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In two-thirds of the European countries, less than four owners hold 80 per cent of the media

- **Experts, politicians, journalists, editors and media freedom organisations from all over Europe meet on Tuesday, 30 January, 2018 in Madrid, to discuss media ownership concentration and media pluralism**

- **At the #NEWSOCRACY conference latest data on media ownership in Europe will be analysed (Media Pluralism Monitor), and the still unpublished recommendations of an expert group working for the Council of Europe will be presented, on how to improve transparency and competition**

- **The conference is organised by the European Center for Press and Media Freedom (ECPMF), the Plataforma en Defensa de la Libertad de Información (PDLI) and the Osservatorio Balcani e Caucaso Transeuropa (OBCT). It is supported by the European Commission.**

Madrid, 30 January, 2018

In Europe, media ownership concentration is working against a pluralistic and transparent media market. According to the latest data by the Media Pluralism Monitor, in two-thirds of the European countries less than four owners hold 80 per cent of the media.

The highest concentration can be found in the audiovisual sector where in 15 states – out of the 17 that publish their data – 80 per cent of the television market is in the hands of four or less operators. By comparison, in the print sector it is 57 per cent.

Regarding the risk indicators used in the Monitor's report on the 30 states, the average risk for transparency in media ownership is at 33 per cent (with higher numbers in Greece with 75 per cent, the Czech Republic with 75 per cent and Luxembourg with 69 per cent). The average risk of ownership concentration ranges at 67% (with higher percentages in Ireland with 97% and Sweden, Finland and Bulgaria with 96%).

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"A scourge of media freedom"

Lutz Kinkel, Managing Director of the **ECPMF** points out the lack of transparency in media ownership: *"To have valid data on media ownership is like taking a necessary x-ray of the market. Citizens need to know in order to assess the media outlets' output. Politicians need to know in order to prevent ownership concentration and to be able to guarantee pluralism. Whenever media ownership is disguised there is a reason for that. A bad reason".*

PDLI's President, **Virginia Pérez Alonso**, calls media ownership concentration *"a scourge of media freedom: The citizens' right to information requires a pluralism of information on the one hand, and economical and political independence on the other. Unfortunately, these two requirements are not guaranteed in Europe at this time: European citizens do not have access to know transparently who the owners of the media are, and even less to know their economic and political interests, which, finally, determine the information that reaches the audience."* she says.

This concern is shared by **Chiara Sighele** of **OBCT**: *'Who is behind our media?' is still a too rare question, which too often leads to neither clear nor easy-to-find answers. However investigating media ownership and its financing is gaining momentum in various European countries, a momentum which might be a unique opportunity to push for advancing the requirements and practices of public disclosure and the awareness of an issue with such impact on our democracies".*

At the #NEWSOCRACY conference different initiatives from different countries of how to improve media market transparency will be introduced. Also we will discuss how new technologies may contribute to this. In addition, alternatives to the current situation will be looked into, such as new business models, media financing and new journalistic formats.

Finally, #NEWSOCRACY will present proposals for state and community regulators, among them, an outlook on the recommendations of the committee of European experts working for the Council of Europe on the subject media ownership concentration.

#NEWSOCRACY is taking place at the Medialab-Prado in Madrid this Tuesday, January 30, 2018, 10am to 17:30pm.

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[ANNEXE] Results by country

Spain - The top 4 TV companies – RTVE (Spanish PMS), Mediaset, Atresmedia and CCMA (Catalan PMS) – achieve 94% of the market share and 78% of audience share. Regarding the radio sector, the market share of the top 4 owners (Ser, COPE, Uniprex (Ondacero) and Radiocat XXI (RAC1) reaches 97% and the Top4 radio stations concentrate 80% of audience.

Transparency risk: 19% Concentration risk: 59%

Autria - The market share of the top 4 audiovisual media owners (in terms of the total revenue generated in the audiovisual market) is almost 100% (excluding foreign television stations since no data exclusively concerning the Austrian market is available). There is insufficient information available on the total revenue of all radio owners. Audience concentration for the audiovisual media market is 64% and 85% for the radio market (2015). The market share of the top 4 newspapers owners (in terms of the total revenue generated in the newspaper market) is 85%; readership concentration for the newspaper market is 73% (2015).

Transparency risk: 44% Concentration risk: 68%

Belgium: In Flanders, two major groups, Mediahuis and De Persgroep, control 100% of the national daily newspapers (except for the freesheet Metro). In the French speaking Community, Rossel Group (owner of Sud Presse) dominates the newspaper market (60%)

Transparency risk: 3% Concentration risk: 67%

Bulgaria: Top 4 audience shares are also indicative of generally high concentration: 82% in the television sector, 81% in the radio sector and 35% in the newspaper market".

Transparency risk: 50% Concentration risk: 96%

Croatia: The market share for the top 4 audiovisual media owners in Croatia is 91% and audience concentration is 77%.

Transparency risk: 3% Concentration risk: 40%

Cyprus: In all types of media, there are only four or five major actors, with their total audience and market share rates rising beyond 60% (radio, television) or up to 88% (television).

Transparency risk: 31% Concentration risk: 67%

Czech Republic: The audience share of the top 4 owners in the television sector accounts for 88%; the nation-wide radio market is divided among three players, and the entire nation-wide newspaper sector belongs to only four owners. The excessive horizontal concentration is most evident in case of the Czech regional print media market, where the daily Deník, with its 72 regional mutations, enjoys a monopoly position.

Transparency risk: 75% Concentration risk: 68%

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Denmark: the Danish state is a large domestic media owner, owning the two large broadcasting companies as well as eight regional public service broadcasters. The largest national news agency (Ritzau) is owned by a large group of media companies including the Danish PS broadcaster DR.

Transparency risk: 3% Concentration risk: 92%

Estonia: Two media corporations dominate the whole media market: the Ekspress Group and the Postimees Group

Transparency risk: 3% - Concentration risk: 88%

Finland: In the TV broadcast sector, the four largest companies hold 92% of the audience and 97% of revenues; the four largest companies in the radio market hold 80% and 92%; and the four largest companies in the newspaper market hold 59% (audience) and 64% (revenue).

Transparency risk: 50% - Concentration risk: 96%

France: Of the nine most important national newspapers, Le Figaro (23,91%), Le Monde (20,58%), L'Equipe-Edition Générale (17,18%) and Aujourd'hui en France (10,68%) concentrate 72% of audiences of newspaper publishing. Canal+, Bertelsmann, Buygues and Lagardère, the top 4 owners across different media markets, concentrate 75% of the market share.

Transparency risk: 6% - Concentration risk: 54%

Germany: The Top4 (public broadcasters, RTL Group, ProSiebenSat.1, and Sky) achieve a market share of 88% of television viewing time. In contrast to this the Top4 newspaper publishers have a 37% share of the total circulation.

Transparency risk: 3% - Concentration risk: 54%

Greece: The market share of the top 4 radio channels indicates a high level of horizontal concentration (67%) but no data on audience shares is available to complete the picture. As to the newspaper market, a medium level of ownership concentration is identified: the top 4 newspapers have a market share (measured by share of advertising expenditure in 2015) of 41% and a readership share of 25%.

Transparency risk: 75% - Concentration risk: 41%

Hungary: No datos.

Transparency risk: 50% - Concentration risk: 68%

Ireland: No datos.

Transparency risk: 50% - Concentration risk: 97%

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Italy: the digital terrestrial audiovisual market is still dominated by the two main operators in Italy (RAI [the PSM] and Mediaset), the switch over to digital terrestrial television and the increase in pay-tv and on-demand audiovisual services have challenged the rigid duopoly of the Italian audiovisual media market. In particular, at least in terms of revenues, SKY Italia has established itself as the third main component of the Italian audiovisual market (32.5% of the resources in 2015), overtaking RAI (27.8%) and Mediaset (28.4%) (See data of AGCOM, 2016). Nonetheless, the market is still highly concentrate

Transparency risk: 56% - Concentration risk: 60%

Latvia: two or three largest daily newspapers that are issued in Latvian dominate the market (Diena, Latvijas Avīze, Neatkarīgā Rīta Avīze). There are three companies that attract larger part of audience and advertisers' investments of TV market in Latvia. The largest market share belongs to the public broadcaster Latvian Radio (LR), which offers four different channels and attracts about 40% of the radio audience

Transparency risk: 63% - Concentration risk: 68%

Lithuania: No datos

Transparency risk: 50% - Concentration risk: 88%

Luxembourg: three media companies clearly dominate the media market (two for the radio sector – RTL and Saint-Paul Group –, two for the press sector – Editpress and Saint-Paul Group – and one for the TV sector – RTL Group) while one site largely dominates the Internet content intermediaries' sector (Google.com).

Transparency risk: 69% - Concentration risk: 92%

Malta: Top4 media owners in the major media sectors (audiovisual and radio) have more than 50% of audience share.

Transparency risk: 50% - Concentration risk: 63%

Montenegro: Three out of four commercial TV stations with national coverage (TV Pink M, TV Prva, TV Vijesti) are majorly owned by foreign companies, as well as three out of four local dailies.

Transparency risk: 44% - Concentration risk: 65%

Netherlands: with joint audience shares of the four largest companies that are between 69% and 91%.. the top 3 owners across different media markets we estimate that there is a concentration of 84,5%.

Transparency risk: 3% - Concentration risk: 83%

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Poland: the top 4 audiovisual owners stood for 70.2% in 2015 and share of the top 4 radio owners for 82.2%. The share of the four leading press groups in the overall circulation of the press market reached around 70% in 2013, 77.5% in 2014 and 76% in 2015.

Transparency risk: 50% - Concentration risk: 67%

Portugal: The Portuguese traditional media markets have, in the majority of cases, an oligopolistic structure, with three or four dominant operators/groups. The major private-owned media groups are Impresa, Cofina, Media Capital and Global Media and there is also a state-owned group that operates in television and radio markets (RTP).

Transparency risk: 13% - Concentration risk: 67%

Romania: The audience concentration in the audiovisual media sector is 56%, comprising the audience share of the top four audiovisual media owners: Intact Media Group, ProTV SRL/CME Media Enterprises, Dogan Media International SA and Ridzone Computers SRL. Similarly, the audience concentration in the radio market is 57%, made up of the audience shares of top four radio owners: Societatea Română de Radiodifuziune, A. G. Radio Holding, Grupul Media Camina-Intact Media Group and Lagardere Active International. The audience concentration for the top four publishers of the newspaper sector is 88% (Adevărul Holding, Ringier Romania, Intact Media Group and the Romanian Patriarchy) and for the Internet content providers **market** 69% (Ringier Romania, Adevărul Holding, ProTV SRL and Realitatea Media SA).

Transparency risk: 25% - Concentration risk: 72%

Slovakia. No data.

Transparency risk:3% - Concentration risk: 58%

Slovenia: 4 owners almost completely control audiovisual market in Slovenia.

Transparency risk: 25% - Concentration risk: 44%

Sweden: No datos.

Transparency risk: 3% - Concentration risk: 96%

Turkey: No datos.

Transparency risk: 25% - Concentration risk: 42%

UK: Top 4 audiovisual media owners command 92% of revenues and 74% of audiences; Top 4 radio owners command 88% of both revenues and audiences; Top4 newspaper owners command 75% revenues and 71% of readership; Top 4 owners across different media markets command 68% of revenues; and Top 4 Internet providers command 59% of revenues and 90% subscribers.

Transparency risk: 50% - Concentration risk: 83%

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Countries	TV		Radio		Press		Risk to transparency	Risk of concentration
	Market	Audience	Market	Audience	Market	Audience		
Germany		88				37	3	54
Austria	100	64		85	85	73	44	68
Belgium					100	80	3	67
Bulgaria	82		81		35		50	96
Cyprus	88	88	60	60	60	60	31	67
Croatia	91	77					3	40
Denmark							3	92
Slovakia							3	58
Slovenia	100						25	44
Spain	94	78	97	80			19	59
Estonia	100	100	100	100	100	100	3	8

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Finland	97	92	92	80	64	59	50	96		
France	75					72	6	54		
Greece			67		41	25	75	41		
Hungary							50	68		
Ireland							50	97		
Italy	100						56	60		
Latvia	100				100		63	68		
Lithuania							50	88		
Luxembourg	100	100	100	100	100	100	69	92		
Malta		50		50			50	63		
Netherlands	85	80	85		84		3	83		
Poland	70		82		76		50	67		
Portugal	100		100		100		13	67		
United Kingdom	92	74	88	88	75	71	50	83		
Czech Republic	88		100		100		75	68		

Romania		56		57		88	25	72		
Sweden							3	96		
Montenegro							44	65		
Turkey							25	42	**Countries in total:**	
Countries in total >80%	**15**	5	**10**	4	**8**	3	**33**	**67**	**33**	**Total Paises >80%**
Countries giving out data	17	12	12	9	14	11			**43**	**Paises con datos**
Countries concentration percentage >80%	**88%**	0	**83%**	0	**57%**	0			**76%**	**Media % concentracion medios**