



CENTRE FOR MEDIA
PLURALISM AND
MEDIA FREEDOM

MPM2023: Market Plurality

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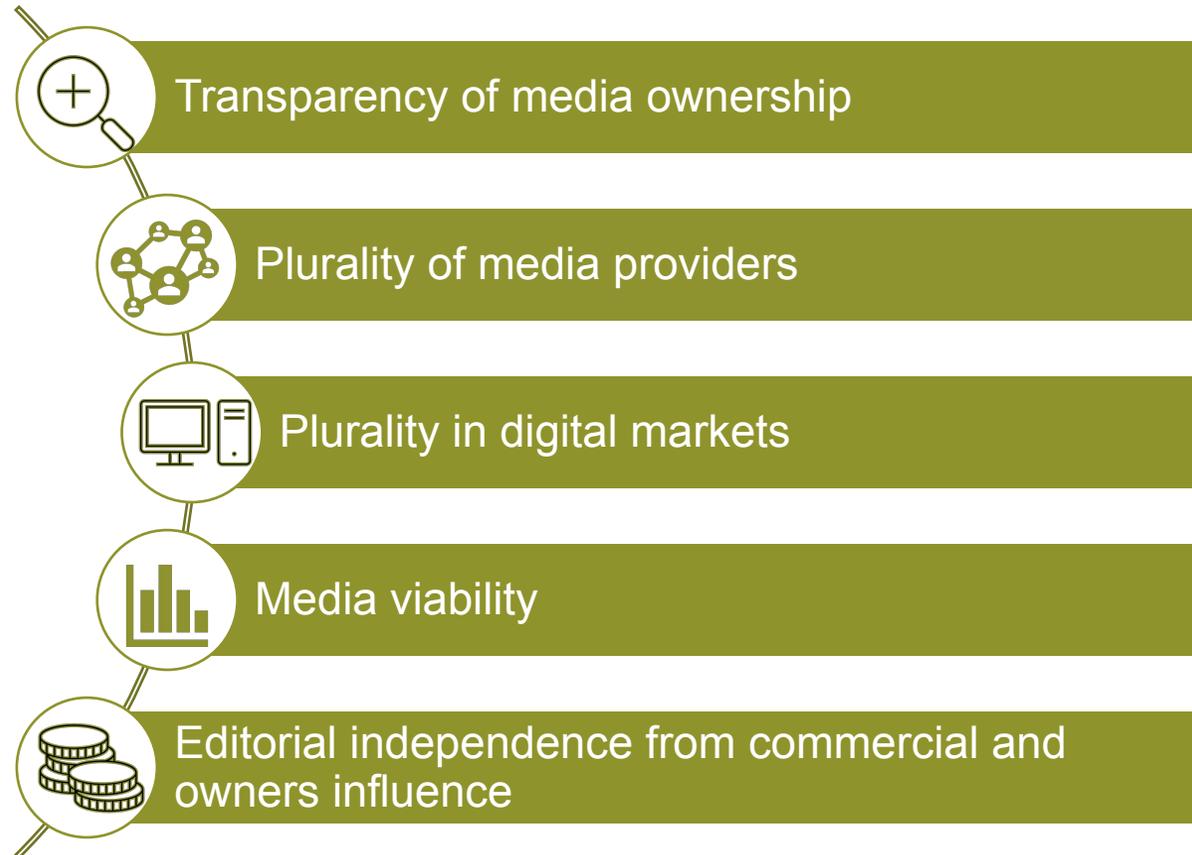
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The Market Plurality area

Here the MPM considers the economic dimension of media pluralism, assessing the risks which originate in the market in which media providers operate, and including the role of other actors (such as digital platforms).



MPM2023-MPM2022: methodological notes

Fine tuning of the indicators and variables:

- to better assess concentration in digital markets
- to take into consideration transparency in financial reports
- to take into consideration standards of transparency/editorial independence/ownership's conflict of interests

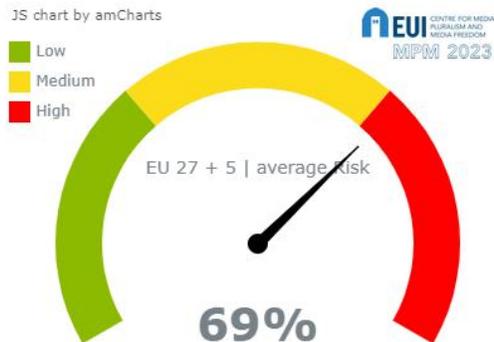
Renaming of 3 indicators:

- News media concentration ➡ Plurality of media providers
- Online platforms concentration and competition enforcement ➡ Plurality in digital markets
- Commercial and owner influence over editorial content ➡ Editorial independence from commercial and owners influence

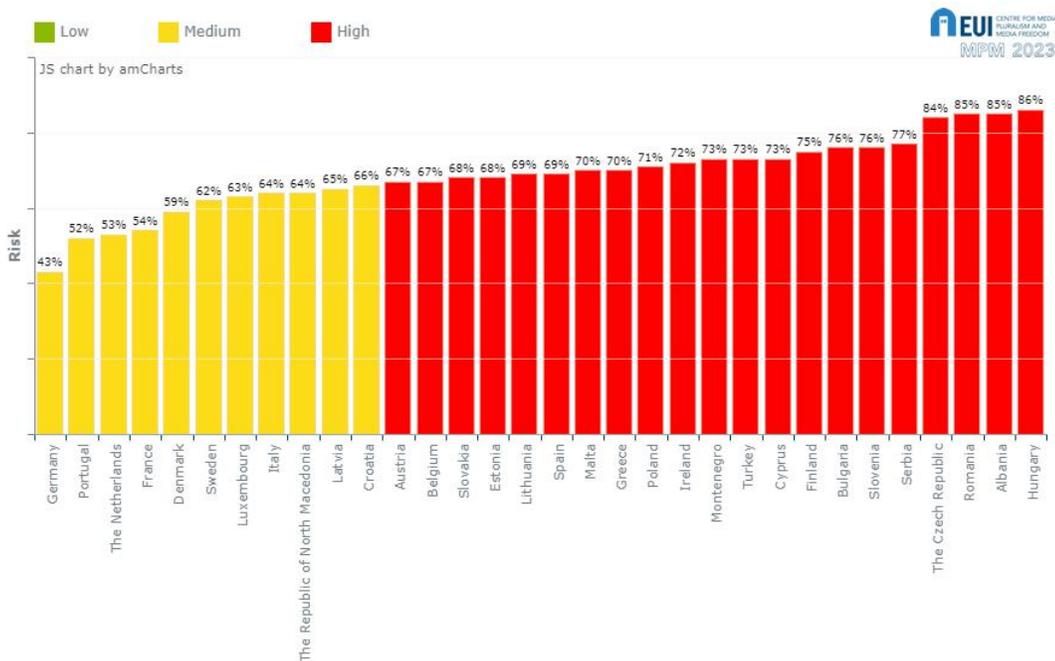
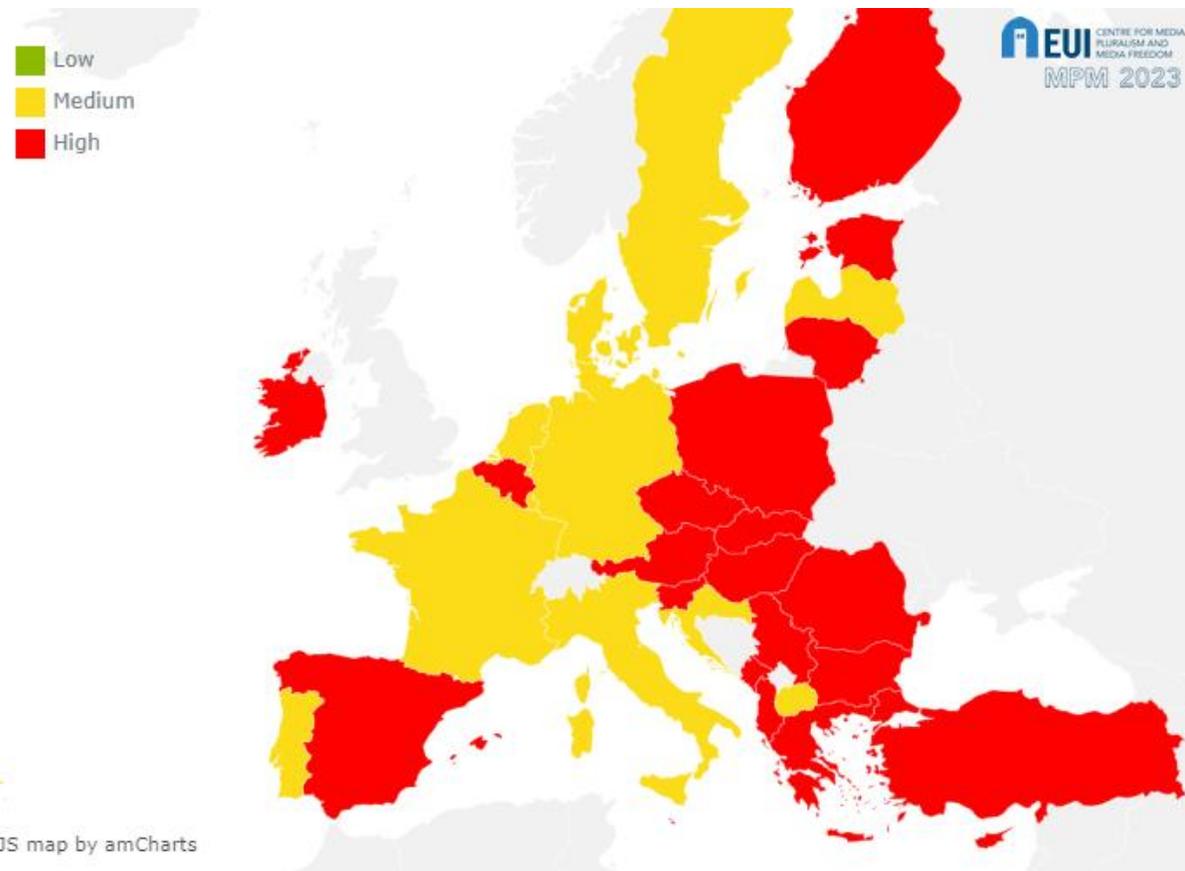
Lack of data:

- ❖ The share of “No data” answers is 15%, vs. 7% in the whole MPM questionnaire
- ❖ For the digital questions, in the Market area, the share of “No data” answers was even greater: 17%.

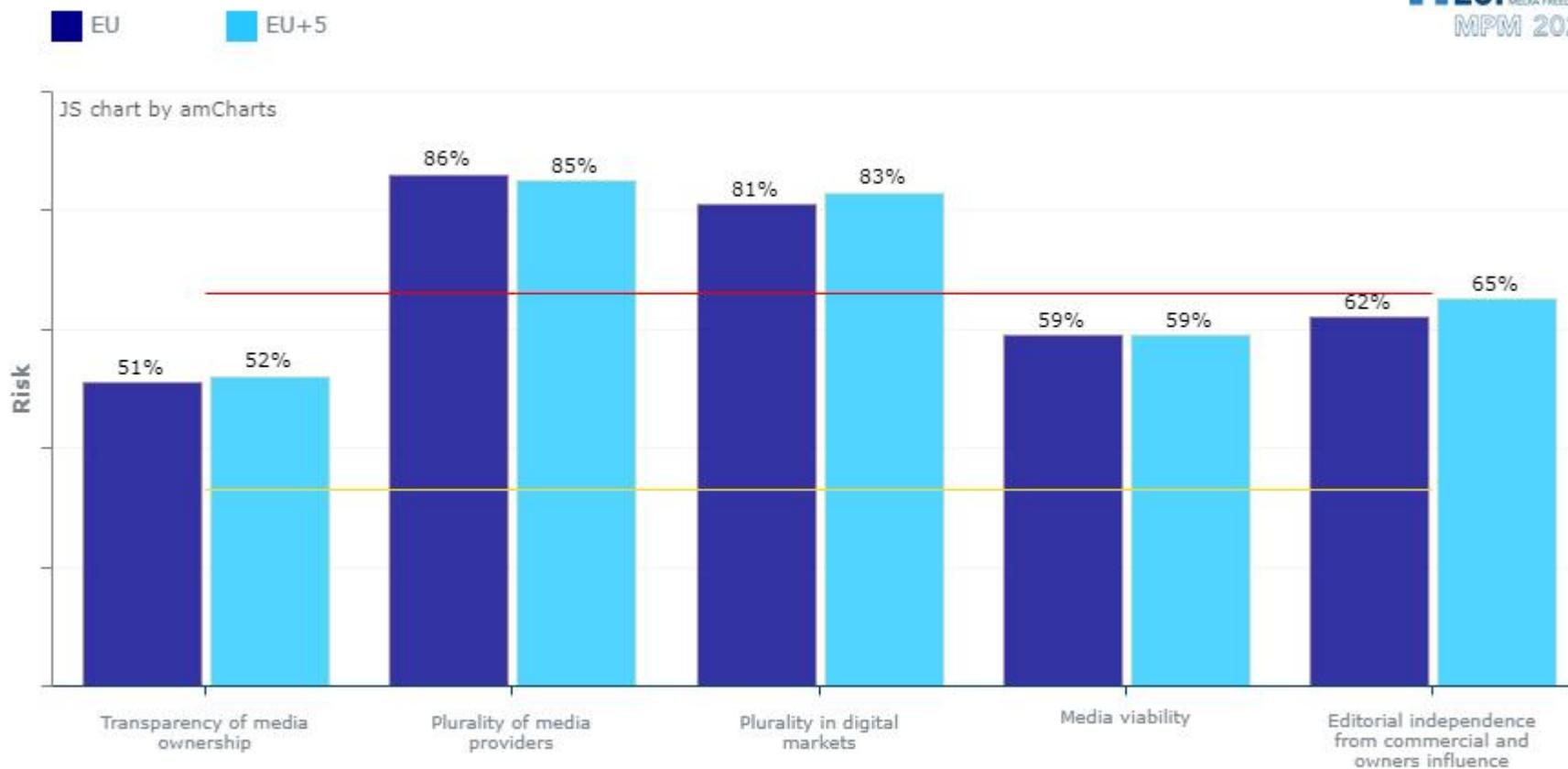
Market Plurality area: average risk and map of risks per country



- **High risk**
- No country at low risk
- Many countries crowding around 60-70%



Market Plurality area: averages per indicator



Increasing: ↑

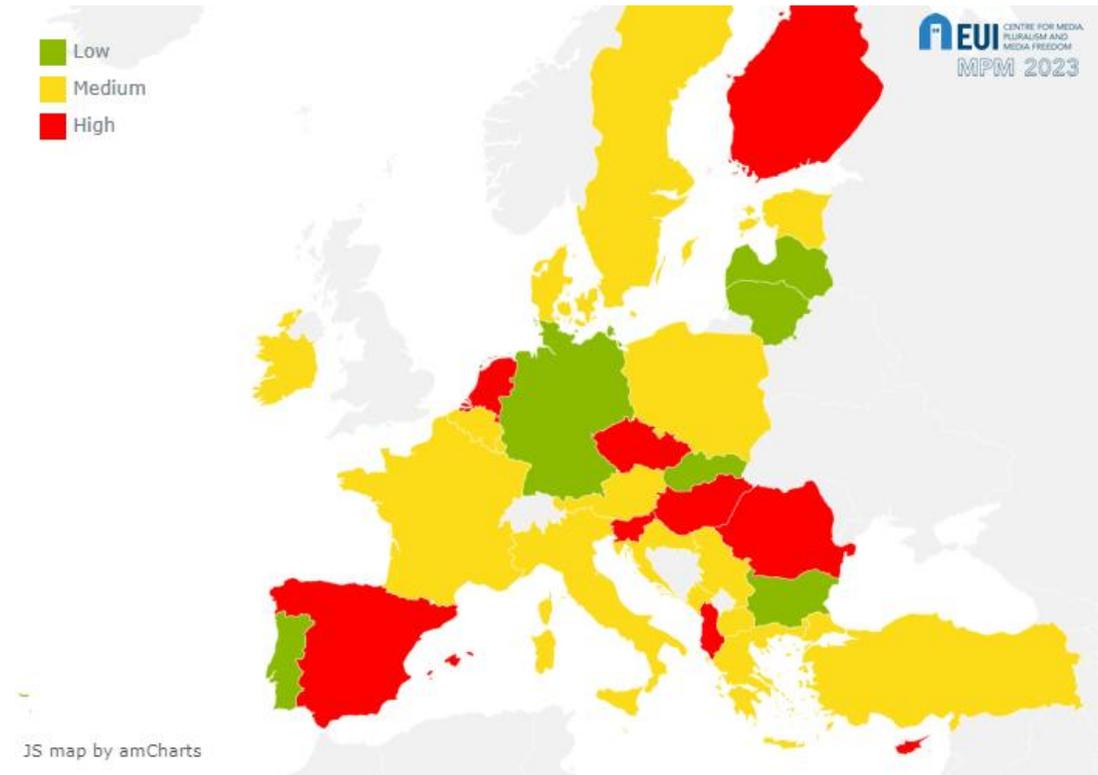
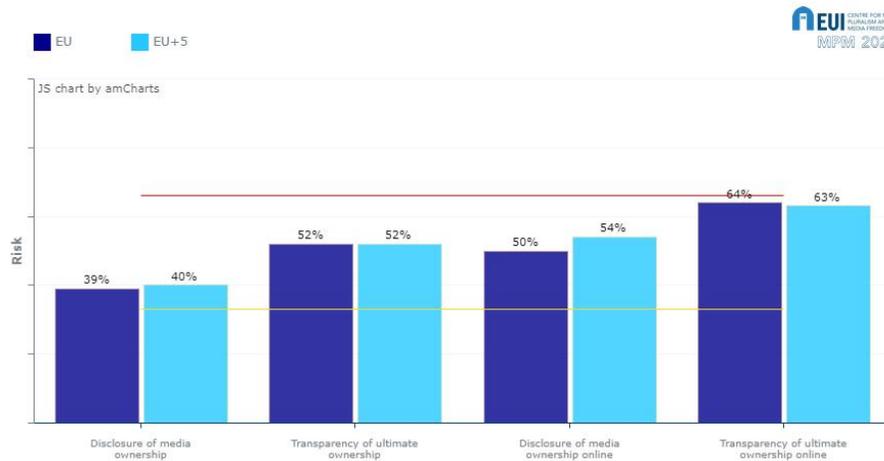
- Media viability
- The two indicators of concentration
- Commercial influence

Decreasing ↓

- Transparency of media ownership

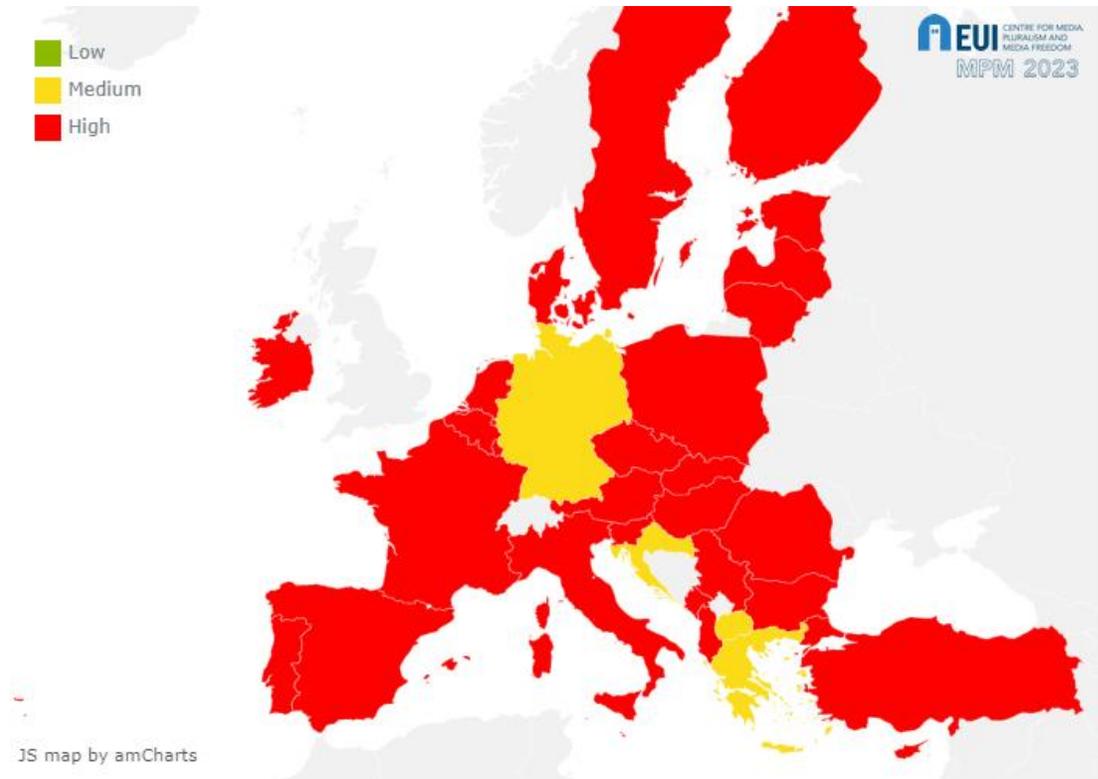
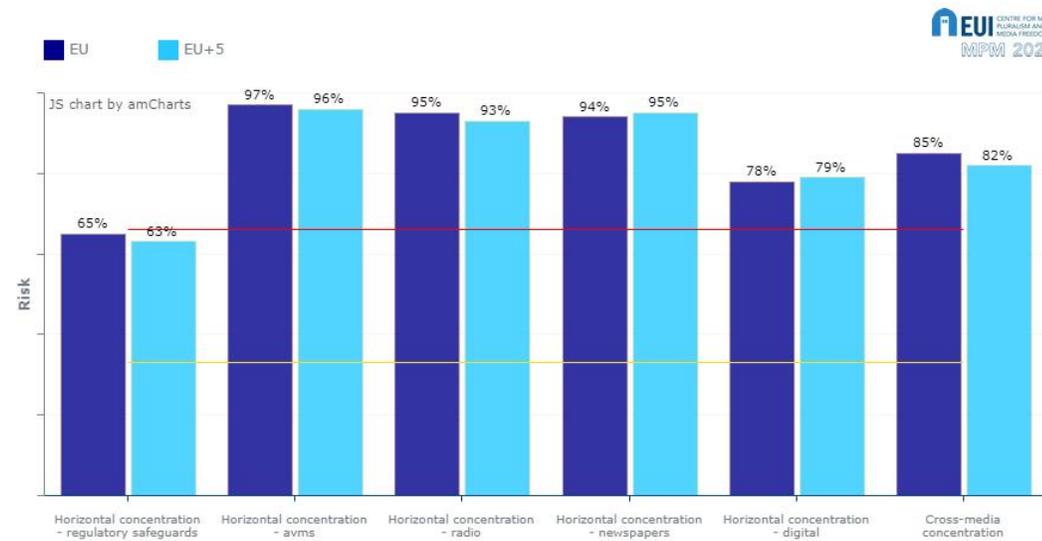
Transparency of media ownership - medium risk - 52%

- 6 countries low risk, 17 medium risk, 9 high risk
- In the last 3 years decrease in the risk score (in part due to the progressive implementation of the AML Directive V and AVMS directive)
- This scenario may change in the future (CJEU ruling 2022)
- Higher scores in the digital sub-indicators



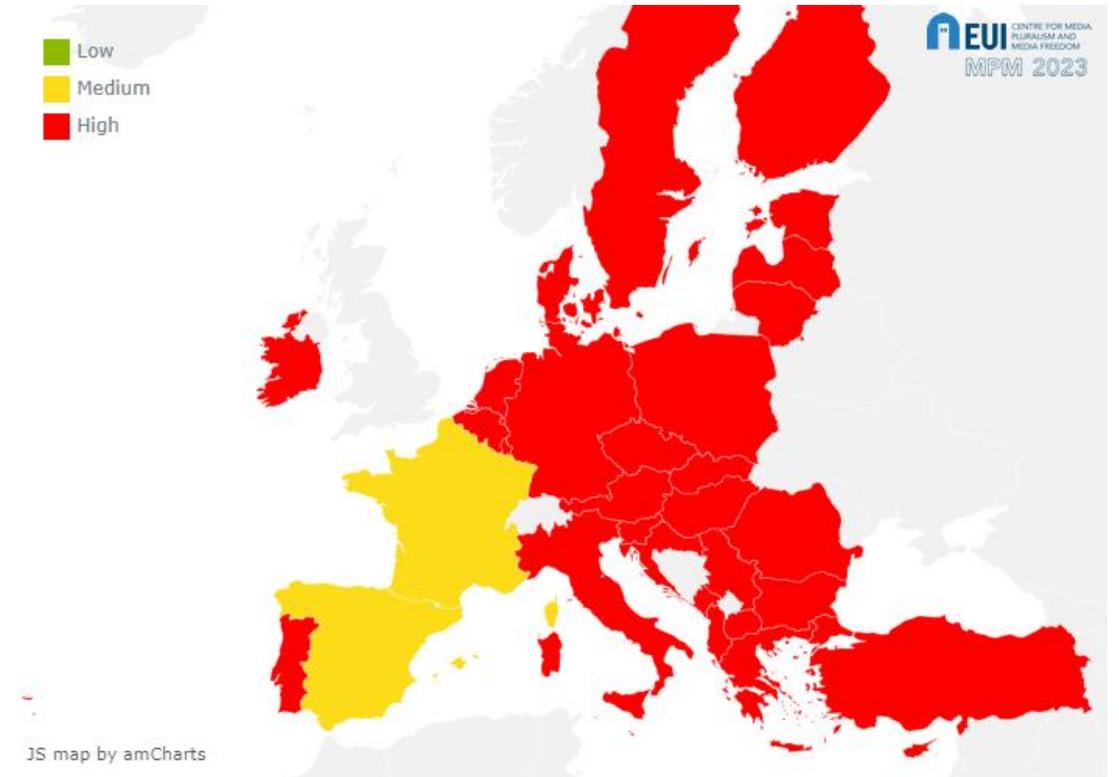
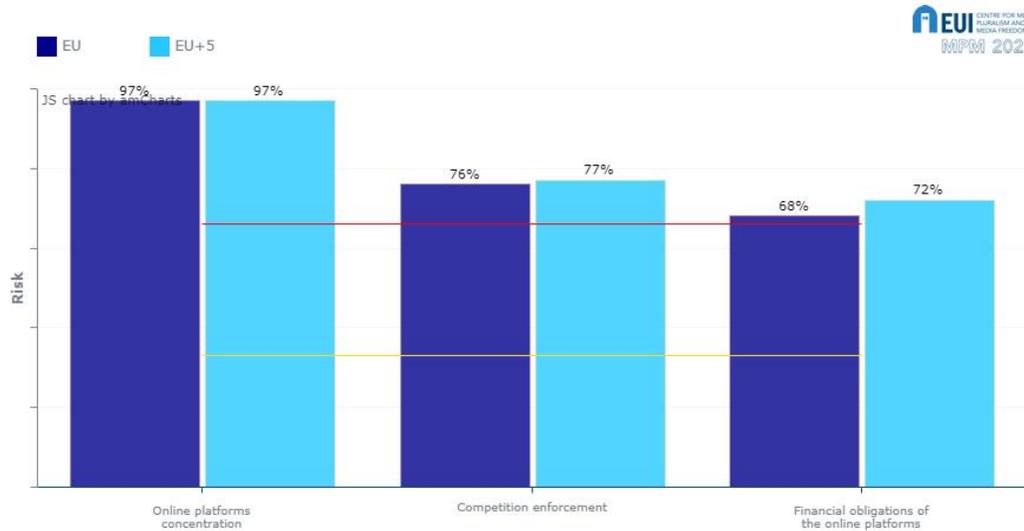
Plurality of media providers - high risk - 85%

- Highest level of risk among MPM's indicators
- No country at low risk. Medium risk: Croatia, Germany, Greece and The Republic of North Macedonia
- Evolution of regulatory frameworks: 1) concentration and media viability 2) updating rules shaped on the traditional media 3) art. 21 EMFA



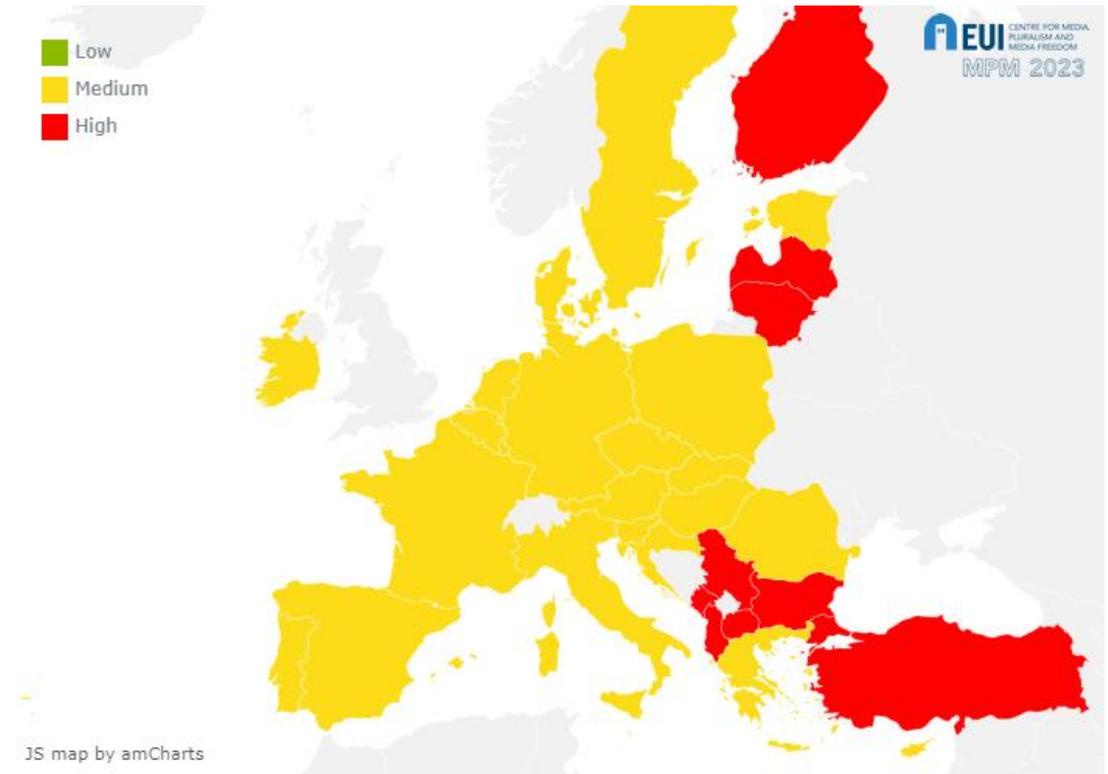
Plurality in digital markets - high risk - 83%

- Second highest level of risk among MPM's indicators
- Concentration of online advertising market
- The new sub-indicator on the financial obligations of the platforms (compensation to the publishers, and digital taxation)



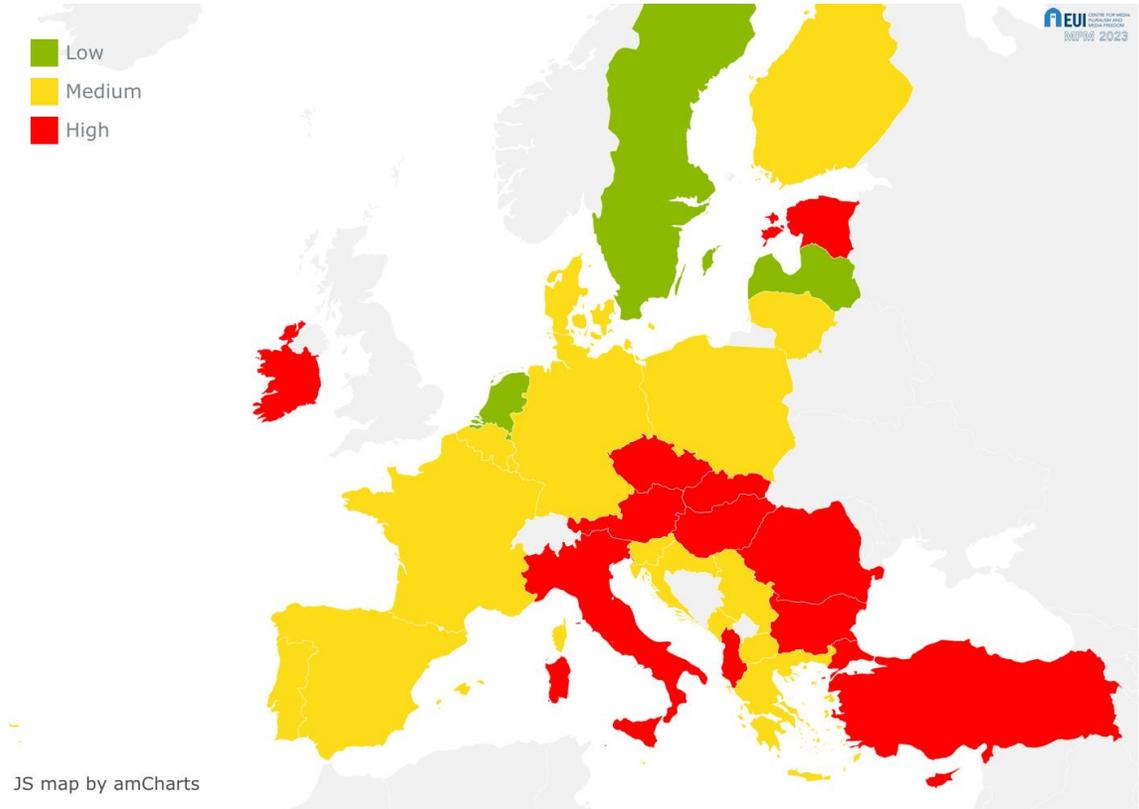
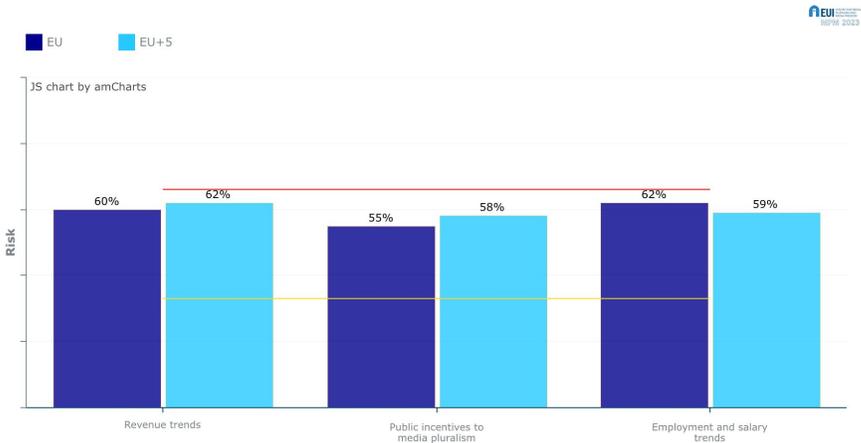
Plurality in digital markets - focus on variable 91

- Variable 91. Negotiations between platforms and publishers
- In nine of the countries there are no rules, nor are there ongoing negotiations: Albania, Bulgaria, Finland, Latvia, Lithuania, Montenegro, Serbia, the Republic of North Macedonia and Turkey).
- In the other countries, medium risk, here are negotiations/agreements, but they are not transparently reported and/or they are limited to the main media outlets.



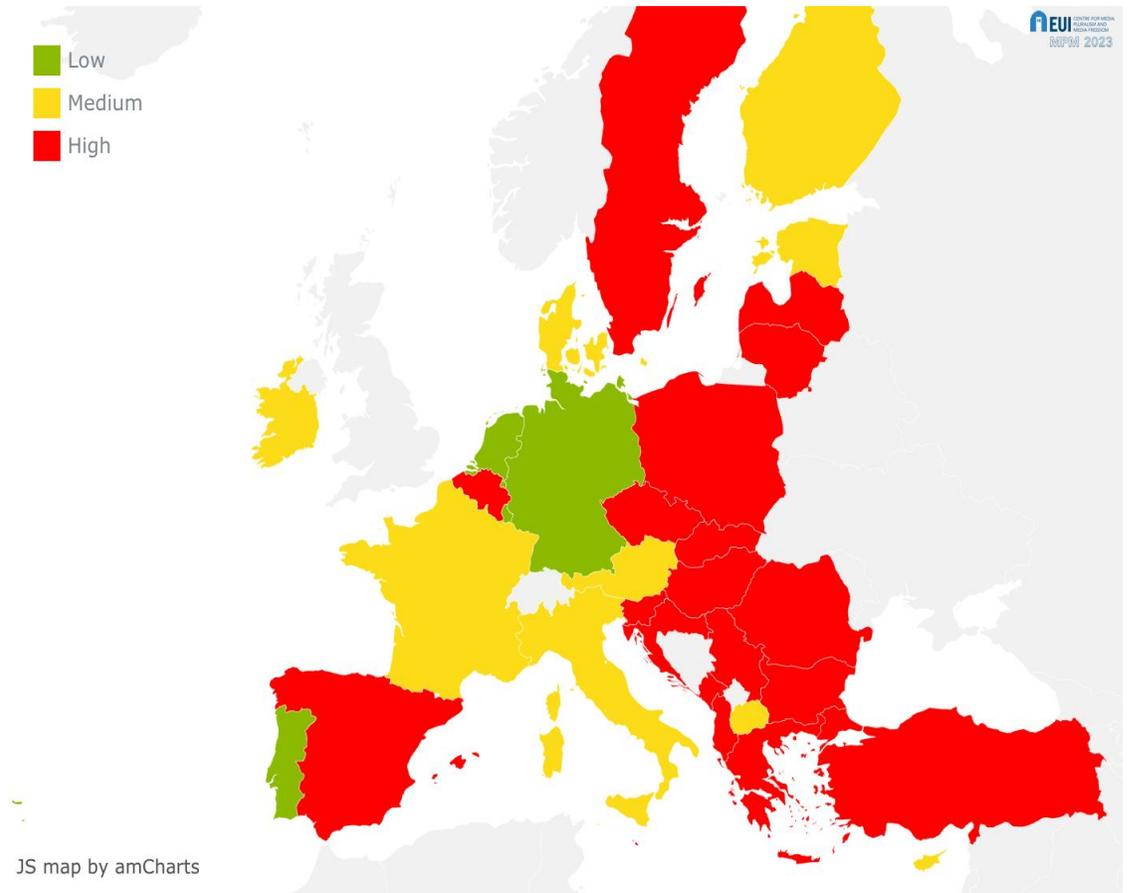
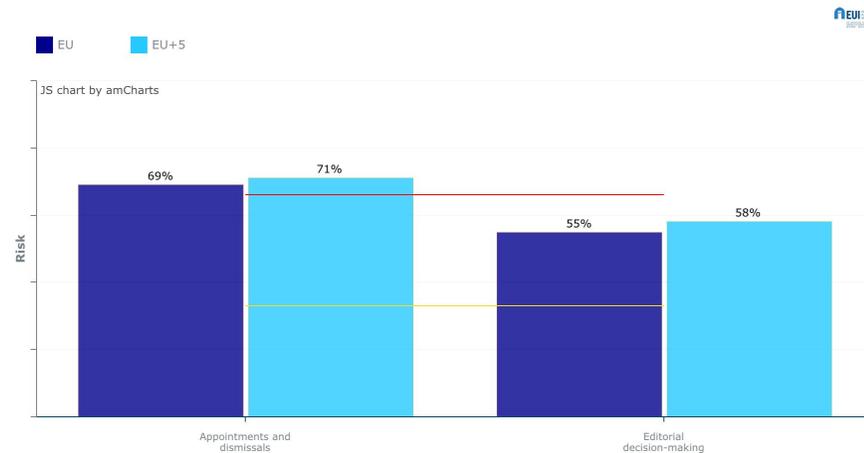
Media viability

- 3 countries low risk, 17 medium risk, 12 high risk
- After post-COVID rebound, the war and inflation posed new economic challenges
- Economic conditions of freelance journalists are bad
- Still not enough public incentives for online media
- Better data is needed to assess local and digital native media
- New indicator on journalistic innovation: only 8 low-risk countries



Editorial independence from commercial and owners influence

- 4 countries low risk, 9 medium risk, 19 high risk
- Insufficient protection for journalists at times of owner-change
- Pressure from owners and economic interest groups
- In 24 countries no attempts to disclose conflicts of interest
- Still insufficient attempts to separate editorial and journalistic activities of newsrooms (only 6 low-risk countries)



Key findings and policy proposals

GROWING CONCENTRATION OF MEDIA OWNERSHIP

Dilemma media consolidation
vs media plurality.

How to assess market and
opinion power in the digital
sphere?

Developments: art. 21 EMFA

PLATFORMS' DOMINANCE IN THE ONLINE ADVERTISING MARKET

The role of data

The new EU regulatory
framework

The impact of the copyright
directive

The potential impact of DMA

MEDIA VIABILITY SHATTERED BY INFLATION

More support opportunities
are needed – both on the EU
and the national level

Better data collection is
necessary on media
revenues

Thank you!