Scene setter

On 7 May, you will have a 30-minute videoconference with the CEOs and/or Directors General of Nordic public services broadcasters from Sweden, Denmark, Finland, Norway and Iceland. Their cooperation is known as 'Nordvision' in the transparency registry.

Participants (CVs in your file):

- Swedish Radio, SR
- Swedish Television, SVT
- Swedish Educational Broadcaster, UR
- Danish Radio, DR
- Finnish Radio and Television, YLE
- Norwegian Television and Radio, NRK
- Iceland Radio and Television, RUV

They would like to discuss the roll out of the Commission's Digital Service Act and what the new provisions mean for the media/audiovisual industry (their recent position paper is included in your file). They would also like to get a better understanding of what their industry can expect from the anticipated reform of European competition regulation. Finally, they will address the current situation with regard to COVID-19 and measures to meet audience demands in times of crisis.

1. The Swedish media landscape

In 2018, Swedes spent six hours daily on media. But despite the rise in internet media, traditional media continue to dominate media consumption, except for the youngest age groups. 81% of the population is watching television every day and most of them still watch traditional TV. However, the situation is changing rapidly with TV on demand-services such as Netflix and HBO Nordic. This has had consequences for traditional broadcasting networks in terms of fewer viewers and declining revenues.

The reading of newspapers, especially morning newspapers, continues to decline. Over the past ten years, it fell from 72% in 2007 to 55% in 2018 (both printed and online). The diminishing market is forcing many regional and local newspapers to downsize, merge with a competitor or close down completely.

The reliance on the public service television is still high, as 48% of Swedes watch news on the state-owned Swedish television broadcaster news five times a week, 35% the Television 4 Evening News, and 89% Swedish radio broadcast news (data from 2018).

Three companies carry out public service broadcasting in Sweden: Sveriges Radio (Swedish Radio), Sveriges Television (Swedish Television), and Utbildningsradion (the Swedish Educational Broadcasting Company). All are without advertising.

These companies are owned by an independent foundation. The foundation's board consists of 13 politicians, representing the political parties in the Riksdag and appointed by the Government. Since 1 January 2020, an active Parliamentarian cannot be elected to the board that assigns the CEOs of the public service companies. This setup is designed to protect Swedish public service broadcasting from political influence.

Since 2019, the public service companies are financed by a public service tax on personal income set by the Riksdag (national parliament) and, prior to that, by public license fee payable by all owners of a TV.
**Swedish Radio, SR**

Sveriges Radio (SR) broadcasts several radio channels with news and current affairs with both local, regional and national focus in Swedish and a number of minority and immigrant languages. The SR website streams over 40 radio channels. SR has 2,227 employees in 50 locations in Sweden.

**Swedish Television, SVT**

Sveriges Television’s (SVT) programming covers the whole genre spectre and offers both local, regional and national focus. SVT operates five channels. SVT has around 2,100 employees in 37 locations in Sweden.

**Swedish Educational Broadcaster, UR**

Utbildningsradion’s (UR) mandate is to produce and broadcast educational and general knowledge programmes, which strengthen, broaden and complement the work of other actors active in education. UR programmes are broadcasted on the following channels: SVT1, SVT2, SVT Barn and Kunskapskanalen, and on the following radio channels: P1, P2, P3 and P4. UR has about 230 employees in Stockholm and two regional offices.

2. **The Danish media landscape**

The Danish media landscape is undergoing radical changes in current years, due to the rapidly growing use of internet-based media, which is now the most used media platform. In general, the population watches less flow TV and listen less to conventional radio, while also fewer Danes read a printed daily newspaper. This does not mean, however, that Danes’ media use is shrinking, only that it is shifting towards new media such as podcasts, streaming TV and the daily newspapers’ digital content.

A total of 65% of Danes watch traditional TV on a daily basis, making TV the third most used media. TV is supplied by DR (national broadcasting company, public service TV) and TV2 (public service and commercials). However, since 2010, TV has lost reach and trends are shifting towards streaming and on-demand services, especially among younger media users.

73% of Danes listen to radio on a daily basis, making radio the second most used media platform, even though the use of radio has also experienced a slight decrease in recent years. Following the former channel Radio24syv’s – a privately owned, but license financed, public service channel – subjection to a larger political conflict resulting in the closing of the channel, nationwide public service radio is now provided by the Danish Broadcasting Corporation (DR) and two new channels, Radio Loud and Radio4.

Despite having suffered severe financial cuts in the latest political media agreement, DR has retained a significant number of news and background programmes covering European affairs and politics. Of the two younger channels, only Radio4 has a dedicated EU programme (Lobbyland), which is characterised by a rather aggressive style.

Danish media policy is based on multi-party agreements. The current agreement, covering the period 2019-2023, was adopted in June 2018 by the Liberal Party (RE), the Liberal Alliance (not in the European Parliament), the Conservatives (EPP) and the Danish Peoples Party (ID).

**Danish Broadcasting Corporation, DR**

The Danish Broadcasting Corporation (DR) is Denmark’s oldest and largest electronic media enterprise. The corporation was founded in 1925 as a public service organisation. DR is an independent, licence fee financed public institution comprising television, radio and online services.

It is a key part of the new agreement that the financial framework for DR, which up until now has received the lion’s share of public media funding, is to be reduced by 20% between 2019 and 2023. This decision has already resulted in substantial layoffs as well
as programmes and TV channels fusing or being shut down as part of a general trimming of the organisation to avoid unfair competition between DR and private providers. The agreement, reached between the centre-right parties in the Danish Parliament, reflects decades-long centre-right criticism of DR for allegedly being centre-left or left leaning in its coverage. As a result of the agreement, DR has toned down its political commentary and political debate programmes somewhat.

During the COVID-19 crisis, DR has clearly been the Government’s and authorities’ preferred information platform, a role that DR has accepted given its status as a publicly financed institution. In the earliest phase of the crisis, DR suspended a raft of platforms and programmes, prioritising those with the widest public reach. The fact that the suspended programmes included the most politically critical programmes was widely criticised. Most programmes have since returned to the air.

3. The Finnish media landscape

The Finnish people are among the most active newspaper readers in the world. Radio has maintained its traditionally high popularity (71% listen to radio daily) and an average Finn watches TV around three hours per day. On-demand services are increasing their popularity especially among younger generations. Finland is also among the countries with the highest percentage (90%) of the population online.

The main players in TV are the Finnish Broadcasting Company (YLE), the main commercial TV station MTV and media group Sanoma. The media coverage of EU issues is reasonable. Still, there are no special journalists for EU affairs and there are less than ten EU correspondents in Brussels.

Finnish Broadcasting Company, YLE

YLE reaches 96% of Finns every week with its four TV channels and six radio channels. Yle Areena is the most popular online service with 2.3 million views every day. Since 2013, YLE is financed with Public Broadcasting Tax that is 2.5% of the part of total earned income and capital income that goes over EUR 14,000. Maximum tax is EUR 163. In 2020, the financing of YLE is EUR 532 million.

The political decisions about YLE are made among all political parties present in Parliament. YLE’s funding is based on State TV and radio fund. This is to ensure that YLE is independent and that the Government in power cannot make changes to YLE’s role alone. A vast majority of the political parties is satisfied with YLE and its funding system – except the populist Finns party who are dissatisfied with the journalistic quality of YLE and wish to reduce its funding. They would also like to transfer the TV content behind paywall, reform the YLE legislation and remove the obligation to support cultural diversity.

YLE is currently reforming its strategy. According to CEO Ylä-Anttila, YLE will strengthen its role as media for all Finns and it will focus more on audio-visual content instead of only online texts.

4. Norwegian Broadcasting Corporation, NRK

NRK (Norsk rikskringkasting AS, Norwegian Broadcasting Corporation) is the Norwegian government-owned radio and television public broadcasting company, and the largest media organisation in Norway. NRK initially had a monopoly on broadcasting in Norway, which came under pressure in the 1980s and subsequently ended in 1992.

NRK broadcasts three national TV channels and three national radio channels on digital terrestrial television, digital terrestrial radio and subscription television. All NRK radio stations are being streamed online at NRK.no, which also offers an extensive TV service. NRK is a founding member of the European Broadcasting Union.

About 94% of NRK’s funding used to come from a mandatory annual licence fee payable by anyone who owns or uses a TV or device capable of receiving TV broadcasts. The remainder came from commercial activities, such as programme and DVD sales, spin-off
products, and certain types of sponsorship. In March 2019, the government decided to liquidate the broadcasting fee as of 1 January 2020 (in part as a reaction to the decline of TV ownership in Norway).

5. Icelandic National Broadcasting Service, RÚV

The Icelandic National Broadcasting Service, Ríkisútvarpið (RÚV), is a public service broadcaster, comprising television (one full-time channel and one part-time channel), radio (three channels) and online services. They place particular attention on the Icelandic language, the history of the nation, cultural heritage and an active dialogue with the public. RÚV’s archives are open and accessible to the public.

RÚV is funded by a broadcast receiving licence fee collected from every income tax payer, as well as from a limited amount of on-air advertising. RÚV has been a full active member of the European Broadcasting Union since 1956. Since 1986, the year in which its monopoly as the only permitted domestic broadcaster ended, RÚV has faced competition from a number of private broadcasting companies, most notably the 365 corporation. On 31 March 2011, RUV introduced a major re-branding of its stations, with new logos and a visual overhaul of its television channel.

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