

The Media in Eastern Europe



Dessislava Boshnakova and Desislava Dankova

Abstract Media systems are always in the process of change. Countries in Eastern Europe have similarities, but at the same time present major differences. Analysis indicates that press freedom, foreign ownership, political parallelism, and the strength of public service broadcasting have a strong correlation. Analysis indicates that press freedom, foreign ownership, political parallelism, and the strength of public service broadcasting have a strong correlation, even though significant differences exist among countries. Thus, it is difficult to argue for a unique type of Eastern European media system.

Overall, the historical background of political parallelism and advocacy journalism in Eastern Europe is rooted in the legacy of the communist era, where the media was used as a tool of the state to control the flow of information and promote the government's agenda. Despite the fall of communism and the transition to democracy in many countries in the region, these practices have persisted in some cases.

Media systems in Central and Eastern Europe cannot be classified as a single model but can instead be divided into three different types. Romania, Hungary, and Bulgaria have high levels of political parallelism and low levels of press freedom. Central media systems (Czech Republic, Croatia, Poland, and Slovenia) have strong public service broadcasting and low levels of foreign ownership. Northern systems (Estonia, Latvia, Lithuania, and Slovakia) have the highest levels of press freedom, the highest levels of foreign ownership, and the lowest levels of political parallelism.

Keywords Central and Eastern Europe · CEE · Transformation · Civil society · Media systems · Parallelism · Clientelism · Instrumentalization · Mass media · Politics · Newspaper circulation · Public broadcasting · TV viewership · Listenership · Social media · Internet · Digitalization

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1 Introduction

Taken together the media systems of EU country members Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Slovenia, as well as those of Albania, Bosnia and Herzegovina, Kosovo, Moldova, Montenegro, Northern Macedonia, Serbia, and Ukraine, form what we usually consider the Eastern European media region. The group is large and not at all homogeneous; however the media systems of these Eastern European countries share characteristics which set them apart from the rest of Europe, which is largely due to similarities in their paths of political and social development in the last century. For the purposes of this chapter, we examine the EU country members only.

Media are an integral part of democracy. The state of the media environment is strongly connected to the state of democracy in each country. The process of transition from communism to democracy includes deep changes in media market and policy. Along the process of democratization and accession to the European Union, free press is one of the prerequisites. The transition of the ex-communist Eastern European countries followed a largely similar pattern and timeline, and their admission to the EU, known as the “Eastern Enlargement,” happened in three phases between 2004 and 2013.

The transition period is important as political changes affected dramatically the media markets in the post-communist countries. The regime changes after 1989 put an end to the monopolistic political control of the media. Freedom of press was proclaimed and most of the media were privatized. A gradual and accelerating evolution towards more democratic and freer media was anticipated to take place across the region, and to a great extent that is what has happened. Nevertheless, those who expected rapid development of free media were often disappointed. The new political elites and their business clientele have continuously tried to limit the autonomy of the media. Most significantly, in the past decade, press freedom in many Eastern European countries has increasingly come under threat.

Unfortunately, the COVID-19 crisis has worsened the status of the free press worse over the world, and Eastern Europe was no exception. Introducing “emergency legislation,” an alarming number of governments in Central and Eastern Europe have used the ongoing health crisis as a pretext to restrict the free flow of information and clamp down on independent media (International Press Institute, 2020). The chapter has the goal to lay out facts, point out roots, and outline patterns of development of the Eastern media model.

2 The Media Market

2.1 Ever-Decreasing Levels of Newspaper Readership

Despite being one of the oldest and widespread forms of media, the printed press market has shrunk globally during the past decades. Digitalization and the subsequent changes in the media environment have left the press media struggling to find a viable business model. Although data about newspaper sales in Central and Eastern Europe (CEE) in recent years are incomplete, the trend is shown on Fig. 1. The biggest decrease in sales and ergo in readership took place between 1995 and 2000.

The most impressive, 72% decrease in newspaper sales is observed in Estonia between 1990 and 1995. In the Czech Republic, which has some of the highest levels of newspaper circulation per capita, newspaper sales dropped by 60% in the decade 1990–2000. In Poland and in Slovakia, 53% and 58% decreases, respectively, resulted in just 5 years between 1995 and 2000. It can be argued that the main reason for this dramatic shift has been the readiness with which readers embraced the emergence of the digital sources of information—online news portals on the one hand and social media networks on the other hand. This has proved to be the biggest challenge print media faced—the pressing need to reinvent themselves and find efficient ways to transit to digital and still play the important role they had as the fourth pillar of democracy. At the beginning of the new millennium, with readers moving to digital sources, news publishers in CEE were forced to start building their online presence. In contrast to the new “native digital” news outlets, traditional publishers were desperate to avoid as much as possible cannibalization of their core sources of revenue, i.e., sales of print products and advertising income, while trying

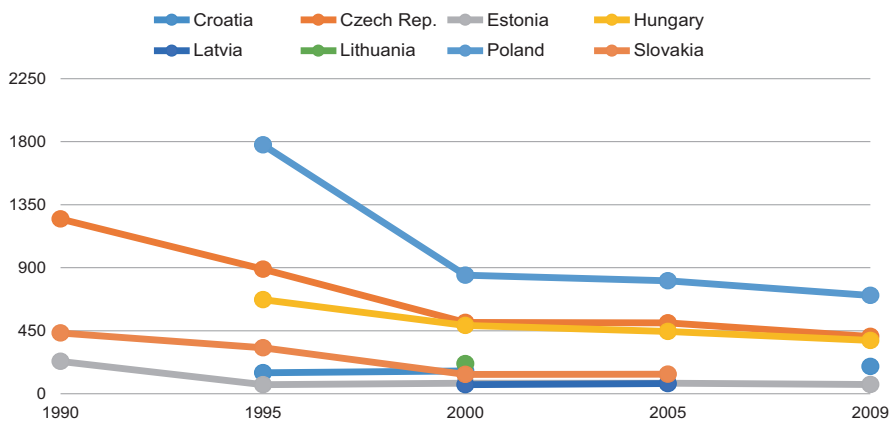


Fig. 1 Number of annual newspaper sales (in millions of copies) (data not available for Bulgaria, Romania, Slovenia). Source: World Association of newspapers—World Trends Reports 1991, 1994, 1996, 1997, 2002, 2007, 2011. Compilation: Eumeplat Project

to “migrate” their readers to and keep them on their own online platforms. It is worth noting that currently it is still the legacy media companies, who are behind the most preferred online news. Nevertheless, written press readership is in steady decline across Europe with the number of people reading at least once a week, standing at 51% in 2021, a decrease by 22% since 2010 (Eurobarometer, 2020/2021). In line with this trend, the daily average circulation in most of the CEE countries is dropping, and that is a clear mark of the situation of print media: people are reading news, but ever less on paper (Fig. 2).

Weekly newspapers have presented a broader readership than dailies, and that is a fact for all countries in the region, except for Estonia until recently. Weeklies do not compete with digital media on the grounds of speed in delivering the news, as they offer readers a deeper analysis and more details. Slovenia and Estonia, the two maintaining the highest standard of living countries in Eastern Europe, display similar levels of daily and weekly readership. At the other extreme, the poorest country, Bulgaria, maintains four to six times difference in favor of weekly readership for the whole examined period. Overall data for the entire region show 30 + % readers of weekly written press, within a clear downward trend.

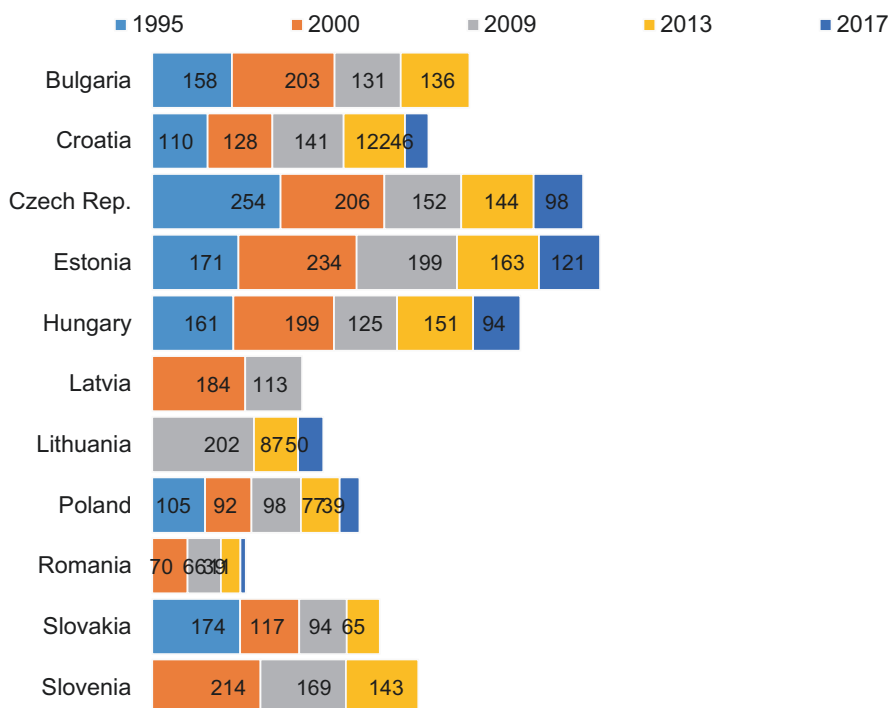


Fig. 2 Dailies’ average circulation/adult population (copies per thousand). Sources: World Association of newspapers—World Trends Reports 1991, 1996, 1998, 2002, 2010; *Total paid-for and free dailies, total average circulation (000)—World Press Trends 2014, WAN-IFRA, 2014. Compilation: Eumeplat Project

In the CEE region, it is arguably the countries with poor records of freedom of press that display the highest percentage of people who claim to never read written press—Romania (44%), Hungary (38%), and Bulgaria (33%). The countries with the smallest proportion of non-readers are Slovenia (15%), Lithuania (11%), and Estonia (9%). And even though countries like Estonia and Lithuania in the last years actually show a decrease in non-readers, the overall clear-cut trend for the region (as for the whole of Europe) is one of steady increase of the percentage of people who do not read written press at all (Eurobarometer 2020/2021).

On the face of dropping circulation and readership, the numbers of newspaper titles seem to be following a much less steep path of decrease with Czech Republic and Estonia actually seeing a threefold growth (World Association of Newspapers, 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2011) (Fig. 3).

As readership and sales decrease, so do advertising revenues. Ad expenditure in written press has been dropping more than half in most of the countries in the region. For instance, 51.5% of all ad spend in Latvia in 1995 was in press. By 2005 that percentage has dropped to 29%. The advertising market is very dynamic, and newspapers and magazines are in direct competition for expenditures with global social platforms like Facebook, Instagram, Twitter, etc.

The COVID-19 crisis made the situation even more complicated, since despite people consuming more news, advertising spend dropped. Some scholars called the situation a paradox, as media had larger audiences but less advertising. According to a 2020 forecast by Dentsu International, a marketing communications company, “overall, 2021 global ad spend is forecast to remain below the pre-pandemic level of US\$ 600 billion recorded in 2019” (Dentsu International, 2020). According to the same forecast, the share of press in global ad spend will continue to drop in 2022 and beyond. With that tendency publishers are scrambling to find working business

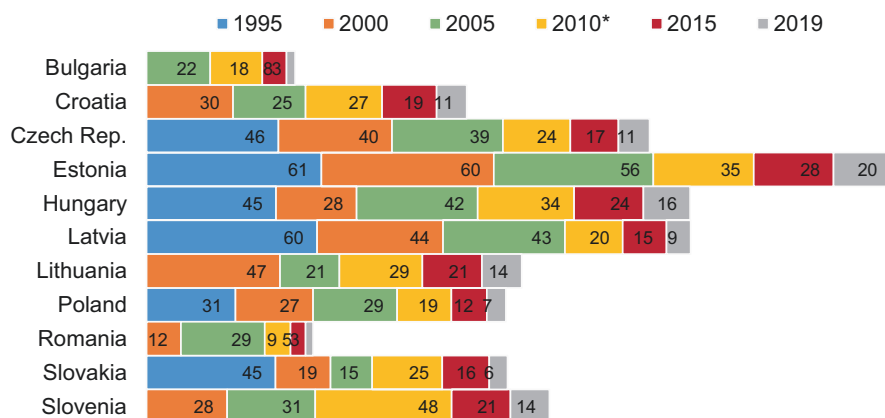


Fig. 3 Press advertising expenditure (newspapers and magazines) (%). Sources: World Association of newspapers—World Trends Reports 1991, 1994, 1996, 1997, 2002, 2007, 2010, 2015, 2017; 2019/*Newspaper advertising expenditure (US\$, million, current prices)—World Press Trends 2014, WAN-IFRA, 2014. Compilation: Eumeplat Project

models to successfully sell their content to readers and advertisers—this time online and more precisely—on mobile devices.

Trust regarding the media is another important question. About half of Europeans now trust the written press. Over the longer term, and in the CEE region as well, the trend is of increasing trust in the written press (+9% over the decade to 2021) (Eurobarometer, 2020/2021). Legacy press publishers tend to transfer the trust in their print content to their online content. “Many publishers across the world have reported record traffic to their digital platforms during the pandemic, as people actively sought accurate and reliable information” (World Association of News Publishers, 2020). It can be argued that the major crisis situations of late (especially the war in Ukraine) have further affected this pattern in CEE. We can assume that no media in the region today can survive on the market without online presence, but that is especially crucial for legacy press.

2.2 Radio: The Most Trusted Medium

In Europe overall radio listening time is in steady decline in the last two decades across all age groups, but particularly among young people, where the average daily listening time is less than 1 1/2 hours. The radio weekly reach is solid with app. 84% of Europeans reached through this medium (EBU, 2022).

Radio continues to be the most trusted medium. 58% of European respondents to a Eurobarometer survey (2020) say they “tend to trust” radio, compared with 35% of respondents who “tend not to trust” it (Eurobarometer, 2020/2021). Within the CEE region, trust in radio is growing in Estonia (77%, +15 percentage points), Czech Republic (72%, +10), Latvia (70%, +5), Lithuania (66%, +4), and Slovenia (58%, +6) and decreasing in Slovakia (60%, -4), Poland (52%, -2), Croatia (48%, -2), Romania (48%, -13), Bulgaria (43%, -8), and Hungary (41%, -5) (Eurobarometer, 2020/2021).

There is a tendency of decrease in the numbers of enterprises operating as radio broadcasters across the European Union, and that is visible in the CEE region as well (Eurostat, 2020). Among the EU member countries with highest numbers of radio enterprises in 2017, Hungary boasted 310, which is still impressive compared to Estonia (10), Slovakia (16), or Lithuania (23). Compared to population size, the number of radio broadcasters per million inhabitants also varies greatly between the countries. The highest ratios were recorded in Slovenia (76), Croatia (38), and Hungary (32), while the lowest ones were observed in Poland and Slovakia (3) (Eurostat, 2020). Slovakia and Slovenia are the only two countries with positive change rate in the period 2010–2018.

In 2017, in the EU, radio broadcasting enterprises employed 14% less people than in 2013 (Eurostat, 2020). The tendency is visible in Eastern Europe too, where Poland is the only country in the region with a positive change rate in the period 2010–2018. In Slovakia, for example, just 63 persons were employed in the radio broadcasting sector in 2017. The number of persons employed as a percentage of

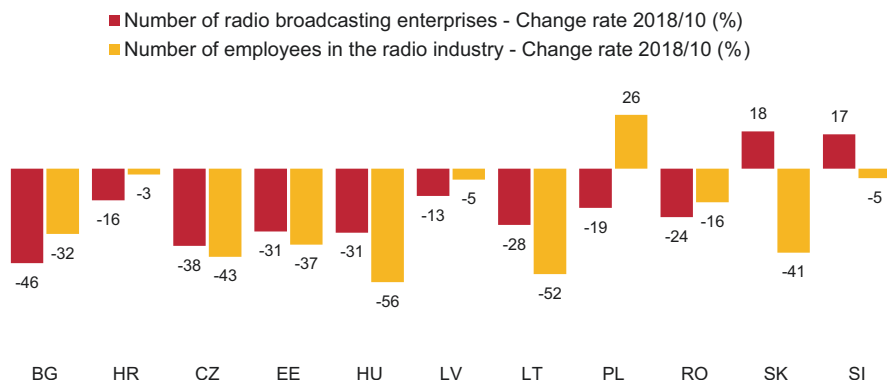


Fig. 4 Change rate of number of radio broadcasters and employees (%). Sources: Eurostat (2020). Annual detailed enterprise statistics for services (NACE Rev. 2 H-N and S95) [sbs_na_1a_se_r2]. Retrieved from: <https://appsso.eurostat.ec.europa.eu>. Compilation: Eumeplat Project

total employment is low in all EU member states and close to zero in the Czech Republic and Slovakia (Eurostat, 2020). It is in Slovakia, Lithuania, Hungary, and Czech Republic that the decrease in the numbers of people employed in the radio industry outpaces the rate of decrease of the number of radio broadcasting enterprises (Fig. 4).

According to Dentsu International's 2021 report and forecast, the global ad spend in radio as a percentage is not declining at present and a similar performance is going to be presented in the near future (−0.8 in 2019, −10.1 in 2020, +4.7 in 2021, and + 1.6 in 2022). The share of global ad spending remains nearly stable—6.0% in 2019 to 5.5% in 2022 (Dentsu International, 2020). In all CEE countries the radio advertising market remains stable and with no big changes. Despite listening time steadily declining, radio remains a trusted medium, and that is reflected in the advertising spend (Fig. 5).

2.3 Television Is the Dominant Medium

The CEE region's television landscape is very diverse and has undergone some major changes in the last three decades. Television has its firm roots in the communist period as the main socially and politically valued medium. For East Europeans it is the mass medium that has come into existence in exactly that period. Hence continuities from that period are important. During the transition from state-controlled broadcasting to a free market media environment, privately owned television channels have appeared, which, together with proliferating cable and satellite television originating from the West, have become an important part of the media universe and thus have pushed public service broadcasting into an evolution of its own.

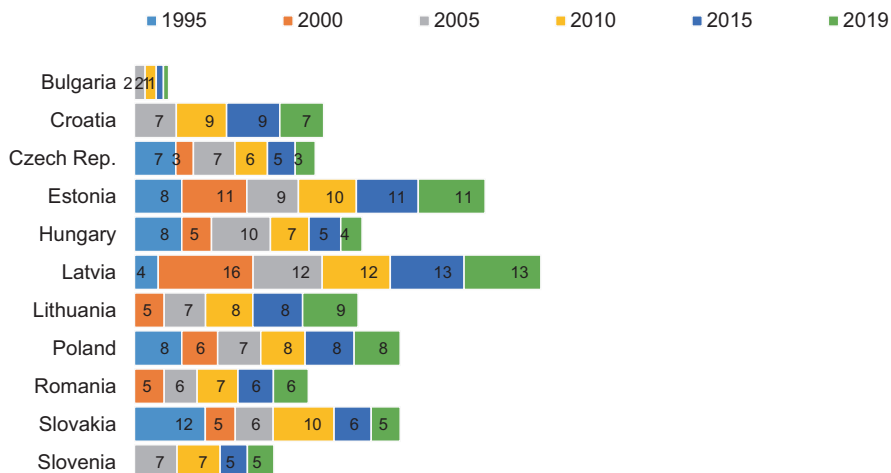


Fig. 5 Radio advertising expenditure (%). Sources: (a) European Media Handbook (1997), (b) European Media Handbook (2004), (c) European Audiovisual Observatory, (d) Data for 2019 retrieved from Statista (2022a, 2022b) MAR-AD Advertising expenditures by media (2001–2019)/ Source: Warc / © European Audiovisual Observatory/Yearbook 2020. Compilation: Eumeplat Project

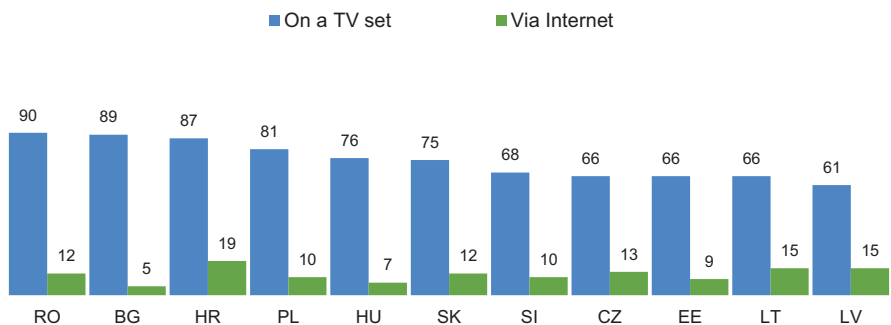


Fig. 6 Share of population watching television every day or almost every day in 2020 (%). Source: Standard Eurobarometer 94 Winter 2020–2021, Media use in the EU. Compilation: Eumeplat Project

TV viewership continues to be at high levels, with more than eight in ten respondents watching every day or almost every day (Eurobarometer, 2020/2021). Although generally declining, the rate is very slow (app.- 3%, over 10 years), with a growing share of viewers transitioning to digital platforms, but nonetheless remaining TV viewers. Viewing rates and habits vary across the region. The highest scores are in the Balkans, with Romania leading the pack. At the other end are the Baltic countries, with much more moderate viewing rates. It is worth pointing out that in Hungary, TV has lost significant audiences. It can be argued that this is the result of the government’s heavy-handed meddling in media over the last decade, resulting in lower levels of trust among a large portion of the population (Fig. 6).

Private TV channels claim the bigger share of TV viewers with over 50% audience reach. Romania is leading with 71.8% daily audience, while the biggest decrease is in Hungary, where in the period 2005–2019, private TV channels have lost audience and fell by 23.4%. At the same time, Hungary had the biggest daily audience of foreign channels: 27.4%, a 19.5% growth, which again is arguably the result of dropping levels of trust in domestic media sources.

During the period 2005–2015, most of the Eastern European countries joined the EU broadcasting market, and new players appeared on stage. There had been a remarkable growth of commercial channels. The number was stable in most countries during the period 2015–2019. There has been a small decline in Croatia. In Slovakia, Slovenia, Hungary, and Bulgaria, there has been practically no change, whereas in all other countries, we see a slight increase in the number of channels. The biggest increase was in Romania with eight new channels in 2019. Poland has the biggest portfolio, comprising 93 commercial channels. Per capita it is Slovenia leading, with 83 channels entertaining a population of 2.1 million (EAO, 2006, 2011, 2015, 2019).

The CEE region historically has been dominated by local players and linear TV. As Digital TV Research mentions, major US players have entered the Eastern European market, especially in regard to SVOD platforms (Easton, 2021). It's worth noting that HBO, the famous cable TV network, first set up a European operation in Hungary in 1991. From there, in the following years, it was rolled out across the CEE region and later to other parts of Europe. Currently cable TV is still the most viewed form of TV in the region. The trend is one of decreasing or stagnating numbers of subscribers of cable TV, apart from Romania, where a significant increase has been observed. But in some countries, particularly in Bulgaria and Slovakia, the number of subscriptions has dropped by half (EAO, 2016, 2020/2021). Currently, the number of digital subscribers is growing but is still below that of analogue, which continues to shrink. The forecast is for the total number of pay TV households to reach 74 million by 2027 compared to over 80 million in 2018. But while the number of digital subscribers will grow, analogue cable will probably completely disappear from the market (Statista, 2022a, 2022b).

Government-funded public TV is highly popular throughout Europe, and CEE makes no exception. During the past decade, audience shares for public service TV have generally ranged between 30 and 40%, depending on the country. All countries in the region have at least 2 public channels, between 4 and 6 in most countries, with Poland being the absolute leader with 12 public channels in 2019 (EAO, 2021).

Public TV stations are largely government-funded. On average the state support for the public audiovisual media sector in the region has grown from 70% to 81% between 2008 and 2014. Public media in most countries receive over 90% of their funding from their governments. This percentage is the lowest in Poland, but it has been growing in the past years (EAO, 2016). However, comparing the proportions of government funding gives us just an indication of the real value of state support for PSB in the different countries. It takes a more complex comparison model, taking into account the specific differences in each country, the levels of advertising

revenues, the existence of license fee system, etc., to establish a clearer view of the situation.

Five countries in CEE currently apply a license fee system for public TV (Croatia, Czech Republic, Poland, Slovakia, and Slovenia). Data shows that, with the exception of Croatia, the fees are under the EUR 121 average for EBU countries (EBU, 2020).

There is scarce coherent data regarding the advertising revenues of public broadcasters in the different countries. But it has been noticed that, for example, the economic crisis of 2008–2010 and the resulting drop in advertising expenditure affected much more severely PSB, than the commercial channels.

Relevant data show that in more than half of the countries of the region, the level of TV digitalization is over 50%, whereas in Slovenia it is 90.3%. It should be noted that digitalization is one of the processes that has started at the same time in nearly all EU countries, regardless of the market size. Without any doubt the COVID-19 crisis had an accelerating effect on all on-demand content services, and now TV landscape is gradually being transformed by the advance of video streaming solutions. “The Eastern European OTT market is set to triple by 2025,” claims a new report (Easton, 2020). The market is changing, and thanks to the ongoing adoption of connected TV, development in digital video delivery, and growing demand for customized content, viewers in many countries now opt for non-linear streaming options. While there are definite regional differences in the availability and usage of digital video content, there is a visible trend towards VOD content in Eastern Europe, too. The growth in revenue is remarkable in all countries, and the highest is observed in Poland—the increase is almost 15-fold (Statista, 2022a, 2022b).

Bulgaria is the only country in the region where TV advertising expenditure is above 70%. In 2019 it's share increased to 86%. The data about Bulgaria indicates the bad situation of the press in the country, as nearly all advertising money are directed to TV. In all other countries, the percentage allocated to TV is around 50% of the market. Estonia and Hungary are the two countries with the lowest portion of TV advertising, below the average for the region. TV advertising volume is dropping in most of the countries of the region, except for Bulgaria, Romania, Slovakia, and Slovenia. TV stations will have to find ways to compete against the new streaming platforms, which attract ever more the attention of advertisers. According to Dentsu International, the share of Digital in global ad spend will grow from 42.8% in 2019 to 51.2% in 2022 (Dentsu International, 2021). From experience, we know that global trends in media advertising will affect all countries sooner or later (Table 1).

Television is generally a trusted medium in 7 out of the 11 CEE countries, where more than 53% of respondents “tend to trust” TV according to Eurobarometer (2020/2021), compared to less than 47% who do “not tend to trust” the medium. The situation is reversed in Poland, Hungary, Croatia, and Slovenia.

The television landscape in the CEE region is diverse and dynamic. Revenues of the TV market have remained relatively stable, and even though TV advertising has experienced a visible decline due to the COVID-19 crisis, television remains one of the leading sources of news and entertainment. The number of viewers has grown,

Table 1 TV advertising expenditure (in million EUR & %)

GEO/TIME	2010		2011		2015		2019		% Change 2019/2011
	M	%	M	%	M	%	M	%	
Bulgaria	240,5	74	260,7	74	371,7	81	690,5	86	12
Croatia	107,6	47	105,9	50	97,3	51	103,5	44	-6
Czech Rep.	358,9	39	376,3	41	352,4	36	584,1	32	-9
Estonia	21,1	32	22,9	32	25,4	30	26,3	27	-5
Hungary	198	33	214,1	35	185,1	30	241,7	28	-7
Latvia	-	36	31	45	33,3	43	34,9	41	-4
Lithuania	-	42.6	47	48	46,1	46	52,3	44	-4
Poland	-	51.5	920,8	46	984,6	41	1037,8	37	-9
Romania	-	65.2	213,6	53	216,2	67	308	64	11
Slovakia	-	68	229,5	47	315,3	49	805,4	68	21
Slovenia	-	31.9	72,5	38	136,7	59	179,7	58	20
		47.3%		46%		48,5%		48,1%	

Source: European Audiovisual Observatory, Yearbook 2015, 2016, 2020. Compilation: Eumeplat Project

and despite the emerging competition from online streaming services, viewership is high. However, while TV penetration rates keep rising, traditional TV consumption is slowly declining as viewing habits and preferences continuously evolve.

2.4 *Catching up with the Rest of Europe on Broadband*

The digitalization of the ex-communist countries has presented a considerable growth in the last decade but is still trailing the process on the rest of the continent. The number of UHD ready broadband subscriptions in Eastern European markets has risen by 286% over just 3 years from 3.7 million in 2013 to 14.2 million in 2016, and now more than 25% of CEE households have subscribed to fixed broadband services with average connection speeds faster than 15 Mbps (Gaber, 2017). Moreover, the connection speeds have been rising constantly over the recent years, with Romania, Czech Republic, Latvia, and Bulgaria displaying the biggest growth.

Those four countries have an overall average speed exceeding 15 Mbps. 2020 data from Statista shows the share of households with broadband Internet is below 85% only in Romania, Lithuania, and Bulgaria. Mobile broadband subscriptions have encountered a tremendous growth during the period (2010–2020) in all the countries. Six countries have reached a result over 100 in 2020, and Estonia is the leader in that indicator with 164.8%. Latvia follows with 140.2% and Poland with 124.6%. Hungary has the lowest percentage: 75.4% (OECD Data, 2021). In the following years, those numbers will continue to grow as mobile access to Internet is the preferred way for young people and more people will use 5G. And this is the technical side of the story.

Usage of Internet paints a slightly different picture. 2020 Eurobarometer data shows daily use of Internet varies substantially among different EU member states and in particular among the CEE countries. Estonia is an overall leader in Europe with 98% usage, while Romania is at the bottom with 58%. The Czech Republic and Latvia are also in the top echelon with 96% each, as are Slovenia and Lithuania with 94–93%, respectively. Slovakia is just above the EU27 average with 76%. Poland, Bulgaria, and Hungary accompany Romania at the bottom with usage rates between 64 and 66% (Eurobarometer, 2020/2021). The share of individuals participating in social media networks has nearly doubled in all countries for the period 2011–2020. In 2020 Lithuania had the highest share (74%) in the EU of individuals using social media daily, while Hungary (51%) and Poland (47%) the lowest (compared to EU27 average of 52%) (Eurobarometer, 2020/2021) (Fig. 7).

With more than half of the population using social media, those platforms are becoming ever more important in shaping public opinion. The key competence for responsible use of social media is media literacy, which is in the focus of many EU

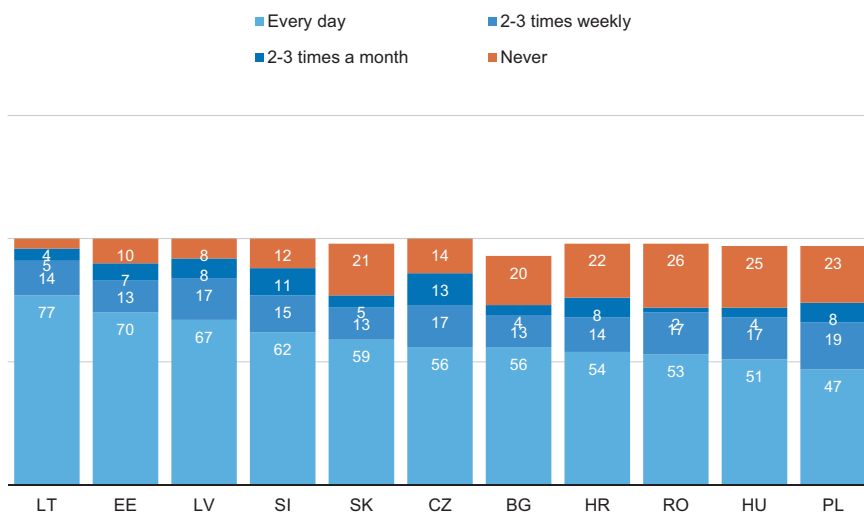


Fig. 7 Share of population using social media in 2020 (%). Source: Standard Eurobarometer 94 Winter 2020–2021, Media use in the EU

surveys. Regarding Eastern Europe, only Estonia (third) is with a top ranking in the Media Literacy Index 2021. The biggest decrease in ranking is registered in Slovenia (−5), Poland (−2), Czech Republic (−2), and Latvia (−2). Romania and Bulgaria are at the bottom of the index in 2021 (Open Society Institute Sofia, 2021).

In the cluster of CEE countries, Estonia occupies a special place. New Yorker magazine has labeled it “The Digital Republic” and has praised its e-Estonia project as “the most ambitious project in technological statecraft today” (Heller, 2017).

3 Is There a Comprehensive Eastern European Media Model? Similarities and Differences

The ten post-communist Eastern European countries we examine here, all made a, more or less, successful transition towards democracy after the collapse of their communist regimes in 1989–1991 and joined the European Union between 2004 and 2013. Freedom of the press was declared, and the vast majority of printed newspapers and electronic media became privately owned. Together, these countries form a presumptive block, featuring a common media system. Nonetheless both similarities and differences are visible between them in terms of their political development and media environment. The group, to which we refer as Central and Eastern Europe (CEE), is not a homogenous one in respect to democratic consolidation, political standards, and levels of economic development. Their media systems operate under varying levels of political pressure, leading to politicization, and economic pressure, resulting in commercialization. In general, the quality of the media in these countries can be considered relatively low. On the one hand, this can be explained with the relatively recent transition from centrally controlled to free democratic media. On the other hand, that is the result of these two negative tendencies (Dobek-Ostrowska, 2016).

The 1990s saw significant changes in the media landscape of Central and Eastern Europe. The transformation of state-controlled media into public service media began, ending the monopoly of state broadcasters and allowing for the emergence of private commercial radio and television stations. Commercial media became the most popular in all countries of the region. Western European investors, who entered the market, introduced many new titles, leading to an increase in the number of political and entertainment publications. The beginning of the new millennium saw a significant rise in the use of cable television, mobile phones, and the Internet. These technological, economic, and other changes in the media and its socio-economic environment led to blurred boundaries between genres and mediums. Many quality newspapers became tabloids, and some public television stations became commercialized. With the opening of geographical and political borders, global contents merged with the local (Jakubowicz, 2007). With the appearance and expansion of new genres, such as talk shows and reality formats, reality and fiction mixed to an extent never seen before, “entertainment” became keyword. New

genres and media redefined the traditional concepts of “politics” and “political communication” (Bajomi-Lázár & Sükösd, 2008). All these changes shaped a profound shift. As Daniel Hallin and Paolo Mancini note:

It is certainly normal to expect that it will take quite a while after a change like that for media systems to be established. It is certain that media institutions will need time to evolve to the point where their relations with other institutions, their place in social structure as a whole are relatively stable. (Hallin and Mancini interview, 2011)

Has a comprehensive Eastern European media model emerged? What is the extent to which CEE media systems should be treated as a homogeneous entity? Before answering this question, it is worth marking briefly what the *differences and similarities* between the different CEE countries are and what they stem from.

The strong historical legacies of the Habsburg and Ottoman empires, as well as the Scandinavian influences over the Baltic region and Poland, suggest base-level cultural gaps between the countries in the CEE region. The Central European countries have historically enjoyed stronger ties with Western Europe, while the three Baltic republics have been exposed for a longer time to the centrally controlled totalitarian Soviet modus operandi. The Czech Republic, Slovakia, Slovenia, Croatia, and the Baltic countries have just recently emerged as new sovereign states; out of former larger formations, Romania is a state of 163 years, while Hungary and Bulgaria, despite being “old” nation states, look back to merely 104 and 144 years of independence in their most recent history. Poland and Romania are relatively big countries, while four countries, Slovenia and the Baltic states are tiny, with population around two million each. Some of the countries (Romania, Bulgaria, Latvia, Slovakia) host large ethnic minorities, which are not necessarily loyal to the country they are citizens of. And that is reflected in the media scene. Romania and Croatia have started their transitions in violence, Czechs and Slovaks have enjoyed a “velvet revolution,” while in most of the countries, the transition from communism to democracy and the free market were negotiated between the old and new elites. The speed and scope of the market and constitutional reforms and the subsequent economic performance varied across the region. Poland and Slovenia managed to grow through the 2008–2010 economic melt-down, while the rest were hit, some of them severely. Slovenia has the highest GDP per capita and approximately three times higher than Bulgaria. Foreign investment in the print media sector is high in Hungary and Estonia, but relatively low in Slovenia or Lithuania. Newspapers in Poland are more prosperous than all other newspapers throughout the region. Again, in Poland, public service broadcasters have a much higher average viewership than in the other countries. Internet use is well above the European average in the Baltic countries, but below average in Bulgaria and Romania. Political and business parallelism seems to be less pronounced in Poland and Slovenia, than in the other CEE states.

The media independence of different countries varies according to the various indexes, with some, such as the Baltic countries and Slovakia, enjoying prestigious rankings while others, such as Bulgaria, Romania, and Hungary, ranking low (Mancini and Zielonka, 2012). It can be argued that a geographically vertical North-South divide is observed, rather than a traditional West-East, with the Baltic and

Balkan countries at the extremes (Castro Herrero et al., 2017). As we can see, these differences stem not only from deep historical background but also from reforms, developments, and influences in the last three decades.

There is a score of distinctive similarities, which we would prefer to review through the prism of Hallin and Mancini's categories and criteria for comparing media systems. These similarities include, without being limited to, politicization of the state; politicization of the media; political and business parallelism; weakness of state structures; weakness of civil society; small and weak media markets; commercialization; clientelism; blurry media ownership; ownership concentration; inconsistent media legislation and regulation; superficial adoption of external models; and disoriented journalistic profession and blurred professional identity (Mancini & Zielonka, 2012). These similarities and differences prompt us to contemplate whether there is unique media system that represents the media landscapes in the region and that we could label as Eastern European.

4 Political Parallelism

We believe the concept of political parallelism (Hallin & Mancini, 2004), which refers to the alignment of the media system with the political system, where media outlets align with specific political parties or ideologies, and the media landscape is divided along these lines and is helpful for understanding the media systems of Eastern European countries. This is because, in the region, media is often heavily politicized, and political and business parallelisms are prominent features. It must be remembered though that the concept, as it has been developed in recent decades of mainstream academic literature, should be applied with caution to the new democracies in CEE, where political parties are neither strong nor stable, leaving room for a variety of interests and individual political figures to influence news media (Mancini & Zielonka, 2012).

Political parallelism and advocacy journalism have deep roots in the history of Eastern Europe. During the communist era, all countries in the region had a state-controlled media system, where the media was used as a tool of the government to promote its ideology and to control the flow of information to the public. This led to a lack of diversity in the media landscape and a lack of independent voices. After the fall of communism in Eastern Europe in the late 1980s and early 1990s, the countries in the region underwent a process of democratization and media liberalization. However, in many cases, the media sector remained heavily politicized, with state-controlled media institutions advancing the agenda of the government and private media supporting particular political parties.

A good example is Hungary, where the media landscape is heavily influenced by politics. State-controlled media outlets such as Magyar Televízió (MTV) and Magyar Rádió (MR) are known to promote the government's narrative and align with the ruling party Fidesz. Private media outlets such as Origo, Magyar Nemzet, and Magyar Hírlap are also known to align with Fidesz. This has led to concerns

about a lack of diversity in the media environment and a lack of independent voices (Polyák, 2019). In Poland and Romania, a similar situation is observed although not to such a drastic extent. In Poland the public Telewizja Polska (TVP) and Polskie Radio (PR), as well as the private publications *Gazeta Polska*, *Nasz Dziennik*, and *Fakt*, are known to support the ruling party Law and Justice (PiS). In Romania it is again public broadcasters Romanian Television (TVR) and Romanian Radio (SRR), as well as private media channels Antena 3, Romania TV, and B1 TV, who follow the government narrative. And there are relevant examples from Slovakia, Bulgaria, and Slovenia. In the Baltic republics, state-controlled media, such as Estonian Public Broadcasting (ERR), Latvijas Televīzija (LTV), and Lietuvos Nacionalinis Radijas ir Televizija (LRT), are considered to be relatively independent, with less government interference. However, there have been concerns about media ownership concentration and political influence in the media. For example, in Estonia, a few big companies own the majority of media outlets, and this has led to concerns about the concentration of media ownership. Additionally, there have been concerns about political influence in the media, with allegations of pressure on journalists and owners to adhere to a pro-government editorial line.

In Eastern Europe, a tradition of advocacy in journalism has been present for many years, particularly during the communist era. Under communism, the state controlled the media, and journalists were expected to promote the ideologies and policies of the state. With the fall of communism, many journalists in Eastern Europe have embraced the advocacy tradition, using their platform to voice their opinions on important issues and hold those in power accountable. Commentary style of journalism, similar to advocacy tradition, is characterized by expressing opinions, analysis, and criticism on various topics, events, and people, rather than impartial reporting of facts. This style of journalism is common in Eastern Europe, where there is a long tradition of political commentary in the press. Some commentators have a strong following and are known for their influential analysis and criticism. However, it should be noted that the situation across the region is diverse and complex, and the different countries have different levels of press freedom, different economic situations, different political regimes, and so on. Therefore, it would be wrong to generalize regarding the situation of advocacy and commentary style of journalism in Eastern Europe.

For example, in Romania, the media landscape is diverse and pluralistic, with many different voices and opinions represented. However, the media sector has been heavily influenced by political and economic interests, leading to a lack of critical reporting on sensitive issues such as corruption. The newspaper *Romania Libera* is known for its investigative reporting and critical commentary on political and economic issues.

In Poland, the advocacy tradition in journalism is strong, with many newspapers and television stations taking a clear stance on political and social issues. For instance, the newspaper *Gazeta Wyborcza* is known for its liberal and pro-democracy stance, while the newspaper *Rzeczpospolita* has a more conservative and nationalistic approach.

In Hungary, as mentioned, the government has been criticized for exerting political influence over the media, which has resulted in a dramatic decrease in diversity of voices and opinions.

In Bulgaria, the media landscape is heavily influenced by business interests, leading to a lack of critical reporting on corruption and other sensitive issues. Still, there are journalists and media outlets that continue to practice impartial journalism and commentary, such as the Economedia newsgroup, which is known for its investigative reporting and critical commentary on political and economic issues.

Some media outlets in Czech Republic have been chastised for their advocacy journalism. The newspaper *Lidové Noviny*, for example, is owned by the billionaire-turned politician Andrej Babiš and has been criticized for its editorial policy that promotes the owner's business interests and political agenda. Similar cases can be found in Croatia with businessman and politician Miroslav Kutle and the newspaper *Večernji List* and in Estonia with Toomas Hendrik Ilves and the newspaper *Eesti Päevaleht*.

5 Instrumentalization of Media

The instrumentalization of media refers to the use of the media as a tool or instrument to achieve specific political, social, or economic goals. This can take various forms, such as using state-controlled media to promote the government's agenda, using private media to promote specific political parties or ideologies, or using media to promote specific business interests. Political instrumentalization of media can occur through censorship, propaganda, disinformation, or manipulation of the news. It can also take place through ownership concentration, where a small number of individuals or companies control a large share of the media market, leading to a lack of diversity in the media landscape and a lack of independent voices. It can also include the use of media ownership and advertising to exert control over the content of media outlets. This practice has been a concern in Eastern Europe, where many countries have a history of authoritarian or semi-authoritarian government and weak democratic institutions. This has led to concerns about media freedom, censorship, and the ability of citizens to access diverse and reliable sources of information. Business instrumentalization of media refers to the use of media as a tool to achieve business objectives, such as increasing revenue, promoting products or services, or shaping public opinion. In scholarly literature, the concept of business parallelism highlights the influence of business interests on the media and the overlap between the media, politics, and business. Media owners are typically businesses or wealthy individuals with connections to political institutions who attempt to influence political decision-making. This fluid and ongoing overlap of various functions and interests is present in Central and Eastern Europe. Colin Sparks (1998) has noted the existence of close ties between politicians, business leaders, and the media in post-communist countries, referring to this phenomenon as the "overlapping between economics, politics, and the media" or "political capital."

In Central and Eastern Europe, instrumentalization of media happens in different forms and in different degrees. The following are a few examples, illustrating the situation in several CEE countries:

Poland's media landscape features examples of ownership concentration, with the media group Polska Press controlled by the business interests of Jarosław Kaczyński, leader of the ruling party Law and Justice, owning over 200 regional newspapers and several national newspapers and magazines. Another major player in the media market is the ITI Group, which owns several popular television channels and has been accused of having close ties to the government and promoting government-friendly content. Additionally, the radio market is dominated by a few large companies such as Eurozet, RMF FM, and ZPR Media.

In Hungary, a small group of companies and individuals control a significant portion of the media market, with many also having business interests in other industries. The concentration of media ownership is particularly high in the television market, with Mediaworks Hungary, controlled by the businessman Lőrinc Mészáros, a close ally of Prime Minister Viktor Orbán, owning several popular television channels and radio stations. The Central European Press and Media Foundation (KESMA), formed in 2018 and controlled by individuals and companies closely tied to the ruling party, controls over 500 media outlets in Hungary. The newspaper *Magyar Nemzet*, which was one of the most important opposition newspapers in Hungary, was owned by the businessman Lajos Simicska, a former ally of the Prime Minister, but was shut down in 2016, seen as a move to silence a critical voice in the media.

In Romania, the media group Intact Media Group, controlled by the politician and businessman Dan Voiculescu, controls several television channels (most notably Antena 1 and Antena 3), radio stations, and newspapers and is often criticized for providing biased coverage and for being used as a tool to influence public opinion. The newspaper *Romania Libera*, which was one of the oldest and most respected newspapers in Romania, was sold in 2014 to the businessman Adrian Sarbu, linked to the then ruling party and has since been criticized for providing biased coverage. The newspaper *Evenimentul Zilei* was sold in 2015 to the businessman Sebastian Ghita, and its editorial line changed after the sale.

Even in the Baltic countries of Latvia, Lithuania, and Estonia, where the regulatory and legal frameworks for the media are generally considered strong, there are concerns about the influence of business and political interests on the media landscape, with several major media companies being owned by individuals with ties to politics and business. For example, the media group *Latvijas Mediji*, which is one of the largest media companies in Latvia and controls several television channels, radio stations, and newspapers, is owned by the businessman Aivars Lembergs, who is also the mayor of Ventspils and has been linked to political scandals. Another example is the newspaper *Neatkarīgā Rīta Avīze*, which was one of the oldest and most respected newspapers in Latvia and which in 2018 was sold to Andris Šķēle, a business oligarch and former politician who served two terms as Prime Minister of Latvia from 1995 to 1997 and again from 1999 to 2000.

Croatia's media ownership is complex and often characterized by a lack of transparency. The country's media market is dominated by a few large companies, and many media outlets are owned by business conglomerates. For example, the powerful Agrokor group, one of the largest companies in Croatia, owns several newspapers and magazines, including *Večernji list* and *Gloria*. Other major media owners include the Todorčić family, who own the newspaper *Novi list*.

In Bulgaria, media ownership is often concentrated in the hands of a few powerful individuals or companies. In 2017, Freedom House reported that media ownership in Bulgaria is highly concentrated, with a small number of companies controlling the majority of the country's print and broadcast media. According to the Centre for the Study of Democracy, in 2018, the three largest media groups in the country controlled over 60% of the newspaper market and over 80% of the television market. These media groups have been known to have close ties to political parties and have been accused of promoting their political agenda. One example of this is the New Bulgarian Media Group, which is owned by businessman and politician Delyan Peevski. The group controls several major newspapers, television channels, and radio stations. Similarly, the MTG Media Group, which is owned by businesswoman Irena Krasteva (Peevski's mother), has been accused of having close ties to major political parties DPS and GERB and promoting their views, through its media outlets.

6 State Intervention and Curbing the Freedom of Media

Following the collapse of communism, democracy-building and state reconstruction (or even state-building in some cases) went hand in hand. Newly formed states such as Croatia, Slovenia, and the Baltic republics had to undertake the complex task of state construction, while established states like Hungary, Poland, Romania, or Bulgaria needed to depoliticize the communist state as a key objective. Political parties, business corporations, organized interest groups, and even individual politicians and businessmen sought to "capture" various state institutions for their own benefit, resulting in these states becoming (re)politicized (Zielonka & Mancini, 2011).

The role of the state in the media sector can vary greatly between the different countries. In countries such as Poland, Hungary, Czech Republic, and Slovakia, the state has a notable presence in the media sector. In Hungary, Poland, or Romania, governments have been criticized for exerting too much control over the media, with allegations of censorship and bias in state-controlled outlets. They have used their control over advertising revenue, ownership of media outlets and regulatory bodies to influence the media, and the news narrative in their favor. This has raised worries about media freedom and the weakening of democratic structures in these countries. In certain cases, media organizations that are critical of the government have been shut down or taken over by government-friendly owners, while in others, government-controlled outlets have become dominant.

In Hungary, the government of Prime Minister Viktor Orbán has faced criticism for limiting media freedom in the country. The government has been accused of using its influence over public media to restrict the diversity of news coverage, using regulatory and financial pressure to force the sale of independent media outlets to government-friendly businessmen, restricting the ability of foreign media companies to operate in the country, thereby limiting the options for news sources available to the public. Furthermore, the government has been accused of using state-controlled media to spread false information and propaganda. “Since 2010, the Hungarian government has systematically dismantled media independence, freedom and pluralism distorting the media market” (European Federation of Journalists, 2019).

The Polish government has been criticized for appointing loyalists to key positions in public broadcasters and for using the justice system to target critical journalists and media outlets. The situation in Poland, for example, pushed the EU to “slam new legislation in Poland that could limit media freedom” (Euronews, 2021).

In Romania, corruption and lack of transparency in state-funded media and state-funded advertising have been reported as problematic (Mungiu-Pippidi, 2003).

In other countries, such as the Baltic states, Czech Republic, and Slovakia, the media sector is considered to be more independent, with less government interference. Media in Croatia and Slovenia are considered to be generally free, but there have been concerns about media ownership concentration and political influence in the media.

In this respect the state of media in Bulgaria is the worst, although it has been showing signs of improvement in the last years. *Bulgarian media are still considered the least free in the EU and in Southeastern Europe “as the few outspoken journalists are victims of smear campaigns, harassment by the state, intimidation and violence”* (Ralev, 2021).

In effect, in Poland, Hungary and Bulgaria, which (together with Greece) continuously occupy the bottom positions of EU countries in the Reporters Without Borders Index for several years now, the media environment is seriously threatened. The most recent (2022) index by RSF has concluded that it is largely in Eastern European EU member countries that “governments have intensified draconian laws against journalists” (RSF, Reporters Without Borders, 2022a, 2022b).

Governments in Eastern Europe have been criticized for limiting press freedom during the COVID-19 pandemic. In Poland, a law was passed allowing dismissal of journalists and editors from public media outlets, and there were reports of government pressure on private media to promote a pro-government narrative and censorship of critical pandemic coverage. In Hungary, emergency powers were allegedly used to limit journalists’ ability to report on the pandemic, plus pressure on private media to follow the government line and censorship of critical reporting (Simon, 2020). Romania was criticized for its handling of pandemic info, including lack of accurate and timely information about COVID-19 spread. Bulgaria also faced criticism for its handling of pandemic info and allegations that state-controlled media was used to control the narrative. In contrast, the press freedom in Estonia, Latvia, and Lithuania has been relatively unaffected by the pandemic.

The countries with the poorest records of freedom of media, such as Hungary, Romania, and Bulgaria, have been most affected; however, similar restrictions have also been reported in the Czech Republic and Slovenia.

7 Limited Professionalization

Journalism in Central and Eastern Europe has undergone significant changes since the fall of communism in the region. While the end of state control has led to an expansion of media freedom and the emergence of new, independent outlets, the sector continues to be characterized by a number of challenges. One of the main issues is the concentration of media ownership in the hands of a small number of individuals or companies, which can lead to a lack of diversity and a bias in news coverage. Furthermore, many journalists in the region continue to face pressure from governments, as well as from advertisers and other powerful interests. These challenges can be traced back to the legacy of communism, where state control and censorship were pervasive and where the media was used as a tool for propaganda and control, rather than as an independent watchdog (Jakubowicz, 2007; Bajomi-Lázár & Sükösd, 2008).

Economic changes have had mixed effects on the profession, as they have reduced job security for journalists without necessarily promoting experience and knowledge. Schools of journalism have improved their teaching standards, but largely have failed to provide sufficient career opportunities for their graduates.

It is generally acknowledged that professional associations for journalists in Central and Eastern Europe have fewer members, limited organizational structures, and limited financial resources compared to their western counterparts. This can be attributed to several factors, including a lack of tradition of independent journalism, as well as economic and political challenges that have made it difficult for journalists to form and sustain professional organizations. In some countries, such as Hungary, the organizational framework for journalism is particularly fragmented, with multiple associations that may be divided along ideological lines. This can make it difficult for journalists to come together and advocate for their rights and interests and can also contribute to a lack of cohesion and coherence in the profession (Metyková & Cíсарová, 2009).

Journalists in Central and Eastern Europe face a number of challenges, including low pay compared to their Western European counterparts, a less stable and coherent regulatory framework, and more direct pressures from politicians and media owners. These factors have led to a lack of adherence to ethical and professional standards in the profession. Additionally, the constantly changing political, economic, and social environment of the post-communist region has made it difficult for journalists to establish a clear and strong professional identity, leading to a blurred professional identity (Hume, 2011). The roles of journalists are often diffuse and overlapping, creating confusion and a lack of coherence. Legal and regulatory reforms have also contributed to uncertainty and a lack of security for the

profession. Furthermore, the professional status of journalists is poorly defined in the region, and journalists' rights such as source confidentiality and access to information are unclear (Metyková & Císarová, 2009). Employers in the region are not able to guarantee legal defense for journalists when cases go to trial, and journalistic salaries are relatively low and often variable. And they vary across the region: on average, journalists earn around EUR 1500 a month in Slovenia, but only EUR 500 in Romania. The overlap between journalism and other professional activities such as public relations is widespread, which results in many student journalists ending up in PR.

This is in close relation to yet another general feature of the journalism in Eastern Europe, namely, political and business clientelism. Daniel Hallin and Stylianos Papathanassopoulos (2002) developed the idea of political clientelism in journalism as a way to explain how media systems work in many Southern European and Latin American countries. They identify five key features of this phenomenon: low levels of newspaper circulation, tradition of advocacy reporting, instrumentalization of privately owned media, politicization of public broadcasting and broadcast regulation, and limited development of journalism as an autonomous profession (Hallin & Papathanassopoulos, 2002). It is evident that these characteristics are prevalent in CEE media, so it is vital to take this into account.

In the 1990s, established Western publishing and TV companies entered the CEE markets in the 1990s, following the opening of these markets to foreign investment. These companies established subsidiaries and partnerships in the region to expand their reach and capitalize on the new opportunities. Some examples include News Corp, which acquired several newspapers and TV stations in Poland, Hungary, and Romania through its subsidiary News International; Bertelsmann, which established a presence in the region through its subsidiary RTL Group and acquired several TV and radio stations in countries like Poland, Czech Republic, and Hungary; Swiss publisher Ringier AG; German media company Axel Springer; and other companies such as WAZ and Handelsblatt. These companies brought with them practices of professional journalism such as accuracy, fairness, and objectivity, as well as a commitment to journalistic ethics and the protection of journalistic sources. Though this improved the quality of journalism in the CEE region and promoted a more open and democratic society, not all companies had the same level of commitment to journalistic standards, and some practices may have been adapted to the local context. Recently, several foreign investors have retreated from some of the media markets in Central and Eastern Europe, including established publishing companies such as WAZ, Handelsblatt, or Bonnier, which might be primarily for economic reasons. But some fear that without the backing of a foreign-based investor, the now locally owned media might be even more prone to political instrumentalization (Mancini and Zielonka, 2012).

Journalists in some Eastern European countries who report on corruption, organized crime, and government abuses of power are at risk of harassment, intimidation, and even violence. As a result, many journalists in these countries practice self-censorship to avoid putting themselves in harm's way. Some recent examples include the murder of Viktoria Marinova in Bulgaria in 2018, while investigating

EU funds misuse, the killing of Pawel Adamowicz in Poland in 2019, and the harassment and death threats faced by Cătălin Tolontan in Romania while investigating corruption. The murder of Jan Kuciak in Slovakia in 2018, which was widely believed to be a result of his investigative reporting, was a reminder of the dangers that journalists can face when reporting on corruption and organized crime. His death led to widespread public outrage and protests and the resignation of the Prime Minister Robert Fico. However, it's important to note that not all countries in Eastern Europe have the same level of risk for journalists. Some countries have relatively strong press freedom and protections for journalists. It's also worth noting that even in countries where the profession of journalists is considered safe, there are still cases of journalists being targeted for their reporting.

The region has its examples of media outlets that prioritize high-quality journalism, such as the Polish newspaper *Gazeta Wyborcza*. An original and independent newspaper, according to Paolo Mancini, is introducing many innovations with respect to Polish journalism (Hallin & Mancini interview, 2011). Other notable examples include the Bulgarian weekly *Capital*, the Polish project *Spieście* (a joint project between five independent newsrooms), the Hungarian outlet *Direkt36*, the Romanian news portal *Republica.ro*, the trilingual Baltic investigative website *Re:Baltica*, and the Bulgarian investigative outlet *Bivol* (Simon, 2021).

8 Concluding Remarks

Media systems are always in the process of change. Countries in Eastern Europe have similarities, but at the same time present major differences. Analysis indicates that press freedom, foreign ownership, political parallelism, and the strength of public service broadcasting have a strong correlation even though significant differences exist among countries. It is difficult to speak of a unique type of Eastern European media system.

In all post-communist CEE countries, the transition period after the regime changes in 1989–1990 was significant due to the major impact political changes had on media markets. The end of monopolistic political control over media resulted in the declaration of press freedom and privatization of most media. A gradual evolution towards more democratic and free media was largely achieved, though with a disappointingly slow pace of progress in places. Additionally, Central and Eastern Europe media market grew from \$47.43 billion in 2010 to \$64.26 billion in 2019 at a compound growth rate of 3.40%. The market is expected to further grow and to reach \$179.65 billion in 2030 at a CAGR of 10.40%.

Overall, the historical background of political parallelism and advocacy journalism in Eastern Europe is rooted in the legacy of the communist era, where the media was used as a tool of the state to control the flow of information and promote the government's agenda. Despite the fall of communism and the transition to democracy in many countries in the region, these practices have persisted in some cases.

Media systems in Central and Eastern Europe cannot be classified as a single model but can instead be divided into three different types. Romania, Hungary, and Bulgaria have high levels of political parallelism and low levels of press freedom. Central media systems (Czech Republic, Croatia, Poland, and Slovenia) have strong public service broadcasting and low levels of foreign ownership. Northern systems (Estonia, Latvia, Lithuania, and Slovakia) have the highest levels of press freedom, the highest levels of foreign ownership, and the lowest levels of political parallelism. Notably, Estonia stands out within this third category, particularly in terms of high rates of online news use, inclusiveness of the press market, and press subsidies, which are similar to those of Scandinavian countries.

In Eastern Europe, there is a correlation between countries with poor records of press freedom and a higher percentage of individuals who do not read written press. On the other hand, countries with strong press freedom have a lower percentage of non-readers. Although some countries in the region have shown a decrease in non-readers, the general trend in Eastern Europe, as well as in Europe as a whole, is a steady rise in the number of people who do not read written press.

Radio listening time has steadily decreased over the past two decades, particularly among young people, who listen for less than 1.5 hours a day. The number of radio broadcasting companies is declining across the EU, including in the Eastern European region. Despite differences in the number of radio companies per million inhabitants, the trend of decreasing employment in the radio industry is visible in Eastern Europe, with Poland as the only exception in the region. The percentage of total employment in radio broadcasting is low across CEE and close to zero in the Czech Republic and Slovakia. In some countries, the decrease in the number of people employed in radio outpaces the decline in radio broadcasting enterprises.

TV viewing remains high, with most people watching every day or almost every day, though the rate has declined slowly. There's a shift to digital platforms but viewers remain with TV. Viewing rates and habits vary across the region, with the Balkans having the highest and Baltic countries having moderate rates. Private TV channels have the majority of viewers, with Romania having the largest daily audience. Public TV is government-funded and highly popular, with the state support for public media growing constantly to levels of above 85%. TV remains a leading source of news and entertainment despite the competition from online streaming services, but traditional TV consumption is slowly declining as viewing habits evolve.

The CEE region has seen substantial growth in digitalization and Internet usage over the past decade, although it still lags behind other parts of the continent. Mobile broadband subscriptions have seen explosive growth in all countries in the region during 2010–2020. There is a large variation in daily Internet usage across the CEE countries, with Estonia leading Europe at 98% and Romania trailing with 58%. Social media usage has nearly doubled for all countries in the region from 2011 to 2020. Lithuania had the highest daily usage in the EU at 74%. The Baltic countries and Estonia in particular showcase an impressive example of successful digitalization of media and society, leading not only within the CEE region but in the whole EU.

In recent years, trust in the written press has increased (about half of East Europeans now trust the written press), with legacy press publishers transferring the trust they've built in their print content to their online platforms. Radio continues to be the most trusted medium, with a majority of East Europeans expressing trust in the medium. The level of trust in radio is on the rise in various CEE countries. Television is generally considered a trusted medium in most of the 11 Eastern European countries studied, with more respondents expressing trust in the medium than not. However, the situation is reversed in a few countries like Poland, Hungary, Croatia, and Slovenia.

Attempts by new political elites and their business interests to limit media autonomy have become a major threat to press freedom in many Central and Eastern European countries. The COVID-19 pandemic has further stepped the challenges faced by free press globally, and Eastern Europe is no exception. Under the guise of "emergency legislation," a concerning number of governments in Central and Eastern Europe have used the crisis as an excuse to restrict the free flow of information and stifle independent media. In this respect media literacy is an important factor. In a 2021 pan-European Media Literacy Index, Estonia was one of the top three ranked countries, while Romania and Bulgaria ranked lowest.

The distinctive changes in the media systems in Central and Eastern Europe have been driven by two major factors—on the one hand, the political changes in the region over the last 30+ years and, on the other hand, the technological advances that have impacted media changes the world over. While the influence of the first factor is gradually subsiding over time and will continue to decrease in the future, the importance of technological developments is growing.

For the countries under study here, the political changes have not been limited to solely the transition from communism to free democracy but include the developments that have stemmed from their admission into the European Union.

Technological development, being pan-global and taking place nearly simultaneously across the world, impacts rather evenly the countries in the region. It can be argued that this would lead to a more levelled field and reduce discrepancies between the media systems of the countries in the CEE region. This will probably be augmented by them all being subjected to a quasi-uniform EU media regulations and general direction of development. From another aspect we can also speculate that the three different groups within the CEE region will also move towards their respective "centres of gravity." The "Southern" group, Romania and Bulgaria in particular, will tend to develop characteristics aligning them with countries from the Mediterranean, Polarized Pluralist media system model. The "Central" group (Czech Republic, Croatia, Poland, and Slovenia) can be expected to develop along lines converging in the long term with the direction of development of the North/Central Europe's Democratic Corporatist Model. Hungary is an interesting example here. The present problematic country of Eastern Europe is currently in an unnatural grouping with Bulgaria and Romania. It can be argued that, following a regime change, over time the country and its media system would migrate in the direction of its Central European peers, with whom Hungary shares a historical background and the leader of which it has been for a long period. The countries of the "Northern"

cluster—Estonia, Latvia, Lithuania, and Slovakia—display a natural gravitation towards the North European/Scandinavian Liberal Model. In any case it is difficult to expect that a distinctive “Eastern European” media system model would materialize.

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