

TITLE

**Content diversity vs. ownership concentration in a new media market:
the case of Croatia**

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ABSTRACT

The premise prevailing in contemporary media policy theory is that ownership concentration leads to diminished diversity of media content, leading in turn to diminished plurality of programs in cultural as well as social and political terms. Based on this premise many European media policies control concentration of ownership in the media as well as support diversity by other measures (including support for public service broadcasting). Contemporary Croatian media policy also includes attention to the issue of diversity and pluralism. This text presents some initial evidence on the structure of the Croatian television market regarding ownership and audiences, as well as preliminary findings regarding the diversity and pluralism of television programs. Although conclusions on the empirical relationship between diversity of content and concentration levels can not be reached without longitudinal research, the results point to the critical role of public service broadcasting in ensuring diversity of socially important content in television.

KEYWORDS

Media policy, media pluralism, media concentration, media market, media programs

ARTICLE

Introduction

There is no doubt about the importance of the media in contemporary societies; in a general sense, it reflects a society as a whole, since it provides "cues about the nature of social reality, for the agendas of our concerns, and for the climate of public opinion" (McLeod, Kosicki and Pan, 1996: 246). In democratic political systems the media should enable citizens to learn and become involved in political processes, as well as to enable communication of diverse ideas, communicated by diverse actors. This is why pluralism and diversity in the media are one of the fundamental topics of media policy makers in European democracies. At the European level, the quest for pluralism is built into the European convention on human rights, article 10, in which the freedom of expression and media are guaranteed (AP-MD 2002). The application of this article through the judgments of the European Court for human rights obliges all the member states to protect pluralism of the media in order for them to carry out their democratic function. All the ensuing political texts and recommendations of the Council of Europe are developed from this basic understanding.

Global media development in recent decades shows several trends that have a possible impact on media pluralism and diversity. Globalization, as the integration of world markets, is playing out in the media field as well. The global expansion of media industries brings the increased concentration of media owners as well as the ever bigger media company. The concentration of media industries is the main contemporary trend at the global level, with the consequence that the smaller number of media companies is controlling an ever larger number of media products and world markets. This trend is linked to technological development which acts as an enabler in this respect. Digital convergence has enabled "dematerialization" of the media product, as well as the creation on new media structures and products (web casting, multimedia). It has at the same time created a strong push towards integration of content producing and delivery companies in the media field, with the view of creating not only economies of scale but also of scope. The liberalization of communication policies has gone hand in hand with these developments, which is bringing about a hyper commercialization of media products, including in public service broadcasting (McChesney 2000).

The premise prevailing in contemporary media policy theory is that ownership concentration leads to diminished diversity of media content, leading in turn to diminished plurality of programs in cultural as well as social and political terms. Based on this premise many European media policies control concentration of ownership in the media (and not only in terms of ensuring market competition), as well as support diversity by other measures (including support for public service broadcasting). Contemporary Croatian media policy also includes attention to the issue of diversity and pluralism. This text will present some initial evidence on the structure of the Croatian television market regarding ownership and audiences, as well as preliminary findings regarding the diversity and pluralism of television programs.

Challenges to media pluralism: from politics to markets in Central and Eastern Europe

Pluralism and diversity of the media was a fundamental aim of European media policies (Ward 2002), even before it became a countertrend to media globalization and the increasing commercialization and unification of the world media market. In a post-socialist context the attempts of ensuring and protecting media diversity and pluralism are burdened by the difficulties that occur regarding the democratization of the media in general, which is connected both to economic and political changes. Former state controlled media has been transformed to public media, or alternatively subjugated to the rules of the market. The major problems that post-socialist states are faced with in regards to media are "slow technological change, weak news competition, crisis of

public service broadcasting, persisting political pressure on the media, weak professional performance of journalists, problematic minority access to the media, hate and nationalist speech, inadequate press and media markets, Europeanization of media regulation" (Sukosd, Bajomi-Lazar 2003: 15).

Media policy developed during the transitions of the 1990s in the European post-socialist countries in three, sometimes overlapping phases. The first was focused on de-linking the media from the state, and included the wining of freedom and independence from the political realm. This phase in most of the countries included the restructuring of the public service broadcasting systems, and introducing structures that guarantee its independence from the political and economic forces (the success has been varied). The second phase is marked with the attention to market developments, and includes liberalization of telecommunications and broadcasting markets and the increased entry of the foreign capital in the media markets. This is also the time when attention starts to shift to threats from the market developments, and the realization that pluralism is (surprisingly) at lesser risk from political than market pressures. The third phase is marked by European integration, and the main activity is harmonization of media legislature with the EU *acquis* in the audiovisual field. This phase includes more attention to the implementation of the media legislation (a sore point for many countries of the region).

The introduction of markets and democratic political systems have in CEE enabled the creation of commercial privately owned media, which have vastly increased the media system diversity in comparison to socialist times. Media concentration trends are apparent also in Central and Eastern Europe (EFJ 2003, Peruško 2003). Media markets in most countries of the CEE region are highly concentrated, and with a very significant foreign ownership. In addition to concentration, in this region the transnational media concentration is particularly apparent, the extent of which, as well as the consequences, is not yet clear. So far little evidence about diversity and pluralism of media content is available from the Central and Eastern European region, apart from statistics on broadcast program genres (for instance, in the Yearbook of the European Audiovisual Observatory).

The adjustments of the Croatian media systems to a democratic political system started with the transitional changes in the nineties, but the consensus to embrace the pluralistic paradigm was reached only after 2000. With the acceptance of Croatian application for the membership in the EU, Croatian media policy entered its third phase, increasingly aware of the globalization and integration context. While the government and the political realm predominantly influenced the character of media legislature in the early 1990's, after 1996 the push for media democratization and pluralism came vociferously from the civil society

The Croatian media policy has only after 2000 passed from the transition stage in which the main obstacle to pluralism was the state, and not the market, and embraced the pluralist paradigm instead of the state building one (Peruško Čulek 1999).

Croatia has, after the year 2000, introduced a new set of media legislation¹ which includes measures to control mono-media and cross-media ownership concentration and ensure transparency of data on ownership and functioning of the media. The Media Law (2004) limits concentration in the printed media and establishes transparency rules for all media (printed and electronic), while the Law on electronic media (2003) limits cross-media ownership. Concentration in the media sector is regulated by a general Law on the Protection of Market Competition (2003) and in the Media Law (2004) and Law on the Electronic Media (2003). The Agency for the Protection of Market Competition reviews all planned concentrations in the media sector (according to the Media Law), regardless of the total revenue of the companies (in the media sector usually smaller than the general threshold of 100 mil. Kuna). The Media Law prohibits concentration in the markets of general information dailies or general information weeklies if the market share of the participants after concentration exceeds 40 per cent of the total copies sold of the general information dailies or weeklies in Croatia. The Law on electronic media prohibits concentration in the radio and television sector, as well as cross-media concentration.

Two commercial televisions at the national level are majority owned by foreign companies (RTL Group in RTL Television, and CME in Nova TV). The public service broadcaster HTV operates two national terrestrial television channels. The television market in Croatia is highly concentrated: the C3 for audience shares of the first three television channels in Croatia in 2004 was 78 per cent (Ward 2006), while the H index in 2005 is 0,54² (Peruško & Jurlin 2006). The study of the Croatian media markets (Peruško & Jurlin 2006) further found that the number of channels of television with national coverage (4 channels and 3 companies: the public channels HTV1 and HTV 2, RTL Televizija, Nova TV) is the same in Croatia and the European countries of the similar size, while this is much lower than the Western European average (14). Croatian public television still has the leading market share of television audiences in Croatia, which, in spite of a decline remained the highest among countries comparable by size. Adult audiences (over 34) predominantly watch two public television channels (HTV1 and HTV 2) (59 %). Young adults prefer RTL Televizija, followed by HTV 1, HTV 2, and Nova TV. Children are true fans of RTL (34.7 per cent), followed by HTV 1, Nova TV and HTV 2.

When the program genres are used as the basis for defining the market, the television market is very highly concentrated in the genre of cultural programs and art, religion (where the HTV has almost 100 per cent market share); and sports, music, information and political programs, documentaries, science and education programs (80 per cent to HTV). For those programs, HTV contributes significantly to the diversity of the television programs in Croatia.

In the information genre (news and political magazines), HTV 1 and HTV 2 combined have 80 per cent of the television audiences; followed by Nova TV (14 per cent). The share of RTL in this genre is less than 7 per cent. In the entertainment genre, the leader is RTL (almost 50 per cent of the audiences), followed by HTV (25 per cent), and Nova TV with 20 per cent. There is a strong competition in the markets of films, series, and to a lesser degree in the entertainment and children's programming.

Television audience share 2004

Channel	Percentage share
HTV 1	31%
RTL Televizija	30%
HTV 2	17%
Nova TV	13%
Other (local television, satellite & cable)	9%
Total	100%

Source: AGB Puls, Privredni Vjesnik, 23 May 2005, p. 5. /May-December 2004

The television market in Croatia is clearly national, as 14 regional and local television stations have an audience of less than 9 per cent. In radio broadcasting however, the market is regionally structured and the study identified 21 regional markets. Based on the Croatian average, 47 per cent of radio audiences are held by the local station, 18 per cent by the regional station, and 24 per cent by national commercial stations. Three national public channels have a joint share of 10 per cent of radio audiences. H index for radio based on genre/audiences demographics in the counties is between 0.50 – 0.71 (youth stations), so the concentration is between medium and high. The Croatian radio market is strongly segmented; national private stations and strong regional stations are present in some of the counties, but the main basis for the diversity and competition in the radio market comes from numerous local stations geared towards the needs of the local audiences. On average, in each county there are two or more strong radio competitors (Peruško & Jurlin 2006).

Pluralism and diversity in contemporary Croatian media policy

Due to recent changes of media policies (2003 and 2004) that aimed at harmonization with European media policies a gap between normative rules and localized practices occurred. This happened, not only because the internalization of new values that would result in a change in the behaviour of actors involved is a long-lasting process, but also due to objective problems that new law regulations initiated, especially in the attempts to implement these into practices. This effects all the actors involved: state institutions, the media, and last but not least the audiences.

The Law on the Media (LoM) (2004) applies to all the media. The state is obliged to initiate pluralism and diversity trough subsidies for the production and publication of content as well as through the regulation of media ownership which has to be transparent in order to ensure the protection of market competition

In the LoM, diversity and pluralism is connected with specific groups (national minorities, gender, disabled persons), type of media (local, non-profit media, and NGO media) and spheres to be covered in the output (culture and art, education, science, protection of the environment and human health, human rights as well as the Croatian national and cultural identity) (Article 5(2)).

The Law on Electronic Media (LoEM) regulates the rights and duties of electronic media that produces and broadcasts program content and services. It applies to commercial television and radio broadcasting as well as to the public service broadcaster. Diversity and pluralism is ensured through the program content which has to provide a broad range of diverse ideas so that "different approaches and ideas are adequately represented", as well as impartial. Other, more specific regulations to ensure pluralism and diversity refers to the amount of news in the program (Article 22), percentage of domestic production (Article 24), and the percentage of program broadcast in Croatian (Article 27). Regulations are made on the amount of audiovisual works made by independent producers and the percentage of program of European audiovisual work (Article 29). However, if the commercial broadcasters do not reach these percentages they have to increase thee shares every year in accordance to the criteria of the Council for Electronic Media. These criteria are not transparent and, thus, prevent a more detailed analysis on whether the broadcasters act in accordance with law regulations. The section dealing with the protection of pluralism and diversity of electronic media also regulates ownership concentration (Article 44, Article 49) and defines concentration restrictions (Article 46, Article 47, Article 51, Article 52, Article 53). In addition to these measures another way to ensure diversity and pluralism is through the Fund for the Promotion of Diversity and Pluralism of Electronic Media³ which supports local and regional broadcasters.

European media policies recognize the important role of public service broadcasting in ensuring the diversity and pluralism of the media landscape. Generally, the commercial media are expected to contribute to external, system diversity, and the public service media also need to be internally diverse and pluralistic. *The Law on Croatian Radio-Television (LoCRT)* (2003) regulates the Public Service Broadcaster. Here to, the importance of balanced broadcasting of information, culture, education and entertainment is emphasized. Pluralism appears in the context of pluralism of ideas, i.e. pluralism of worldviews, political and religious ideas and interests that has to be presented to the public in an unbiased and respectful way. The Law also stresses the special attention that has to be given to specific groups such as the Croats living outside the state, national minorities within the state (Article 5), children and youth, and people with disabilities. In addition to these general statements the insurance of diversity is enabled through a defined percentage on domestic production, program output in Croatian language and specific genres that has to be produced in Croatian (particularly stressing movies, documentaries, cartoons and entertainment). The public service broadcaster is funded by licence fee and advertising. Total revenues of the HRT (television and radio) amounted to 186 mill euro, with the licence fee contributing 60 per cent of the amount.

Regulation on advertising does not directly refer to diversity, but it determines the type of genre that will be more present in the program output. The commercial broadcasters are allowed to advertise maximum 12 minutes per hour. Genres such as comedy, drama, entertainment programs, do not have any restrictions, while movies are allowed to be interrupted ever 45 minutes. News and religious rituals cannot be interrupted, while program such as informative broadcasts, documentaries, religious programs and children television cannot be interrupted if shorter than 30 minutes. For the PSB, in the regulation of advertising, maximum 9 minutes per hour is allowed. An advertising block (two or more) can only be broadcasted between the programs. In addition, informative programs, documentaries, religious programs, children television, movies and programs that last for less than 30 minutes are not allowed to be interrupted. Advertisements from political parties, religious communities and unions are not allowed, except by political parties in the period of elections.

Diversity in Croatian television programs

Concentration is in economic terms a characteristic of a market in which the competition of companies is foreclosed to different degrees, with monopoly position being the drastic example in which the access to a given market is totally barred. In this text, we are interested not in the economic aspects and ramifications of concentration in the media sector, but in the social and political consequences that these developments possibly have on the fulfillment of the media's social role.

The interest for analysis of media markets in Croatia began at the end of the 1990s in the research community and the first study including market data – shares of the audience (viewers, listeners, circulations in the press), and shares in advertising – published in 1999. Thereafter, several research projects and published texts focused on the issues of concentration of ownership, pluralism and diversity (Peruško, Jurlin 2006). All were based on scarce publicly available data, and none performed a systematic economic market analysis

In addition to structural diversity (of owners, companies, types of media, different territorial outreach - from local to national), diversity and pluralism need to be in the final analysis reflected within media programs, in order to enable the development of a democratic society. In the realm of media content, diversity implies types of program genres (different news genres, documentaries, movies, new genres), topics that are covered (politics, economy, culture, science, education, religion), audiences they address, (majority and minority, children, groups with special needs), actors with access to the media and the political orientations and worldviews they present.

In order to examine diversity and pluralism in the media output and relate it to the structures of media ownership on the television market in Croatia, a short comparative analysis of three televisions broadcasters at the national level was conducted.

The data base set for the analysis of content diversity was created in the comparative "Study on the assessment of content diversity in newspapers and television in the context of increasing trends towards concentration of media markets", by David Ward, Centre for Media Policy and Development (London), for the Media Division of the Council of Europe. The Croatian research was performed at the Department for Culture and Communication, IMO, Zagreb. The content analysis was performed simultaneously in Croatia, Italy, Norway and the UK.) A quantitative content analysis was conducted in the period of two weeks (24.10.2005 – 06.11.2005), through the monitoring of daily newspapers and television news coverage, as well as genres appearing in the programs of the broadcasters. For the purpose of this paper, the data set on television news coverage and genres was used.

We looked at three aspects of diversity: diversity of content, diversity of actors and diversity of ownership by taking into consideration the differences in the programs of two privately owned broadcasters operating at the national level (NOVA TV, RTL TV), and the Croatian Public Service Broadcaster (Croatian Television HTV). In order to analyze diversity of content, we examined genre that appear in the programs, as well as diversity of topics raised in the news bulleting, and diversity of geographic area covered in the news bulletins of the three broadcasters.

Actors were selected if they had access to television news bulletins through direct quotation. The analysis of actors was conducted by taking into consideration actors representing different groups or institutions that operates in the public life of a, society, as well as gender representation in the news.

Diversity in media output can be reached if there is balance between the representation of actors carrying characteristics of race, ethnicity, gender, sexual orientation, educational background, ideas, beliefs etc. Diversity inspiring tolerance and respect among citizens can only be accomplished if these groups and categories are presented in an unbiased way. In this study, we managed to estimate how much time was devoted to diverse actors and topics, and to what extend different genres are present in the media output. However, this quantitative content analysis did not allow for conclusions on qualitative data. This is the next step needed to be able to clearly asses to what extent unbiased representation is present in the media, and hence, contributes to the formation of a diverse and pluralistic media landscape.

Actors representing groups or institutions

- Even though all three broadcasters give most space to the anonymous general public in their news, the percentage is lower in the news of PSB (22 %) compared to the privately owned broadcasters (Nova TV, 27 % and RTL TV, 26%). Differences are visible in that the PSB gives more space to actors representing state institutions funded from the state budget such as public employees, government and ministers, national defense and security forces and civil servants, while privately owned broadcasters gives considerably more space to the general public, as well as to celebrities. They also give more space to company representatives and independent experts, but the differences are small (except in the case of RTL TV giving 7 % of the space to independent experts, while Nova TV 4 % and the PSB 3%). The division between commercial broadcasters' tendency to infotain (Delli Carpini, M. X., Williams, B. A., 2001) and the PSB to give more space to actors and institutions representing the state is clearly visible.

Table 1: Types of actors with direct access to news coverage

ACTOR	BROADCASTER			NATIONAL BROADCAST- ERS IN TOTAL
	NOVA TV	RTL TV	PSB	
GENERAL PUBLIC	27 %	26 %	22 %	25 %
PUBLIC EMPLOYEES	18 %	17 %	20 %	18 %
GOVERNMENT AND MINISTERS	14 %	9 %	15 %	13 %
FOREIGN POLITICIANS AND DIPLO- MATS, INTERNATIONAL COMMUNITY	3 %	9 %	9 %	7 %
COMPANY REPRESENTATIVES	7 %	7 %	6 %	7 %
NATIONAL DEFENCE AND SECURITY FORCES	4 %	4 %	6 %	5 %
CIVIL SERVANTS	3 %	4 %	7 %	5 %
CELEBRITIES	8 %	7 %	0 %	5 %
INDEPENDENT EXPERTS	4 %	7 %	3 %	4 %
PROFESSIONAL ASSOCIATIONS	3 %	4 %	3 %	3 %
RELIGIOUS GROUPS	3 %	1 %	3 %	3 %
NGOS	3 %	2 %	2 %	2 %
JUDICIARY	2 %	2 %	2 %	2 %
POLITICAL PARTIES	2 %	1 %	1 %	1 %
TRADE UNIONS	0 %	0 %	0 %	0 %
GRAND TOTAL	100 %	100 %	100 %	100 %

David Ward, Report on Media Diversity, 2006

Actors and Gender Balance

- the subordinated position of women in the media is visible regardless whether we focus on the frequencies of appearance or the topics shaped through women's voices. Table 2 and 3 shows that there is a marked gender imbalance in the space given in the news of all broadcasters⁴. When compared according to broadcaster ownership, the highest percentage of women appearing in news bulletins is present in Nova TV (24 %), while the lowest percentage is present in RTL TV (18%), closely followed by the PSB (19 %). In addition, Nova TV gives considerably more space to female company representative (15 %), compared to RTL TV 6 %) and the PBS (4 %). Within the female population having access to news bulletins, most of them represents the anonymous general public, however this percentage is lowest in the PBS, where females being public employees and government and ministers representatives appear more frequently, compared to privately owned broadcasters, which shows that women are given the role of subjects with expertise. However the number of women given space in the news is expected to be higher in the PSB. The representation of males within the male population is more equally distributed through the categories of actors, and a considerably lower percentage of males represent the general public compared to women (21 % to 40 % in total).

Table 2: Gender with Access to News Coverage

GENDER	BROADCASTER		
	NOVA TV	RTL TV	PSB
FEMALE	24 %	18 %	19 %
MALE	76 %	82 %	81 %
TOTAL	100 %	100 %	100 %

Table 3: Types of Actors and Gender Access to News Coverage

ACTOR	BROADCASTER					
	NOVA TV		RTL TV		PSB	
	F	M	F	M	F	M
GENERAL PUBLIC	42 %	23 %	43 %	23 %	37 %	19 %
PUBLIC EMPLOYEES	13 %	19 %	19 %	16 %	26 %	19 %
GOVERNMENT AND MINISTERS	9 %	15 %	9 %	9 %	11 %	16 %
COMPANY REPRESENTATIVE	15 %	4 %	6 %	7 %	4 %	7 %
FOREIGN POLITICIANS AND DIPLOMATS, INTERNATIONAL COMMUNITY	0 %	4 %	3 %	11 %	0 %	11 %
OTHER	21 %	35 %	20 %	34 %	22 %	28 %
GRAND TOTAL	100 %	100 %	100 %	100 %	100 %	100 %

Diversity of topics

- The most frequent topic covered in the news bulletins is that of home, security and crime. This dark topic, that builds the core of tabloid media, is most present in RTL TV news (36,8 %), followed by the PSB (33,3 %), with the lowest percentage in Nova TV (26,9 %). According to the data, Nova TV seems to give importance to topics such as social issues (15,7 %), while RTL TV gives a considerable amount of space to sport (16,6 %). The PSB seems to more importance to business and economy (14,1 %) compared to the commercial broadcasters (Nova TV – 9,1 % and RTL TV 7,6 %). Arts and culture are equally covered in the news of Nova TV and the PSB (5,7 %), but pretty neglected in RTL TV news (1,4 %). The latter gives more space to topics of human interests (5,5 %), compared to Nova TV (3,6 %) and the PSB (2,8 %). (Table 4)

Table 4: Diversity of Topics in News Coverage

TOPIC OF CLIP	BROADCASTER		
	NOVA TV	RTL TV	PSB
HOME, SECURITY AND CRIME	26,9 %	36,8 %	33,3 %
SOCIAL ISSUES	15,7 %	9,4 %	12,9 %
POLITICAL AFFAIRS	11,5 %	8,1 %	12,9 %
BUSINESS AND ECONOMY	9,1 %	7,6 %	14,1 %
SPORTS	10,6 %	16,6 %	2,2 %
ARTS AND CULTURE	5,7 %	1,4 %	5,7 %
INTERNATIONAL AFFAIRS	4,7 %	4,4 %	3,8 %
HUMAN INTERESTS	3,6 %	5,5 %	2,8 %
PUBLIC SERVICE	3,0 %	2,2 %	4,0 %
ENVIRONMENT	3,9 %	3,3 %	2,3 %
CONSUMERS AFFAIRS	1,2 %	1,6 %	1,0 %
ENTERTAINMENT	1,9 %	0,0 %	0,8 %
HEALTH	0,5 %	1,2 %	0,6 %
SCIENCE	0,4 %	0,4 %	0,5 %
EDUCATION	0,0 %	0,5 %	0,0 %
PARTY POLITICAL AFFAIRS	0,4 %	0,1 %	0,4 %
LIFESTYLE	0,5 %	0,0 %	0,0 %
CELEBRITY	0,4 %	0,0 %	0,0 %
OTHER	0,0 %	0,9 %	2,7 %
TOTAL	100 %	100 %	100 %

Diversity of geographic scope

– there is a huge imbalance between the news related to issues and events within the national corpus and the rest of the world. This is visible in news programs of all three broadcasters, with a slightly smaller percentage in the RTL TV news (68 %). Around 15 % of the news are related to the European continent in all three broadcasters, while commercial broadcasters will give a bit more space to issues related to the American continent (8 %) compared to the PSB (5 %). The PSB gives a bit more attention to Asia (4 %), while the commercial gives more space to Australia. However, these percentages are very low and can be a result of variation in the news analyzed in a specific period. There is an urge to introduce the audiences to a broader set of information related to the rest of the world, in order to avoid a Eurocentric perspective of thought. (Table 5)

Table 5: Geographic Area in News Coverage

AREA	BROADCASTER		
	NOVA	RTL	PSB
National	71%	68%	70%
European continent	15%	15%	16%
American continent	8%	8%	5%
International	2%	4%	4%
Asian continent	2%	3%	4%
African continent	1%	1%	1%
Australian continent	1%	1%	0%
TOTAL	100 %	100 %	100 %

David Ward, Report on Media Diversity, 2006

Diversity of genre

- In the analysis of genre, the differences in the program output of commercial and PSB television is most visible. While commercial broadcasters shows 17,9 % (RTL TV) and 13,6 % (Nova TV) of light entertainment, the PSB only have a percentage of 2,4 % of this genre. The differences are also visible in the time provided for soap operas: Nova TV – 25, 9 %, RTL TV – 19 %, and the PSB – 8,2 %. RTL TV gives more space to comedy (15,1 %), drama (9,4 %) and chat and talk shows (6,6, %) compared to Nova TV and the PSB, while Nova TV gives considerably more space to movies 27,2 %, than RTL TV (18,8 %) and PSB (16,9 %). However, movies are the most frequent genre in Croatian national broadcasters program viewed in total. The PSB differs from the commercial broadcasters in that it has the highest percentage of news (5,5, %), children television (9,7 %), quiz and panel games (3,6 %), political interview and discussion (3,4 %) and documentary (3,3 %). It also contributes to the diversity of content, and thus fulfills its role as to serve the public, since it is the only broadcaster that broadcasts on schools and learning, breakfast television, magazine, arts and culture, current affairs, nature and wildlife, religion, cinema, history and hobbies and leisure (Table 6).

The differences of the program content visible in the private and public broadcasters can partially be explained through economic reasons, due to the restrictions in the LoEM on advertising in specific genres, such as religious program, informative program, documentaries and children program. Advertising is allowed in genres like movies, which can be interrupted every 45 minutes, and comedy, drama and light entertainment program that can be interrupted without restrictions,

Table 6: Genres in Broadcast Program

GENRE	BROADCASTER		
	NOVA TV	RTL TV	PSB
MOVIE	27,2 %	18,8 %	16.9%
CHILDRENS	6,2 %	4,3 %	9.7%
SOAP OPERA	25,9 %	19,0 %	8.2%
COMEDY	8,6 %	15,1 %	7.5%
DRAMA	6,2 %	9,4 %	6.7%
NEWS	2,7 %	2,5 %	5.5%
SCHOOLS AND LEARNING	0,0 %	0,0 %	4.4%
BREAKFAST TV	0,0 %	0,0 %	3.9%
QUIZ AND PANEL GAMES	1,3 %	0,0 %	3.6%
SPORTS	0,4 %	0,6 %	3.5%
MAGAZINE	0,0 %	0,0 %	3.5%
POLITICAL INTERVIEW AND DISCUSSION	0,7 %	0,0 %	3.4%
DOCUMENTARY	1,3 %	1,2 %	3.3%
ARTS AND CULTURE	0,0 %	0,0 %	2.7%
CURRENT AFFAIRS	0,0 %	0,0 %	2.7%
LIGHT ENTERTAINMENT	13,6 %	17,9 %	2.4%
MUSIC	1,7 %	0,0 %	2.3%
NATURE AND WILDLIFE	0,0 %	0,0 %	2,0 %
RELIGION	0,0 %	0,0 %	1.7%
CINEMA	0,0 %	0,0 %	1.4%
CHAT AND TALK SHOW	2,1 %	6,6 %	1.3%
HISTORY	0,0 %	0,0 %	0.8%
HUMAN INTEREST	0,0 %	1,1 %	0.6%
CONSUMERS AFFAIRS	0,7 %	0,1 %	0.4%
HOBBIES AND LEISURE	0,0 %	0,0 %	0.8%
OTHER	1,4 %	3,4 %	0.8%
TOTAL	100 %	100 %	100 %

Conclusions

In order to show the influence of ownership concentration on content, it is necessary to study both. While there is ample evidence of the concentration trend world wide, the relationship to content has not often been studied, especially in new European democracies. While this paper, based on one set of data on market structures and content diversity can not be said to prove that the concentration of the television market influences the diminished diversity of program content, some conclusions on the influence of competition and the structure of the media policy in respect to diversity of content can be drawn.

The data clearly show that the majority genres with socially important content (news and information, culture, political discussion, and other topics not in the category of light entertainment – mainly devoted to reality television) is shown on the public service broadcasting channels HTV 1 and HTV 2. Not surprisingly, the audiences at the national level are in these segments highly concentrated on the public service broadcaster. This would tend to show the important role of the public service broadcasting in providing diversity of non-entertainment content, and unwillingness of commercial broadcasters to invest in this type of programming. In this respect, the implementation of the media policy needs to be questioned, as all broadcasters are obliged to contribute to cultural identity, the promotion of cultural creativity, and development of education, science and art. Nova TV devotes 75 per cent of its programs to entertainments (films, soap operas, comedy and light entertainment), RTL TV 71 per cent, and HTV 35 per cent. Within the Croatian television market, the public service broadcaster is clearly more diverse in its programs. When we compare the findings, however, with the programs of public service broadcasters in Norway, UK, and Italy, HTV shows the smallest percentage of news and current affairs programs (Ward 2006). The Croatian public service broadcaster's largest program segment is the movies, as opposed to news programs which are the largest segment in other PSB's studied. The study of the Croatian media markets showed that in the segment of movies and series, the Croatian market is very well segmented and similar shares are held by all three companies broadcasting at the national level. This would tend to show that the public service broadcaster is giving in to commercial pressures.

In respect to domestic production, only HTV reaches the required 50 per cent of domestic production, while Nova TV has only 20 per cent, and RTL TV 33 per cent of programs produced in Croatia. The majority of domestic production is in the non-fiction genres (77 per cent of non fiction in HTV is domestically produced, 75 in RTL and 51 in Nova TV) (Ward 2006). This also indicates that the legal requirements for domestic production, and especially in the area of cultural creativity, are not yet met.

Regarding the diversity of topics and actors presented in the news, the differences between the public service broadcaster and the commercial stations is only slight, with some more emphasis on the economic and business news, political affairs and public service topics in the HTV. HTV also gives a little more voice to "official sources" and none to celebrities. The differences are not pronounced. This could be evaluated in two ways: the need of the public service broadcaster to compete for news audiences brings about the streamlining of its news output (although they have 80 per cent of the national audience in news and current affairs programs), or, as improvement, in great similarity to commercial broadcasters (i.e. political independence).

Expected consequences for the pluralism of content in respect to concentration relate to the diminishing of the choice and diversity of the number of titles (in the press), and in the mainstreaming of the remaining titles in order to maximize audiences. Another aspect is the editorial concentration, a practice of "diversified" media conglomerates: the media content is produced in one central place, and distributed world wide to local audiences. The diversity and pluralism is at risk again, as only one viewpoint is presented in different kinds of media (press, TV, radio, internet). Concentration also has negative effects on programming quality, as was shown in an analysis of the US entertainment program diversity and quality after recent mergers (Einstein 2002). Standardization of the cultural content in the media is also a result of concentration: all media companies use the same audience-at-

tracting strategies (Humphreys, 1996). If we take a more radical view, the very essence of the corporate media ownership is a threat to the development of civil society. The media follow editorial policies that are commensurate with the aims and social values of their corporate owners (Bagdikian 2000). The opinions that are contrary to these interests never have a chance of entering the public sphere, even if they represent the majority of civil society (McChesney 2000).

Other studies have analyzed the relationship between type of the market and the content of the media. Roth (2004) shows the correlation of the structure of the media market and the diversity of the media system in the Netherlands. Comparative project on the quality of programming (Ishikawa 1996) showed (expectedly) a higher level of diversity for public television channels, while the lowest results were scored by American commercial television network. The relationship is however not uncontroversial: repeated analysis in Sweden in 1996 showed that "in the presence of increasing competition from commercial channels, Sweden's public service television system increased its diversity, while her public service radio system decreased in diversity" (Hillve et al).

The Croatian data tend to show a high degree of similarity of the largest programming segments of public service broadcaster and the commercial broadcasters, which could support the thesis that the commercial competition in a highly concentrated market brings about the streamlining of program output. The public service broadcaster is still producing the majority of socially important content. The media policy in Croatia should take further steps to ensure that the programming obligations in this respect are met also by the commercial broadcasters.

Acknowledgements

The research was performed within the project "Media, Cultural and Communication Aspects of Civil Society" of the Department for Culture and Communication, Institute for International Relations, Zagreb, financed by the Croatian Ministry of Education, Science and Sport.

The study on Croatian Media Markets was supported by a grant from the Media Division of the Council of Europe thanks to the voluntary contribution of the government of Norway within the Media Component of the Stability Pact for South-Eastern Europe.

Notes

¹ The Media Law (2003), The Electronic Media Law (2003), The Law on Croatian Radio and Television (2001, 2003), The Law on the Croatian Press Agency HINA (2001), The Law on the Adoption of the European Trans-frontier Television and the Protocol of changes of the European Convention on Trans-frontier Television (2001), Law on the right of access to information (2003).

² C3 = sum of three largest market shares where 0-35: low concentration, 36-55: moderate concentration and 56+: high concentration; The Herfindahl-Hirschman index is calculated as the square root of the sum of the squares of market shares of all competitors in the relevant markets

³ This fund is also financed through the revenue of the public television of which 3 % has to be given to be Fund (Law on Croatian Radio-Television (Article 54).

⁴ Compare similar findings in The Global Media Monitoring Project 2005 <http://www.globalmediamonitoring.org/>.

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