are the controllers? In what interest is control carried out? What are the consequences of the controls? What role do digital communication platforms and legacy media play in this? Moreover, the increased transparency requirements fail to offset efforts of non-transparency. The hypothesis is that those who have sufficient economic policy power are most likely to be able to maintain or even improve their positions vis-à-vis the state and civil society by means of measured transparency and elaborate lack of transparency, by means of targeted self-transparency and external transparency. Here, too, an ambivalent conclusion emerges: The increased transparency of the control, regulation, and monitoring of the Internet economy and digitalisation does not necessarily lead to a power shift in favour of civil society – in the best case, to a disclosure of increased social control by dominant high-tech companies.

Voluntary transparency is based on the creators of that transparency. Such institutions and organisations, which determine the conditions for and the extent to which transparency activities are carried out systematically, thus have

a position of social power. It is precisely the voluntary nature of transparency that can be capitalised or instrumentalised by economic enterprises and state administrations, namely in the form of increasing trust, social acceptance, and social control. In addition, even voluntary transparency threatens privacy, because excessive data collection via the Internet continuously expands the involuntary transparency of members of civil society. Ordinary members of the public are told that resistance in the struggle for privacy is pointless. Open and covert demands for transparency, up to the abolition of privacy, primarily endanger the members of civil society and enrich the institutional data collectors, who only allow transparency where the business model is not, or only marginally, affected. Today, data collectors hastily ignore the informational sovereignty and privacy of members of civil society.

When assessing the transparency of leading news media, the aim is not to consider transparency or lack of transparency only in terms of market power and state regulation, but also to capture the lack of transparency in journalism – especially when it is often insinuated that democracy and the media are in a symbiotic relationship with each other. The two German-speaking journalism researchers Meier and Reimer (2011) are themselves sufficiently transparent, but at the same time contradictory when it comes to working out the lack of transparency in journalism with its challenges, conflict zones, and ambivalences. They note that it has never been particularly desirable for media professionals to disclose how they arrive at their stories, how they have approached the story concretely, how they work by hand, how the sources presented themselves, what they did not know before or had found out, and what information they did not pass on to their readership.

Transparency has long been regarded as a professional quality feature, and yet Jane B. Singer (2005: 179) states simply that “traditionally, journalism has been among the most opaque of industries”. Journalism is opaque because of editorial secrecy. Digital journalism is unlikely to change this. Nor is the fact that the advice literature argues that transparency is desirable in terms of media ethics and represents a normative construct that is linked to responsibility and accountability to the public (Meier & Reimer, 2011). In day-to-day journalistic work, more transparency – instead of the general focus on lack of transparency – is also associated with a number of risks: waste of scarce and precious resources, the threat to editorial autonomy, and the fear that the explicit presentation of sources could damage the impact of history and distract from its quintessence and importance (Meier & Reimer, 2011). But while discussing the need for transparency and the associated risks, Meier and Reimer do not acknowledge that lack of transparency is part of the institutionalised business model. The media and their corporate management do not want to admit that voluntary self-transparency regarding their factual and attributed powerlessness could have a lasting influence on their role in the struggle for certain social conditions. The

structural lack of transparency – or even professionally disguised or ignorance of one’s own politically and economically independent power development – seems to be more advantageous in the long term than the constant invitation to open and participatory self-reflection.

According to Bastian and Fengler (2016), transparency in journalism and the media can play a central role in restoring a higher degree of credibility in journalism and reducing the impact of undifferentiated media criticism. As a result of deregulation came the first instruments of media transparency, such as codes of ethics, press councils, and media criticism developed in the US and United Kingdom in the early twentieth century. Source transparency – that is, the disclosure of the origin of information, the clear labelling of advertising, and the separation of editorial content – are further details of media transparency. However, according to Bastian and Fengler, the research results in the field of media transparency suggest a certain discrepancy between claims and reality. For example, editorial offices rely above all on transparency instruments that are easy and cost-effective to implement, such as editorial lines or the composition of the editorial staff. In addition, media professionals demand transparency from competitors and argue, above all, that readers are not interested in internal editorial processes and professional standards. Some describe transparency demands as a disruptive factor, while for others, transparency serves as a measure to build and promote trust. Bastian and Fengler struggle to explain why media professionals claim the production of external transparency as a core competence, but at the same time want to shield themselves from power and subordination conflicts with professionally prescribed lack of transparency. Those who stay in power circles and contest position battles learn to think and act strategically – thus, transparency only to the extent it is necessary and helpful, and lack of transparency insofar as it preserves power and influence.

Almost at the same time as Bastian and Fengler (2016), two American journalism researchers, Chadha and Koliska (2015), set out to conceptually develop transparency in journalism and newsrooms. Working independently, the two pairs of researchers came to comparable conclusions. Chadha and Koliska (2015: 216) state in their literature study that “transparency has increasingly come to be viewed as offering a solution to contemporary challenges, particularly the loss of public trust”. In a second step, Chadha and Koliska try to conceptualise transparency by means of interviews with media representatives from elite newspapers, to address the implementation of transparency and to track down the modes of transparency. Although most of the media professionals surveyed understand what is meant by transparency – namely “allowing the audience to look behind the curtain” as a normative objective – it was not part of their day-to-day work: “In fact, the majority contended that transparency was an unlikely topic for discussion in any newsroom” (Chadha & Koliska, 2015:

219). Although respect and accountability towards members of civil society are demanded from a media-ethical and democratic perspective, transparency as an ideal prerequisite for this is almost completely ignored by media professionals: “virtually all the newspaper journalists we interviewed were unequivocal that news production is a ‘routine task,’ and consequently information about how a story came about was unlikely to be particularly valuable or interesting to the audience” (Chadha & Koliska, 2015: 220).

However, this professional ignorance and elitist arrogance are in contrast with the expressed view that the media would no longer have the same authoritative status as journalists, gatekeepers, information distributors, and information brokers as before. From this conflictual approach to transparency, this enlightened gesture mutates into a rather defensive marketing strategy. According to the Chadha and Koliska, this is mainly because editorial offices and media professionals are primarily willing to implement such forms of transparency that can be achieved without great effort: “The leading US news organizations [...] appear to have adopted transparency only on a limited extent”, a sort of low-risk managed transparency. Chadha and Koliska (2015: 226) further explain:

There is little willingness [...] to utilize technologies to provide insights into the more substantive aspects of news production. Indeed, news organizations remain deeply reluctant to share issues related to decision making and news judgment as well as journalists’ views and opinions.

“Transparency standards” (Plaisance, 2007) remain partial and contingent, and “journalists are still grappling with the notion of transparency as a professional norm” (Chadha & Koliska, 2015: 227). Furthermore, there is still “a significant gap between the type of transparency that is normatively imagined and potentially possible [...] and what is actually implemented in news production on a quotidian level” (Chadha & Koliska, 2015: 227). The reading solidifies the impression that media professionals, newsrooms, and those responsible for the group want to have as little to do with the external demands as possible.

The media ethicist Debatin (2010: 27) attaches great importance to the central norm of transparency as “disclosure of interests, preferences, motives, intentions, practices and sources [translated]”, especially with regard to online media and information offerings on the Internet. However, he does not link transparency with media ownership or the power of disposition over media companies. Picard and Pickard (2017), on the other hand, use the philosophical concept of openness to unequivocally call for transparency in media ownership. Consistent application of this standard should enable members of civil society “to identify and assess who is speaking through media and making content choices, what interests they represent, and how those interests might influence social and political values they convey and the public choices they advocate in media outlets” (Picard & Pickard, 2017: 28–29). However, these are precisely

the goals that not even the most respected scholars can achieve, let alone ordinary members of civil society.

First, the power relations within media companies are complex, and the power structures and decision-making processes are correspondingly complex and opaque. How owners, supervisory boards, top management, editors-in-chief, and media professionals, as well as other stakeholders inside and outside media corporations, actually perform their more-or-less formally assigned roles in day-to-day business and journalistic life is impossible to grasp from the outside. Second, no conclusions can be drawn about the power or powerlessness of owners, editors, or other interest groups on the basis of the journalistic end product. At most, individual decision-making processes and subordination structures can be reconstructed and traced with some degree of reliability in court proceedings. Third, it is highly controversial which powers can be derived from private or collective ownership or be considered legitimate. Finally, it is permissible for owners, publishing management, and editors-in-chief to exert massive influence on editorial matters at best. Corporate control of the editorial office by the owners needs no justification. The establishment and expansion of media power via media ownership is not actionable from the outside, and when the abuse of media power begins is highly debatable.

The pursuit of ownership interests in certain content of commercial media also does not yield information about their partisan or sociopolitical interests. These two different processes do not necessarily relate to one other.

These normatively postulated connections are hardly tangible scientifically. The transparency of media ownership, for example, in no way makes it possible to control the abuse of media power. Who abuses their media or market power and in what way? Owners, management, media professionals, the advertising industry, social interest groups, or all of them together? When is the assertion of economic and political media power legitimate and desirable in terms of democratic politics, and when does the illegitimate enforcement of market power and media power begin?

Many questions can be raised that are not answered reliably or plausibly by either policy-makers or academics. In any case, transparency of ownership is far from sufficient for enabling the public to make informed decisions about how to respond to the content on offer: “Transparency does not limit ownership, but makes it visible so that the public can make informed decisions about how to respond to the content being offered” (Picard & Pickard, 2017: 29).

For the media industry and media professionals, ownership is neither an important aspect of media literacy nor a building block for trust in media companies, as Picard and Pickard imply. The media industry, with its industry representatives, firmly negates the notion that the power to dispose of media and its control structures can play a central role in shaping political discourse. Just as the annually celebrated transparency of the three hundred richest

families in Switzerland cannot reduce growing social inequality, increased transparency of ownership does not lead to democratically impregnated media and platform structures. Transparency alone does not leverage the power of disposal of oligopolistic legacy media and platform companies any more than authorised collection of ownership data by independent national regulators or research groups.

### Intermediary conclusions

Before we discuss the evaluation of transparency in leading news media in the context of the MDM research project, we summarise and sharpen the most important findings of the theory discourse in the form of theses, in order to be able to bring them into an elaborate context with the empirical results.

First, the social science debate on the concept of transparency is not uniform, but in general, the basic tenor is cautiously positive, especially in public relations and business administration. The creation of (supposed) transparency of powerful actors often appears as a (simple) solution to complex problems. The focus is on trying to defuse the social problem by means of seemingly uncomplicated and easily implementable transparent demands and transparency rules. For example, “open government” is intended to compensate for the lack of participation of civil society in political decision-making processes. In the media sector, the transparency of ownership is intended to limit the effects of concentrated corporate power.

Second, the state, the economy, and society, however, formulate very high expectations and demands for transparent behaviour by organisations and institutions, especially in the analysis of measured effects and consequences that have occurred. Staged self-transparency is not able to directly or indirectly bring about a structural solution to problems, significantly reduce democratic deficits, secure good governance and corporate and association management, or to restore trust in general. The performance potential of transparent trade is massively overestimated. At the same time, self-transparency promotes a lack of transparency, because the latter is constantly able to trigger incentives of a power-political nature.

Third, in our context, the transparency issue in the context of communication science and journalism research is of particular interest. While the concepts of the public sphere and journalism are well established in communication science based on different theories, this is by no means the case with the term transparency. In Denis McQuail’s book *Journalism and Society*, this key term does not even appear. If one takes the four normative roles of legacy media – namely the monitorial, facilitative, radical, and collaborative roles (McQuail, 2013) – as starting point, all four roles are dependent on at least a minimum

of transparency of all actors involved and affected. Transparency seems to be an important prerequisite for creating publicity through journalism. Transparency of acting and affected persons, organisations, and institutions, as well as transparency of facts and debates, are important at all levels of socialisation. However, transparency for the manufacturers and transparency for the addressees are usually not congruent. What seems transparent to professional elites can prove to be completely non-transparent for members of civil society. Transparency is anything but generally accessible, but is basically coded and implemented by the actor who voluntarily creates transparency or lack of transparency, or is obliged to do so.

Fourth, the call for transparency is commonly heard when a pseudo-solution is sought to reduce existing uncertainties without, however, having to make the central structural parameters available for disposition. Transparency degenerates into an auxiliary construction that has the task of tackling the problem where it seems to be almost effortless to tackle. Transparency is used to minimise hazards and risks while maximising efficiency and legitimacy. In addition, transparency should generate trust and acceptance while at the same time disinfecting organisations and institutions from non-transparent power attacks in complex organisations. But the struggle for self-transparency is a power struggle for lack of transparency in order to be able to successfully enforce economic and political strategies. Self- and external transparency as norms turn out to be ambivalent, contradictory, interest-laden, and complex.

### Media ownership transparency at the national level

While transparency is a complex and far-reaching concept, as we have pointed out, empirical data from the 2011 and 2021 MDM projects, as well as the 2021 MPM (Media Pluralism Monitor), focus on available information about media ownership in participating countries. The research question corresponding to the MDM indicator about transparency of data on leading news media (C3) addresses the degree to which citizens have access to detailed information about ownership and control of leading news media in each country (Trappel & Tomaz, 2021a: 45). Points (0–3) were awarded for completeness of information as well as recurrence of updates, accessible in full to citizens without expert knowledge. Ideally, such information is on publicly available websites, checked and proved by competent agents. Data, which is provided just by the media companies themselves, are rated lower than externally evaluated data.

Within the MPM (Bleyer-Simon, et al., 2021) transparency of media ownership is one indicator of the “market plurality” aspect of the instrument. According to Bleyer-Simon and colleagues (2021), a lack of transparency as well

as media ownership concentration may constitute threats to market plurality. The MPM indicator for transparency of media ownership is defined as follows:

[A] precondition of pluralistic and open markets, being essential to measure and tackle the risks that arise from ownership concentration. For transparency to be fully effective, the disclosure of media ownership has to be provided to the public bodies and to the public, and has to include information on the ultimate ownership. (Bleyer-Simon et al., 2021: 42)

Although the 2021 MPM assesses the risks for market plurality as high and growing, the risks constituted by the indicator for transparency of media ownership are medium (see Bleyer-Simon et al., 2021: 45 & 47). This score is based on evaluating the legal framework on the existence of media-specific laws, as well as on its effectiveness and its practice.

Thus, the Media for Democracy Monitor and the Media Pluralism Monitor are similar, but the latter also includes legal provisions, while the former focuses on the availability in practice only, irrespective of whether there are transparency laws and obligations in place. This difference is rooted in the general approach of the MDM, which exclusively addresses the performance of leading news media under free circumstances, irrespective of legal provisions or requirements (Trappel & Tomaz, 2021b).

Empirically, the two research instruments deliver similar results for those countries that participated in both (although research teams have been different). Findings can be categorised in three distinct groups: full media ownership transparency, transparent ownership with flaws, and failing media ownership transparency.

### Full media ownership transparency

First, a small number of countries report full transparency of ownership. This best-practice group of countries provides not only full information, but they also make them available to the general public online or in specific registers. Germany and Portugal fall into this category in both the MDM and MPM. In Germany, a state-run commission publishes a report on the development of media ownership concentration every year, in which information on owners and cross-ownership is displayed; this report is available online and is easy to find. Furthermore, academic institutions closely monitor (print) media ownership and provide continuously updated information online. In the case of broadcasting, public institutions publish yearbooks on radio and television ownership. In its overall assessment, the German research team awards the maximum of 3 points and concludes: “Transparency data on large parts of the media system is recorded and available to the public online” (Horz-Ishak & Thomass, 2021: 239).

Another best-practice example is Portugal, where the media regulatory entity ERC has provided a public database for the transparency of media ownership since 2010, which was upgraded to a full operational transparency portal in 2019. Furthermore, the ERC publishes information on the advertising markets, including details about how much advertisement public institutions have bought and in which media they placed it (Fidalgo, 2021).

Two more European countries score best in the MDM: the Netherlands and the United Kingdom, which are both ranked as medium risk in the MPM. In the Netherlands, the Media Authority [Commissariaat voor de Media] operates a comprehensive website, *mediamonitor.nl*, which contains updated information on media ownership (Vandenberghe & d’Haenens, 2021). In the United Kingdom, the government displays in a detailed searchable register relevant information on the ownership of all companies in the country. Furthermore, most media companies publish annual accounts and details of owners and board members on their websites. The BBC is obliged to release company data, which is verified by the regulator Ofcom, who also maintains lists of broadcasting license holders (Moore & Ramsay, 2021).

Finally, South Korea is among the best-practice examples from outside Europe in the 2021 MDM sample. Fulfilling legal obligations, leading news media must report their key business figures, including ownership and management details, to the financial supervisory service annually. These reports are publicly available and those on print media are also published by the Korean Press Foundation (Kim & Lee, 2021).

Horizontally across nations, public service media are good-practice models. Although obliged by law in most cases, these organisations publish all their business and accounting figures in annual reports, which are available to the general public. These reports normally include all relevant business statistics, as well as information on board members and leading staff, often also performance data on market shares and (daily) reach for radio, television, and online media.

## Transparent ownership with flaws

The second, and largest, group of the sample is composed of countries where information on ownership is broadly available, but either incomplete or difficult to find. These countries scored 2 points in the MDM or were classified as “medium risk” by the MPM. Again, both instruments largely conform in their ratings, with the notable exception of Finland, which is rated at “high risk” in the MPM. Finland is a vivid example of a case where information is available in principle, but hard to find for non-professionals. “While ownership data is theoretically available to all, acquiring it is practically too cumbersome for a layperson”, write Manninen and Hjerpe (2021: 9), members of the MPM

team in Finland. This deficit is also addressed by the Finnish MDM team, who awarded Finland 2 points. The latter claim and take into account the publication of a thorough report by the Ministry of Transport and Communication in 2018, which contained detailed information on the media in Finland, with a follow-up in 2020 (Ala-Fossi et al., 2018, 2020, 2021).

Italy, a country in which ties between journalism, political parties, big corporations, and the state have always been strong, has some provisions for media ownership transparency, but this information is not easily available to citizens. The state Authority for Communication Guarantees, Agcom, annually collects and publishes ownership data, but it is hard to find. One reason for this reluctance is that leading news media are not keen to publish information on their ownership and key business figures (Padovani et al., 2021). In Iceland, the national Media Commission also collects data on media ownership provided by media companies, but it does so only to a limited extent, because finances and staff are lacking to provide and publish this information in full (Jóhannsdóttir et al., 2021). Two more examples of flaws in media ownership transparency are found in Austria and Chile, where the competent authority collects ownership data based on self-declaration by the media themselves. In Austria, however, private commercial media owners are not obliged to, and thus do not, publish any information beyond the strict legal requirements. This results in a situation in which the public can find ownership information after some online search, but does not find any relational data on business development, as media companies treat these data as confidential (Grünangerl et al., 2021). In Chile, the general transparency law only obliges public organisations, such as public television, to disclose their ownership structure. Private media companies voluntarily decide on the amount of information they publish, resulting in an irregular body of public knowledge (Núñez-Mussa, 2021).

It appears that within this group of countries, media authorities are empowered by law to collect media ownership data, but this information is either incomplete and reduced to the strict minimum, or not easily available to the public. Private media organisations do not recognise the advantages of ownership transparency and prefer to disguise as much information as they legally can. Thereby, they jeopardise faith and miss the opportunity of becoming trusted agents operating in the public interest.

### Failing media ownership transparency

At the bottom end of the scale for media ownership transparency is a mixed group of countries, some with strong democratic traditions. In Australia, media ownership information is scattered over company websites. Media authorities publish reports, but they go largely unnoticed by the public, thus Australians have

little or no knowledge about their news media (Dwyer et al., 2021). In Hong Kong, public information is limited to data provided by the stock market (Lo & Wong, 2021). In Greece, media companies release relevant information only occasionally, and the degree of detail is decided at their own discretion. Thus, “citizens retain a blurred image of the media field” (Papathanassopoulos et al., 2021: 216). The main weakness in Swiss media transparency lies with the lack of authoritative assessment of data delivered by the media organisations themselves. While there are a number of reports on the Swiss media market, they all rely on the same sources, which are the media companies (Bonfadelli & Meier, 2021).

The results of the MPM instrument show the following:

In a significant proportion of European states there are no specific requirements relating to media ownership transparency and that only about half of the countries examined (14 of 31) require disclosure of ownership information directly to the public. (Craufurd Smith et al., 2021: 16)

Furthermore, most MPM countries considered at high risk for media ownership transparency are located in Central and Eastern Europe, with the exception of Spain. All of these countries are not part of the MDM sample. Again, this MPM result is mainly rooted in the inclusion of the legal provisions into the evaluation criteria, which is not the case for the MDM project.

## Conclusions

In this chapter, the merits and limitations of media transparency have been discussed theoretically and, on a case-by-case basis, empirically. The concept of media transparency oscillates between the democratic requirements of openness and access to corporate and journalistic information to keep the public informed about the world, on the one hand, and the privacy and protection of confidential sources of information, on the other. Journalistic practice in particular must cope with these paradoxical demands. While the core business of journalism is to provide transparency and, at best, criticism of the exercise of power and domination in politics, business, and culture, its own professional work is based on the preservation of confidentiality and the protection of valuable sources of information. Media transparency extends far beyond journalism to include industry structures, ownership, the business model, corporate governance, editorial statutes, revenues, turnover, and wage structures.

In terms of media policy, the European level currently focuses exclusively on the transparency of media ownership. Transparency of media ownership is intended to provide the public with an accessible, continuously updated source of information, and make public whose interests are behind the news and whether there are any conflicts of interest. Empirical data on transparency of media

ownership show a pronounced divide between countries. In some countries, transparency is considered less important by policy-makers, so citizens tend to be uninformed about the political economy of the news media (e.g., Australia, Greece, and Hong Kong). In other countries, information is unavailable or accessible only to experts, and private media refuse to publish their data to the extent they are legally able to (e.g., Austria, Chile, Finland, and Iceland). In other, best-practice cases, transparency of media ownership is a long-established operational standard of commissions and observatories that collect information and make it publicly available; the Netherlands, Portugal, South Korea, and the United Kingdom are positive examples of such practices. However, transparency of media ownership is rather ineffective as a policy goal if this information is not continuously contextualised and classified. Ownership transparency does not lead to more market competition or less concentration of power in itself, because it often remains unclear and highly speculative what conclusions can be drawn from ownership disclosure. Transparency in itself creates neither pluralistic media nor reporting at the service of democracy.

On the contrary, isolated demands for transparency promote a kind of symbolic politics that obscures the complex power structures within media corporations and negates the multiple institutional embeddings of leading news media in politics and business. The daily observed appropriations and instrumentalisation of leading media considered to be independent are neither articulated nor problematised by either those working in the media or by the consumers who are affected. Most times, the power of media and power through media remain hidden because the exercise of power cannot usually be justified from a democratic political perspective. The apparent visibility of ownership, produced by self-regulated industry associations, tends to prevent media policy measures from strengthening democracy. Transparency can only ever be the starting point – and not the goal – in politics defending the normative ideals of news media in liberal democracies.

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## Chapter 13

# Journalistic practices contesting the concept of internal pluralism

### *Mapping strategies for internal diversity in and through the news*

Enrique Núñez-Mussa, Kari Karppinen,  
& Hanne Vandenberghe

#### Abstract

The concept of internal pluralism is employed in this chapter to delve into how journalists and editors from 18 countries worldwide understand and practice internal diversity in their newsrooms. The results reveal a tension between normative expectations of pluralism and the representation of society in news media, professional journalistic standards, and how aspirations to pluralism are taken into action through sourcing routines. Although the sample is diverse – not least in terms of political and media systems – there is a common trend of increasing awareness about the need for pluralism in the newsroom, and a shared lack of structures for incorporating this ambition in internal journalistic routines.

**Keywords:** internal pluralism, newsroom diversity, pluralism in journalism, source pluralism, media pluralism

## Introduction

When considered as a core value in journalism, the notion of internal pluralism opens a tense dialogue between different normative perspectives about how journalists should represent society and the diversity of newsrooms with the conditions in which journalists and editors practice pluralism. In this chapter, we analyse the structural conditions and understanding of internal pluralism in the news media of 18 countries worldwide to map the diversity of interpretations of the concept in different national contexts and the related practices.

Each section of this chapter explores a particular aspect of internal pluralism in journalism, with examples from the 18 countries participating in the 2021 Media for Democracy Monitor (MDM) research project (Trappel & Tomaz, 2021b, 2021c). Considering the different understandings of diversity, more or less polarised political contexts, and varied journalistic cultures and

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Núñez-Mussa, E., Karppinen, K., & Vandenberghe, H., (2022). Journalistic practices contesting the concept of internal pluralism: Mapping strategies for internal diversity in and through the news. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 275–288). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-13>

routines, we first review the foundations of the concept of internal pluralism and related scholarly discussions. We present the contradictions and conflicts that arise from the ideal role of journalism as a mirror of society, on the one hand, and journalism as an activity that constructs an image of society for the public, on the other.

MDM Indicators and related research questions addressed in this chapter:

**(F3) Diversity of news sources**

How diverse are the sources used by the leading news media? (Trappel & Tomaz, 2021a: 21)

**(F7) Procedures on news selection and news processing**

What rules are implemented and practised in the leading news media regarding the selection and in-house processing of news items? (Trappel & Tomaz, 2021a: 25)

**(F9) Gender equality in media content**

To what extent do media outlets acknowledge and address challenges to gender equality in media content and promote free expression and inclusion of diverse voices? (Trappel & Tomaz, 2021a: 28)

**(E4) Minority/Alternative media**

Do minority and alternative media exist? Are all sorts of minorities served by media? Do minorities have their own media? (Trappel & Tomaz, 2021a: 35)

**(E10) Rules and practices on internal pluralism**

How do media organisations ensure different views and perspectives are being reported? (Trappel & Tomaz, 2021a: 41)

In this chapter, we examine the structural organisation inside newsrooms and the extent to which media outlets acknowledge and address challenges to gender equality in media content and promote free expression and inclusion of diverse voices. We describe the challenges related to the homogeneity of media teams regarding gender, ethnicity, and background and how journalism's views and opinions are incorporated in newsroom decision-making in the sample countries with hierarchical media organisations.

We also report journalists' awareness of incorporating internal pluralism into their daily work. We detected a level of agreement on the relevance of journalistic news values that guide decision-making on sourcing and framing. There were also common limitations to this ambition of most newsrooms, such as limited time for reporting, pressing deadlines, and more structural aspects, such as the partisan stance of a particular media house.

## Definitions and dilemmas of internal pluralism

Definitions of the role of media in a democracy all acknowledge that journalism ought to represent a diversity of voices and perspectives in society. Academic conceptualisations (e.g., Karppinen, 2018) and journalists' perceptions (Vandenbergh et al., 2020) of what this means and what makes journalism pluralistic or diverse can vary. As for the former, both media pluralism and diversity have been conceptualised in various ways in different parts of the world. Similarly, journalists' perceptions of these concepts and their implications for journalistic work can vary across media systems, journalistic and political cultures, and different types of media outlets.

In this chapter, we are primarily concerned with the idea of internal pluralism, which refers to fostering a diversity of perspectives within one media outlet in terms of political views, gender, ethnicity, and other social and cultural differences. In contrast, external pluralism typically refers to the diversity of different outlets across the media system (e.g., Karppinen, 2013).

Though there is a general agreement that journalism should include a variety of voices, the implications of pluralism as a normative principle for journalism and news media remains controversial (Karppinen, 2013, 2018; Raeijmaekers & Maesele, 2015; Valcke et al., 2015).

The controversies about the nature of internal pluralism mirror some fundamental questions about the role of news media and journalism as the gatekeepers of the public sphere (see, e.g., Christians et al., 2009). A lasting question is whether journalism should reflect the balance of existing identities and differences in society, or whether it should question the existing sociopolitical status quo, promoting critical voices and views that challenge the prevailing structures of power and might otherwise be silenced in public debates (Raeijmaekers & Maesele, 2015; see also Karppinen, 2018). It is also important to investigate the extent to which journalism contributes to constructing these differences (Karppinen, 2018).

These normative questions have implications for several practical issues in journalism, including the selection of sources, judgments of newsworthiness, framing of individual news stories, and the inclusion of different perspectives within the newsroom, which all impact whose voices are heard in the public sphere. While these choices are often constrained by journalistic routines and organisational factors, such as time and resources, they also reflect different normative assumptions about the role of journalism in society (Karppinen, 2018).

According to Denis McQuail (2007), the aim of journalism to promote society's diversity in their reporting can be approached from at least four normative standpoints: 1) reflection, that is, journalism should mirror the balance of existing political, cultural, and social differences in society; 2) equality, which means journalism should provide equal access to various perspectives and

groups in society, regardless of popularity; 3) choice, which means there is a diverse range for individual consumers to choose from; and 4) openness, that is, fostering innovation and difference and valuing new ideas and various voices.

In journalistic practices, these normative assumptions may sometimes conflict and even contradict one another and raise questions about identifying the groups or perspectives that need representation, and deciding which are to be considered underrepresented (Karppinen, 2018). In addition, the differences that journalism ought to represent can range from different political viewpoints to gender, ethnic, and cultural diversity in the content that is published and inside the media organisation where the content is produced.

In previous studies on internal and external news pluralism and diversity, the community structure theory of media coverage has indicated that journalistic reporting tends to be shaped, at least to some extent, by existing demographic and community characteristics and patterns in public opinion (e.g., Pollock, 2013). On the other hand, journalism never only “mirrors” social reality but also constructs and selectively frames the issues covered by the news. Furthermore, critical scholars have often criticised mainstream journalism for offering a plurality of views “within the box” – that is, providing plurality within certain ideological limits that maintain the status quo of existing social consensus (e.g., Glasser et al., 2009; Raeijmaekers & Maesele, 2016).

In some cases, decisions concerning internal pluralism may be subject to formal rules regarding, for example, election reporting or equivalent coverage of political candidates. In most cases, however, the range of views represented by a media outlet is governed by informal journalistic routines and practices associated with the ideals of objectivity and balance.

One mechanism noted in many canonical journalism theories that support the media’s purported elite orientation is the news media’s reliance on official and expert sources. Stuart Hall and colleagues’ (1978) theory of “primary definers”, for example, highlights how the media tend to reproduce existing elite consensus, not because of an unconscious bias, but because of professional norms and practices that help reinforce a relationship of reciprocity and interdependence with policy elites. Similarly, Herbert Gans (1979) established an influential hierarchy of sources: from “knowns”, which already occupy prominent positions, to “unknowns”, such as ordinary people or protesters. The selection of sources by news organisations has a significant impact on pluralism if one considers expert sources who interpret issues for the public as exercising power in framing journalistic coverage (e.g., Dimitrova & Strömbäck, 2009; Manninen, 2017; Vandenberghe et al., 2020).

It is also evident that different types of media outlets interpret the normative standpoints of pluralism differently. Public service media, for example, is often tasked with the explicit aim of fostering internal pluralism and serving all groups in society, including minorities. In contrast, media outlets with a

political stand or a party affiliation would interpret their role differently and more in line with the idea of external pluralism.

## Method

Differences in media systems, political and journalistic cultures, and media market size could also be expected to produce different challenges and journalistic self-perception concerning internal pluralism in countries characterised by different journalistic cultures and traditions of consensual or polarised politics (e.g., Hallin & Mancini 2004; Hanitzsch et al., 2019). In this chapter, we review the data from the 2021 MDM research project (Trappel & Tomaz, 2021b, 2021c), guided by existing conceptualisations of internal pluralism. We performed an in-depth reading and thematic clustering of the MDM indicators addressing the diversity of news sources (F3), procedures on news selection and news processing (F7), gender equality in media content (F9), minority and alternative media (E4), and rules and practices on internal pluralism (E10) (for further details about the indicators, see Trappel & Tomaz, 2021a). Based on the clustering, we derived a variety of understandings and interpretations of pluralism and diversity issues found in newsrooms across the world.

The first category is internal diversity as a reflection of society, referring to its cultural, political, social, and demographical composition. A heterogeneity in terms of gender, age, language, ethnic origin, social class, and ideological viewpoints should be reflected both in news content and newsroom staff. Conversely, a lack of diversity within newsrooms is seen as the main problem for reflecting society accurately in news content. Diversity of political opinions is also a recurring aspect. Although news media are primarily impartial, a balanced representation of political standpoints and parties is sought, especially within the opinion or editorial pages of newspapers. This category is elaborated in the section discussing signs of a growing awareness of the need for internal diversity.

A second category derived from the MDM data is the view that professional journalistic standards is the primary condition for ensuring internal pluralism, which means that those standards are what journalists declare guide their decision-making (see the section below, “Decision-making in the newsroom”); although, a precondition for that is editorial freedom and autonomy. Moreover, budget cuts resulting in fewer journalists in general, and specifically fewer foreign correspondents, is indicated as one of the most significant risks for not providing internal pluralism, especially in the variety of information and sources that can be used to produce news stories.

This last issue relates to the third understanding of diversity, namely that of diversity due to sourcing practices (see the section below, “Sourcing practices as a diversity issue”). One aspect of source diversity is the type of sources used in

the news, especially in television news, the variety of voices from so-called vox populi to experts. The second aspect is the type of primary sources used in the newsrooms. News agencies, public relations material, and Internet search engines are primary sources in the general newsroom. National news agencies remain an essential source in the daily journalistic business; however, more prominent news media tend to use it more often as a secondary or tertiary source, whereas smaller or online-only news organisations use the news agencies more frequently as the primary source. The use of public relations material increases, although those interviewed for the MDM project did not address the interdependence of their journalistic work.

Lastly, interviewees in the MDM address (ownership) concentration as an increasing issue, making pluralism more compelling than ever before (see also Bonfadelli et al., Chapter 6). A few major (commercial) brands are setting the news agenda, which endangers the diversity of news stories and opinions. There is an increase in content exchange between platforms of the same owners. Although the concentration issue can impact the space and time given to diverse voices in the news content, for example, with more hierarchical newsrooms, overall, it is more an issue at the external level of pluralism, which is not within the scope of this chapter.

### Explicit awareness of diversity

There are clear indications in the 2021 MDM country reports of an explicit awareness of diversity issues related to journalism. Internal pluralism is recognised as a central goal in most mainstream media outlets. Most interviewees acknowledge that they have a strong newsroom commitment to diversity-related goals, such as gender equality and a range of viewpoints.

The MDM results also tell of internal debates concerning the theme of diversity, and at times, tensions between different generations of journalists or different conceptions of the role of journalism. In Germany, for example, it is reported that issues related to the selection of sources that reflect societal diversity in terms of gender, age, and ethnic origin have become a sensitive topic in newsrooms (Horz-Ishak & Thomass, 2021).

Awareness regarding gender equality is evident (see also Padovani et al., Chapter 4), and projects like the Global Media Monitoring Project (GMMP) have produced academic information on women's presence as journalists and news sources, gender bias, and stereotypes in the news. News media in several countries also report that they regularly track the proportion of women as news subjects and sources. While news media in Sweden have succeeded in increasing the share of women sources to around 40 per cent, in most cases, the share remains below 30 per cent (in the 2015 GMMP report, the European

and global averages are 25% and 24% of women subjects). In some countries, such as the United Kingdom, policy-makers have also specifically urged news media to take steps to ensure that they better reflect society by providing a gender balance (House of Lords, 2015).

Despite these apparent land winnings, not every country in the 2021 MDM sample shared the commitment to improving gender balance. Interviewees in some countries reported no awareness of gender sensitivity. In Greece, for example, it is reported that there is a lack of culture relating to gender equalities in news and “a lack of an understanding that this is a problem in the first place” (Papathanassopoulos et al., 2021: 196). Similarly, editors interviewed in Flanders, Belgium, failed to indicate the existence of, or the need for, explicit mechanisms to monitor and guarantee gender balance in news subjects.

In addition, attention to gender diversity does not ensure that similar awareness extends to other aspects of diversity, such as ethnic, cultural, or social diversity. In many countries, we could confirm relatively little attention to minorities in the mainstream media. Various minorities, because of their race, class, gender, sexual orientation, (dis-)ability, ethnicity, and others, were often under- or misrepresented in mainstream media. In countries that have experienced sudden increases in immigration, such as Chile, Finland, Germany, Hong Kong, and Iceland, the media faces challenges and criticism on covering these new populations. Usually, immigrants tend to have low visibility as actors, and that coverage of immigrants is often associated with negative frames, such as crime or political unrest. This mirrors existing research on how immigrants and refugees are represented in the media, revealing established framing patterns and systematic biases (e.g., Berry et al., 2015; Georgiou & Zaborowski, 2017).

In contrast to gender, there are fewer mentions of attempts to increase the share of groups, such as ethnic minorities or immigrants, as sources or subjects in the news. Instead, ethnic minority media is often explicitly conceived as its own niche “sector”, or at most, something that falls within the mandate of public service media, which in many countries is mandated to produce specific minority programming.

A more general issue raised in the interviews was whether journalism is collectively able to cover all layers of society when most journalists themselves are middle-class professionals living in metropolitan areas. Particularly in countries that have experienced large migration, such demographic homogeneity concerns journalists who would like a more heterogeneous newsroom: This was the case in Belgium, Finland, the Netherlands, Sweden, and Switzerland. In many cases, the representation of ethnic minorities also remains marginal in the workforce of mainstream media houses. Besides public service media, some news media (e.g., *de Correspondent* in the Netherlands) have also begun initiatives to improve the diversity of their editorial staff by purposively hiring journalists from different backgrounds (Vandenbergh & d’Haenens, 2021).

In some countries, respondents identify a specific social mobilisation or event as having triggered the discussion of internal pluralism in some newsrooms. For example, the Black Lives Matter movement awoke a concern in Canadian journalists from CBC about regulations that had the potential to restrict journalists' voices (Taylor & DeCillia, 2021). In Chile, the political and social turmoil experienced in 2019 revealed a generational gap among reporters and editors on how to cover the protest, exposing contending notions of impartiality and professionalism (Núñez-Mussa, 2021).

In the countries participating in the MDM research project, there are no formal procedures to ensure internal pluralism in the media outlets, apart from general journalism professional and ethical standards. However, in many countries, the public service media (PSM) has an explicit mandate to represent society. For instance, the Austrian public broadcaster ORF must represent all crucial voices in society and scouts for new experts in various fields, coaching them in how to perform in front of the camera (Grünangerl et al., 2021). The Danish public broadcaster DR has a Director of Pluralism and Diversity, whose job is to recruit staff that can add diversity to teams, journalist positions, and participants in programmes (Blach-Ørsten et al., 2021). VRT, the Dutch-language Belgian public broadcaster, is considered one of the leaders in diversity policy-making within Western and Northern Europe (d'Haenens et al., 2018) and has a diversity policy document establishing quotas of 40 per cent women both in the staff and on-screen, and 7 per cent people with a foreign origin (outside EU-15) in the staff and 7.5 per cent on-screen. That said, it is not always the case that PSM is more diverse than other news media; for instance, only 12 per cent of the Canadian public broadcaster's staff is a visible minority (CBC, 2018). Also, the political circumstances affect how the stated purpose of the national PSM is interpreted, as in Greece and Portugal, where some audiences perceive public media as mouthpieces for the government.

Regarding political pluralism, respondents in some countries consider polarisation and partisan press as obstacles to internal pluralism. Far-right parties are gaining parliamentary representation, as in Belgium and Germany, challenging journalists' ideals about how news should be and the notion of representing all relevant voices in the political agenda. This is particularly conflicting considering that journalists from several European countries state that news values such as independence, objectivity, conflict, and impartiality are their primary reference in sustaining their arguments in newsroom discussions.

Despite the aim to represent all views in society, the journalists interviewed for the MDM project made it clear that there are limits to political pluralism within mainstream media. They mainly refer to the exclusion of fringe views, which supports the idea of mainstream media offering plurality only within certain ideological limits deemed within "a sphere of legitimate controversy" (Hallin, 1986; see also Ræijmackers & Maesele, 2016).

## Decision-making in the newsroom

MDM results also show how respondents perceive the voices of journalists to be represented inside the organisation. In most contexts, decision-making inside the newsroom takes the form of an oral culture of daily discussion. Usually, the editorial meeting is the central instance for story proposals, news selection, and framing – in some countries, such as Chile and Finland, more than once during the day. In Australia, it was considered an opportunity for guaranteeing accountability in the journalistic decision-making process, making them open, so visitors can attend the meetings (Dwyer et al., 2021). Although informal, journalists and editors in several countries (like Belgium, Chile, Germany, and South Korea) recognise editorial meetings or newsroom debates as a relevant occasion for reporters to voice their opinions and build the media's agenda. They also stress the relevance of conversations during the day, where they negotiate the framing of the stories.

These instances are deliberative and a propulsor of internal pluralism, depending on the country and the hierarchical structure of the newsroom. The most common scenario is that reporters can propose stories and editors have the final word, with nuances between countries regarding reporters' autonomy (see also Trappel et al., Chapter 14).

According to the MDM findings, Canada, Denmark, Finland, and Iceland are exceptional cases for journalists' autonomy. In Canada, reporters can refuse to sign an article (Taylor & DeCillia, 2021), and in Denmark, journalists have the opportunity to say no to an assignment or an editor's instruction if they consider that the assignment in some way goes against their principles (Blach-Ørsten et al., 2021). In Iceland (Jóhannsdóttir et al., 2021) and Finland (Ala-Fossi et al., 2021), journalists are responsible for proposing stories and their frames, so they do not depend on assignments and can intervene in their news organisations' agenda and message.

Greece is different, as editorial meetings are between editors and editors-in-chief. The political view of the media organisation is the most relevant criterion in deciding what is covered (Papathanassopoulos et al., 2021). Another example is Italy, where journalists do not have a say on the stories they are asked to cover and must respond to assigned topics and deadlines from their editors, with journalists declaring little autonomy (Padovani et al., 2021).

Seniority and expertise are recurring arguments to support the practice of allowing journalists to propose and incorporate stories into the news agenda. In the United Kingdom, where newsrooms have a vertical structure, roles and seniority influence discussion (Moore & Ramsay, 2021). In Chile, it depends on the editor's trust in the individual reporter (Núñez-Mussa, 2021). Across the sample, investigative journalists tend to be more independent and have more opportunities to pitch stories, because they also have more specific skills. Experi-

ence, as well, influences the editing process. In Belgium, for example, articles by less-experienced journalists are edited with more caution (Hendrickx et al., 2021).

### Sourcing practices as a diversity issue

Respondents mentioned professional routines as sometimes being a limitation for internal pluralism. Journalists in Austria, Chile, Hong Kong, the Netherlands, Portugal, and Switzerland agree on the difficulties of thinking strategically about daily coverage due to time constraints, tight deadlines, and breaking news. Therefore, journalists tend to answer to the daily agenda and seek out the sources and experts they know will give a proper quote for their stories.

Some answers indicate that, in some contexts, online media outlets contribute more to internal pluralism than legacy media. This was the case in Belgium, where online-only media contributed more viewpoints to the public agenda (Hendrickx et al., 2021). In South Korea, online journalists stated they have more autonomy; therefore, they can present more voices (Kim & Lee, 2021). In contrast, in Chile, digital media tends to republish, follow up, and cover content introduced in the agenda by legacy media, so they replicate the sources and voices already part of the mainstream agenda (Núñez-Mussa, 2021).

Respondents in Finland, Iceland, and Sweden are concerned about finding a more heterogeneous group of expert sources to interview. In Iceland, it is an ongoing discussion in newsroom meetings (Jóhannsdóttir et al., 2021). In Finland, some news organisations keep a statistical record of their interviewees' genders (Ala-Fossi et al., 2021). Canada and the Netherlands share a similar situation, but it depends on the individual initiative of each journalist. A Canadian reporter “stressed the importance of ‘getting the best sources’ while acknowledging an effort to avoid filling stories with ‘old white guys’” (Taylor & DeCillia, 2021: 72).

Despite good intentions and genuine efforts, time was a recurrent limitation to finding newer, reliable sources who can provide an adequate answer, especially in television, where experts require stronger communication skills. Journalists from Austria, Finland, Iceland, the Netherlands, South Korea, and Switzerland mentioned that experts with more media experience could give more efficient answers and probably get a new call to appear in the media. In addition, as small countries, Finland and Iceland have a limited number of reliable experts.

Another topic relevant to the issue of sourcing is journalists' autonomy and the media's political stance. A noticeable case of the first situation happens in Switzerland, where only editors, and not reporters, can evaluate sources (Bonfadelli et al., 2021). In Hong Kong, the political stance of the media is so influential that journalists tend to practice self-censorship, or their interview invitations get rejected by sources who disagree with their media outlets. An

extreme example from that country is one media that keeps a blacklist of pro-democracy experts (Lo & Wong, 2021).

In Greece, Hong Kong, and South Korea, the media coverage depends on the political perspective of the reporting media, which also conditions the availability of sources willing to speak with a specific outlet. This phenomenon could also be observed in the United Kingdom during the Brexit election (Moore & Ramsay, 2021).

## Conclusions

The 2021 MDM country reports and the interviews broadly reflect a consensus around the general expectation that the news media should represent the prevailing differences of backgrounds, opinions, and social conditions of the population (McQuail, 1992). The country reports also indicate an awareness of diversity issues and internal pluralism as problems that must be worked upon within media organisations and the profession. In concrete terms, this included issues such as diversifying the range of expert sources used and increasing the diversity of the journalistic workforce.

Several difficulties arise in putting the ideals of internal pluralism into practice. These were both practical in nature, such as entrenched journalistic routines and lack of resources, and more principled, such as varying understandings of internal pluralism as an aim. The MDM project has no clear definition or shared understanding of internal pluralism. Many journalists and editors understand the concept (and ideal) of pluralism differently, reflecting the academic understanding of these concepts as essentially contested and difficult to define objectively or measure empirically (Karppinen, 2015).

Although we have not attempted to produce a systematic comparison of countries or the factors that explain differences across countries, apparent differences between countries arise from, for example, the role and status of public service media as the institution that is most explicitly linked to internal pluralism; different journalistic cultures and norms; and varying levels of political polarisation and multiculturalism. The fact that news content should constitute a reflection of society is a well-accepted normative point of view in the academic context.

In most cases, there are no formal guidelines on internal pluralism for media organisations. Instead, journalists and editors primarily rely on their professional competence and implicit norms of the newsroom.

The results of this chapter show that despite journalists' shared awareness and expectations about internal pluralism, there are no universal or standardised practices, which adds to logistical, cultural, and political constraints to incorporate the ideals of pluralism in day-to-day editing and reporting routines.

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## Practising democracy in the newsroom

### *Comparing practices of news processing, conflict resolution, and hiring*

Josef Trappel, Joaquim Fidalgo, & Achilleas Karadimitriou

#### **Abstract**

Newsroom democracy, defined as the exercise of fundamental democratic principles and practices in generating and processing news within professional news organisations, is rarely addressed in communication studies. Yet, the topic contains an interesting paradox: While newsroom journalists are expected to guard democracy, newsrooms themselves are often hierarchical in organisation and practices. In this chapter, the development of the concept of newsroom democracy is discussed, up to today's contemporary integrated newsrooms. Empirical findings show that public service media are more advanced in terms of internal democracy than private media, and some younger democracies outperform long-established and venerable democracies in this respect. We conclude by arguing that democratic newsroom practices best serve both the public and private interest.

**Keywords:** newsroom democracy, newsroom autonomy, democratic governance, journalistic watchdogs, media ownership, monitory democracy

### Introduction and theory

Think, for a moment, if environmentalist role model Greta Thunberg arrived at a Fridays For Future student strike on a heavy motorbike; if public health officials during times of a virus pandemic were deliberately and demonstrably not vaccinated themselves; if an activist organisation called Transparency International refused to disclose its financial supporters and board members – they would all be accused of hypocrisy. Trust and legitimacy of their causes would suffer, and public support would rightly wane.

A similar case could be made for (leading) news media in mature democracies, the object of scrutiny in this book and for *The Media for Democracy Monitor 2021* (Trappel & Tomaz, 2021b, 2021c). In research as well as practice, leading news media are often held as champions of democratic governance, holding the

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powerful to account, being fearless watchdogs of society, providing fora for deliberation, examining the exercise of power and protecting the public from wrongdoings, providing a platform for open debates, giving voice to the people, and representing the citizens (see Curran, 2005). While supposedly providing these crucial services to the democracies they are part of, leading news media rarely allow insight into newsroom operations. Little is known or publicly communicated about the practices within newsrooms, how decision-making on news framing comes about, and the level of participation by newsroom staff when editors-in-chief or other leading personnel are hired.

Newsroom democracy, defined as the exercise of fundamental democratic principles and practices in generating and processing news within professional news organisations, is also sidelined in communication studies. Even comprehensive handbooks on journalism studies – such as the seminal *Handbook of Journalism Studies* (Wahl-Jorgensen & Hanitzsch, 2019) and the *Handbook of Digital Journalism* (Witschge et al., 2016) – emphasise the democratic role of journalism in society over the role of democracy within newsrooms. The place of newsroom democracy in the scientific literature is marginal. In the 1970s and 1980s, some attention was paid to the issue of how news media organised their work. Dreier (1978: 75) recalls the so-called long march through the institutions of society during the students’ movement of the 1960s: “Beginning in the late 1960’s, however, journalists around the nation began to talk about ‘newsroom democracy’. [...] Journalists, too, realized that their own powerlessness on the job created obstacles to aggressive and responsible journalism”. The perceived contrast between giving voice to powerless groups in society and their own powerlessness within their organisations ultimately lead journalists to create a “newsroom democracy movement” (Dreier, 1978: 84).

Later, in the 1980s, when the scientific debate on global communication equalities surged following the publication of the landmark UNESCO report by MacBride (1980), *Many voices one world: Towards a more just and more efficient world information and communication order*, Picard (1985: 78) suggested a “staircase of press freedom needs”, including newsroom autonomy and democracy as a distinct step: “This requirement [...] helps insulate journalists from the biasing influences of newspaper publishers and owners and the causes that they support”. This concept of newsroom autonomy and democracy was inward-looking towards freedom and autonomy from media owners. Much later, Clifford G. Christians addressed the outward component towards the accusation of hypocrisy in his contribution to the centrepiece of normative communication study literature as follows:

If hardly anyone today disputes democracy as a worthy goal, not everyone expects it to apply to their own decisions and activities. Newspaper editors [...] often champion democratic values on their editorial pages but seldom

apply those values in their own newsrooms. And editors usually see no irony in the gap between what they preach and what they practice, because for them democracy denotes a form of government and not a set of requirements aimed at private persons and their private enterprises. (Christians et al., 2009: 92)

Thus, newsroom democracy has been somewhat recognised in the literature on media and democracy, but never discussed in detail. One reason might be that newsroom democracy is hard to imagine in the prevailing capitalist setting of the media industries. In this mindset, media ownership seemingly comes naturally with the right to appoint leading newsroom staff and to define the editorial line. Without questioning these ownership privileges any further, McQuail, author of six editions of *McQuail's Mass Communication Theory* since 1983, concedes the following: "There is no doubt that owners in market-based media have ultimate power over content and can ask for what they want to be included or left out" (McQuail, 2010: 291). His successor as author of this highly valued volume on media and communication theory, Mark Deuze, upheld this view in the seventh edition (McQuail & Deuze, 2020).

Against this background, contemporary democracies and communication practices require a revision of these mass media-based approaches. Both contemporary forms of democracies and news media organisations find themselves under transformative pressure, seeking adequate responses to new challenges.

First, representative democracies – the successful model of the nineteenth and twentieth century – have come of age. Following the ancient Greek assembly-based democracy built upon the spoken word, representative democracy intertwined with print culture. In John Keane's reading, communicative transformations along digitalisation, the Internet, and "communicative abundance" require thinking of contemporary democracies as "monitory democracies". According to Keane (2009: 688), "monitory democracy is a new historical form of democracy, a variety of 'post-parliamentary' politics defined by the rapid growth of many different kinds of extra-parliamentary, power-scrutinising mechanisms". Next to and in addition to mass media, a plethora of unelected representatives has emerged with the purpose of holding the powerful accountable, in the form of public integrity commissions, judicial activism, public interest litigation, think tanks, participatory budgeting, bloggers, fora, summits, regional parliaments, human rights watch organisations, conflict-of-interest boards, consumer councils, online petitions, democracy cafés, global watchdog organisations, expert councils, public scorecards, public consultations, and so forth (Keane, 2009).

Within this form of contemporary democracy, unelected representatives – both individuals and organisations – are "champions of public causes and values, public figures whose authority and power base are located outside the boundaries of electoral politics" (Keane, 2013: 13). Numerous both in number and causes, unelected representatives provide valuable input to the public debate,

thereby strengthening democracy. The legitimacy of such individuals and interest groups is based on representation. In relation to their cause, interest groups are “agents capable of addressing democratic deficits in governing institutions [...] in large part because they are assumed to contribute democratic legitimacy to policy processes” (Fraussen & Halpin, 2018: 23).

Thus, within contemporary monitory democracies, interest groups, unelected representatives, and concerned individuals provide legitimacy to policy, based on their own interest. Their legitimacy is based on representation of a sufficiently large number of citizens. The more important the cause, the higher the number of represented citizens; and the more democratically the cause is negotiated within the interest group, the higher the relevance in the political process.

Second, news media organisations are subject to transformation as well. Along the representative paradigm of democracy, news media developed an identity as an estate in its own right in the political realm. The famous metaphor of the fourth estate, however, is slanted in several directions. The term originates in the ancien régime in pre-revolutionary France, with clergy, nobility, and commoners (everyone else) representing the other three estates. Attributing the press and other news media a similar position in society as the reigning powers of the eighteenth century somewhat overrates the media’s contingencies. In other European languages (among others, Spanish, Italian, and German), the same metaphor labels media as the fourth power, next to parliament, government, and judiciary. Again, the metaphor is inappropriate; contrary to the other “powers”, the press and news media cannot claim any democratic legitimacy for themselves, as they are unelected, mostly private organisations.

In the age of the “network society” (Castells, 2000), characterised by individuals linked by networks (van Dijk, 2020), networked individuals armed with information and social support are supposed to hold politicians and mainstream institutions accountable. Dutton (2007, 2009, 2013) baptised these networked individuals the “fifth estate”, and argues that this additional estate holds the promise for opportunities of even greater social accountability compared with the media (Dutton, 2013).

Hence, editorial news media are confronted with a vast array of additional watchdogs in the age of networks and within monitory democracies. In order to remain relevant, news media must find and define their place within this plethora of networked individuals, interest groups, and unelected representatives – all driven by individual causes and values – being legitimised by those whom they represent (in the terminology of digital platforms, their followers).

Most news media do not claim to represent a specific interest, cause, or group, apart from a larger or smaller readership or audience. Their “followers” are diverse, and news media (most of the time) do not follow a specific agenda or advance a specific cause. In this respect, they lack legitimacy compared with Dutton’s fifth estate. Instead, editorial- and newsroom-based media could en-

hance their legitimacy by strengthening their internal democracy. In this respect, public service media are not much different, although they operate with a public mandate providing them with some authority and legitimacy. In fact, for public service media, newsroom democracy is often a requirement.

Newsroom democracy is in the interest of both the news media companies and the public. Newsroom democracy is in the best interest of media owners and journalists, as democratic structures establish and enhance legitimacy of the media in the political process, similar to interest groups (Fraussen & Halpin, 2018). While the latter create legitimacy through representation (“who and how many do we represent?”), news media create legitimacy through reach (“how many use our news?”), without representing anybody. Therefore, democratic decision-making and conduct has the potential to substitute representation and increase the legitimacy of news media. Newsroom democracy is in the public interest too, as higher-quality content can be expected if newsrooms provide for the most developed decision-making procedure with regard to democratic values such as participation, representation, inclusiveness, equality, voice, minority rights, and so on.

In this chapter, we ask the following question: To what extent can newsroom democracy provide legitimacy for leading news media’s role in contemporary monitory democracies?

MDM Indicator and related research question addressed in this chapter:

**(F4) Internal rules for practice of newsroom democracy**

To what extent do newsroom journalists practise internal democracy? (Trappel & Tomaz, 2021a: 22)

Within the 2021 Media for Democracy Monitor (MDM) research project, newsroom democracy has been operationalised for the participating countries and their respective news media along four strands (for more details, see Trappel & Tomaz, 2021a: 21–22):

- Internal news processing: How democratic is the process of daily news processing? Who has voice in the editorial meetings?
- Conflict resolution: How is conflict mediation organised in newsrooms?
- Decisions on staff recruitment, in particular, recruitment of leading personnel such as editors-in-chief: Who has a right to participate in these decisions? Are those affected by the decision participating in the decision, and in what way? What provisions are in place for gender balance in staff selection?
- Representation: How is representation of different staff categories organised and applied?

## Newsroom democracy in the digital age

The above list shows how democracy in the newsroom refers to the level of autonomy enjoyed by journalists in their daily task of reporting the news as well as in co-forming the functional components of the editorial environment. Traditionally, conflicts between journalists' professional values and the editorial policies of news organisations have drastically affected the practices of journalists who had to comply with their employers' wishes (Altschull, 1996).

Over the last two decades, news production and dissemination have undergone major changes in terms of technological and economic conditions influencing newsroom professionalism (Ornebring et al., 2014; see also Ruggiero et al., Chapter 15). Contemporary journalism has resorted to digital data reporting in its considerable task of holding power to account, regarded as an efficient investigative method enforcing the accountability mission of journalists while also enhancing audience engagement (Felle, 2016).

Furthermore, in digital newsrooms, the introduction of audience metrics reflects a "new paradigm" (Anderson, 2011) that permits managers to monitor journalists more efficiently, thus rendering audience metrics as an important factor in newsroom discipline. Indicative is the example of the Reuters bureau in Nairobi, Kenya, where the dissemination of audience metrics about the attractiveness of stories and the promotion of journalists to higher positions changed the perception of who is a "good" journalist (Bunce, 2019).

The Internet age has given rise to integrated newsrooms, where cross-media journalism presupposes multitasked journalists who are confronted with the challenges of quality news storytelling corresponding to the demands of the online environment. The expansion of traditional media to multimedia enterprises, characterised by demanding rhythms in news cycles, expectedly poses challenges to the organisation of daily news processing, and thus the decision-making procedures that lie behind it. When there are fewer journalists investigating stories – with less time to produce more news stories, and working for multiple platforms – newsroom democracy in terms of internal news processing, conflict resolution, and deliberation on staff recruitment becomes even more challenging, but not less relevant.

The advances in technology have also renewed the composition of newsroom power hierarchies, identifying the concept of the accepted and successful media professional, with editors or reporters highly engaged in a round-the-clock digital culture with a wide range of digital skills (Robinson, 2011). This demanding working environment lays the foundation upon which the maturity of newsroom democracy can be judged in the context of a growing space of networking individuals (as fifth estate), who have set the ground for a new source of accountability pertaining to all sectors of society (Dutton, 2009).

## Empirical findings

In its empirical approach, the 2021 MDM research project devotes one indicator to newsroom democracy (F4). Country teams were requested to collect information on practices and routines in newsrooms of the selected leading news media which can be associated with newsroom democracy. The indicator itself assumes that effective rules on internal democratic practices enhance democracy at large and provide democratic legitimacy to the news media. Internal democratic practices are appropriate measures against accusations of hypocrisy and for the enhancement of quality output. In operational terms, this research indicator had the following criteria (Trappel & Tomaz, 2021a: 22):

- newsroom journalists have a formal and equal say in how to portray and frame political issues
- newsroom journalists must arrive at a consensus on how to frame political issues
- newsrooms have clear editorial guidelines for impartiality, with sanctions attached
- existence of a newsroom council
- internal rules for electing or appointing editors-in-chief, other positions, etc.
- journalists choose their editor-in-chief
- existence of internal rules to support and promote women journalists' careers and their access to managerial positions
- existence and implementation of a system of monitoring and evaluation of the presence and participation of women in decision-making at all levels

The main source of information was interviews with members of the newsrooms of the pre-selected leading news media. In cases where respondents claimed that formal rules regarding democracy in the newsroom exist, respective documents such as guidelines or commitments were collected. In order to avoid socially desired answers from editors-in-chief and journalists, interviews with representatives of journalistic trade unions were conducted in addition. Furthermore, research reports and other sources were recommended as suitable material for further input. Of course, this methodological approach provides some room for interpretation. Nonetheless, gathered information in most country studies was straightforward with clear-cut answers. During the collective debate among all researchers from the 18 participating countries, no controversies occurred with regard to this indicator.

## Newsroom democracy in news processing

Empirical findings on how news are processed in newsrooms demonstrate a high degree of trust in professional norms. In most of the newsrooms under scrutiny, interviewed journalists reported some kind of “open debate culture” and “flat hierarchies”, which includes all newsroom members (to be found in the Nordic countries – Denmark, Finland, Iceland, and Sweden – as well as in Flanders/Belgium and the Netherlands, and also in South Korea). Often, no written rules govern this process (e.g., in Finland), but rather routines and traditions. Decisions on news selection as well as on topic framing happens collaboratively and collectively – with Canada as the prime example of this. Canadian journalists also have the right to refuse putting their name under news stories (Taylor & DeCillia, 2021).

The kind of relaxed practices in internal newsroom debate is probably best practice only as long as there is a wide consensus among newsroom journalists. Were this consensus to be challenged (e.g., by new staff or new issues), newsrooms would need some kind of mechanism to handle such disruption. Results show that the majority of the countries participating in the 2021 MDM research project lack such preparedness.

However, there are notable exceptions to this rule of “professional self-conduct”. In South Korea, most leading newsrooms operate along written editorial guidelines (Kim & Lee, 2021). In Italy, a set of national and internal rules are in place that guarantee equality, impartiality, objectivity, and internal democratic practices in newsrooms (Padovani et al., 2021). Similarly, in Portugal, the law requires rules for newsroom democracy; however, an important gap exists between the rules and daily practice (Fidalgo, 2021).

In a few countries in the 2021 MDM research sample, a strict hierarchical order prevails in the newsroom. In the United Kingdom, seniority is an important element that provides weight in newsroom coordination meetings (Moore & Ramsay, 2021). Chile (Núñez-Mussa, 2021) and Greece (Papathanassopoulos et al., 2021) are united in the powerlessness of ordinary newsroom journalists: Editors-in-chief make decisions, while journalists lack an equal say (Greece), and processing power, as journalists may only suggest, not decide, topics (Chile). As observed by Hughes (2012), such a hierarchical newsroom order contains the risk of a journalistic culture of self-censorship and a mere instrumental exchange of information.

Overall, countries scoring high in the ranking for indicator F4 in the 2021 MDM research project apply relaxed professional rules and flat hierarchies in their newsrooms; rules do exist, but they are in most cases informal and not notified. At the other end of the scale, countries scoring low in the overall ranking maintain strict hierarchical rules, again not necessarily notified, but applied in practice by editors. The scale assumes that an open debate culture for newsrooms, with equal voice for all members, is the superior model for leading news media.

## Newsroom democracy in conflict resolution

Newsrooms are not free of conflict, and discussions about topic selection and topic framing are frequent and part of the daily routine. How newsrooms settle disputes and reconcile internal conflicts is another measurement for the maturity of newsroom democracy. In the interviews with newsroom members, some interviewees had reservations about discussing conflict resolution. Nevertheless, statements gathered more or less echo contradictory yet interesting findings with regard to news processing. Countries fall into two camps: One camp practises collaborative conflict settlement over hierarchical decisions by editors, while the other does the opposite.

What unites the two camps is the general pattern of the editor-in-chief having the last say in editorial matters. Also in flat organisations, editors make the final decision in the case of conflict in daily editorial matters. In such cases, the editor is both member of the disputing parties and the final judge. Different procedures apply when it comes to conflicts with regard to employment matters. In these cases, formal or informal reconciliation committees are in place in several countries (e.g., Austria, Germany, and Portugal), most often, but not exclusively, within public service media organisations.

Conflict avoidance is another strategy which is applied, for example, in Hong Kong, where in the most extreme cases, political news framing is rarely discussed. In other cases, permission to discuss framing depends on the political sensitivity of the news story and the political stance of the media outlets (Lo & Wong, 2021).

With the reluctance of participants to share internal conflict resolution procedures, too little information is available to draw robust conclusions. However, it appears that conflict resolution in day-to-day editorial matters is rare, as newsroom members know well the informal “red lines” and do not deliberately cross them. Editors have the final say in cases of disputes. Different procedures apply in cases of employment matters, where formal rules exist in most cases. Overall, the strategies in place to resolve conflict in the newsroom largely comply with the requirements for democracy in the newsroom.

## Newsroom democracy in hiring and internal pluralism

That newsrooms participate in the appointment of editors-in-chief is more of an exception than a rule in the news media covered by the 2021 MDM research project. This example from an interview presented in the report concerning Greece is representative of most of the 18 participating countries:

For privately owned media, [the appointment of the editor-in-chief] is clearly a decision of the ownership. We do not have a self-governing system; the

owners decide and appoint who will take charge. (Papathanassopoulos et al., 2021: 189)

Portugal is partly an exception to the rule of editors-in-chief being chosen without the newsroom staff participating in the process. Here, senior-level appointments are required by law to be preceded by a consultation of the elected newsroom council. Some years ago, no editor-in-chief in any Portuguese medium was allowed the position against the vote of the council; but the law was amended, and now the newsroom council has only a non-binding opinion about the appointment of the editor-in-chief (as well as about the appointment of other editors and deputy editors) (Fidalgo, 2021). In most countries participating in the 2021 MDM research project, there is a practice of informal consultations of the newsroom to ensure that the leadership is not opposed by the journalists. That the support of affected journalists is important is illustrated by the following quote from an interview in Finland: “Reporters cannot affect the selection of an editor-in-chief. Should there be a really incompetent editor-in-chief, if necessary, they can march out to demand having him relegated from his position” (Ala-Fossi et al., 2021: 162). In other cases, as in the Netherlands, newsroom editors’ editorial statutes give them a say in the nomination of a new editor-in-chief. The democratic participation in the newsroom only goes up to a certain point, as is summarised in the Dutch country report: “Staff decisions are taken by the owners and executives, but in connection with newsroom staff” (Vandenberghe & d’Haenens, 2021: 269).

When it comes to the gender balance in newsrooms, most countries participating in the 2021 MDM research project agree that some progress has been made in this regard in recent years, but there is still a lot to do, mainly with respect to equal pay, equal opportunities for “hard news” reporting, or equal chances to get a leading position in the company. Countries like Austria, Canada, Finland, Germany, Hong Kong, and the United Kingdom have an almost 50:50 distribution between female and male journalists (on the contrary, in Chile, Belgium, Iceland, Portugal, South Korea, and Switzerland, there is still a clear majority of male journalists, although the trend among young professionals points in the opposite direction). However, there is no gender balance when considering managing positions in the newsroom. Most leading news media clearly suffer from gender imbalances, either in terms of persistent pay gaps between male and female employees or because of the much-referred-to glass ceiling that makes it difficult for female journalists to progress in their careers after a certain point. There are also frequent complaints of gender-biased stereotypes influencing editors’ decisions about who to send to implement a certain job: Hard news on politics or economy and reporting from conflict situations abroad are still topics assigned more often to male journalists, while female journalists are more commonly given soft news regarding issues of society, education, travel, or leisure. “Patterns of inequality

persist”, as pointed out in the Italian country report, following examples of such topic-related “horizontal segregation” between male and female reporters (Padovani et al., 2021: 337; see also Padovani et al., Chapter 4).

In addition, many news media managers don’t seem to acknowledge the existence of gender inequalities: A number of the editors-in-chief interviewed for the 2021 MDM research project insist that men and women are treated and paid equally and that no one is subject to discrimination. But female journalists do not agree. The fact is there are still very few media companies where formal rules or special committees are in place to promote gender equality. Examples of such a proactive attitude appear in news media companies in Germany, South Korea, Sweden, and the United Kingdom, while in Finland and Iceland, gender equality – for example, in employment conditions – is protected by law. Moreover, some civic associations are being created in order to monitor (and publicly denounce) gender inequality, thus calling attention to and fostering awareness of the problem in the media; for example, Pro Quote in Germany (Horz-Ishak & Thomass, 2021), Donne in Quota or Si non ora quando in Italy (Padovani et al., 2021), and Korea Women Journalists Association in South Korea (Kim & Lee, 2021). In summary, there is an increased focus on gender balance in newsrooms, outside and inside media organisations, but much is still to be achieved.

### Staff representation in media organisations

The existence of a newsroom council allows journalists to be formally represented in the debate and management of the editorial department. A number of countries participating in the 2021 MDM research project lack newsroom councils (Chile, Denmark, Finland, and Switzerland), while others (Australia, Belgium, and South Korea) have mixed councils that are somehow related to journalists’ unions and deal more with labour-related issues than editorial issues. Among national contexts that have newsroom councils, the cases of Portugal (Fidalgo, 2021) and Italy (Padovani et al., 2021) stand out, as Portuguese and Italian councils are based on a legal rule for all the news media employing at least five (in the Portuguese case) or ten (in the Italian case) journalists. This representative structure of journalists is considered so important in the case of Portugal that their existence is inscribed in the highest law of the country – the Constitution of the Portuguese Republic. Newsroom councils also exist in Austria, the Netherlands, and South Korea, for instance, while in other countries, the presence of a council varies much according to the news medium in question. Another instrument that establishes and regulates democracy in the newsrooms of some countries (e.g., Austria, Germany, and the Netherlands) is the editorial statute, thus giving some formal framework to the demand for journalists’ participation in editorial decisions and daily life in the newsroom.

The fact that various news media do not have formal instruments for democratic participation in the newsroom (such as a council) does not mean that journalists are absent from editorial discussions and decision-making processes affecting the newsroom. Several country reports in the 2021 MDM research project refer to the importance of the daily editorial meetings, such as the Canadian report highlighting that at these meetings, “journalists, editors, and newsroom leaders collaboratively discuss their coverage of issues and events. [...] Most journalists interviewed for this study talked about the synergy and collective decision-making that happens at these meetings” (Taylor & DeCillia, 2021: 55). Something similar is reported from Germany:

All interview partners agreed that decisions on subjects and framing of covered issues are debated in the daily editorial meeting, in which all journalists have an equal say. However, it is often the managing editor who makes the final decision. (Horz-Ishak & Thomass, 2021: 207)

In general, some degree of informal participation and freedom to make decisions is granted to journalists. Examples come from Finland, where participation is “ensured more effectively through journalistic culture and professional norms, rather than written guidelines” (Ala-Fossi et al., 2021: 162); Belgium, where “journalists report no signs of a lack of formal democracy in newsrooms [and where] editors(-in-chief) tend to be readily available to discuss and (re)negotiate the portrayal and framing of (political) issues in news articles” (Hendrickx et al., 2021: 16); Denmark, where there is “a strong, but informal democratic culture in newsrooms that grants individual journalists veto rights, flat hierarchies, and participation in decision-making processes” (Blach-Ørsten et al., 2021: 154); Greece, where “guidelines and rules [for democratic participation] exist at an informal level” (Papathanassopoulos et al., 2021: 188); Sweden, where “daily news selection and news value processes are transparent, and the framing of political issues is openly discussed in the newsrooms” (Nord & von Krogh, 2021: 361); and Switzerland, where there is “an informal democratic practice, but no formal bottom-up democracy [in the newsrooms]” (Bonfadelli et al., 2021: 399).

Contrary to these regular interactions in the newsroom, there are signs of increasing difficulties in debating and reflecting upon things, such as high-speed procedures and requirements of immediacy exacerbated by the online environment. An interviewee from a Portuguese news medium commented that “[newsroom] meetings are reduced to a minimum and time to discuss or reflect on what is being done has almost disappeared” (Fidalgo, 2021: 312).

Summarising, some degree of journalists’ democratic participation exists in many newsrooms covered by the 2021 MDM research project, mostly at an informal level and on an individual basis. Many journalists interviewed expressed that they usually feel free to do their work autonomously, choosing which news topics to cover and the angles with which to frame them. Structures

(and norms) that ensure representation of journalists and allow journalists to participate in decision-making processes on a collective basis are rather absent. Democracy in the newsroom thus depends more on the good will of those who run editorial teams than on a permanent, structured commitment to have all journalists involved in the editorial project. The truth is that “when effective rules exist to guarantee internal democratic practices, democratic freedom is more likely to be safeguarded, and democracy promoted”, as is stated in the Italian report (Padovani et al., 2021: 329).

### Cross-country trends of practising newsroom democracy

Across all 18 participating countries, scores for the newsroom democracy indicator F4 were modest. Only the Netherlands received the highest possible score, mainly because of the presence of editorial statutes in practically all leading news media. Nonetheless, the Netherlands too suffered from a lack of provisions for ensuring equal representation of men and women (Vandenberghe & d’Haenens, 2021). All other countries received modest scores. In eight countries, newsroom democracy scored 1 point (in a 0–3 scale). In these countries, leading news media are vivid examples of the “gap between what they preach and what they practice” (see Christians et al., 2009: 92).

A common pattern, being fulfilled in most countries, is that one of the core requirements of newsroom democracy – that either formal or informal democratic deliberation rules in news processing are in place, or participatory statutes allow for participation of journalists in decision-making. Fully democratic elections for selecting editors-in-chief are rare and found only in self-governed media organisations, such as *Der Spiegel* in Germany, *The Guardian* in the United Kingdom, and *Efimerida ton Sintakton* in Greece. In all other news organisations, at the most, journalists are granted veto-right against top-down appointments (e.g., in selected news media in Austria and Germany).

As pointed out above, public service media organisations generally score higher than private commercial media for this indicator. Legal mandates often require public service media to implement newsroom councils, and in some countries (e.g., Austria and Italy), these councils endorse member nominations to the governing boards where, again, top-down decisions are taken on leading positions in the newsrooms.

## Conclusions

The concept of newsroom democracy is neglected in the literature and in public debate. However, the 2021 MDM country reports show that in some countries,

internal news processing allows for ample participation by all newsroom members, regardless of status, age, gender, or experience. Although the editor-in-chief has the final say, debate cultures are well developed.

In contrast, apart from notable exceptions, leading news media are hierarchically organised, and newsroom members have little input in decision-making. Exceptions are in place at public service media organisations which, as a rule, include journalists on the deciding board, as well as a few self-governed news media and even fewer news media owned by the journalists themselves.

Not much representation occurs within news organisations, thus reinforcing the newsroom democracy paradox. While the profession is well trained to defend their rights and position against outside forces in editorial matters, less emphasis seems to be on representation and democratic governance within newsrooms.

In digital newsrooms, where web metrics are influencing the traditional gatekeeping role of the media (Vu, 2014), a new set of editorial roles related to transferring the voice of the audience to the news organisation have emerged (Ferrer-Conill & Tandoc Edson, 2018). In light of these changes, the paradigm of strict hierarchical order or absolute professional practices needs to be revised, since decision-making processes may vary among media organisations, depending on a number of factors.

These findings demonstrate that there is room for improvement both in editorial practices and staff recruitment procedures in leading news media around the world. As a consequence, the leading news media miss out on the potential legitimacy that could be generated from routines and processes ensuring internal democracy.

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# ISSUES ON THE RISE



## Chapter 15

# The professionalisation of journalism

## *Global trends and the challenges of training and job insecurity*

Christian Ruggiero, Achilleas Karadimitriou, Wai Han Lo, Enrique Núñez-Mussa, Mauro Bomba, & Simone Sallusti

### Abstract

This chapter aims to answer the question of how the professionalisation of journalism is experienced in the 18 countries included in the 2021 Media for Democracy Monitor (MDM) research sample. To this end, we focus on two dimensions of analysis, which concern, on the one hand, the importance of education and professional training – including the aspect of accountability processes along with the self-regulation culture – to the construction and development of journalistic professionalism, and on the other, the way in which the precariousness of journalistic work affects its perception and self-perception. Ideally, these two levels should correlate, but when being put to the test in the context of the actual working conditions of journalists, they have margins of deviation. The first dimension captures the ideals of journalists and the rootedness of the values that characterise the professional ethos of journalism. The second dimension captures some of the conditions that make journalists able to carry out their work in a way that responds to the ideals of society and the journalists themselves.

**Keywords:** professional ethos, professional training, job security, newsroom inequalities, ethics

### Introduction to the professional ethos of journalism

Throughout the last quarter of the twentieth century, journalism has had a solid tradition of professional values, which have survived against a backdrop of transformations within the media field. These values compose an “enduring professional ethos”, incorporating the notion of a public service mission with notions of objectivity, accuracy, and fairness, reflecting core standards connected to journalists’ need to behave professionally (Mari, 2015). However, over the last two decades, professional values and working practices of journalists are facing a growing number of challenges (Deuze, 2007; Meier, 2007; Phillips, 2011), most notably technological advances, new patterns of media consump-

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Ruggiero, C., Karadimitriou, A., Lo, W. H., Núñez-Mussa, E., Bomba, M., & Sallusti, S. (2022). The professionalisation of journalism: Global trends and the challenges of training and job insecurity. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 309–335). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-15>

tion, and an understanding of journalists as multiskilled news workers with a flexible working ethos, or using the words of Deuze (2007) and Kantola (2012), within a framework of liquid journalism.

A point of departure for this chapter is that journalism's practice and ethical journalistic behaviour, developed through training, can be regarded as a prerequisite for a professional ethos. That is why changes in journalism practice, for example, caused by shifts in working conditions, may affect the professional values considered important to the journalist profession: truthfulness, independence, accuracy, objectivity, impartiality, fairness, and public accountability, as recent comparative research shows (Örnebring, 2018). However, the dimension of the precariousness of one's job is now a "normal" fact for journalists; this dimension influences journalists' ways of thinking about their profession and their work – "ways of thinking" that are, together with the more traditional dimensions related to norms, identity, and mythology, constitutive of the very concept of professionalisation. In other words, the professionalism of journalists cannot be implemented in a context where these shared values are impossible to uphold, as the professional ethos is not only a matter of individual character but materialises in the collective journalistic practice. Additionally, the professionalism of journalists is also hindered in a context where the awareness of journalists concerning the norms of self-regulation is at a low level. Therefore, safeguarding principles of journalistic practice based on self-regulation or accountability mechanisms can ideally operate as an effective means of contributing to a high-quality professional ethos.

Journalistic professionalisation is one of the critical variables in every comparative analysis between media systems. Blumler and Gurevich's (1975) pioneering research deals with the nature of the legitimising creed of media institutions and, more specifically, the distance between the reporter and external interests. The latter is understood as a place of tension between an ideal concerning the journalist's professionalism and audience and the interrelated political and economic interests affecting the media system.

According to Hallin and Mancini (2004), professionalisation is one of the dimensions used to clarify some problematic concepts. They illustrated some of the variations in professionalisation criteria among their four models of media and politics, dividing them into three dimensions: autonomy, distinct professional norms, and public service orientation. Hallin and Mancini paid more attention to the systematic body of knowledge or doctrine generally required to be recognised as a profession (compared with doctors and lawyers) and consequently on the fundamental variables regarding formal training and education.

Though a direct link between the education rate of those who work in journalism and their degree of professionalisation cannot be made, the 2021 Media for Democracy Monitor (MDM) data provides an encouraging sign regarding the comprehensiveness of the training of contemporary journalists (Trappel &

Tomaz, 2021b, 2021c). Concurrently, another critical issue that respondents have raised in the 2021 MDM project is the need for further training. The importance of training concerns the ethical and deontological principles that should guide decisions on newsworthiness. At the same time, training also relates to the challenges that come from the so-called hybrid media system (Chadwick, 2013), in which journalistic companies compete with a direct flow of information at different levels, from the circumvention of the gatekeeping role to the proliferation of fake news.

The portrait of the profession that emerges from our data illustrates that journalists do not have the time for further training. The time constraints faced by journalists have already been recognised by Koljonen (2013), who places the relationship between time and journalism at the heart of the profession (along with dimensions related to knowledge, relationship with the audience, position towards power, and reflection on ethical dilemmas of one's work).

The integration of the temporal dimension in contemporary journalism becomes a challenge in terms of the ability, for example, to connect the present with the past and the future (developing through education and professional training the skills to do so), and thus the possibility of playing a more active role in setting the public agenda.

The value of immediacy has slowly been translated into the need to contribute significantly to the news flow. The problem arises when the definition of newsworthiness itself is linked to the search volume of different online queries over time, and the trends that sanction the popularity. Journalists are therefore increasingly dispossessed of their ability to set their own agenda and have professional and satisfying working time.

At the crossroads between the temporal dimension and that of the relationship with power – the former understood in terms of the effects of the acceleration of production routines on the professional ethos of journalism, and the latter concerning Hallin and Mancini's (2004) concept of autonomy and Blumler and Gurevich's (1975) concept of legitimation – there is an additional dimension of analysis that concerns the precariousness of journalistic work. The rise of the "network economy" (Castells, 1999) has represented a turning point for businesses and consumers, but also for workers, who have been asked to be creative, flexible, and autonomous in ways that do not necessarily correspond to their employment contracts. Based on socioeconomic differences in individual national contexts, and according to patterns that are difficult to trace back to traditional models of journalism, the mix between flexibility as a skill and flexibility as an occupational status has become a driving force for vitalising specific parts of the labour market while at the same time feeding traditional labour inequalities. In the field of journalism, this led to a provocative question: "Are Journalists Today's Coal Miners?" (Borchardt et al., 2019). Among the key findings of Borchardt and colleagues' research, one is the contradiction between a new generation of motivated, flexible, and technologically prepared journalists and their demand

for work–life balance and a career perspective only partially compatible with the rhythms and workloads required by newsrooms operating round-the-clock. The introduction of this last dimension, that of precariousness, allows us to think about the professional ethos of journalism in less abstract terms.

A starting point for our analysis is the opinion that it is necessary to preserve an ideology of journalism as serving the public trust (another of the recurring elements in the definition of the professional ethos of journalism), and the aim of journalism to “expose hidden information, produce information independently, and interpret and even criticise the information offered to them [and in sum] to position themselves as a correction factor between power holders and citizens” (Koljonen, 2013: 147). But the autonomy needed to carry out the tasks described above is linked to the economic dimension – and the labour market in particular – as much as the political one. It is not just a question of the mere length of the employment contract: It has to do with the very nature of journalistic work and the perception of becoming part of a community that puts its members in a position to make a difference.

This chapter, based on data and interviews with journalists and editors-in-chief working in the leading news media of 18 countries, gathered for the 2021 MDM project, investigates the level and standards of journalism professionalism in different media environments to highlight positive and negative trends of contemporary journalism in defining and setting in place a common professional ethos. An equally important parameter in journalists’ relationship with the professional ethos is the role played by the self-regulation processes, since they considerably affect professional journalistic standards based on which journalistic quality is ensured or protected.

MDM Indicators and related research questions addressed in this chapter:

**(C4) Journalism professionalism**

How well developed is journalism professionalism? (Trappel & Tomaz, 2021a: 46)

**(C5) Journalists’ job security**

What provisions are in place to provide maximum job security for journalists? (Trappel & Tomaz, 2021a: 48)

**(C8) Professional training**

What importance do leading news media attribute to journalism training? (Trappel & Tomaz, 2021a: 51)

**(E8) Level of self-regulation**

Does a media self-regulation system exist at leading news media, requiring the provision of fair, balanced, and impartial reporting? Is it effective? (Trappel & Tomaz, 2021a: 38)

**(F8) Rules and practices on internal gender equality**

To what extent do media outlets acknowledge and address challenges to gender equality in their own operations and internal functioning? (Trappel & Tomaz, 2021a: 26)

## Determining the dimensions of analysis

To answer the question of how the professionalisation of journalism is experienced in several media markets, the 2021 MDM research framework set several analytic criteria to be verified through desk research and interviews with information professionals and representatives of trade unions and associations. These criteria serve to test the ideal categories that make up the idea of journalists' professional ethos: investigative research as a priority, ethical tension towards what is being reported, and the ability to intervene constructively in public debate. What are the elements that limit the ability of journalists to reflect these values? What resources are available to assist them in living up to these expectations?

In this chapter, we intend to focus on two of these dimensions, which intercept the elements and suggestions in the scientific literature: the role of training and education in developing and upholding journalistic ideals – a small but essential part of which is related to journalists' awareness of self-regulation norms – and the conditions that contribute to the precarity of journalistic labour.

The first dimension has a direct relationship with the professional ethos. It has to do with the possibility for journalists to learn the fundamental values of the profession and develop critical tools to observe, understand, and report on its evolution. This possibility is enhanced when journalists are receptive to the idea that raising their awareness of self-regulation norms can affect journalism professionalisation. Overall, this is a somewhat problematic dimension, as it calls into question one of the reasons why it is difficult to define what exactly a professional journalist is: As there are many paths to becoming an information professional, non-professionals cannot be excluded from the field (Shoemaker & Reese, 1996). Additionally, not all professional journalism paths include training, although ongoing training is required in the profession. As Foote (2008: 133) points out, “mapping journalism programs worldwide is a challenging undertaking”, even when the highest international institutions dealing with education and journalism take on this onerous task. This is because of the different nature of the institutions that provide training for those who wish to become journalists. Yet, it is a necessary exercise, because it is through these institutions that the orientation, content, and thrust of those learning the journalistic profession – and thus their attitudes toward the field and the profession itself – are formed. This is even more true in a context in which the relationship

between the institutions representing the journalistic profession and the institutions dedicated to the training of information professionals is less marked by a contract between education and apprenticeship and more oriented towards recognising entry qualifications.

The challenges in terms of training by no means stop at the moment of entry into journalism education. Murphy (2019) notes, concerning the United Kingdom, a context in which the crisis in journalism appears less severe overall, that developing more skills in ethics, law, curating, digital fact-checking, media analysis, and entrepreneurial journalism represent a commitment of immense proportions for journalists. Not only from a technical point of view, considering that video, audio, graphics, and other creative skills are now standard requirements for journalists, but above all, adapting to an interactive relationship with the public poses new challenges in terms of recognising the role of the reporter and building a trusting relationship with readers and viewers. In addition, it should be noted that the current multimedia requirements expected by journalists necessitate continuous professional development, not always guaranteed by national professional organisations and heavily influenced by a lack of time and financial resources. Moreover, the technological skills needed to meet the multimedia requirements of the journalism profession dramatically intercepts the forms of inequality linked to age insofar as younger journalists, more technologically skilled, are also the least paid and protected. Therefore, the least “equipped” to best exercise the journalistic role aligns with the outlined ethos.

The second dimension is more distant from the subject of this chapter but equally relates to the professional ethos of the journalistic profession. In a nutshell, it is a matter of pragmatically acknowledging that the values and functions of this profession cannot be implemented without reducing the inequalities (e.g., related to gender and age) that remain in the journalism sector and by demanding greater job security.

Considering staff turnover primarily in terms of savings for the media company, letting go of an experienced journalist to hire a younger and cheaper employee debases the very foundation of what it means to be a journalist. Such a lens does not account for the gains related to experience and the related maturation of a professional image characterised by the journalistic ethos. Research conducted by Nygren (2011) offers some interesting data in this regard. It shows how dissatisfaction with the conditions of one’s job is closely associated with the fixed-term contractual condition. The absence of a prospect of real integration in a newsroom generates the feeling of not improving and growing in one’s profession. This concerns, in particular, younger journalists (under 40) who have less experience in the field (paradoxically enough, often hired to renew the capacity of the editorial staff), employed in local newspapers and radio stations – sectors particularly affected by the economic crisis but crucial for the ability of journalism to fulfil its’ democratic function.

The difficulty for female journalists to break through the glass ceiling automatically reduces the possibility of having multiple points of view and makes the profession less desirable for female workers (see Padovani et al., Chapter 4). North's (2009) analysis of women's perceived "foreignness" in newsrooms remains highly present due to journalistic practices deeply rooted in male professional culture. More recent research has shown the urgency of overcoming the "professional myopia" (Lobo et al., 2017) produced by these practices.

Adherence to the values of journalism in general, and of the newspaper for which one works in particular, is inevitably called into question by the use of employment contract standards that disable paths of "secondary socialisation", which have traditionally characterised belonging to the editorial staff, and that at worst result in a lack of professional solidarity in case of conflict. Moreover, the importance attached to journalists' workers' rights in a country reflects the social relevance of the journalistic profession.

## How training and education shape journalism's professional ethos

### *Challenges for journalism education*

The 2021 MDM data confirms that the number of working journalists with higher education, or a university degree, has increased since the 1990s. In some countries, this progression is outstanding. In Australia, 35 per cent of journalists went to university in 1992, and 80 per cent in 2010 (Dwyer et al., 2021), and in Chile, 50 per cent of working journalists had a degree in 1960, while in 2021, 92.5 per cent had one (Núñez-Mussa, 2021).

Although the trend is that journalists in most countries have some higher education experience, there is more variation regarding whether journalists have a degree in journalism or communication sciences. This depends on different professional and educational cultures and the particularities of educational journalism models in each country participating in the 2021 MDM project.

Deuze (2006) determined that countries usually have one dominating journalism education model, through which professional journalists acquire deontological knowledge and practical skills. This socialisation occurs within the higher education system in some countries, while in others, in standalone schools. There are also some hybrid systems, for example, where journalists' training takes place while being on the job, or other types of institutions offer training programmes.

In Germany, 75 per cent of journalists have a university degree (Hanitzsch et al., 2016), but 56 per cent are in subjects other than communication or journalism. Still, journalists usually undertake four weeks of journalism education at an independent institution, followed by a two-year internship (Horz-Ishak & Thomass, 2021).

As diverse as the educational models are, journalism education is quite similar worldwide and faces the same challenges (e.g., Gaunt, 1992; Goodman, 2017; Deuze, 2006). This homogeneity is reflected in the answers from journalists interviewed for the MDM project, who stressed autonomy, independence, and impartiality as journalistic values that guide them in decision-making and in defining characteristics of their professional ethos. This is coherent with previous research showing how these values transcend specific political and cultural contexts (Deuze, 2005; Josephi, 2010).

There is a common concern among the interviewed journalists about acquiring professional training to adapt to convergent or multiplatform media organisations, pushing journalists to produce stories for more than one format (text, video, sound, and graphic). These changes concerning reporters, broadly discussed by scholars, have not yet been integrated into the curriculum of most educational organisations (e.g., Canavilhas, 2013; Casals Carro, 2006; Tejedor, 2008).

In addition, there is a broad debate on whether and to what extent journalism education should focus on skill development and production versus theory (Foote, 2017); integrate both aspects to educate journalists (Reese, 1999); and if journalism education should prioritise innovation or preparing competent reporters for the industry (Deuze, 2006). Educators determining course content must relate to a fast-moving industry in need of skills that risk becoming quickly irrelevant. In contrast, some skills that the new context demands will likely remain, and with time, transcend the structure and content of educational programmes if not considered. Journalism presents itself as a profession where skills must be continuously updated; for example, the interviewed journalists agree on the need for training in order to gain new digital skills, particularly for data journalism.

Exceptional cases, such as Australia (Dwyer et al., 2021), Germany (Horz-Ishak & Thomass, 2021), Denmark (Blach-Ørsten et al., 2021), and Sweden (Nord & von Krogh, 2021), have institutionalised training programmes for working journalists. Still, although acknowledging the existence of training opportunities, journalists from most countries declared time and resource constraints to engage in further education. In some cases, like Switzerland (Bonfadelli et al., 2021), Greece (Papathanassopoulos et al., 2021), or Portugal (Fidalgo, 2021), skill development is dependent on journalists' initiative, while journalists in Hong Kong must look for training opportunities abroad (Lo & Wong, 2021).

As there are increasing regional and international training opportunities for journalists, as can be seen on the website of the International Center for Journalists, it is relevant to emphasise that journalism education at the university level is yet emerging (Foote, 2017), with ongoing discussions on what the proper curriculum for the profession is.

The creation of the World Journalism Education Council in 2004 is an example of an emerging global academic journalism culture. There is still a significant challenge in integrating criteria and building dialogues between practising journalists, schools, and journalism scholars (Lewis, 2018). However, there is evolution on this matter since practitioners serve as instructors and, in some cases, become researchers that can close that gap.

### *The role of professional training*

Here, we focus on the first dimension of the professionalisation of journalism: the role of training and education. We consider what is needed to become a journalist and live up to the ideal of journalism as expressed in democratic theory. One of the most ambitious readings in this field comes from the Italian sociologist Giovanni Bechelloni, who, taking up Edgar Morin's concept of a "well-made head", argues that the journalist must have the necessary competencies to read and understand the complex reality produced by the intersection of social, cultural, political, economic, and technological revolutions (Bechelloni, 1982). This perspective of journalism as culturally or socially oriented which Bechelloni introduces applies to the contemporary hybrid media system. In the context of information overload and its consequences, the role of information professionals is more than ever not only to tell the news, but to give a profound interpretation of society. It is also helpful to recall the theorisation of Carlo Sorrentino (1987), who, taking up an intuition of Max Weber, identified a similarity between the role of the journalist and that of the social scientist, as both study the evolution of society. Within this framework, Sorrentino proposes the definition of participant journalists – as opposed to neutral journalists – as professionals with a high level of education and solid journalistic training who are involved in social issues such as inequality, poverty, defence of social and civil rights, and who work in dominating media companies based in large urban centres. Education and training evolve gradually as the media sector develops, and the social issues to be described and explained multiply and become more complex.

Given these premises, it is interesting to analyse the specific issues related to training in the 18 countries participating in the 2021 MDM research project. If we read the analyses of the country reports in light of the models of media and politics developed by Hallin and Mancini (2004), we find some of the cleavages defined by the authors still practically untouched. As we already underlined, the level of education among journalists is emphasised in countries like Germany (Horz-Ishak & Thomass, 2021). Also, in the Dutch-speaking part of Belgium, about 93 per cent of journalists have a degree, particularly younger professionals (Hendrickx et al., 2021). Switzerland also has highly educated journalists, although the profession is "open", because there are no formal requirements to work as a journalist (Bonfadelli et al., 2021). According to the results of a survey

conducted in 2015, about 70 per cent of Swiss journalists have an academic degree, nearly half in journalism, communications, or a similar field of study (Dingerkus et al., 2018). The situation does not seem significantly different in countries belonging to Hallin and Mancini's (2004) Mediterranean model. In Italy, 68 per cent of journalists have a university degree, thanks in part to the progressive recognition of their qualifications for entry into the professional register (Padovani et al., 2021). Something similar is happening in Chile, where a law on freedom of opinion and information and on the exercise of journalism requires journalists to have a university degree or to be legally recognised as a journalist (Núñez-Mussa, 2021).

Even with a strong investment in education and training, economic pressures hurt the professionalisation of journalism in the countries included in the Mediterranean model. Journalistic professionalism in Greece, for example, has been strongly challenged by the financial crisis, which harmed journalists' labour rights. The economic crisis of 2010–2018 and the recent Covid-19 crisis have led to the bankruptcy of several Greek media outlets (Papathanassopoulos et al., 2021). As the representative of the Journalists' Union of Athens Daily Newspapers (JUADN) affirms:

The level of journalistic professionalism has always been very high in Greece [...]. Nonetheless, the financial crisis and the special crisis afflicting the media industry in recent years, and the various pathogens that characterise the way media owners grow and invest, have induced a significant blow to the industry, sometimes distorting the image of [high journalistic professionalism]. (Papathanassopoulos et al., 2021: 217)

Likewise, the economic crisis in Portugal had a negative impact on the journalist population in terms of remuneration: A survey conducted in 2015 among 806 journalists confirmed that 55.4 per cent received less than EUR 1,000 net monthly (Miranda, 2019). In Italy, younger journalists must have many skills and competencies while in precarious job positions. A harsh testimony on the subject comes from the president of the National Union (Padovani et al., 2021: 369):

In recent years a series of labour policies have been adopted that have increased flexibility, that turned it into precariousness for life, that in some cases have created what I call the "information riders", that is, girls and boys who work in particular in the areas most at risk, in Campania, in Sicily, in Calabria; they work for unscrupulous publishers, paid one euro per piece.

Where the effects of the economic crisis and job insecurity are less severe, journalistic professionalism is challenged by harsh competition, substantiated in the pressure exerted by newsrooms on journalists. For instance, in the United Kingdom, quality journalism seems increasingly threatened by this demanding

context: In 2018, 77 per cent of newspaper journalists reported higher work intensity, 41 per cent said they produced a lower quality of journalistic work, and 42 per cent reported a lower job satisfaction (Spilsbury, 2018). In Austria, job satisfaction has decreased significantly over the last decade (Kaltenbrunner et al., 2020). The scarcity of financial and temporal resources significantly reduces job satisfaction in various national contexts, including Austria, Iceland, and Portugal. In the Dutch-speaking part of Belgium, declining job satisfaction among journalists is attributed to the unfortunate combination of a heavy workload, on the one hand, and the demand for continuous skill improvement, on the other (Hendrickx, 2021).

Problems related to work–life balance, referring to working conditions and private life as well as training and education, seem to affect, among others, journalists in Finland (Ala-Fossi et al., 2021) and the Netherlands (Vandenbergh & d’Haenens, 2021). In several nations, the issue of professional training is regulated by formal organisations. In this regard, the Order of Journalists manages continuous training in Italy. It involves both professionals (journalists with permanent jobs and associated legal protection) and publicists (journalists with no legal protection and short-term contracts) (Padovani et al., 2021). Professional training is also organised by formal organisations in the Netherlands, Portugal, and South Korea. Specifically, in the Netherlands, training courses are offered by the NVJ (Dutch Association of Journalists) and VVOJ (Association of Investigative Journalists) (Vandenbergh & d’Haenens, 2021). In Portugal, where continuous training is not a top priority for leading news media, courses are sometimes organised by entities outside the media companies, such as the Centre for Training of Journalists (Cenjor) or the Journalists’ Union (Fidalgo, 2021). In South Korea, professional training is managed by the Korea Press Foundation (Kim & Lee, 2021).

Just as greater professionalisation does not automatically follow from journalists having attended higher education, the presence of a formal network of organisations that deal with the continuing education of journalists does not by itself contribute to professionalisation. However, in several of the countries where no such networks exist, journalists perceive the absence of a formalisation of further training as a missed opportunity for professionalisation: in the Dutch-speaking part of Belgium, the interviews show that professional training is of significant importance to journalists, but it is not required by law to participate in additional training (Hendrickx et al., 2021); in Greece, the need for continuous training is not embedded in national news media organisations’ culture (Papathanassopoulos et al., 2021); in Switzerland, although there are many training opportunities through the courses organised by the Media Education Centre MAZ in Lucerne or the Zurich University of Applied Sciences (ZHAW) in Winterthur, participation is not stimulated by editorial offices and can be seen as an individual matter (Bonfadelli et al., 2021); and Hong Kong

does not provide educational training, but the journalists interviewed admitted the importance of professional courses in order to improve skills related to Big Data analysis and artificial intelligence (Lo & Wong, 2021).

An interesting phenomenon concerns in-house training. This may be a response to the lack of a formalised structure for further education, but, significantly, it develops in countries that already invest heavily in the training of their journalists (Canada, Finland, Germany, Italy, Sweden, and the United Kingdom). In this regard, it is possible to argue that leading news media provide special forms of professional training dedicated to their journalists, which underlines 1) the attention to the improvement of professional skills of companies in a competitive news media market, and 2) the difference in terms of economic and human resources between leading news media and other competitors for the professional improvement of journalists, with an impact on the quality of journalism among news media companies. In contexts where professionalisation is high, national and company training projects struggle with those same limitations that we have identified as the most significant research challenges: issues related to digital journalism and gender inequality. The representative of the German journalists' union states: "Not all journalists are up to date in training on Big Data analysis. We have noticed that the willingness of companies to actively offer such a service is very weak", denouncing a sort of reluctance on the part of editors-in-chief to provide a member of their editorial staff the tools for career advancement (Horz-Ishak & Thomass, 2021: 247). The same interviewee also states that diversity, gender, and inclusion training are rarely booked: "There is still room for improvement in gender-oriented continuing education. Here the German media landscape still has a considerable need for improvement" (Horz-Ishak & Thomass, 2021: 247).

Finally, it should be noted that the drive for change is more about professional training aimed at implementing digital skills; Big Data analysis, artificial intelligence, visual skills (design, photo, and video editing) are of particular interest. We can argue that journalists are fully aware of the need for acquiring digital skills in a digital-driven market. Sometimes, the desire for professional training conflicts with the rhythms of newsrooms, fostering job dissatisfaction.

## Professionalisation and self-censorship in journalism

Attempts of self-regulation in the media field date back to the late nineteenth century and extend to the twentieth century – in codes of ethics, press councils, and ombudspersons (Brown, 1974; Campbell, 1999; Dennis et al., 1989; Laitila, 1995). In the participatory media culture of the twenty-first century, a renovated set of self-regulation instruments have emerged, such as active newsroom blogs and criticism through social media, enriching the existing paradigm of media

accountability. Both traditional and new accountability mechanisms greatly influence professional journalistic standards, perceived as a means by which journalistic quality is protected (Bardoel & d'Haenens, 2004). Theoretically, these accountability mechanisms are based on ideal values and norms contributing to high-quality journalism and a high-level professional ethos.

The paradigm of media self-regulation refers to ethical norms set, implemented, and sanctioned internally by the professionals themselves rather than the government (Campbell, 1999), in order to safeguard the principles of journalistic practice. These ethical guidelines reflect the journalistic profession's virtuousness, offering protection from internal challenges (tabloid-journalism, unsubstantiated reporting) and external pressures (state, interest groups) as well as contributing to solidarity within the profession (Laitila, 1995).

The media accountability culture is not characterised by the same dynamics across various media systems. It has been argued that in Anglo-Saxon and Northern European states, there are well-developed mechanisms of media self-regulation, as opposed to some countries in Central and Eastern Europe, where accountability practices are considered inexistent (Fengler et al., 2015). The critical question being raised today is to what extent self-regulation instruments can respond to the conditions of the various media systems facing different financial constraints, levels of journalism precariousness, and levels of politicisation.

According to the 2021 MDM research findings, self-regulation in the 18 countries is practised in many ways. One of the most typical instruments is a code of ethics sanctioned by specialised organisations to promote journalistic ethos and quality. This is exemplified in several countries (Finland, the Netherlands, South Korea, Sweden, and Switzerland); however, this model of self-regulation reflects varying degrees of contribution to media accountability. For example, while it seems functional in Sweden – where journalists present themselves as fully aware of the national code of ethics' importance (Nord & von Krogh, 2021) – it seems ineffective in Switzerland, where the ethical code of media organisations has a limited impact on the level of professionalism in journalism (Bonfadelli et al., 2021). Ombudspersons do not constitute a widespread instrument within the media self-regulation mechanisms of the sample countries, and when applicable (e.g., South Korea), their effectiveness is not ensured.

Public service media adopt more inclusive accountability processes than private media. For instance, German public service media incorporate formal provisions for self-regulation based on a wide range of instruments (Horz-Ishak & Thomass, 2021). Moreover, in Portugal, public service broadcaster RTP operates based on an editorial statute identifying the obligation of public service television to promote pluralism and diversity. Since 2006, it has been obliged by law to have at its disposal an active ombudsperson (a separate one for radio and television), applicable to both cases in the form of a broadcasting

time every week (Fidalgo, 2021). Last but not least, in the United Kingdom, the BBC's news output and the rest of its programming are regulated based on the broadcaster's editorial guidelines, which are set out in the Royal Charter and Agreement. The BBC should also publish complaint reports based on data derived from its complaint mechanisms (Moore & Ramsay, 2021).

The findings of the 2021 MDM research project also show that innovative self-regulation practices are rare, taking place only in limited media markets. Distinctive is the case of the Netherlands, where an open debate culture in newsrooms focuses on fairness, balance, and impartiality (Vandenberghe & d'Haenens, 2021). Additionally, in Finland, the public broadcaster's self-regulation is conducted using a special position called the "head of journalistic standards and ethics", in charge of supporting journalists and monitoring their compliance with the ethics standards (Ala-Fossi et al., 2021). A special programme called *Newswatch* is hosted by the public service broadcaster in the United Kingdom, offered to audiences every week for most of the year, in order to allow listeners' and viewers' complaints relating to news coverage to be heard. At the same time, the programme is based on a right of reply offered both to the audience members and the BBC's news personnel (Moore & Ramsay, 2021).

In order for self-regulation mechanisms, such as ethics codes, to be operational and strengthen the professionalisation of journalism, journalists must accept and be able to understand the codes. Internal training programmes oriented to that targeting would be useful in raising journalists' awareness of the importance of self-regulation. Particularly in today's media markets, where economic constraints risk affecting the quality of journalistic output, ethics training in journalism can counterbalance the challenges faced by journalists to maintain the desired quality of the news flow. According to the 2021 MDM research findings, an exemplary case of relatively widespread ethics training is the United Kingdom, supported by the National Union of Journalists and the National Council for the Training of Journalists (Moore & Ramsay, 2021).

The level of journalists' awareness of self-regulation norms and the ways they are employed in practice is an important indicator of journalistic professionalisation. However, there seems to exist several challenges testing the professional ethos of news workers. One of the most common practices in newsrooms has turned out to be self-censorship, which poses a direct threat to media freedom, and in extension, democracy. Nevertheless, it is a common practice in today's news media to favour the interests of media organisations. In the increasingly competitive media environments, journalists acknowledge that the complexity or unattractiveness of news topics being in disharmony with the media company's interests are sufficient reasons to avoid getting involved in them or to mitigate their tone (Pew Research Center, 2020).

Self-censorship practices vary from country to country, with journalists being motivated by various factors, depending on the political context. The

most common sources of self-censorship are pressures from political, social, and economic factors (Hayes et al., 2006; Skjerdal, 2010). Self-censorship practices directly oppose the ideal mission of journalism and condemn media professionals to a denial of issues that are sensitive to powerful interests. There are cases where journalists are forced to self-censor their news topics for fear of losing their job or their life, and in doing so, the credibility of their profession and its future is also put at stake (Yesil, 2014). In other cases, the practice of self-censorship has been found to contribute to the balance of power relations (private and public interests) that influence the media, safeguarding political safety by minimising political risks and at the same time practising professional journalism to the benefit of the public (Tong, 2009).

### Journalism as a precarious profession

Several inequalities affect the work of newsrooms in the countries participating in the 2021 MDM project. Two main trends are highlighted by the journalists interviewed: The first concerns the disparity between men and women, not only in terms of a pay gap but also in terms of access to decision-making positions and underrepresentation within editorial offices, an issue that has long-standing origins and cuts across different national and work contexts (see Padovani et al., Chapter 4). The second is a more recent challenge, raised by the constant state of economic stagnation affecting the news market in most MDM countries. This puts the younger generations of journalists – who are entering the profession with less protection and compensation than in the past – into conflict with long-time professionals, who often enjoy more solid contracts and higher salaries. The interviews and data derived from the 2021 MDM project suggest that this disparity is sometimes resolved in favour of older, more protected, and privileged journalists, and sometimes in favour of younger journalists with lower labour costs, greater flexibility, and digital skills.

Analysing the aspects of gender inequality and generational cleavages makes it possible to define the context and conditions under which journalists work and how these elements influence – positively or negatively – the professionalisation of journalism. Gender equality plays a crucial role in ensuring social justice and contributing to democratic governance and diversity in the newsroom. In turn, it helps the news industry achieve professionalism.

#### *Gender inequality in newsrooms*

Even though the presence of women in the editorial staff is generally considered to be increasing in most European countries, and averages around 40 per cent in the countries participating in the 2021 MDM project, only in Sweden do

women make up a considerable part of the management of media companies. The three public service media in Sweden are headed by women, and the same applies to two out of the four major daily newspapers (Nord & Van Krogh, 2021). The situation is similar in Finland, Germany, the Netherlands, and Switzerland, where state laws and internal editorial regulations promote gender balance, equal pay, and support the careers of female journalists. Particularly virtuous is the case of Germany, which in 2016 introduced a law to prevent sexual harassment in the workplace, also applied in editorial offices (Horz-Ishak & Thomass, 2021). Even in these countries, however, gender inequality still exists; for example, German and Swiss journalists report a minority of women in management positions, and Swiss and Finnish respondents emphasise a tendency of stereotyping assignments, with female journalists assigned to “soft news” content (39% in Switzerland; Bonfadelli et al., 2021) and men to “hard news”. In the rest of Europe, the disparity is greater: In Austria, only 8 per cent of women hold managerial positions, compared with 14 per cent of men (Grünangerl et al., 2021); in Belgium, over 70 per cent of the management positions in news media in the whole country are filled by male journalists, and the salary gap is 12 per cent (Hendrickx et al., 2021); and in the United Kingdom, *The Telegraph*’s pay gap is over 22 per cent, and women are more likely to have precarious part-time or freelance roles than their male colleagues (Moore & Ramsay, 2021).

In the South European countries in the sample, the gender issue is more critical. The Greek and Portuguese interviewees revealed that gender equality is not perceived as a relevant issue within the editorial offices. There are few women at the top of media companies in Greece, Portugal, and Italy. In the Italian peninsula, women are more likely to have precarious contracts, and the pay gap reaches 19.57, and in Portugal, it is 18 per cent. Significantly, in all the 2021 MDM countries where there is a substantial disparity between men and women (except for Italy), the male professionals interviewed maintain, despite the data, that parity has been achieved (Fidalgo, 2021; Papathanassopoulos et al., 2021; Padovani et al., 2021).

Despite the remaining inequality, the situation in Europe seems to be improving: The Austrian, Belgian, Danish, Finnish, German, and Italian interviewees claim a significant increase in the number of women attending degree courses in journalism and those entering the profession (especially in digital media); and the issue of gender inequality seems to be particularly prioritised in editorial offices and public opinion (apart from Greece and Portugal, as mentioned above). Looking at the non-European context, gender equality in the newsroom remains to be achieved in Australia, Canada, and South Korea, although there have been recent improvements. Hong Kong is an exception, with equal employment conditions, including salaries, for male and female journalists (Lo & Wong, 2021).

In South Korea, the proportion of female journalists reached 31.5 per cent in 2018. The gender imbalance is even more evident in high-ranking positions, with 34.8 per cent of male respondents in the South Korean MDM sample holding positions above the director level, compared with only 7.5 per cent of female respondents. In 2018, virtually no women were in top-level management positions at South Korean news media firms, suggesting that women have little say in what is reported or how reporting is conducted (Kim & Lee, 2021).

Looking over the Australian mediascape reveals more female representation, but concerns remain regarding inequalities in pay and promotion, as well as with respect to issues of discrimination and harassment. Furthermore, nearly half of female respondents had experienced harassment or bullying in the office (48%) or online (41%). Although there are government initiatives to address some of these concerns (Women NSW, 2018), significant work is needed to improve the position of women in the Australian news media (Dwyer et al., 2021).

In Canada, none of the journalists or newsroom leaders interviewed for the MDM project had significant concerns about inequalities in working conditions. Indeed, most of the interviewees discussed their organisations' sensitivity to eliminate inequality and promote the advancement of women. Some of the journalists interviewed raised concerns about men being more assertive in negotiating higher salaries than their female counterparts. According to a reporter working at a major Canadian media organisation, more work is needed to improve gender equity: "There should be rules", the reporter told us, adding, "I think all these organisations could do a better job of promoting women" (Taylor & DeCillia, 2021: 61). Canadian Broadcasting Corporation data (unearthed in 2018 using Canada's Access to Information Act in the wake of the gender pay gap scandal at the British Broadcasting Corporation) support this position, revealing that male hosts in the Canadian Broadcasting Corporation were paid almost 9.5 per cent more than their female counterparts (Houpt, 2018). Media unions in Canada also remain concerned about gender inequality and continue to push news organisations through collective bargaining and other forms of advocacy, in order to further reduce inequality and make newsrooms more sensitive to the needs of female journalists. Despite some progress, there is still room for improvement (Taylor & DeCillia, 2021).

In contrast to Australia, Canada, and South Korea, it is argued that there is no difference between male and female journalists in terms of promotion opportunities and salaries in Hong Kong, despite the lack of formal rules or regulations enforcing equal standards. Female journalists have an equal opportunity to take leading positions in newsrooms. Many female journalists have held leading roles – such as editor-in-chief or managing editor – with the leading news companies. The pay equality might be due to the generally low salaries paid to journalists in Hong Kong (Lo & Wong, 2021).

### *Generational inequality in newsrooms*

The second trend of apparent inequality within newsrooms is linked to age and contractual conditions. Many interviewees maintain that, in the context of decreasing job security, there are two primary risk trends: the “generational conflict” between young and old journalists and the inclination of new hires towards contracts with less protection than in the past. Regarding the first issue, the age disparity sometimes translates – as in the case of Austria, Belgium, Greece, Iceland, and the Netherlands – into replacing older journalists with younger, less experienced, and less expensive journalists (Grünangerl et al., 2021). Sometimes, however, young journalists are hired with contracts providing less protection, less compensation, and fewer guarantees, as in Denmark, Germany, and Italy. In general, there is a contraction of permanent contracts and greater recourse for flexibility. Freelancing is increasing in Germany, Greece, Italy, and the Netherlands, and job security for local and regional journalists is decreasing in Belgium, Germany, Portugal, Sweden, and the United Kingdom. German and British journalists note that these disparities have been exacerbated by the Covid-19 crisis, which has worsened the job insecurity of these workers (Horz-Ishak & Thomass, 2021; Moore & Ramsay, 2021). Among non-European countries, Hong Kong also faces the challenge of age inequality. When experienced reporters leave the newsroom, their places are usually taken by junior staff members (Lo & Wong, 2021). The apparent reason for this preference for junior replacements is the considerably higher salary costs for experienced reporters than those at the beginning of their careers.

### *Job insecurity – a cross-cutting issue*

We have already mentioned that the dimension of job insecurity influences journalists’ ways of thinking about their profession and work. This is a particularly interesting dimension among those constitutive of the concept of professionalisation of journalism because, unlike the consolidated set of norms, identity, and mythology – and similarly to the dimensions linked to gender and age mentioned above – it configures a critical redefinition of professionalisation itself. It is true that even the elements most traditionally identified as characterising the professional ethos of journalists need to be updated in light of a social reality that is infinitely more complex and interconnected than the one within which they were formulated. But they express basic principles that the profession can and must continue to take into consideration, with the necessary updating: Think, for example, of the value of objectivity. And in this process of updating – which concerns, for example, the role of digital media – a central role is played by continuous education and training processes. As we have noted (Ruggiero & Karadimitriou, 2020b), the trends in the 2021 MDM

sample countries regarding continuing education and training are practically opposite to those regarding job security. This creates a short-circuit: Professionals who are increasingly well prepared – which reinforces the “founding” dimension of the professional ethos – at the same time are less and less able to exercise their profession with the guarantees that would allow them to put into practice those “fundamental” precepts they have assimilated and learned to put into practice in a complex communicative context.

The 2021 MDM data show that the media sector suffers from low job security. Only in one case, Chile (Núñez-Mussa, 2021), did the author decide to give this indicator the minimum score (no/low job security, precarious journalistic jobs are the rule). The countries in the sample are divided almost equally into two categories, which we can call “medium-high job security” (once employed, journalists usually remain employed for a long time, but such jobs are thinning out) and “medium-low job security” (news media change their journalistic staff frequently, and employment for a more extended period is not the rule). Austria, Belgium, Denmark, Finland, Germany, the Netherlands, South Korea, Sweden, and the United Kingdom scored 2 points (in a 0–3 scale), positioning them in the “medium-high” cluster; Australia, Canada, Greece, Hong Kong, Iceland, Italy, Portugal, and Switzerland scored 1 point, positioning them in the “medium-low” cluster (Trappel & Tomaz, 2021b, 2021c).

Interestingly, these two clusters do not overlap perfectly with the more traditional geographical distributions of journalistic traditions. For example, according to Hallin and Mancini’s (2004) model, all the countries in the MDM corpus belonging to the Mediterranean, or polarised pluralist, model (Greece, Italy, and Portugal) score the same, placing them in the “medium-low” cluster, but that cluster also contains Canada and Switzerland, classified as democratic corporatist and liberal models. This indicates that economic changes are likely to erode the boundaries of models constructed according to the logic of historical reconstruction. In other words, the positions of privilege from which some countries start can no longer be taken for granted, and at the same time, there is a movement towards levelling out privileges in some countries.

A more decisive factor than the specificity of the two clusters just defined (with effects across the dimensions of gender and age inequality discussed above) is the tendency towards precariousness of journalistic work. The difference between countries in the medium-high and medium-low clusters is indeed defined, if comparing the type of contracts commonly in place in newsrooms. The increase of freelancers is a global phenomenon, and this category of journalists does not benefit from the same forms of protection as permanently employed journalists. This explicitly translates into a low level of job security only in the medium-low-grade countries, with the country reports of Iceland (Jóhannsdóttir et al., 2021) and Italy (Padovani et al., 2021) showing a very critical situation. In contrast, in medium-high-grade countries, it is still possible to record fierce

struggles for equal pay for freelancers and permanent employees, as in the Netherlands (Vandenberghe & d'Haenens, 2021).

Overall, there are few media markets (e.g., in Austria and Denmark) where the journalism profession is characterised by conditions of security and duration of stay. However, even where this sense of security exists, at least in Denmark, it is less pronounced for the younger generation of journalists, whose incomes are lower compared with those of the older journalists (Blach-Ørsten et al., 2021). Even in the Netherlands, where newsrooms can be considered highly professionalised, permanent contracts in the media industry constitute a rare working condition. In some other cases where there are no legal provisions for journalists' job security (e.g., Canada), the uncertainty of the profession is reflected in phenomena such as the decrease of newsroom staff as well as the movement of journalists to digital news media or to non-journalistic positions in social media management. In Switzerland, the uncertainty of journalism posts is considered to be more intense within commercial media organisations compared with their public service counterparts (Bonfadelli et al., 2021); in Italy, the precariousness of the journalism profession differs between north and south and between different categories of journalists (Padovani et al., 2021); and in the United Kingdom, instability and precarity in employment is worse for female media professionals (Moore & Ramsay, 2021). In the context of this predominant unfavourable working environment, an exceptional case seems to be the Finnish media market, where journalists are protected by law against dismissal (Ala-Fossi et al., 2021). Moreover, the unemployment rate is low and the media industry is characterised by a decrease in freelance journalists.

## Conclusions

The 2021 MDM research data reveal two dimensions of particular importance that help determine the degree and nature of journalistic professionalisation: the processes of education and professional training of information professionals and the growing issues related to their job insecurity. Both refer to the concept of journalistic autonomy: One can be defined as internal to journalistic work and the other as external. In the first case, we identify a positive trend, as there are multiple efforts to improve the training and skills of journalists. In the second case, the external dimension, there is cause for concern.

The first dimension concerns the increasingly widespread role of self-organisation, which is related to the two closely linked fields of the application of ethical criteria to information and continuing education, with particular regard to new communication technologies.

The essence of self-regulation, in theory, lies in shielding the media from government intervention and safeguarding their independent operation (Puddephatt,

2011). However, the existence of professional ethics in itself does not equate to high-quality journalism, since adopting these ethical guidelines can be regarded as a considerable matter of journalists' conscience. The 2021 MDM research findings reveal that journalists' attitudes towards self-regulation differ among the participating countries, depending on the overall journalistic culture and their perception of the level of professionalism. Northern European countries, for example, place more emphasis on professional codes to ensure a professional ethos.

A professional ethos of journalists is not necessarily ensured in a working context inundated with complex regulations, but mainly in a free and safe working environment where journalists feel protected to perform their role (Clark & Grech, 2017). A qualitative professional ethos on the part of journalists cannot be achieved unless an overarching and stable normative philosophy is being cultivated. Overcoming or at least mitigating pressures leading to self-censorship, and providing reliable information, presupposes a constructive commitment to ethics and self-regulation mechanisms whose practical application is affected by the political structures of the country, the occupational culture within newsrooms, as well as the individual values of journalists.

Given that worldwide, a great number of national journalistic codes of ethics lack references to online journalism or to digital activity (Díaz-Campo & Segado-Boj, 2015), it seems reasonable that the professional ethos of journalists runs the risk of being regarded as inflexible or non-adaptable to the requirements of the new media era. Therefore, a considerable question being raised is whether self-regulation can adapt quickly to the evolving participatory environment of journalism so as to enhance professional standards by urging media organisations to develop their professional standards according to the era of digital disruptions.

The second dimension discussed in this chapter relates to the structure of the labour market in which the journalistic profession is embedded. It is a dimension that has to do directly with issues concerning job security, and indirectly with the perpetuation of inequalities linked to gender and especially age. The trend towards flexibility in the profession has introduced new types of fixed-term contracts and a much faster turnover rate than in the past, in a context that does not always provide adequate guarantees for journalists. This applies as much to the protections provided by the state as to the profession's ability to trigger processes of self-protection for its members (Ruggiero & Karadimitriou, 2020a). It is important to underline this last point, because it would be too easy to attribute this critical dimension only to the external context – to the ability of national economic systems to interpret the flexibilisation of the profession as an engine for change – rather than as a way of coping with a productive rhythm that is in fact unsustainable through recourse to “unrecognised professionals”.

Overall, the 2021 MDM research findings reveal a state of flux with regard to journalism professionalism and journalistic job security of the leading news

media, a challenging setting dictated by a climate of uncertainty dominating the news media field. The increasingly common use of fixed-term contracts and the generational change in newsrooms – aimed primarily at saving resources in times of crisis – are two factors that, to varying degrees, contribute to enhancing the already worrying decline in journalistic professional security in several countries.

These trends are in contrast to the great percentage of highly educated journalists. The economic pressures, shortages in staff, increasing workload, as well as adverse working conditions (including very low salaries and difficulties in implementing original journalism) are adversely affecting both quality and job satisfaction within newsrooms. In this unstable context, journalism seems a precarious routinised profession far from the goal of quality reporting or news narrative. Of course, exceptional cases exist (such as journalism in the Netherlands); however, in several countries, vulnerabilities persist, preventing the safeguarding of professional ethos in newsrooms. The rise of temporarily employed journalists, the apparent inclination of the media system towards freelancers, as well as the replacement of experienced journalists by younger ones, are trends that may not change; however, what can change is the mentality of media professionals, with the aim of eliminating the questioning of journalism's core values. Ethics training in journalism can be regarded as a prerequisite for professional ethos. Particularly in today's media markets, where economic constraints risk affecting the quality of journalistic output, ethics training can operate as a counterbalance to the challenges faced by journalists in their reduced capacity to maintain the desired quality of the news flow and the (high) standards of their professional ethos.

Only a reflection involving both the world of journalism and its stakeholders at all levels can change this trend. And from that shared reflection, combined with the practices of self-organisation that have already demonstrated journalism's ability to adapt to a changing context, a real re-thinking of the very category of journalism professional ethos can come.

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## Chapter 16

# Innovation in journalism

## *How technology affects the news media, publication formats, and the journalist profession*

Leen d’Haenens, Wai Han Lo, & Martin Moore

### Abstract

This chapter takes as its starting point an indicator for the diversity of news formats from the 2021 Media for Democracy Monitor (MDM) project as an important feature for plurality of information. A wide range of news formats through different types of newspapers, television, radio, and online media is seen as a positive characteristic of media systems, especially since ownership diversity does not automatically translate into news format diversity. We make a connection between diversity of news formats and innovation in journalism: As news media seek to develop new news formats and solutions, broadcasters and news editors are setting up “news labs” to meet the expectations of their audiences. New storytelling methods and algorithms are being experimented with. This chapter collects examples of good practices of innovation in journalism in the countries participating in the 2021 MDM, but it also offers the opportunity to look elsewhere. It becomes clear that output is changing and diversifying thanks to innovation, and that innovation shapes newsroom culture as well as the journalist profession.

**Keywords:** technology and journalism, innovations in journalism, best journalistic practices, independence of news, news distribution platforms

## Introduction

There are several dimensions to the phenomenon of technological innovation in journalism. In addition to the technological innovations which let journalists and users determine journalistic innovation through their technological skills and media platforms, there are the *audience-led* innovations which contribute to news content and promote the diversification of news formats, as well as *organisational* innovation that includes the possibilities and resources made available by media companies, leading to the specialisation of staff and more structural complexity (Young & Hermida, 2015). These innovations are also interdependent, as pointed out by Boczkowski (2004), who argued that techno-

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d’Haenens, L., Lo, W. H., & Moore, M. (2022). Innovation in journalism: How technology affects the news media, publication formats, and the journalist profession. In J. Trappel, & T. Tomaz (Eds.), *Success and failure in news media performance: Comparative analysis in the Media for Democracy Monitor 2021* (pp. 337–354). Nordicom, University of Gothenburg. <https://doi.org/10.48335/9789188855589-16>

logical innovation triggers the adoption processes of multimedia and interactivity, which are in turn shaped by organisational structures (Hollifield, 2011).

Social and political factors also have an impact at the meta-level on context-related innovations in journalism. According to Posetti (2018), journalism innovation recognises the importance of integrating new ways of doing things with foundational practices and core values. Innovative journalistic formats are characterised by interactivity and immersion. The notion of interactivity is usually associated with today's huge social media platforms, which are interactive by design, using "likes", "comments", and "shares" for interaction among users. Twitter is used by journalists as a tool to interact with media audiences, for example, but also as an interpretation platform to supplement regular journalistic products. Indeed, journalists intent on reaching a diverse audience can use the great innovation potential of the various social media platforms and formats: WhatsApp, Instagram, Facebook, and so forth –including live blogging, Stories, Instagram surveys, and 360° images (Casero-Ripollés et al., 2020).

Utilising, among other sources, the data and results of the 2021 Media for Democracy Monitor (MDM) research project (see Trappel & Tomaz, 2021b, 2021c), comparing leading news media across several countries, we address the issue of technological innovation within the journalism realm and how it impacts the journalistic formats and methods, news production, and distribution. Data come from secondary sources and interviews with stakeholders. Relying on data provided in the 2021 MDM project complemented with other sources, this chapter on the use of technology and technological innovation in the news media is organised in three parts. First, we present a narrative of technological innovation in journalism and the media business helping journalists do their job and illustrate innovative news formats and content adapted to the affordances of the platform used. Second, we analyse how technology may help news outlets and media organisations produce, edit, and promote content, while exploring innovative strategies to finance journalistic content. Third, we discuss public-led technological innovation and how it can empower audiences.

MDM Indicator and related research question addressed in this chapter:

**(E3) Diversity of news formats**

How diverse are the formats for news presentation? (Trappel & Tomaz, 2021a: 34)

## The benefit of technology for journalists

This chapter takes as its starting point the indicator regarding the diversity of news formats (E3) from the MDM research project as a characteristic for

plurality of information. The chapter builds on diversity of news formats as one of several manifestations of the concept of journalism innovation, which is related to technological innovation, funding and revenue development, and creativity toward an audience with ever-increasing expectations. Journalism innovation – in all its facets, of which diversity in news formats is one – is essential both to the survival of the news industry and to enable journalism to perform its democratic functions. We bring many examples of good practices of innovation in journalism in the countries participating in the 2021 MDM project, but also from beyond, and we discuss the role technology plays for journalists, media companies, and different ways of revenue development. Technology has always been a driver for change in journalistic methods, news production, and distribution, but the last few years have seen a sharp rise in innovation and experimentation. This is due in part to the emergence of new sources of funding – mostly major technology platforms such as Google – but also to the growing recognition that technology is needed to cope with the surfeit of digital media content and data. For journalists, the shift from a world of information scarcity to one of information abundance has been difficult to navigate. How can any one journalist or team of journalists sift through the vast quantities of video, audio, images, and text that are published every minute of every day online, and identify what is salient and newsworthy? Or keep track of claims and assess their accuracy? Or spot patterns or anomalies across voluminous quantities of data? Doing any of this in a virtual environment, in real time, would be almost impossible without the help of technology.

This is why journalists rely on software to filter user-generated-content, to automatically tag content with metadata, and to do preliminary analyses. Journalists use natural language processing tools, artificial intelligence, and machine-learning to curate data, monitor organisations and public figures, and power investigations (Beckett, 2019). In Spain, for example, journalists at *Diario AS* have access to a “Football Data Suite” that lets them analyse football statistics (Prisa, 2016). “Read the Game” performs a similar function for journalists at *Spiegel Online* in Germany (Der Spiegel, 2016). In Romania, the *Buletin de Bucuresti* analyses large volumes of public data to scrutinise government spending – for example, expenditure on personal protective equipment during the Covid-19 pandemic (Buletin de Bucuresti, 2020). Similarly, *Bellingcat* (in the United Kingdom) reviews multiple open data sources as part of its investigations and has recently used these to track and map French, British, and American government financial support to businesses closed due to Covid-19 (Williams, 2020). Innovations like *Bellingcat* have helped maintain the United Kingdom’s wide diversity of news formats and maintain its score for indicator E3 at 3 points (Moore & Ramsay, 2021).

Technology is also being integrated into journalists’ workflows in order to alert them to unexpected events (natural disasters, accidents, etc.) or sto-

ries that are about to go viral. Applications are numerous: In Germany, the *Rheinische Post* has developed a suite of tools called Listening-Center to keep track of trending and emerging stories on social media and across the web. *The Post* was thus able to discover – and then report – that the head of the AfD in North Rhine-Westphalia was about to be toppled (Rügheimer, 2018). *La Voz de Galicia* took a similar approach in Spain to develop a Hyperlocal Listener and Community Manager to monitor its community's interests and discussion topics (Google News Initiative, 2020b). Technology lets teams of journalists collaborate and find patterns in large corpora of text or data; 108 different partners in 88 different countries around the world collaborated over 16 months to investigate over USD 2 trillion worth of transactions found in the FinCEN files, an investigation coordinated by the International Consortium of Investigative Journalists (ICIJ) and led by BuzzFeed news (ICIJ, 2020). Using tools like the graph database platform Neo4J, journalists were able to analyse hundreds of spreadsheets and thousands of financial transactions and then visualise the resulting data (Hunger et al., 2020). Digging through vast sums of leaked data (*Panama Papers*, *Paradise Papers*, *FinCEN files*, etc.) requires such transnational collaboration between media outlets, but also the use of multiple machine-learning techniques largely based on new technology (Carvajal, 2018).

Increasingly, technology also helps journalists verify stories and claims. Full Fact in the United Kingdom uses artificial intelligence to identify claims by public figures and then correlate them with openly available statistical evidence to check their validity (Full Fact, 2019). In Lithuania, Debunk EU uses a combination of artificial intelligence, journalists, and civil society volunteers (or “elves”) to spot and debunk disinformation almost in real time (Debunk.eu, n.d.). Much of the fact-checking has so far focused on content, though attention is now turning to identifying fake or manufactured sources, especially those engaged in coordinated disinformation on social media.

For news outlets, technology supports the production, editing, and promotion of news. RADAR (Reporters And Data And Robots) uses artificial intelligence to generate news stories for local outlets across the United Kingdom. Its owner (Press Association) reported that in RADAR's first 18 months of existence, its five computer-assisted reporters had produced 250,000 stories (RADAR, 2020). In Belgium, *The Echo* developed the Quotebot service that produces text-based business and finance briefings using financial data (Becquet, 2019), bringing greater innovative diversity to a country otherwise dominated by traditional news formats (leading Belgium to score 2 points out of 3 for indicator E3). Finnish public broadcaster Yle has created the Voitto bot, which writes reports on ice hockey games in the Finnish and Swedish languages. The organisation has open-sourced the bot's code so that other news organisations can use it (Yle, 2018). Finland scores 3 points for indicator E3 in the 2021 MDM in part due to Yle's leading stance amongst European public service broadcasters in

adapting to the digital and mobile environments (Ala-Fossi et al., 2021). Belgian news industry body *La Presse* has been developing technology to translate text into audio via smartphone, so newsreaders can listen to stories on their phones (Baldrige, 2018). Each of these innovations is in addition to the online data analytics used by almost all European news outlets – either off-the-shelf services such as “Chartbeat” or a bespoke one such as *The Guardian’s* “Ophan”. At the same time, more and more concerns arise around news automation and robot journalism. In 2019, for example, the Council for Mass Media in Finland proactively issued a recommendation for transparency when publishing robot material (Haapanen, 2020). The Online News Association (a non-profit membership organisation for digital journalists connecting journalism, technology, and innovation) also advocates a code of digital journalism ethics.

### Diversity of news formats and content adapted to the affordances of media platforms

In the 2021 MDM scoring (on a scale of 0–3 points), countries where news dissemination is based on a variety of mobile and digital tools score high on the indicator for diversity of news formats (E3). Nordic countries such as Finland (Ala-Fossi et al., 2021), Denmark (Blach-Ørsten et al., 2021), Iceland (Jóhannsdóttir et al., 2021), and Sweden (Nord & von Krogh, 2021), together with Austria (Grünangerl et al., 2021), Germany (Horz-Ishak & Thomass, 2021), and the Netherlands (Vandenberghe & d’Haenens, 2021) score highest (with 3 points) because local, national, and international news is disseminated through different platforms there. These include traditional news media, television, radio, and print, but also digital formats such as podcasts, news feeds on social media, short videos, and data visualisations. In Europe, southern European countries Greece (Papathanasopoulos et al., 2021) and Portugal (Fidalgo, 2021) score lowest (with 1 point) in terms of diversity of news formats: In both countries there is more homogenisation than diversification owing to declining investment in journalism. Outside Europe, Canada (Taylor & De Cillia, 2021) and Hong Kong (Lo & Wong, 2021) also score highest in terms of diversity of news formats, while Chile (Núñez-Mussa, 2021) is still at an early stage in terms of variety and consolidation of news formats, scoring 2 points. In Australia, scoring 2 points (Dwyer et al., 2021), the diversity of news formats is also under pressure. In South Korea, news innovation is mainly situated on visual formats catering to the mobile smartphone generation with “card news”, a news format based on “cards” that feature both text and images, contributing to its upper-middle score of 2 points (Kim & Lee, 2021; Newman et al., 2020).

Looking at the world scene, Silva and colleagues (2020) show that media content is increasingly being adapted based on the technology used. For instance,

for any one application, there are web versions and mobile versions, in which content is adapted to the affordances of the media platform. The omnipresence of smartphones and other mobile devices is giving rise to new forms of visual communication, including infographics that visually support data on online media channels. Tools such as Infogram and Tableau help journalists visualise data to complement their stories. The “explanatory” journalistic approach – which frames the relevance of news stories in narrative depth and contextual description – is, among other things, a consequence of the emergence of Big Data and the large amounts of information journalists must contend with nowadays (e.g., Posetti et al., 2019). van Dijck, Poell, and de Waal (2018) speak of the “datafication” of journalism, characterised, among other things, by interactive visualisations of quantitative data.

And there are other techniques through which news reporting takes place in an interactive way: Interactive documentaries (or web documentaries), gamification, and podcasts are some examples of narrative transmedia formats (e.g., Casero-Ripollés et al., 2020). An example of an interactive documentary (Vázquez Herrero & López García, 2016) is *Alma*, which lets the user follow various storylines. This gives a new perspective to the “prosumer” concept, according to which users co-produce content by following their own path within the news story (Löwgren & Reimer, 2013). Journalists can also go for a “game thinking” approach (or “gamification”). For instance, the iReporter game lets the user act as a BBC journalist and fact-checker based on real-world images rather than animations. It includes elements that allow the player to interact with other characters within the storyline. And virtual reality projects with 360-degree images and interviews of people on site, such as “The Displaced” (*The New York Times*) or “Inside the horrors of human trafficking” (BBC) bring an immersive storytelling format (Silva et al., 2020). Podcasts are mostly used to complement existing radio and television clips or to provide an audiovisual alternative in a society where mobile media consumption is on the rise (Silva et al., 2020).

User experience is enhanced by virtual and augmented reality techniques (VR and AR) which immerse the viewer into the storyline of the news story. Today’s media audiences are hyper-connected, so that participatory, transmedia narratives have become a full-fledged journalistic approach. “Virtual worlds” are the object of the so-called narrative transport theory: Viewers are involved in the story to such an extent that they let go of their connection with their own reality. One example is *The Guardian’s 6x9* documentary, which brings the experience of what it is like to be locked up alone in a cell (Green et al., 2004; Veira-González & Cairo, 2020).

Fully automated or “robotic” journalism goes one step further: The creation and dissemination of news pieces on various media platforms and carriers is done by algorithms without human interference. Through automated

journalism, news pieces are decoupled from time-related factors and created using large amounts of data (Carlson, 2015; Coddington, 2019; Sallaverría & de-Lima-Santos, 2020). It remains to be seen whether journalists have the skills needed – including coding skills and analytical abilities – to analyse and contextualise large amounts of data and to do “computational thinking”. Journalists put their efforts on asynchronous media audiences that consume news via multiple media platforms and devices (Túñez-López et al., 2020; Uskali, 2018; Posetti et al., 2019).

## Public-led innovation

Journalists write with an audience in mind – an audience that is constantly changing along with the digital world. For users, technology enhances personalisation and enables participation. For instance, the *Frankfurter Allgemeine Zeitung* in Germany allows its readers to customise their news feed on mobile devices (Google, 2017). In Leipzig, Germany, *The Buzzard* tries to help people break out of their filter bubbles by letting them view many diverse perspectives (Buzzard, 2021). *The Irish Times*’s Diaspora Project provides readers worldwide with the ability to post pictures and stories on a dedicated web page, “Picturing the Irish Diaspora” (The Irish Times, 2021). And in the United Kingdom, The Bureau of Investigative Journalism’s (n.d.) *Bureau Local* has used the technology outside the newsroom and into the local community: Journalists work with members of the public, showing them how to investigate and report using open data and easily available digital tools.

Digitalisation is causing a shift in the media market, with the Big Five players (Google, Facebook, Amazon, Apple, and Microsoft) dominating the online world. Journalists must be able to adapt to these platforms, or find new media formats to bypass them, without losing their audience. Innovation and diversity in news formats is critical to this. Posetti and colleagues (2019) mention experiments with storytelling formats born from the recognition that a news story is interpreted and can be explained in various ways. Traditional consumers are increasingly seen as engaged, active citizens. Thus, social engagement has taken on a new meaning: Citizen journalism – a joint endeavour of the media and local community members – is another way to attract readers (Solito & Sorrentino, 2020). For example, citizen journalism in Canada had major impact in a news story surrounding the taser-related death of Polish Immigrant Robert Dziekanski at the Vancouver International Airport in 2007. Paul Pritchard turned over a video showing four police officers subduing Dziekanski to the police, who claimed it was necessary for their investigation. When the investigation concluded, it was not what Pritchard had witnessed and police refused to return his film, so Pritchard hired a lawyer and held a

news conference in order get the film back, which he then sent to the media. A major investigation into police tactics ensued (CBC News, 2009; see also Taylor & DeCillia, 2021).

At the same time, news practitioners also caution about how to use audiences' content. For example, in Greece, the default stance of citizen journalism is to rarely employ videos or audio items taken straight from the Internet without further text or context which is later provided by the media themselves (Papaathanassopoulos et al., 2021).

Traditional profit-based earning models are shifting with digitalisation towards an audience-driven alternative in which loyalty and personalisation are central. Users will become the core of the revenue model, making it crucial for building a sustainable relationship with the public (Rodríguez-Vázquez et al., 2020).

While the focus on public engagement has changed, so have user habits. Older audiences are more likely to use newsletters or direct references to news sites (the attempt to bypass social media hegemony by directly engaging with the public seems to be working), while younger people tend to rely heavily on mobile news notifications (Newman, 2019; Rodríguez-Vázquez et al., 2020). Direct messaging apps such as WhatsApp seem popular for spreading news in the Global South (Newman et al., 2020). News aggregators seem to thrive in South Korea. Globally, news aggregators, such as the Netherlands's Blendle and major players such as Google News account for seven per cent of the news collection. Direct access via news sites and social media remains in the lead across all age groups (Newman et al., 2020). Continuing experimentation in news diversity, and integration of new technology, therefore remains vital to reaching new audiences.

## Innovation in media organisations

This section, in which we look at how technology is used in journalism, moves beyond the data of the 2021 MDM project. We illustrate manifestations of innovation in media organisations with examples from around the globe. Regarding journalistic principles and practices, Welbers and Opgenhaffen (2019) point to a conflict between the logic of traditional media on the one hand and social media logic on the other. The question remains whether Altheide and Snow's (1979) media logic – which revolves around objectivity and truth – can be reconciled with the subjective logic of social media, which thrive on virality and the rapid-fire dissemination of information to huge numbers of people.

Social media platforms can be described as a double-edged sword, since their revenue model is based on online advertising, while they dramatically extend the reach of news (Küng, 2015). The platform-capture phenomenon

means that social media such as Facebook have an unfair advantage: They are capable of adjusting their algorithms according to their own rules and with a focus on close connections (i.e., Facebook friends) to the detriment of news content and production (Newman, 2019). However, social media remain an important distribution mechanism for news outlets.

In this respect, Posetti and colleagues (2019) point to a distinction between legacy or mainstream news media and the so-called digital-born news media, with the latter focusing on long-term strategies and experimenting with innovative techniques. This means that the survival of digital-born news first and foremost depends on innovation, whereas legacy media are in a better position to contain or slow down experimentation. Digital news media are also trying to move away from a traditional media logic which favours exceptional or extreme stories. Different from the legacy media's earning models, the focus is no longer on profit only, but also on social engagement. An editor of *De Correspondent* (in the Netherlands) points out that digital, independent start-ups pride themselves on bringing a total picture rather than sensationalist snippets. Financial stability in itself is not an objective, but it is a factor that can have an impact on the journalistic goal (Witschge & Harbers, 2019).

A media organisation's stance and abilities also determine the innovative quality of its approach. *The New York Times*, for example, has its own school to train creatives intent on working within journalism and the news media. For the time being, such programmes are US-centric. The curriculum covers digital media, storytelling, and content marketing; however, technical skills, data analysis, coding, and data visualisation techniques are not yet commonly taught in media training programmes worldwide (Heravi, 2019).

Innovative journalism is also predicated on the national social-political situation (e.g., Nunes & Canavilhas, 2020). In Hong Kong, digital news media seem to be a faddish affair. They mostly focus on short Instagram videos, on animated "news" and cartoons presenting a peculiar mix of celebrity gossip, crime news, and political coverage, with dedicated editors working on content for social media. Online start-ups are an important news source within the region, but with press freedom under attack in Hong Kong (Lo & Wong, 2021), many topics are taboo. And yet, so-called civil rights journalism – *New Bloom Magazine* is an example of this – is making great strides in South Korea and Hong Kong, for instance. The fight against authoritarian regimes and their disinformation is mainly conducted online and via social media. In response, news stories can be triggered among the public, which one might call citizen or participatory journalism. For example, the Mapuche people – an ethnic group in Chile who have taken part in a historical conflict with the Chilean State for their autonomy, territories, and political representation – have started the website *Mapuexpress* to report news about their communities (Mapuexpress, 2020; see also Núñez-Mussa, 2021). In politically and socially unstable contexts, social

media platforms might be used to push back against attacks on press freedom and threats to newsmakers, coming from extreme-left or extreme-right voices in society, which are becoming more vocal. The *Standnews* (in Hong Kong) works with the public via Facebook to report the largest anti-government movement in Hong Kong 2019 (Lo & Wong, 2021). However, social media platforms can also threaten journalistic freedom (Posetti et al., 2019). For instance, journalists can be subject to continuous online attacks (see also Baroni et al., Chapter 3). And this is by no means limited to authoritarian regimes. In the Netherlands, for example, it was felt necessary to set up an online reporting and information platform – *PersVeilig* – to tackle online and offline violence against journalists. Moreover, trust in the media is lagging due to the rapid online circulation of misinformation and fake news (e.g., Newman et al., 2020).

### Using technology to finance journalistic content

Striving to find a sustainable revenue model while trying out innovative ways to develop revenue is essential to the survival of the news industry. Experimenting with earning models to boost digital revenues is crucial, but due to the supremacy of Google, Facebook, and Amazon, doing so without relying on their technological infrastructure is nearly impossible. Improved technology availability and accessibility have provided increased opportunities due to open-source communities (GitHub, etc.) and software (Apache Solr, Tika, etc.), as well as new financing sources. For example, news media might use crowdfunding to finance content. This is the case, for example, in Switzerland, where some news-related online media backed by crowdfunding have entered the news market; for instance, *watson.ch* provides news and entertainment for young people (Bonfadelli et al., 2021). In Hong Kong, online media platforms such as *Standnews* and *Citizen News* rely on crowdfunding, and *AppleDaily*, one of the city's largest pro-democracy legacy news media platforms (now shut down), also raised funds through crowdsourcing as a result of political suppression and declining advertising revenue. Indeed, crowdfunding is an important way to engage with the public. For example, the *CORRECTIV* non-profit news site lets German Internet users develop news reports collaboratively, and today it has more than 18,000 contributors (Google News Initiative, 2020a; Horz-Ishak & Thomass, 2021).

Subscription is another way to finance content. In Chile, *El Mercurio* SAP is a major player in the printed press. Its *El Mercurio* newspaper features daily supplements covering economics and international affairs, and a longer weekend supplement that focuses on culture, interviews, and in-depth political reporting. The company publishes several subscription-only, long-form journalism magazines that cover current events, home decor, women's issues, and travel. In 2020, to decrease costs, these magazines became supplements of the

*El Mercurio* newspaper. In 2019, the newspaper implemented a paywall on its website; users must now subscribe before they can access the digital version of its print edition and exclusive content, such as a newsletter (Núñez-Mussa, 2021). In the Netherlands, print media paywalls have become common over the last five to ten years. Typically, a few articles or sections are freely accessible, and users can freely view a specified number of subscriber-only articles over a given period (Vandenberghe & d'Haenens, 2021). Another successful example is the Swedish daily *Dagens Nyheter*, which has flexible paywall options. Three free articles offered on a weekly basis attract readers to lifestyle articles and to premium content behind the paywall. This paid content strategy involves editorial decisions made by an editor, backed by an AI-algorithm (Nord & von Krogh, 2021). In Denmark, users tend to avoid subscription services, and editors are still striving for sustainable profit models. Print newspapers have traditionally taken a broadsheet format, carrying a range of genres (e.g., original news items, telegrams, op-eds, backgrounders, features, and columns) and topics (e.g., politics, economics, current affairs, culture, and sports) in varying proportions depending on their target market. However, the print sector has steadily lost market share during the last decade, while the online sector has grown dramatically (Blach-Ørsten et al., 2021).

Journalistic content is of course an important driver for profit, and some news companies are taking more innovative paywall approaches than others. Although forms of access to online news differ, most people have access to paid news from a single brand. The team at *vol.at*, a local news site in Austria, runs a loyalty scheme that rewards users with redeemable points. Reporters and Data and Robots (RADAR), an automated news agency, taps 400 British newsrooms to create data-driven articles using a blend of human and artificial intelligence. The publisher of Italy's *L'Eco di Bergamo* creates personalised newsletters to boost the newspaper's readership. Some media organisations operate in the audio market. The Portuguese company Observador has gained 25 per cent of the local on-demand audio market, and its live digital feeds are viewed by 180,000 unique users each month (Google News Initiative, 2020a).

An alternative way to attract audiences and earn greater advertising revenue is to pursue more sensationalist stories and formats. For example, in Austria, the private television channel ATV broadcasts a news programme (*ATV Aktuell*) with shorter, popular stories three times a day, in addition to less frequent, news-oriented magazines (*ATV Die Reportage*). Puls 4 provides two news programmes, the breakfast-time *Café Puls* and the evening *Puls 24 News*, followed by an infotainment show (Grünangerl et al., 2021). In Greece, newspapers, experiencing low circulation and fierce competition (Greeks read five to six news sources per day) have turned to a more tabloid and sensationalistic format (Diana, 2019), for instance, using click-bait techniques and embedding tweets, images, and television clips (Papathanassopoulos et al., 2021).

Social media and apps are yet another strategy for generating revenue and attracting audiences. In Germany, the most popular mobile news products are the tagesschau app and the *tagesschau24* and *tagesschau 100 seconds* news streams (updated hourly). ZDF – the second-largest public television station – provides the ZDFheute app. These new formats are a response to changing viewing habits and greater mobile news consumption (Horz-Ishak & Thomass, 2021). The NZZ Companion app by *Neue Zürcher Zeitung* (Switzerland's oldest newspaper) is a digital companion that personalises news delivery. The newspaper has enjoyed a 20 per cent increase in subscribers since launching the app (Bonfadelli et al., 2021). Twitter has become an important hub both for news dissemination and for news media networking. In Germany, the platform is popular among journalists, politicians, and the public alike. Renowned journalists such as Dunya Hayali and Anja Reschke have been increasing their audiences on Twitter, making political news more accessible, establishing a broader online discourse about politics, and forming counter-publics against hate speech and fake news (Horz-Ishak & Thomass, 2021).

Some governments provide financial assistance to support legacy media. For example, print circulation figures are declining in Flanders, Belgium, but less so than elsewhere in western Europe. This is partly due to ongoing federal government funding allocated to the national post service, which enables it to deliver newspapers and magazines from media companies to subscribers free of charge. This funding was introduced in the 1990s to support both news diversity and the postal service, although critics say it is no longer needed given the significant changes in news consumption. Many of these critics are involved in the online-only news industry and view this government funding arrangement as a barrier to fair competition between digital and print news media (Hendrickx et al., 2021).

At times, foundation grants supplement government funding. The European Journalism Centre (2021), for instance, partners with various international foundations to support new journalism initiatives, with some of the funding coming from governments. In 2019, the British government gave the NESTA innovation foundation GBP 2 million to be redistributed as grants to twenty innovative news projects (NESTA, 2020).

Much of this extra money – especially funding directed at technological innovation – comes from American technology platforms, primarily Google (and more recently Facebook). Between 2016 and 2020, Google distributed approximately EUR 150 million to 662 projects across all 27 European Union member states through its Digital News Innovation Fund (Google News Initiative, 2020a). Many of the innovations described above have been funded (at least in part) by Google. According to a number of project heads, this Google funding was essential in getting the initiatives started (Fanta & Dachwitz, 2020). Yet such funding is not necessarily beneficial to the long-term future of news and

innovation. A study by Alexander Fanta and Ingo Dachwitz (2020: 15) points to the “complex ties [that] interlink the news media and the major platform companies, the latter of which are at once competitors, infrastructure providers, and subjects of coverage for the media”. Fanta and Dachwitz conclude that Google’s funding favoured incumbents over new market entrants, supported Google’s political aims, and discouraged journalists from criticising Google.

## Conclusion

The role of technology within the news realm can be ascribed to three areas: helping journalists do their job; empowering the public, giving it access to relevant content, and allowing it to contribute to the news process; and helping news outlets produce, edit, and promote content as well as generate revenue. In this chapter, we looked at examples of best practices in journalism innovation, while also recognising that innovation can compromise as well as enhance journalism. This goes to the contradiction at the heart of news innovation: Innovation can – as we have shown – provide journalists with more tools to do their work, give news organisations new ways to edit, distribute, and monetise their content, and allow the public to discover, and respond to, news that matters to them. At the same time, the more journalists become dependent on technologies that are out of their control, news organisations rely on distribution platforms that are not their own, and the public outsource their navigation of news to opaque algorithms, the greater the risk to the independence of news and to the coherence of a shared public sphere.

Nowhere is this more apparent than in the funding of innovation by big tech companies. While this has catalysed widespread innovation and invention, it has also brought dangers. Chief amongst these is the danger of over-reliance – both on funding and on technology. Funding is entirely at the discretion of Google or other superpower platforms, and it can be withdrawn as easily as it is granted. Indeed, in 2019, Google extended its news initiative to the rest of the world, downscaling its focus on Europe. There is also a risk that newsrooms become too reliant on platform technology – what Efrat Nechushtai (2018) has referred to as infrastructural capture. Most news organisations have long relied heavily on Google and Facebook to disseminate their content. What’s new is the fact that they increasingly depend on them for their technological infrastructure as well. Google even offers journalists a free suite of tools (Google Journalist Studio). This financial and technological reliance may jeopardise future news innovation and make news organisations less willing to criticise the tech giants. All told, while the last few years have seen much innovation and integration of new technologies and techniques into newsrooms, these developments are unevenly distributed between news media organisations, and there is no guarantee that

they will hold out should the money that funds them dry up. Now more than ever, investigations of big tech by the news media are needed. This is best done if news media are independent, and not beneficiaries, of big tech services and data.

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# SUCCESS AND FAILURE IN NEWS MEDIA PERFORMANCE

## Comparative Analysis in The Media for Democracy Monitor 2021

The Media for Democracy Monitor (MDM) assesses the performance of leading news media in mature democracies with regard to three core dimensions of democracy: freedom, equality, and control. After monitoring 10 countries in 2011, the MDM project expanded to cover leading news media of 18 democracies in 2021.

In this book, the most salient results from the MDM were selected to undergo cross-country and longitudinal comparison, searching for patterns and tendencies across countries, with a particular focus on the influence of digitalisation. Some of the key results are the ubiquitousness of the news media's financial crisis, increasing consumption gaps as younger generations prefer online platforms, and persisting gender inequalities, both in news content and in newsrooms. However, the volume also shows that the reach of news media remains high, the watchdog role and investigative journalism are increasingly relevant in daily practice, and that public service media, in general, continue to play a vital role for democracy. These results have implications for media policies, regulations, and practices to improve news quality and, ultimately, democracy worldwide.

The MDM is a research project conducted by the Euromedia Research Group (EMRG), a network of researchers concerned with media structure and media policy in Europe and beyond.



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