The Media in Northwestern Europe in the Last Three Decades

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Abstract On the basis of the model of Hallin and Mancini (*Comparing media systems. Three models of media and politics*. University Press, Cambridge, 2004), the chapter describes the media systems in Northwestern Europe with respect to their main characteristics and the developments of the markets and points to the development of trust in the media that we observe in the countries of Ireland, the United Kingdom (UK), Belgium, the Netherlands, Luxembourg, Germany and Austria. The degree and nature of the links between the media and political parties are considered as well as the development of journalistic professionalism and the role of the state in the function of the media. We conclude that the media systems of the Northwestern European region are still in accordance with the democratic corporatist model of Hallin and Mancini.

Keywords Press markets · Broadcasting markets · Deregulation · Journalistic professionalism · Trust · Internet · Platformisation

1 Introduction

In this chapter, we give an overview of the main characteristics of the media systems in Northwestern Europe with respect to the model of Hallin and Mancini (2004) and how they developed during the last 30 years. We will first briefly sketch the main characteristics of the Northwestern European region, then describe the developments of the markets and point to the development of trust in the media that we find in the respective countries. According to Hallin and Mancini, the development of media systems is dependent on the markets and on three more variables, i.e. (1) the degree and nature of the links between the media and political parties; (2) the

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development of journalistic professionalism and journalistic autonomy; and (3) the role of the state in the function of the media. We will explore these dimensions and conclude whether the media systems of the Northwestern European region are still in accordance with the democratic corporatist model of Hallin and Mancini.

Looking West to East, the region encompasses Ireland, the UK, Belgium, the Netherlands, Luxembourg, Germany and Austria. It groups together seven countries where strong cultural and economic interactions are to be expected. Although the UK and Ireland belong to Hallin and Mancini's Liberal Model, we consider them together with the five countries on the continent belonging to the Democratic Corporatist Model, because, as we will see, the UK and Ireland have much in common with the Western European countries. This is due to the press, where "the political orientations of British newspapers today are as distinct as anywhere in Europe" (ibid. 210), and to broadcasting with the BBC as the foremost example of the professional model that should largely insulate broadcasting from political control. When Büchel et al. (2016) reviewed Hallin and Mancini's models using the method of qualitative comparative analysis, they included the UK in the Corporatist Model. The four Nordic countries sharing the characteristics of the other seven countries also form a region of their own (see Chapter "Nordic Media Systems").

2 Main Characteristics of the Northwestern European Region

The region consists of countries that share the Democratic Corporatist Model, which is characterised "by a historical coexistence of commercial media and media tied to organized social and political groups, and by a relatively active but legally limited role of the state" (Hallin & Mancini, 2004, p. 11). There is an early and strong tradition of rational-legal authority and welfare-state where the three powers of the state follow democratically agreed rules and serve the public interest (ibid. p. 55 f.). With an early rise of literacy and mass newspapers in the region, there are high levels of journalistic professionalism both in commercial and non-market media. With the decline of the membership of mass organisations like churches, unions and political parties from the mid-twentieth century, strong ties between social pillars and media disappeared. New social movements brought forth new parties and parallel media. Thus, an overt colouring of newspapers and therefore soft political parallelism persist, and there are no indications of its fading away towards a liberal, neutral media landscape. At the same time, the Northwestern European region has come under the dominance of the market that characterises the liberal model, particularly in the phases of neoliberal deregulation in the 1970s through the 1990s.

There are two different traditions of corporatism in the region. One is strongly segmented or pillarised (the Netherlands, Belgium, Luxembourg and Austria), and the other is less clearly segmented (Germany and the UK). Or in the terms of Lijphart (1968), one is a consensus democracy, and the other a majoritarian democracy. The first is a multi-party system with an orientation towards bargaining, compromise and power sharing that supposedly leads to "neutral" journalism as segmented external pluralism. A majoritarian democracy is characterised by a system of two catch-all, centre-left and centre-right, "people's parties" (Tories and Labour in the UK, CDU and SPD in Germany, ÖVP and SPÖ in Austria) and supposedly leads to neutral journalism and catch-all media, while in fact newspapers are professional and politically coloured and thus externally plural in the entire region.

There is an increased segmentation of parties and parallel media which goes along with a growing percentage of the population expressing distrust in traditional parties, government institutions and mass media. These audiences get their news from alternative media and from peers on the Internet. While the "echo-chamber" hypothesis is still under debate and empirical scrutiny, there are first studies confirming it. Ceron and Memoli (2015) use Eurobarometer survey data from 27 European countries from 2007 on trust in government and model how that is affected by the political slant of the newspapers and PSB stations that respondents consume. Their results show that the pro- or anti-government slant of media outlets interacts with the individual ideological views of each citizen and confirm that media act like "echo-chambers" that reinforce pre-existing attitudes.

Looking at the countries in the Northwestern European region, we find that in summer 2022 trust in the press is above EU27 average (38%) with the Netherlands (56%) and Belgium (46%) taking the lead. The pattern repeats with trust in political parties, where all countries in the region were above EU average (21%) with Luxembourg (37%) in the lead followed by the Netherlands (35%) and Austria (32%). And the same goes for trust in government with EU average 34%, of which frontrunners are Luxemburg (70%) and Germany (49%) and at the rear is the Netherlands (38%) (European Commission, 2022).

The region, like the rest of the world, has seen a strong decline in the circulation of newspapers. Digitisation and the Internet have revolutionised media operations from research, requiring new skill sets from journalists, through distribution and interaction with "the people formerly known as the audience" (Rosen, 2012) to advertising funding. Over the last 30 years, press publishers, broadcasters and journalists have been struggling to adapt to the new media environment. We may include media researchers in this list.

3 Development of the Markets

3.1 The Press Market

Protestantism, literacy and industrial revolution in northern Europe provided the ground for the development of mass circulation newspapers. Size certainly matters (Lowe & Nissen, 2011; Trappel et al., 2015). Some media markets are simply bigger than others, which can have important implications for the number of media outlets and hence for both state regulation of media and the relation of media outlets with political actors (Hallin & Mancini, 2004, p. 25 f.). Newspaper markets also vary in the balance of local, regional and national newspapers. Some (the UK, Austria) are dominated by a national or super-regional press, none in the region by local papers, and some (Germany) have a combination of both.

Hallin and Mancini find the national commercial newspaper markets in Northern Europe to be segmented by class and by political affiliation. The strongest separation between a sensationalist mass press and quality papers was addressed to an elite readership they identify in the UK, while other Northern European countries are dominated by newspapers that serve elite and mass readerships simultaneously (Hallin & Mancini, 2004, p. 25). The most important trends in the last two decades have been a decline in membership of traditional civil society organisations like churches, unions and parties and thereby their funds and societal impact and the rise of the Internet. This went along with a quite dramatic decline in newspaper circulation, in turn leading to heightened competition, newspaper closures and increased concentration.

European newspapers had been "firmly rooted in history, culture, and politics", as de Bens (2007, p.141) described in an overview of developments in the press industry. But this stable situation was uprooted in the recent three decades due to several challenging changes. Societal developments, shifts in audience and advertising preferences, the appearance of new media competitors and above all the spread of digital media and the convergence process turned the traditional business models upside down (Lund et al., 2011, p. 45). During the 30-year period from 1990 to 2020, the press market in the Northwestern European region has been in decline. While the number of daily, weekly and Sunday newspaper titles remained fairly constant, sales and circulation of dailies dropped constantly, rising dramatically to losses of more than 20 percentage points between 2005 and 2010 in the Benelux countries.

The share of advertising expenditure going to press as compared to other media shows a strong decline after 2010, most dramatic in the UK. Exceptions where ad expenditure in press remained fairly constant throughout are Austria, likely because of indirect subsidies through government ads, as well as Belgium and Luxembourg. While magazines receive roughly half of the ad money of newspapers, the decline here is more pronounced, even in the subsidised market of Austria, ending in mid to low single digits in 2019 (World Association of Newspapers, 2021; EAO, 2021).

These changes in newspaper circulation and consumption urged the publishers towards several adaptations. First, they moved from print to the Internet. While by 2000 nearly all newspapers had online editions, from 2005 there were more online than offline newspapers, in Germany more than twice as many in 2017. In the UK in 2010, the data show 99 offline titles compared to a staggering 1410 online (World Association of Newspapers, 2021). Second, they tried by either corporate expansion or the launch of new products in the print markets to open new windows of opportunity. Powerful publishers as the German Axel Springer Group develop into large integrated media conglomerates by shifting from journalistic press to varied online businesses. Expansion also took the form of acquiring dwindling publishers in

Eastern Europe. Examples are the Austrian Styria Group in Croatia and Slovenia and the German WAZ group in Croatia and Serbia. Third, they expanded into non-journalistic lines of activities (travel, books, exclusive consumer products) to compensate weakening ad sales.

3.2 Broadcasting

3.2.1 Public Service Broadcasting

Before we look into the market trends of radio and television, we sketch the development of public service broadcasting with a focus on the breakup of its monopoly status, as this has a strong impact on how the market changed. After WW II the monopoly of public service broadcasting (PSB) was established in most countries of our sample. In the countries of the Northwestern European region, the organisational form of PSB had initially become firmly established in the post-war period before commercial stations were introduced from the 1980s onwards. The BBC model of an independent PSB was influential everywhere. In Germany and Austria, it served as the standard by which the broadcast system was remodelled after 1945. All countries in the Northwestern European give broadcasting professionals fairly high levels of autonomy. In this sense, Hallin and Mancini (2004) write, the BBC "may have contributed to the 'secularization' of society in Northern and Central Europe among other things by introducing a model of nonpartisan journalism that eventually influenced the professional culture of the news media" (ibid. p. 170).

In the Netherlands, the Media Act of 1969 established the NOS (Nederlandse Omroep Stichting) from two precursors as management organisation of the Dutch public broadcasting system. Its statutory tasks are twofold. One is to provide daily news broadcasts on radio and television and a news format for a young audience, sport and parliamentary reporting and reporting of national holidays and commemorations. As manager of the PSB system, NOS's other main task is to provide for the current nine public broadcasting associations. NOS is the licensee of radio and TV frequencies and allocates broadcast time on the NPO channels as well as public funding to the PSB broadcasters based on the number of their members as reflected in subscriptions to their programme guides. The Dutch PSB system currently consists of the two statutory stations NOS and NTR and the pillarised stations founded in the 1920s (VPRO, NCRV, KRO etc.).

Austria is the clearest representative of a consensus democracy with a parliamentary model of PSB regulation. It leads us to expect each new government to appoint its parallel directors of ORF. This was indeed the situation in the early days after the precursor of the ORF had been founded in 1957. In 2013 an idea from the 1960s was discussed again of installing two Director-Generals, one of whom was supposed to be black and the other red (*Profil*, 26.10.2013). The changes in government made obvious how strong the party parallelism of the "Proporz" system still is in Austria.

In Germany, like in Austria, broadcasting after 1945 was re-established by the allied occupation forces to ensure the population would be re-educated to democratic values. The BBC served as model. German PSB was organised as a public law institution controlled by society in a kind of broadcast parliament. The German constitution is unique in that next to the freedom of the press, it also explicitly guarantees the freedom of broadcasting (Art. 5 Grundgesetz).

The ARD was established in 1950 as a "working group" of the PSB stations in the federal states who jointly operate one national channel and one in each of the Länder. In 1963, a second national channel was added, the ZDF. In a time that envisioned "society" as corporatists, a number of organised socially relevant groups were identified, including churches, unions, professional, business and sports associations and political parties who internally decide on their delegates to the Council. After a scandal of political interference, the Federal Constitutional Court which plays an important role in Germany in setting central broadcasting policy and in protecting the independence of PSB ruled in 2014 that no more than a third of the members of a Broadcast Council should be politicians in public office or leading party members.

The European Audiovisual Observatory (EAO) reported for 2017 that seven of the top ten TV channels were public channels. In 15 EU countries, including Germany, PSBs represented the single largest broadcasting group in the national market (EAO, 2019: 31). PSB audience share in Northwestern region was highest in the UK and Germany at about 46%, followed by Flemish Belgium (37%), Austria (33%), the Netherlands (32%), Ireland (27%) and French Belgium (23%) (ibid. 33). At the same time, PSB revenues decreased by 0.4% in real terms, and the weight of PSBs dropped by 3% down to 31% in 2020, with top 100 revenue growth driven solely by the private sector (+12% over the same period). The largest budgets in 2020 were those of PSBs in Germany (EUR 9.47 billion) and the UK (EUR 6.83 billion). Yet even they cannot rival international competitors. While almost half of the 100 leading European television and radio groups were PSBs, their revenue share stood at 35% in 2020. "The erosion of PSB funding is particularly apparent in a five-year comparison: the funding volume for PSBs in Europe contracted by EUR 801.0 million between 2015 to 2020" (EAO, 2022, p. 54).

While media outlets diversified, also European societies changed from mono- to multicultural and brought a new task to public service broadcasters. Integration is one of the core remits of PSB, e.g. the German Interstate Broadcast Treaty stipulates that "they are to promote international understanding, European integration and social cohesion at the federal and state levels" (§ 11 Abs. 1 RStV; cf. Lilienthal, 2009). This had now to be applied to the diversified societies in all Western European countries. In Germany, Austria, Belgium and the Netherlands today, the percentage of citizens with a migrant background is about one-fourth. In the UK only 14% have a migrant background with the majority from its former colonies in India, Africa and the Caribbean. This creates cultural tension with the other often being depicted in stereotypes. Since integration is one of the core remits of PSB, Thomass et al. argue that "PSM have to answer to diversity requirements in migrating societies" (Thomass et al., 2015, p. 190.) Among the segments of society that PSB finds harder to reach are migrants, the less educated and younger audiences. Given all these challenges, PSB remains significant throughout the EU.

By including the Internet in its services, Public Service *Broadcasters* have transformed into Public Service *Media* (PSM), yet their basic challenge still is to remain independent from both the state and the market and fulfil "the democratic, social and cultural needs of each society" (European Union, 1997, p. 109). PSM have come under increasing pressure, with various forces sawing at their foundations. At the same time, they are confronted with the challenges of reaching out to all parts of society, of countering the polarisation and right-wing shift of society and the deluge of disinformation and hate, of Europeanizing the public sphere (Thomass et al., 2015, p. 192 ff.) and of developing themselves further onto the yet uncharted territory of the digital public sphere.

The Northwestern European region's PSB had been under the BBC's guiding star from the outset. The BBC is again the avant-garde of its current reconfiguration. A perceived left-wing bias of PSB is countered by a shift to the right. BBC funding has been cut by 30% over the past 10 years with similar cuts across the region. The compulsory licence fee has been under attack for decades as perceived unfair competition for commercial media. For instance, Rupert Murdoch's newspapers have been waging a campaign against the BBC since he entered the television business in the early 1980s. By framing it as unfair competition for newspapers and other commercial media, he has targeted the compulsory license fee. The debate to move towards a subscription system has already started. The principle of the licence fee is secured by the BBC Charter until its review in 2027. But there is a mid-term review ongoing in 2022/2023, which will adjust its level and review BBC governance.

In most countries of the region and, in fact, the entire EU, except Luxembourg and the UK, PSB was the only service licenced to use the public airwaves until the mid-1980s. Deregulation of broadcasting started from two main dynamics: there was a push to end the PSB monopoly from press publishers, audiovisual producers and advertising groups as well as out-of-territory "pirates", commercial stations transmitting from Luxembourg or from off-shore ships or platforms (the Netherlands, UK) and from social movements demanding their share of the electronic public sphere, and there was a pull from the new transmission technologies cable and satellite from the 1970s that made available additional broadcast channels. Both effects played out in the neoliberal political atmosphere of the 1980s at the beginning of large-scale privatisation of public infrastructure and deregulation in many sectors.

Cable TV with signal injection via satellite and later direct satellite broadcasting into the home allowed to carry all existing PSB channels and a range of additional ones. The growth of cable services differed across the region by size and policy of a country. It was the most rapid and extensive in the Benelux countries, reaching 93% of households in Belgium in 1991 and 80% in the Netherlands in 1990. Germany and Ireland belong to the middle group of cable countries, while in the UK less than 13% of households had subscribed to cable in 1987 (Franquet et al., 2020, 269 f.).

The additional channels were licenced to commercial and often local broadcasters under a public regulator to ensure minimal diversity requirements in the programming even of private enterprises. This led to the creation of a whole range of providers from media but also non-media sectors like banking, construction, telecommunications and other public utilities and to a "shift from broadcasting towards narrowcasting—from service intentions for broad, large audiences to targeted audience segments" (Hujanen, 2016, p.34 f.; cf.; Franquet et al., 2020, p. 260 ff.).

The EU is also a strong driver in deregulation. It was primarily founded as an economic alliance, and the Single Market is still its focus today. It has no competence in media which, like culture and education, remain the responsibility of its member states. It can therefore view broadcasting only as a service in a market like any other. When the EU passed the Television Without Frontiers Directive in 1989, the goal was to nurture a common European audiovisual market that would be capable of competing with US media conglomerates. Its main instruments are subsidies for audiovisual production and distribution and imposing quotas for European content on broadcasters.

Deregulation seized all the countries in the Northwestern region, except Luxembourg, where the privately owned precursor of RTL, the Compagnie Luxembourgeoise de Télédiffusion (CLT), was established already in 1931.

Britain ended its monopoly of the BBC in 1955 when Independent Television (ITV) started. In 1982 a fourth television service next to BBC One and Two and ITV was set up with a remit to produce "high quality and distinctive programming". The commercially funded Channel 4 was originally owned by the Independent Broadcasting Authority (IBA) and then transferred to a public corporation established in 1990 of what later became the Department for Digital, Culture, Media and Sport (DCMS). In 2010, Channel 4 extended service into Wales and became a UK-wide television channel. Channel 5, launched in 1997, is a general entertainment channel that shows both internally commissioned programmes and imports from the USA in particular.

The UK Broadcasting Act of 1990 transposed the 1989 EU Television Without Frontiers Directive. The aim of the Act was to liberalise and deregulate the British broadcasting industry by promoting competition. Oversight over the commercialised and deregulated PSB family in UK today rests with Ofcom, the now unified government-approved regulatory and competition authority for the broadcasting, telecommunications and postal industries.

The Netherlands, like Belgium, actively encouraged cabling the nation. Market leader in commercial TV is RTL that began to broadcast in 1989, much of it US-American content. The second largest provider is SBS Broadcasting Group, owned by ProSiebenSat.1 Media AG. TV exports from the Netherlands are dominated by TV production conglomerate Endemol, founded by media tycoon and billionaire John de Mol who developed the reality show Big Brother and the theatrical producer Joop van den Ende.

In Germany it was the Constitutional Court that paved the way to commercial broadcasting. In its 1986 ruling, the court defined the role of commercial broadcasters as ancillary to that of public service broadcasters. In the new dual order, the fundamental service (Grundversorgung) is the responsibility of the PSB. Because of their universal reach and their ensured fee funding, they are able to offer a comprehensive range of programmes. The court ruled that commercial broadcasting is permissible only as long as and insofar as PSB ensures the provision of universal fundamental informational service to the citizens (BVerfGE 73, 118). In its next and final "deregulation ruling" in 1987, the Federal Constitutional Court clarified that "fundamental service" means that programmes are offered to the entire population which inform comprehensively and in the full breadth of the classical broadcasting mandate and give expression to the diversity of existing opinions in the broadest possible range and completeness. In addition, the court clarified that the concept of broadcasting is open to new technical developments and thus also includes "communication services similar to broadcasting" such as digital online services (BVerfGE 74, 297). Commercial broadcasting commenced in January 1984, first on cable, then soon on satellite and eventually also on terrestrial transmission. The introduction of commercial broadcasters in 1984 brought forth a number of providers that soon consolidated into two "families", Bertelsmann's RTL Group and the Kirch Group out of whose insolvency in 2002 emerged the ProSiebenSat1 Group.

In Austria the radio monopoly of ORF ended with the passing of the Regional Radio Act of 1993 that permitted regional and local commercial and community radio stations (Franquet et al., 2020, p. 267). Commercial TV channels from neighbouring Germany have been present in Austria on pay-TV and via terrestrial overspill since the 1980s, but it was one of the last countries in Europe to end the PSB TV monopoly with the 1997 Cable and Satellite Broadcasting Act. ServusTV is today one of the most important commercial stations in Austria next to ATV and Puls 4. Both Puls 4 and ATV are owned by ProSiebenSat.1 Media SE, since 2007 and 2017, respectively. In addition, there are several stations by the German RTL Group and ProSieben Austria and Sat.1 Österreich, Austrian editions of the German stations on cable and satellite that mostly only localise their advertising.

It has become evident that commercial providers in broadcasting emerged under very different circumstances than in the press. The crucial nexus for the much larger role of the state is the electromagnetic spectrum. This nexus ended with cable and satellite. Additionally, terrestrial broadcasting was digitised in the mid-2000s in most of the region with the UK lagging behind. The digital switchover released spectrum. In the general drive towards privatisation of public resources, also the airwaves were privatised. Frequency bands that became available were no longer licenced for a limited time but auctioned off to mobile phone providers.

Deregulation changed the broadcast landscape fundamentally. The new commercial broadcasters immediately gained large shares of TV and radio audience, particularly among young people. Commercial rivals for PSB also led to soaring prices for attractive sports, major movies and TV series as well as media personalities. At the same time, PSB was often criticised for responding to the challenges by lowering their traditional quality and becoming too commercial (d'Haenens et al., 2011, p. 190).

In the competitive arena, commercial broadcasters, once they had broken the PSB monopoly, started to complain that PSB is taking away their market. They attacked PSB as unfair competition. Consumers would not be willing to pay, e.g. for news if they could get it free-to-air while having to pay for it through a compulsory fee. They invented the mantra of the "market failure": publicly funded broadcasting would only be justified where the market failed to deliver programmes necessary, as the EU had highlighted, to fulfil “the democratic, social and cultural needs of each society”. By this rationale all programmes that can be paid for by customers or advertisers, most of all entertainment, fiction and sport, should be left to the market, while the remit of PSB should be reduced to unprofitable yet societally desirable “merit goods” like information, education and cultural programmes (cf. Thomass et al., 2015, p. 185).

When from the mid-1990s the Internet emerged, it soon turned into contested territory. And because, while media policy, law and remit are still national, the entire legal framework by then had started to become thoroughly Europeanised, the struggle over what PSB should be allowed on the Internet played out in the European arena. The Internet changed everything and requires the institutions to change from Public Service Broadcasting to Public Service Media.

3.3 Development of Radio Markets

Radio in the Northwestern European countries developed mostly, like TV, as a public service. The only exception is Luxembourg, where a commercial-only model was established.

The liberalisation of broadcasting led to an increase of the number particularly of commercial radio enterprises, reaching its peak in most countries of the region around the turn of the century. By 2010, the number of stations had started to drop in most countries, with a delay in Austria which was late in liberalisation. The number of employees in the radio industry from 2010 to 2018 dropped even more than the number of stations, indicating that many of the commercial stations relied on computer-generated playlists while saving on personnel. The only exception seems to be Austria where a comparably small number of commercial stations might be counterbalanced by an increase in personnel at ORF (ibid.).

Data on listening time and radio audience are too patchy to draw any robust conclusions but seem to indicate that both remain stable over the 30-year period and across the region (European Communities, 2003, p. 128; EBU, 2015, p. 5 f.; EBU, 2020a, p. 9). While listenership seems to have peaked in 2014 followed by a severe drop, the numbers in 2019 are everywhere similar to or higher than those in 2000. This is also what the EBU (2007, p. 21 ff.) noticed, as it found a great diversity in terms of audience shares and overall radio listening.

The stability of radio consumption seems to be confirmed by the share of advertising expenditure it receives. This shows only minor fluctuations, with peaks between 2000 and 2015 in all countries except Austria where ad money in radio peaked in 1990 and dropped continually by more than 50 percent until 2019 (EAO, 2021; European Communities, 2003).

As the figures in Fig. 1 show, radio is still a relevant mass medium in the Northwestern European countries or—as Kleinsteuber puts it—a “resilient medium” (Kleinsteuber, 2011, p. 61). He claims that due to low access costs and the ability of

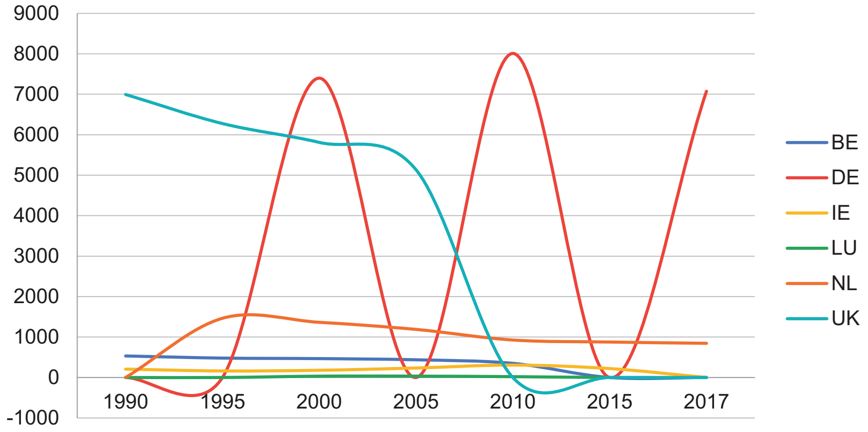

Fig. 1 The evolution of annual newspaper sales (in mln). Source: World Association of Newspapers, World Press Trends Database 1990–2017. Compilation: Eumeplat Project

radio to reflect the high diversity in Europe, it is defending its place in the media market. The competition between the public model (which is a genuine European invention) and the commercial model (which can be seen as a US import) is quite balanced (ibid. 68). In contrast to the notion of the dual system, Kleinsteuber refers to a three-pillar system, as he includes community radios. Because the landscape of those is even more diverse and oscillating and regulation for many years was absent, it is extremely difficult to get reliable data in this field. Nevertheless, community radios play a relevant role in the market as they—due to low market entry costs and many enthusiasts working for them—cater for a diversity of interests and genres.

3.4 Development of Television Markets

From the mid-1990s onwards, TV, like radio, was based on the three pillars of public service, commercial and community stations. The exception is again Luxembourg where no PSB developed.

Overall TV viewing time in the region peaked around 2005 and 2010 at values from 195 minutes per day in the Netherlands to 242 minutes in the UK. Exceptions are Austria and Flemish Belgium where viewing time continued to increase throughout the 30-year period, in 2019 reaching 183 and 170 minutes, respectively (Fig. 2).

Since the start of the pandemic in 2020, television viewing time experienced a revival after years of decline, growing by 5% on European average, 23% in Ireland and 22% in the Netherlands. The average audience market share of European PSBs in 2020 grew by 4% over the previous year.

Given the number of commercial competitors, of audiovisual offerings on the Internet and other forms of audiovisual entertainment, particularly gaming, the appreciation of PSB television remains astonishingly high across the region. The most dramatic developments are seen in Austria and Ireland where in 2019 the PSB TV viewership share had dropped to half of its value in 2000, which at 31 and 27% is still high compared to the Mediterranean countries. PSB TV share remained essentially unchanged in the other countries of the region in the 2000 to 2019 period. At between 45 and 50%, it is the highest in Germany and the UK (EAO, 2006; EAO, 2020). The number of PSB TV channels was essentially unchanged throughout the region, with a slight peak in 2015. The broadcast fee from 1990 to 2019 across the region rose roughly in line with the inflation rate. The fee was abolished in the Netherlands in 2000 and in Belgium in 2002, where PSB since then is being funded from the state budget. The rate of the fee which covers both radio and TV ranges from 160 EUR in Ireland to 300 EUR in Austria (European Communities, 2003; EAO, 2011 p. 32; EBU, 2020c).

3.5 The Rise of Thematic Channels

The new distribution technologies of satellite and cable and the ensuing deregulation led to a glut of new contenders for the potentially lucrative segments of the TV market. To provide the full range of programming in the sense of the Reithian remit of the BBC, i.e. to inform, educate and entertain, is quite costly. Therefore, most new entrants cater to special interests and thematic niches that are popular enough to attract audiences that in turn attract advertisers or paying subscribers. The number of thematic TV channels throughout the region peaked in 2015 followed by a

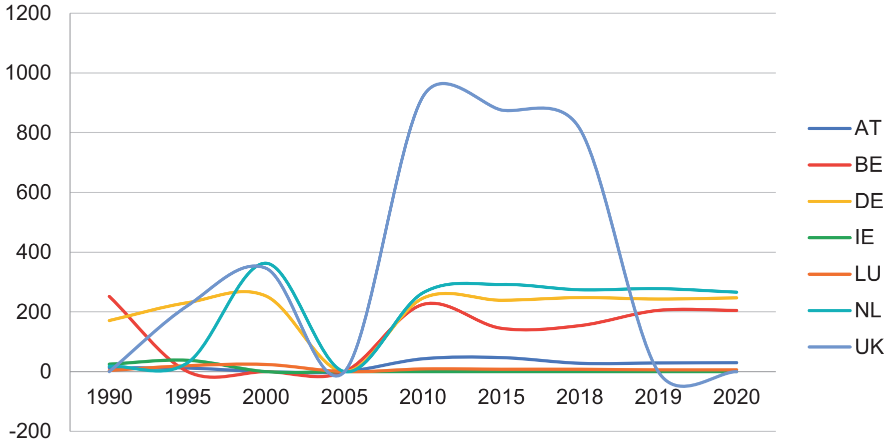

Fig. 2 Number of radio broadcasting enterprises (both public and commercial). Sources: EAO (2006, 2011, 2020). Compilation: Eumeplat Project from various EAO sources

dramatic drop until 2019, ranging from 27% in the UK to more than 94% in Luxembourg (Fig. 3).

Looking at the distribution of the genres of these thematic channels in 2019, it seems to be most even in the UK, with the largest share of adult channels among the seven countries. The genre DNA looks similar to that of neighbouring Ireland, only that in that Catholic country there were no adult channels at all and only one religious channel compared to 17 in the UK. Larger clusters of generalist channels were seen in Austria, Germany and the Netherlands. Their numbers rose after the 2015 market consolidation, just as in the UK, while it fell in all other countries in the region (EAO, 2011, 2015 and 2019). Sports channels remained relatively strong in Belgium, Ireland and Luxembourg after consolidation (ibid.). Film and fiction channels had a 10 to 15 percent share in all markets, with only the Netherlands having less. In Germany, their number continued to rise slightly after 2015 (ibid.). News and business channels were quite strong at the height in 2015, but had almost or even entirely disappeared by 2019, except for the UK with 17 channels remaining, Germany with 11 and Belgium with 9 (ibid.).

Overall, the deregulation of the TV market was hailed by some for creating growth, jobs and most of all freedom of choice, while sceptics feared that commercialisation would lead to a dumbing-down of the public sphere. It also led to an increased internationalisation of the European mediascape. Even in the PSB-only days, many of the series and movies were US-American. With cable and satellite, new actors needed content to fill the new channels. European production capacity was no able to fulfil the demand. US-American content produced for a large domestic market and a large global English-language audience is both globally appealing and offered cheaply.

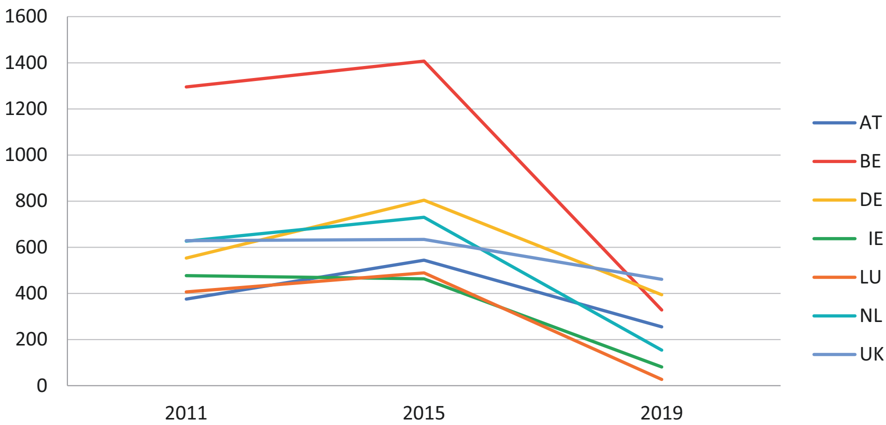

Fig. 3 Number of thematic TV channels by country. Sources: EAO Yearbooks 2011, 2015 and 2019. Compilation: Eumeplat Project

4 Media Concentration

Ensuring a public sphere with reliable information and a diversity of opinions so that citizens can freely form their opinion and participate in democratic decision making is the overarching goal of media policy in all the countries of the region. However, media concentration is a threat to the plurality of news sources, and it never had been combated in the Northwestern European region in a substantial manner, while on a European level, it is rather lenient (Artero et al., 2020, p. 302).

The Euromedia Research Group's "Media for Democracy Monitor 2021" considers the level of media concentration for selected countries on the national and on the regional level. In all the countries under study here, ownership concentration on a national level is remarkably high as a few big media companies divide the market among themselves. This is true for Austria, for Germany and increasingly for the UK, while Belgium, due to its multi-lingual media landscape, still is quite diverse. A difference can be made with respect to the markets for TV, radio and print (EMRG, 2021).

In Austria, newspaper and news magazine markets are controlled by very few companies, resulting in spectacularly high media concentration ratios which derive from several waves of concentration up until the mid-1990s (Grünangerl & Trappel, 2011, p. 78). Ten years later, the situation is similar, as the same authors report for the Media for Democracy Monitor 2021 (Trappel & Tomaz, 2021, p. 31 ff.). The number of publishing companies in Germany had halved from the 1950s to 2011, and the number of published units (*publizistische Einheiten*), which is the number of newspapers whose content is composed by separate newsrooms, decreased from 225 in 1954 to 135 in 2008 (Marcinkowski & Donk, 2011, p. 143). The five biggest publishing companies shared 41.3% of the daily newspaper circulation in 2008 (Röper, 2008, p. 421) which was reduced to 38.6% 10 years later (Röper, 2018). In the Netherlands, the overall market of national, regional, free and specialist newspapers has been dominated for many years by three large groups (d'Haenens & Kik, 2011, p. 216), a situation which even deteriorated, as today only two large players dominate both the national and regional newspaper markets (Vandenberghe & d'Haenens, 2021, p. 277). The findings are similar in the UK, where the Murdoch family alone with its News International (renamed into News UK in 2013) held more than a third of the newspaper market, followed by Daily Mail and General Trust and the Trinity Mirror Group (Humphreys, 2021, p. 327). The UK regional press is even more concentrated. Here, newspaper monopolies are the norm. The 2018 figures reveal that three companies—News Corp UK and Ireland, Reach PLC and DMG Media Ltd—accounted for 72% of all revenue of national newspaper publishers (Moore & Ramsay, 2021, p. 474).

Looking at media ownership concentration in the press, we have to keep in mind that media concentration is measured in terms of single media sectors (print, television, radio and online media). However, changes due to the convergence of media markets, media offerings and end devices and therefore media cross ownership are neither considered by the current media concentration definition nor by media concentration law. Media concentration is the highest in the TV sector. Only in Germany a higher competition among several media houses provides a greater variety of radio stations and newspapers. As for the regional level, the picture is more differentiated. Regional media ownership concentration is high again in Austria, Belgium and the Netherlands (print), as well in Germany, whereas the UK and the Netherlands (TV and radio) have less concentration in the regional market.

Growing internationalisation manifests itself in increasing market power of non-domestic TV channels in national markets. This is the highest in Luxembourg (67%), French Belgium (63%), the Netherlands (53%), Austria (47%) and Ireland (38%) and less so in the UK (25%), Flemish Belgium (18%) and Germany (7%) (European Audiovisual Observatory (EAO, 2019, p. 38). The overwhelming majority of these foreign services are US-American in the UK and in Germany, while in all other countries of the region, they are predominantly European (EAO, 2019, p. 39).

With the Internet boom of the late 1990s and again in the mid-2000s, media acquisitions and mergers boomed and have led to European multinational companies and to the presence of non-European companies, particularly in entertainment and advertising, but also in news, most notably Rupert Murdoch's News Corporation (Artero et al., 2020, p. 302).

As media companies started to be traded at the stock exchange, they were also drawn into the effects of financialisation. This was enabled by the liberalisation of financial markets and fuelled by the dot.com bubble in the late 1990s with its high investments in expectation of even higher returns (Winseck, 2010, p. 366 f.) The IfM Media Data Base on the 50 largest media corporations in 2019 is led by US-American and Asian technology companies like AT&T, Alphabet, Comcast, Facebook, Tencent and Sony. Among the European media and knowledge corporations on the list, the UK is present with three corporations, the Netherlands and Germany with two each (IfM, 2021). Of the other EU countries, only France and Sweden also have players in this league. Thus, the Northwestern European region emerges in Europe as a centre of European media power.

5 Political Parallelism

"Political parallelism" refers to the ties between media and political actors. Hallin and Mancini (2004, p. 37) extended it to imply an instrumentalisation of media by political and economic interests seeking to wield political influence; and they include media parallel no longer to specific parties but to more general political orientations. Parallelism is now seen as driven by market segmentation and by the political involvement of owners and journalists (ibid. p. 214 ff.), and in the Democratic Corporatist region today appears as newspapers with recognisable general political tendencies. Journalists tend to work for and audiences tend to read those papers whose colouring matches their own political affinities.

The British press, Hallin and Mancini write, “is still characterized by external pluralism. It is no coincidence that the concept of ‘party-press parallelism’ was developed in Britain, where despite their commercial character and despite the importance of the fact-centered discourse stressed by Chalaby, the press has always mirrored the divisions of party politics fairly closely” (Hallin & Mancini, 2004, p. 208).

This is most pronounced in the case of tabloids. Tabloids everywhere are characterised by “reject[ing] the constraints of objective reporting”, by populism, often in a tone of outrage, launching campaigns around causes they expect to be popular. “In Britain as in Germany, this most commonly takes the form of a right-wing populist stance, emphasizing nationalism, anticommunism, traditional views on gender and on many social issues, and hostility to politicians” (Hallin & Mancini, 2004, p. 211). Hallin and Mancini’s remark on the UK press landscape at the turn of the century reads like forebodings of the Brexit disaster: “Since the rise of the Labour Party there has been a strong partisan imbalance, with most of the press—with only the exceptions of the Mirror, Guardian, and Independent—clearly on the political right …” (Hallin & Mancini, 2004, p. 215).

The pillars in the Netherlands began to dissolve in the 1960s. Most national dailies gradually redeveloped distinct profiles with recognisable ideological positions and a partisan audience. After the depillarisation, i.e. the end of strong segmentation and strong links between parties and media, the Dutch media system “is nowadays characterized by independent media and high levels of professionalization. Mainstream media might have a certain political leaning or orientation but lack a clear partisan bias” (Van der Pas et al., 2017, p. 492).

Additionally, in Luxembourg the pillars began to fade. The pillar system in Austria with respect to public offices is called *Proporz*. Links between newspapers and traditional political pillar organisations remain, but the papers are primarily run by professional journalists vying for market shares. The Corporatist culture of compromise and power sharing allows for cooperations even between competing newspapers.

Germany was never as clearly pillarised as the Netherlands, Belgium, Luxembourg and Austria, but also here there were papers parallel to political parties and other social organisations. The local press used to constitute a counterweight to the national papers, thus balancing pillarisation even more, but is hardest hit by the crisis and by concentration.

As a trend for the region, we can summarise that while organisations from the traditional pillars remain, their relevance for the ownership of media has disappeared, giving way to a market with cooperation across the lines of political affinities. These affinities remain and continue to serve different audience segments. As long as our societies are organised as representative democracies where political opinion and will is formed and voted in political parties, parties will inherently have a relationship with media—as sources of information, as objects of reporting and as “primary definer” of news.

6 Journalistic Professionalism

Journalistic professionalism refers to the differentiation of the functional system of the mass media by increasing self-referential operations (Habermas, 1962; Luhmann, 1995). These include establishing a professional ethics, bodies of self-regulation like press councils and editorial statutes and claiming autonomy from other functional systems of society like politics, law and business. The question stands to which degree this autonomy of mass media is challenged by other powers in society.

While the media logic, which has been established with the institutionalisation of journalism, has emancipated itself from the political logic, Hallin and Mancini see the strongest threat in the logic of commercialisation that rose together with professionalism in the 1960s and 1970s but accelerated in the 1980s and 1990s. And indeed, journalists perceive internal press freedom and editorial independence as jeopardised by commercial pressures. A survey of 2500 journalists in Germany, Austria and Switzerland conducted in 2014 and 2015 found that German journalists feel the economic influence of external actors, managers and owners more strongly than journalists in the other two countries (Laurer & Keel, 2019).

Journalism professionalism in our selected countries is quite high. The share of higher education among journalists is increasing such as in Austria or has been a given for long for the majority of journalists such as in Germany, the Netherlands and the UK, according to the EMRG's "Media for Democracy monitor 2021" reports. Training, including ethics training, is freely available and used by a majority of journalists, and self-reflection of the work is regular on editorial meetings, although it occurs mostly on an ad hoc basis. What is a burden for professional journalism in these countries of Western Europe is that time and resources as well as job satisfaction are on the retreat.

The principle of journalism as a fourth system in the division of powers, in the checks and balances of the state, has gained widespread official acceptance in the region. This is expressed by Freedom of Information and Transparency laws and laws to protect whistleblowers as well as by public funding for investigative journalism, all of which, as we have seen, can still be improved. Wikileaks, the Panama Papers and the Snowden leaks led to the recognition that—bizarre conspiracy narratives aside—there are in fact known secrets, loopholes, corruption and systemic abuses of power that can only be uncovered by an insider with a moral compass like Edward Snowden. Large caches of leaked documents on global activities and therefore of global interest like the Panama Papers also brought forth large-scale international investigative cooperation and therefore a heightened professionalism and internationalism of journalism.

In the EMRG's "Media for Democracy monitor 2021", all the countries in the region rank fairly high in the watchdog indicators. This time the UK takes the lead with 22 of 27 points, and Belgium is at the rear with 16 points.

In the Northwestern European region, institutionalisation of journalism and respect for the autonomy of journalism are high. In the Reporters without Borders'

World Press Freedom Index, all the countries rank high (RwB, 2022; see below under “media and the state”). Where the freedom of the press is under attack, it is less from state actors but from civil society. Distrust in government institution and mainstream media has fused with nationalist, racist, anti-semitic, anti-Muslim, misogynist convictions and conspiracy narratives in the corona denier movements across Europe. This has led to a level of hatred and violence against the media that currently allows journalists only to report from demonstrations with protection of bodyguards.

The decline of newspapers and the rise of new online intermediaries have changed the journalistic occupation and the labour market. There is a strong trend towards precarisation of journalism with a growing number of freelancers who can no longer make a living from their profession. There is a growing gap between them and the stars in the field, top journalists who establish themselves as brands with their own production company surfing the market, selling to PSM one season, to commercial TV the next and to Netflix the following (cf. Bobkov & Herrmann, 2020; EMRG, 2020; Morini et al., 2014).

The most consequential dynamics of the last 30 years for both press and broadcasting arguably is digitalisation. Computers and the Internet have revolutionised media operations from research and new skill sets required from journalists through distribution and interaction with “the people formerly known as the audience” (Rosen, 2012) to advertising funding. Most of all, media have to connect to younger audiences who might be digitally native but need to learn to find high-quality information and tell it apart from disinformation. These are new challenges for professional journalists. Furthermore, the integration of TV, radio and online, first in the newsroom and then in the entire media enterprise, is still under way. It challenges journalists in their professionalism in many ways as they have to overcome the hitherto media specifics of writing and producing and include cross-media working procedures.

7 The Media and the State

The role of the state and the nature of its intervention in the media system is the last of the four dimensions for comparison of media systems in the model of Hallin and Mancini that we want to illustrate. They differentiate between state ownership of media, press subsidies and the function of the three powers Legislature, Executive and Judiciary to make, apply and interpret laws and the state as censor and source of propaganda.

Although the normative goal is that the state should not own media which are regarded as fourth (independent) power, in many countries the state at times has owned news agencies, newspapers or other media-related enterprises, either directly or through state-owned enterprises. Hallin and Mancini single out the state-ownership of PSB as the “the most important form of state intervention” (Hallin & Mancini, 2004, p.41). PSB in the region was in the technical sense state-owned but carefully constructed to prevent any control over programming by the state (for a detailed discussion of PSB and its deregulation, see above "broadcasting").

Press subsidies are sometimes criticised as an undue state influence on the media, but as Hallin and Mancini point out, "critical professionalism" in journalism in Northern Europe grew in the 1970s when subsidies were highest. Since they are granted according to clearly established criteria consistent with rational-legal authority, pressuring media by means of subsidies is unlikely (Hallin & Mancini, 2004: 163). Western democracies with a high level of press funding such as in the Nordic countries are characterised by a high degree of media freedom, a very professional media environment and a low degree of political parallelism as well as a high reach. Cornils et al. (2021) analysed press subsidies in seven European countries and Canada and found a reason for it in market failure and therefore need for public support—most dramatic in local media. In all of the media systems examined, specific requirements for eligible organisations are formulated (ibid., p. 45). Their country analysis shows a general transformation in subsidy systems from circulation-oriented towards direct production support. In addition, there are production project funds specific, e.g. for the support of investigative journalism. The Stimuleringsfonds voor de Journalistik in the Netherlands, for example, has a programme to promote platform-independent investigative journalism with a total budget of EUR 2.8 million, 75% of which goes to local and regional projects (ibid., p. 32). Many countries studied have set up innovation support programmes, albeit mostly with smaller budgets.

The making, application and interpretation of laws are the most fundamental forms of state intervention in the media. Aside from public funding discussed above, these include market regulation with laws on ownership, competition and media concentration. Others are intended to ensure the fairness and integrity of democratic elections by regulating political communication. Some codify privileges of the journalistic profession necessary for fulfilling its function for society like professional secrecy laws (protecting the confidentiality of sources), "conscience laws" (protecting journalists when the political line of their paper changes) and laws regulating access to government information. Others protect the objects of journalism, including privacy, libel, defamation, right-of-reply and more currently hate speech laws (Hallin & Mancini, 2004, p. 43 f.).

All these laws ultimately derive from the fundamental right of the freedom of the press which is opposed to any form of state censorship. The struggle for press freedom was arguably the single decisive element in the professionalisation of journalism (see above). It is now enshrined in the constitutions of the EU member states and in the Charter of Fundamental Rights of the European Union. Reporters without Borders in its 2022 World Press Freedom Index ranks the countries in the Northwestern European region high. Ireland takes the lead in place 6 of 180 countries. Austria is the rearguard at place 31 (RwB, 2022).

Journalists in this region were on the whole able to work freely, enjoying the respect of much of the population as well as legislative and institutional protection. In the corona pandemic, governments classified journalists as essential workers so that they could work relatively freely during the lockdown. Unlike the state as a censor, it "always plays an important role as a source of information and 'primary definer' of news (Hall et al., 1978), with enormous influence on the agenda and framing of public issues" (Hallin & Mancini, 2004, p. 44). The state being the means of society for dealing with issues of national and public interest, this cannot be otherwise. In summary, the region is characterised by strong guarantees for the freedom of the press and no state-ownership of media. Press subsidies and public funding of PSM do not threaten but ensure the diversity of media offerings. The watchdog function is increasingly legally recognised but needs to be developed further.

8 The Internet Shifts the Paradigm

The era of traditional twentieth century media is coming to an end. The numbers so far indicate that TV viewing time reached its climax around 2010, while the number of commercial stations, in a kind of optimistic delay, peaked around 2015 (see above). Meanwhile radio use remained fairly resilient and was complemented rather than replaced by podcasts. The press market had started its decline already in 1990, and the drop in circulation accelerated significantly from around 2005. The decisive factor in these developments is, no doubt, the Internet or, more specifically, not the Internet as such but a phase in its development that started at the beginning of the twenty-first century and is characterised by mega-platforms like Google, Facebook, Amazon and Netflix.

Broadband Internet, as a prerequisite for using these streaming platforms, has only started to spread from 2000 and is now pervasive across the region. It was available at 90% of households in Belgium and up to 97% in the Netherlands in 2020 according to data from EAO (Fig. 4).

Even more astonishing is the proliferation of mobile broadband connections. The first digital mobile telephony network in Germany launched in 1992. In that time, the first tranches of the "digital dividend" of spectrum no longer needed for broadcasting were auctioned to mobile carriers. In 2000, the ITU selected UMTS as standard for the third generation, allowing for transmission rates of up to 384 kbit/s. Internet-connectable smartphones appeared in the late 1990s but only saw their breakthrough in the mass market with Apple's first iPhone in 2007. Take-up of mobile connectivity started from essentially zero in 2007 and exploded in only 10 years to the point where, with the exceptions of Belgium and Germany, each citizen in the region now has more than one connected mobile device (ITU, n.d.).

As for the next generation of wired transmission technology, the incumbents lag behind the new entrants to the EU market. When after 1990 telcos started to roll out connectivity in the new member states in Eastern Europe, they laid glass fibre from the start, while in their former state monopoly markets in the region, they try to make the most of their legacy copper networks and shy away from investments. This inertia of the telcos in the Northwestern European countries leads to most of them

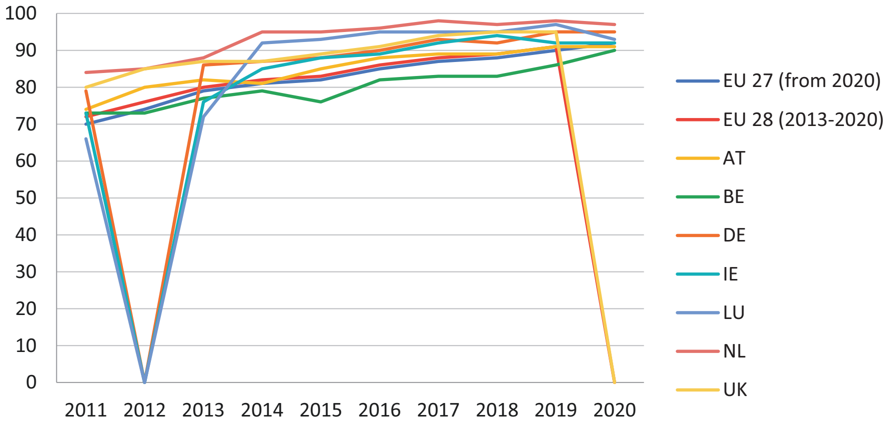

Fig. 4 Percentage of households with broadband Internet (%). Source: European Audiovisual Observatory, 2011–2020. Compilation: Eumeplat Project

being at the end of the line in fibre among 39 OECD countries (OECD Broadband statistics).

8.1 Platformisation of the Internet

With the centralised server-client platforms which came to dominate much of the Internet's activity in the early 2000s, social dialogue became centralised on global intermediaries like Facebook (2004), YouTube (2005, acquired by Google in 2006), Twitter (2006), Tumblr (2007), WhatsApp (2009, acquired by Facebook in 2014) and Instagram (2010, acquired by Facebook in 2012).

Social platforms do not provide content themselves but create feedback loops among their users, which is as well the case for search engines, as they provide an algorithm that grades a website by the number of pages and the importance of those pages that link to it. What became Google (1998) is therefore not based on artificial intelligence but on data analysis of the sum of dispersed human decisions. This approach proved so successful that Google search became a central gateway for navigating the Web for most of its global users, an infrastructural service much like a public utility.

A study by Dachwitz and Fanta recounts how Google has distributed more than half a billion euros to major European news companies since 2013. Their conclusion is "Google is the world's biggest patron of journalism" (Dachwitz & Fanta, 2020, p. 11). Since this battle over the new publishers' right was lost, Google's funding now serves to tie media organisations more closely to the company's product ecosystem of analytics and advertising. Google is out to become the dominant "operating system" for digital journalism (ibid. 91).

As Google, like all so-called social platforms, is free to users, its business model is built on advertising. An entire ecosystem of platforms and ad tech companies emerged that is quite different from the world of offline media advertising but has a strong impact on the business models of the legacy ad financed media. Data profiles are compiled of individual users' preferences, choices and behaviour and auctioned to advertisers in real time whose intended target group they match (Ryan, 2018). The legacy media cannot compete with these new forms of targeted advertising and increasingly lose their ad revenues.

The use of the Internet has been growing since 2000. Watching TV and on-demand video has also continuously gained in popularity across the region, even more so than using social media (European Commission, Eurostat, n.d.).

The 1990s superhighway vision promised to bring "500 TV channels" to the homes (Dennis et al., 1994). And in a sense, this came true. Video did not kill the radio star (The Buggles, 1979), but online video seems set to replace ever more time spent on linear broadcast TV. Two services can be singled out: One is the social video-sharing platform YouTube, launched in 2005 and acquired by Google in 2006. The other is Netflix, founded in 1997, initially to provide DVD rental by mail. In 2007, Netflix started its video on demand (SVoD) service. 2012 it expanded to Europe, first in the UK, Ireland and Scandinavia. The Netherlands followed in 2013, and Germany, Austria, Belgium and Luxembourg in 2014. Amazon launched its OTT SVoD service Prime Video in 2006. Apple started movie rentals in the iTunes Store in 2008. YouTube Premium followed in 2014.

The video streaming market in 2020, according to Statista data, in Germany was divided between Amazon Prime and Netflix (with 40% each and Maxdome, Sky Ticket and YouTube Premium 5% each) (Statista, 2021: 61). In the UK, Netflix (35%) is ahead of Amazon Prime (25%), followed by NowTV (10%) and Youtube Premium, Sky Ticket, Hulu, HBO and DisneyLife 5% each (ibid. 62). Based on company information, Statista reports that in 2021, Netflix had 158 million paying subscribers in over 190 countries.

9 Trust in the Media

"Trust" has become an important metric in public discourse. Even if this is a fluid concept, the comparison of trust surveys over time gives an indication of trends. The EBU in its Trust in Media 2020 report (based on Standard Eurobarometer 92) finds that radio has a positive trust index of 21, while the written press stands at −1 and the Internet at −23 followed by national parliaments and governments, whereas political parties (−57) are trusted even less than social networks (−45) (EBU, 2020b, p.13).

The composite trust in media index of 2019 shows that Luxembourg, Germany and the Netherlands were close to the EU28 trust average. Ireland was mid-field. Belgium and Austria were at the high end of high trust and low in distrust. The UK was at the end of the line not only in the region but in the entire EU with the lowest level of high trust (7%) and highest distrust (60%) (EBU, 2020b). Trust in the press was high throughout the region, with medium trust in Ireland and again no trust in the UK (EBU, 2020b: 38 f.). Trust in radio was high throughout, except in the UK where it was only medium high and had decreased by more than 10 points between 2014 and 2019 (ibid. 32). Trust in PSM, particularly PSM news, was highest in the Nordics, the Benelux states, Central Europe, Ireland and the UK (ibid. 17). With the exception of the BBC, the UK trusts neither its national news nor its newspapers or TV.

The reason for eroding trust in the media is a topic of broad research. There is some evidence that this is not driven entirely by delusions of conspiracies but also by reports of actual threats against journalists, interference with their work and political pressure on PSM. The World Press Freedom Index strongly correlates with the level of trust in a country's broadcast media. "The strong correlation suggests that in the European context, citizens' trust in radio and TV is intertwined with a free and independent news media landscape" (EBU, 2020b, p. 14).

Reporting on the results of the Reuters Institute Digital News Report survey 2020, which showed that trust in the news has fallen in most countries since 2015, Richard Fletcher concludes that "within our community there's no real consensus on why this has happened or what can be done about it". A closer look at the data provides a more differentiated picture: In 10 of the 18 countries, trust in news has indeed declined, in Germany from 60% in 2015 to 47% in 2019 and in the UK from 51% to 40%. But in the other eight countries, it has either increased or stayed the same. In search for explanations, Fletcher points to recent comparative research that finds that media trust cannot be analysed in isolation but is connected to political trust, polarisation or even a more general disenchantment with social institutions (e.g. Hanitzsch et al., 2017; Newman & Fletcher, 2017).

The crisis which came with the COVID-19 pandemic and the lockdowns amplified right-wing, populist movements that had grown since the 2010s. Their spokespeople now claim that the virus is harmless but used by an "elite" as a pretext to foment fear, abolish fundamental rights and establish a dictatorship. By now, up to a third of the population tends to believe in dark powers that control world affairs. They no longer trust the government, science and media and get their information from alternative media that spread "alternative facts".

Social media platforms like YouTube, Facebook, Twitter and Telegram are crucial for publishing and sharing of alternative media. But they have also come to dominate online information, news consumption, debate and advertising in general. In fact, platforms have become a focus of EU concern in various ways since the beginning of the century. These have led to regulations against hate crimes, terror propaganda, disinformation and child abuse material. The EU, although still acting within the frame of competition regulation, tries increasingly to address these harmful developments. The 2019 Copyright in the Digital Single Market Directive strengthened copyright enforcement on user-upload platforms by mandating upload filters and introduced a new ancillary press publishers' right in Europe. The 2018 Audiovisual Media Services Directive (AVMSD) expressly covers video-sharing platforms with rules for the protection of minors and against criminal offences, terror and hate.

10 The Northwestern European Media Model in Comparison

The aggregated data from our study confirm the existence of a cluster of countries with similar characteristics that Hallin and Mancini (2004) termed the Democratic-Corporatist model of media systems. Particularly PSM and the role of the state in ensuring the freedom of the press and the diversity of media remain strong throughout the seven countries of the Northwestern European region.

In this chapter, we have argued that the UK and Ireland with their strong PSM and polarised press belong to the Democratic-Corporatist rather than the Liberal Model. This has been confirmed as well. The UK remains somewhat different, though, in that it was at the forefront of the neoliberal shift. It had the highest number of commercial radio and TV stations in the region, peaking in 2010, and in the same year also the highest daily TV viewing time (242 minutes). The UK also shows by far the highest number of online-only news sources and the most dramatic drop in ad revenues of newspapers, while it has the highest share of ad spending on the Internet (65% in 2019). While citizens in the region trust their national media most of the time, the UK has the lowest trust in media in all of Europe. Brexit and the pile of lies it was based on suggest itself as explanation. The only exception still trusted in the UK is the BBC.

Austria's classification in the Democratic-Corporatist model has been called into question, favouring to place it in the Polarised-Pluralist Model of the Mediterranean countries instead. In our Region Report, we have argued that characteristics like high journalistic professionalism, decreasing political parallelism and an inclusive, regulated press market convinced us to keep Austria in the Democratic-Corporatist group. The data review confirms this decision while also showing some peculiarities. Together with Flemish Belgium, Austria is the only country in the region where TV viewing time continued to increase over the 30-year period. Together with Ireland, it is the only country that saw a significant drop in PSB TV viewership share. And finally, together with Belgium, Austria shows the highest levels of trust in media.

11 Conclusions

The seven countries of the Northwestern European region have a common past and share many of their traits and challenges. The press is in dire straits, still searching for sustainable business models in the digital environment. PSM are under increasing pressure, their legitimacy called into question by neoliberal forces, while right-wingers attack the trust in traditional media all together in order to market their own. Media concentration, influence by non-media capital and financialisation increase.

Political affinity parallelism in the region has proved beneficial to both politics and press and meets the expectations of the audience. The audience, at least in Germany, would like journalists to be more opinionated than those themselves see fit (Loosen et al., 2020, p. 7). As long as societies are organised as representative democracies, political parties and the state will be closely linked with media—as sources of information, as objects of reporting and as "primary definer" of news.

The social democratic or dirigiste tradition of the region manifests itself in a larger role of the state. Freedom of the press was originally freedom from the state. With PSB the notion emerged that it is the positive duty of the state to create a space where freedom of the press is facilitated in material reality. Today the state serves to protect against physical attacks of journalists, to keep concentration at bay and as an enabler facilitating a diverse public sphere. Funding has started particularly for regional and local journalism, investigative journalism and innovation. The debate on how to support a public infrastructure for the digital European public spheres and achieve technology and data sovereignty has only just begun.

The landscape of media and politics has become more complex and confusing. Building on Hallin and Mancini's comparative models, Esser and Pfetsch (2020) propose to develop it further with the concept of a "political communication ecosystem" in which political communication is created, shaped and disseminated among actors from the political system, the media, industry, civil society and the public at large. Their approach allows to address a desideratum in Hallin and Mancini's work, the question of discursive power which here refers to controlling the flows of information in this ecosystem. As we have seen, Hallin and Mancini's pioneering comparative models have already brought forth a whole wealth of research following in their footsteps (cf. Hallin & Mancini, 2017). It continues to inspire research and enrich our understanding of the systems of media and politics.

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