

# MAPPING DIGITAL MEDIA: **SWEDEN**



# Mapping Digital Media: Sweden

**A REPORT BY THE OPEN SOCIETY FOUNDATIONS**

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# Mapping Digital Media

The values that underpin good journalism, the need of citizens for reliable and abundant information, and the importance of such information for a healthy society and a robust democracy: these are perennial, and provide compass-bearings for anyone trying to make sense of current changes across the media landscape.

The standards in the profession are in the process of being set. Most of the effects on journalism imposed by new technology are shaped in the most developed societies, but these changes are equally influencing the media in less developed societies.

The **Mapping Digital Media** project, which examines the changes in-depth, aims to build bridges between researchers and policy-makers, activists, academics and standard-setters across the world. It also builds policy capacity in countries where this is less developed, encouraging stakeholders to participate and influence change. At the same time, this research creates a knowledge base, laying foundations for advocacy work, building capacity and enhancing debate.

The Media Program of the Open Society Foundations has seen how changes and continuity affect the media in different places, redefining the way they can operate sustainably while staying true to values of pluralism and diversity, transparency and accountability, editorial independence, freedom of expression and information, public service, and high professional standards.

The Mapping Digital Media project assesses, in the light of these values, the global opportunities and risks that are created for media by the following developments:

- the switchover from analog broadcasting to digital broadcasting,
- growth of new media platforms as sources of news,
- convergence of traditional broadcasting with telecommunications.

Covering 60 countries, the project examines how these changes affect the core democratic service that any media system should provide—news about political, economic and social affairs.

The aim of the Mapping Digital Media project is to assess the impact of these changes on the core democratic service that any media system should provide, namely news about political, economic and social affairs.

The **Mapping Digital Media** reports are produced by local researchers and partner organizations in each country. Cumulatively, these reports will provide a much-needed resource on the democratic role of digital media.

In addition to the country reports, the Open Society Media Program has commissioned research papers on a range of topics related to digital media. These papers are published as the **MDM Reference Series**.

# Mapping Digital Media: Sweden

## Executive Summary

Sweden's media system is based on the dominance of public service broadcasters and high newspaper penetration. However, while press circulation figures are still among the highest in the world, the overall consumption of broadcast media has decreased slightly over the last five years. At the same time, levels of internet penetration and computer use are among the highest in the world.

Media platforms are converging, and media content is being commercialized. New media are not *replacing* old media, however. For old media companies are among the most important players on new platforms. New forms of interaction are evolving, creating success for 'mixed' platforms such as web-TV, radio podcasting, and online editions of newspapers.

The history of broadcasting in Sweden is to a large extent the history of strong political influence. This influence was very evident in the approach to digital switchover. The main reason why Sweden fast-tracked the introduction of digital terrestrial television (DTT), starting around 2000, was that many households were being offered satellite and cable television. The government feared it would be impossible to preserve the public service ethos in broadcasting unless switchover was accelerated.

Accordingly, DTT has been offered country-wide since 2007 on a government-owned network. The public service broadcaster, *Sveriges Television* (Television of Sweden, SVT) was not a business partner in the switchover process.

The development of digital radio (DAB) was halted in 2006, because of the perceived uncertainties affecting the technology and the limited interest in digital radio receivers in the domestic consumer market. This about-face has probably not affected radio listening very much. SR remains in a strong position, and new listeners have been reached by streamed radio or radio on demand.

Overall, the digitization of terrestrial television—like the failure to digitize radio—has not changed the media landscape in any fundamental way. There are few signs that digital media are enhancing democratic deliberation and participation. There are no significant examples of digital activism on the internet with power to influence the political process.

Digitization seems to have affected general media preferences much more than news media preferences. The battles over entertainment (movies, sport and drama) seem largely to be lost to commercial media, but public service radio and TV have maintained their position as trustworthy and reliable news providers. Television news still reaches 83 percent of the population every day, and SVT and *Sveriges Radio* (Radio of Sweden) are still the most trusted outlets, along with TV4, the largest private channel.

Surveys confirm that news journalists make increasing use of digital tools in their work. Yet this does not necessarily improve diversity and accuracy. Surveys show that fewer journalists than before think that diversity has increased in the news media, despite the increased supply of content. Concerns have increased over the slackening of professional and ethical standards under pressure from the digital news-cycle.

Nevertheless, the growth of digital media has contributed to news quality and pluralism. Even if the majority of new channels and websites are commercially oriented, more information-rich content is available thanks to digitization. User-generated content (UGC) on news websites is increasing dramatically.

While the importance of the internet is growing in general, it has not become a main news source, except for younger people. The most popular news sites are on-line services produced by traditionally leading national news media companies. Consequently, news production has become more oriented towards multichannel publishing.

In terms of media ownership: concentration at the national level is the dominant trend in the newspaper and television markets. (Sweden has no law against media ownership concentration.) This presents a threat to independent news media. Joint ventures by media companies may also be reducing the range of media content offered to citizens in most parts of the country. Research has shown that the supply of local news falls when there are fewer local media companies on the scene. More positively, it is still the case that the vast majority of Swedish media owners are not active in other business sectors.

Self-regulatory mechanisms have a long tradition in Sweden, and have not changed in any important ways due to digitization.

Looking ahead, the core challenge facing public service broadcasting is the transition to public service *media*. Politicians have generally been supportive of the expansion of public service onto new platforms, and there is a social consensus that public service media remain important. However, the recent introduction of public value tests—to measure the market impact and public service media activities—may undermine the position of public service media in the long run.

Public service ratings have declined, and households spend, on average, much more money on private television than on the license fee (€237 in 2010). Pay-TV is the fastest expanding financing model in the television market. Viewers paid almost five times more for TV in 2006 than they did ten years earlier, despite the fact that the television viewing time has stayed roughly constant, at some two hours per day. New public-private media partnerships may emerge.

# Context

Sweden is the largest of the Nordic countries,<sup>1</sup> both by geographical size (449,964 km<sup>2</sup>) and by population (9,249,249 inhabitants). In 2009, there were 4,948,089 households.<sup>2</sup> Around 85 percent of the population lives in urban areas.

Sweden is an increasingly multicultural society and has received more immigrants per capita than most other European countries. 19 percent of the population have their roots outside Sweden. Swedish is the national and completely dominant language, even if there are a handful of recognized minority languages: Sami (Lapp), Finnish, Meänkieli (Tornedalen Finnish), Yiddish, and Romani Chib. Sweden is a very secularized society. According to studies, only one in 10 Swedes thinks religion is important in daily life. The Church of Sweden—separated from the state since 2000—is Evangelical Lutheran, which coexists with many other beliefs. Seven million Swedes are members of the Church of Sweden. Islam is now the second-largest religion after Christianity, and there are around 450,000 Muslims in Sweden.<sup>3</sup>

In Swedish democracy, the political parties have traditionally been more important than individual candidates in national elections. General elections are held every fourth year, with national, regional, and local elections on the same day. Voter participation is high, reaching almost 85 percent in the last national elections. Public opinion polls show that about 50 percent of Swedes have confidence in politicians.<sup>4</sup>

Sweden's modern political history has been dominated by a single party, the Social Democrats, who have been in power for 65 of the past 78 years. The party has been positively associated with the principles of the welfare state, economic growth, and outstanding political leadership. However, the two most recent national elections, in 2006 and in 2010, resulted in center-right alliance governments, and the previous Social Democratic hegemony seems to have been broken (see Table 1).

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1. The Nordic countries comprise Denmark, Finland, Iceland, Norway, and Sweden.

2. See Statistics Sweden, available at <http://www.scb.se> (accessed 1 August 2011).

3. See [www.sweden.se](http://www.sweden.se) ("The official gateway to Sweden") (accessed 21 June 2011).

4. H. Oscarsson and S. Holmberg, *Regeringskifte. Väljarna och valet 2006* (Change of Government. The Voters and the Election 2006), Stockholm, 2008, p. 212.

Table 1.

The Swedish Elections and Governments, 1994–2010 (showing % of popular vote)

	1994 (%)	1998 (%)	2002 (%)	2006 (%)	2010 (%)
The Left Party (v)	6.2	12.0	8.3	5.8	5.6
The Social Democrats (s)	45.3	36.4	39.8	35.0	30.7
The Green Party (mp)	5.0	4.5	4.6	5.2	7.3
The Centre Party (c)	7.7	5.1	6.1	7.9	6.6
The Liberal Party (fp)	7.2	4.7	13.3	7.5	7.1
The Christian Democrats (kd)	4.1	11.8	9.1	6.6	5.6
The Moderates (m)	22.4	22.9	15.2	26.2	30.0
Sweden Democrats (sd)	N/A	N/A	N/A	2.9	5.7
Turnout	88.1	81.4	80.1	82.0	84.6
Parties in government	(s)	(s)	(s)	(m)+(fp)+(c)+(kd)	(m)+(fp)+(c)+(kd)

Note: N/A = Not available.

Source: Swedish Election Authority (*Valmyndigheten*); Statistics Sweden (*Statistiska centralbyrån*).

In international affairs, Sweden has a long tradition of non-alliance and neutrality. However, Sweden joined the European Union (EU) in 1995.

Sweden is a wealthy country with a well-developed economy. National exports are still strong, even if most big companies have entered joint ventures and now have foreign owners. The automotive and forestry industries remain important, while newer sectors such as telecommunications and pharmaceuticals have become increasingly significant. The economy is generally market-driven, with less frequent state intervention since the country joined the EU.

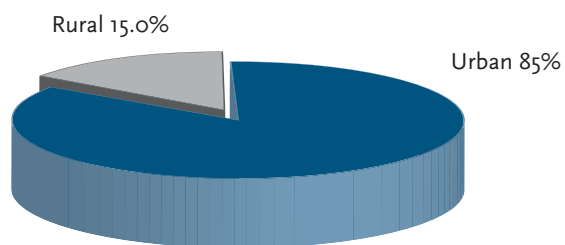
The global economic crisis of 2008–2009 hit the economy, and unemployment rates increased slightly (see Table 2). On the other hand, Sweden has the benefit of being outside the eurozone, and, at this time of writing, the national currency (Swedish Krona, SEK) is strong. Additionally, public finances are comparatively healthy.

# Social Indicators

Population (number of inhabitants): 9.24 million

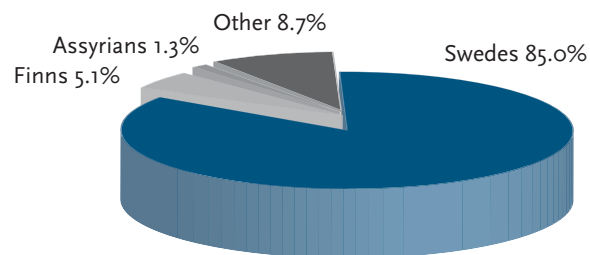
Number of households: 4.9 million

*Figure 1.*  
Rural–urban breakdown (% of total population)



*Source:* Data based on the 2005 Census, Statistics Sweden (*Statistiska centralbyrån*).

*Figure 2.*  
Ethnic composition (% of total population)

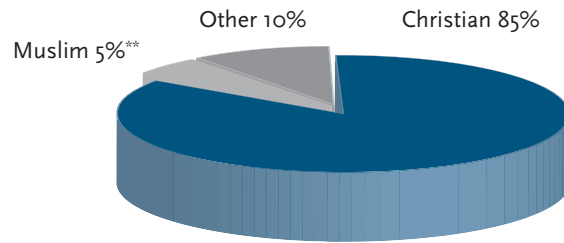


*Note:* “Other” covers more than 15 ethnic groups, including immigrants.

*Source:* Data based on the 2005 Census, Statistics Sweden (*Statistiska centralbyrån*)

Figure 3.

Religious composition (% of total population)



*Source:* Data from the Church of Sweden,<sup>5</sup> the Muslim Council of Sweden, the 2009 Report on International Religious Freedom.<sup>6</sup>

*Note:* It is illegal in Sweden for the government to collect data on the religious faiths of its citizens. Therefore, data on this were collected from other sources as indicated. The Lutheran Church of Sweden accounts for the largest part of the population: approximately 73 percent of Swedes are part of it. However, it must be said that religion plays a very limited role in Swedish life: only 2 percent of the Church of Sweden's members regularly attend the church's public worship, according to the Church of Sweden's statistics.

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5. Church of Sweden data, available at <http://www.svenskakyrkan.se/default.aspx?id=657773> (accessed 3 August 2011).

6. US State Department data, available at <http://www.state.gov/g/drl/rls/irf/2009/index.htm> (accessed 3 August 2011).

# Economic Indicators

Table 2.  
Economic indicators

	2005	2006	2007	2008	2009	2010	2011f	2012f
GDP (current prices), total in US\$ billion	370,580	399,076	462,513	487,576	406,072	444,585	474,686	511,141
GDP per head (current prices, US\$)	40,997	43,946	50,558	52,728	43,403	48,874	58,228	63,044
Gross National Income (GNI), current US\$, per head	32,960	36,140	39,360	40,870	37,810	39,600	n/a	n/a
Unemployment (% of total labor force)	7.6	7.0	6.1	6.2	8.3	8.2	8.2	7.7
Inflation (average annual rate in % against previous year)	0.8	1.4	1.5	3.3	2.0	1.8	1.8	2.0

Source: International Monetary Fund, *World Economic Outlook Database*, available at <http://www.imf.org/external/pubs/ft/weo/2007/02/weodata/weorept.aspx?sy=2005&ey=2007&scsm=1&ssd=1&sort=country&ds=.&br=1&pr1.x=51&pr1.y=4&c=144&s=NGDPDPC&grp=0&a=>; SCB.se 2011 (accessed 19 August 2011); Statistics Sweden (*Statistiska centralbyrån*).

Note: n/a = Not available.  
f – forecast.

# 1. Media Consumption: The Digital Factor

The Swedish media system can be described in terms of a mixture of classical liberal ideas: the press is considered to be an independent and monitoring “fourth estate”, and relationships between the political system and the media system are considered to be necessary in order to maintain diversity and public service, particularly in broadcasting.

The party press system in printed media (with well-established links between newspapers and political parties, including the press subsidy system) and the public service broadcast media were undoubtedly core aspects of the media system during the period 1950–2000. However, they have gradually lost some of their importance under the converging trends of rapid digital media technology development, the deregulation of media markets, and the increasing fragmentation of audiences.<sup>7</sup>

Media development in Sweden is characterized by the convergence of media platforms and the commercialization of media content. However, it would be an oversimplification to state that new media are *replacing* old media. The most interesting development is probably new forms of interaction and interplay between different media, and the success of “mixed” media platforms such as Web TV, radio podcasts, and online editions of newspapers.

## 1.1 Digital Take-up

### 1.1.1 Digital Equipment

Sweden has a relatively long history of high internet penetration and ranks among the leading countries in the world in the level of computer use.<sup>8</sup> Consequently, internet access is offered equally in all parts of the

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7. H. Hvitfelt and G. Nygren (eds.), *Medievärlden 2020* (Media World 2020), Lund, 2008, pp. 26–27 (hereafter H. Hvitfelt and G. Nygren (eds.), *Medievärlden 2020*).

8. P. Norris, *A Virtuous Circle. Political Communications in Postindustrial Societies*, Cambridge University Press, Cambridge, 2000, pp. 124–125; O. Findahl, *Swedes and the Internet 2010*, .SE (The Internet Infrastructure Foundation), Stockholm, 2010.

country (mostly by broadband connection), and internet use has increased continuously during the last decade and is now comparably high in all segments of the population. Public use of the internet has increased steadily: in 2009, 86 percent of the population reported that they had a personal computer with internet access in their homes. As to the digital divide, young people are still over-represented among internet users, as are men and more educated persons. However, these differences seem to have diminished in recent years, mainly due to the higher penetration of the internet across society.<sup>9</sup>

In addition to the internet, digital terrestrial television (DTT) has been offered throughout the country for four years. Digitization of television started in some regions in 2005, and the switch-over process was completed in the whole country in autumn 2007, six months ahead of schedule. The DTT network is owned by the government through the state-owned company Teracom. The network is operated by another company, Boxer AB, of which Teracom owns 70 percent. The public service broadcaster, Sveriges Television (Television of Sweden, SVT), has not been a business partner in the DTT system, apart from the must-carry principles.

Digitization of radio (DAB) was planned during the early 2000s. Sveriges Radio (Radio of Sweden, SR), the public service broadcaster and market leader, invested considerable resources to prepare for the change. In 2006, however, the former Social Democratic government decided, to widespread surprise, to stop the process because of the perceived uncertainties of digital radio technology and the small quantity of digital radio receivers available in the domestic consumer market. Currently, a limited number of digital niche radio channels are available, but FM is still the main radio distribution platform.

Table 3.

Households owning equipment 2005–2009

	2005		2006		2007		2008		2009	
	No of HH ('000)	% of THH	No of HH ('000)	% of THH	No of HH ('000)	% of THH	No of HH ('000)	% of THH	No of HH ('000)	% of THH
TV set	4,117	94	4,130	94	4,329	98	4,349	98	4,326	97
Radio set	4,248	97	4,302	98	4,418	100	4,438	100	4,460	100
PC	3,504	80	3,603	82	3,666	83	3,861	87	3,924	88

Note: HH = Households; THH = Total households; n/a = Not available.

Source: Author calculations based on data from Eurostat; Nordicom Internet Barometer 2010.

As Table 3 indicates, virtually every home has a television and a radio. The switch-over process from analog to DTT in 2005–2007 did not affect the penetration of television in a negative way, as the purchase of the necessary set-top boxes for DTT was not a problem for consumers.

9. A. Bergström, “Personligt och privat i sociala medier” (Personal and Private in Social Media), in S. Holmberg and L. Weibull (eds), *Nordiskt ljus* (Nordic Light), Gothenburg, 2010, p. 436 (hereafter A. Bergström, “Personligt och privat i sociala medier”); U. Carlsson and U. Facht, *MedieSverige 2010* (Media Sweden 2010), Nordicom, Gothenburg University, Gothenburg, 2010, p. 151 (hereafter U. Carlsson and U. Facht, *MedieSverige 2010*).

## 1.1.2 Platforms

The availability of media in people's homes is, however, not only a matter of the existence of specific equipment, but also of the different platforms available for this equipment (see Table 4).

Table 4.  
Main platforms for television reception in Sweden, 2005–2010

	2005		2006		2007		2008		2009		2010	
	No of HH ('000)	% of TVHH	No of HH ('000)	% of TVHH	No of HH ('000)	% of TVHH	No of HH ('000)	% of TVHH	No of HH ('000)	% of TVHH	No of HH ('000)	% of TVHH
Total terrestrial reception	3,273	38	3,308	45	3,487	40	3,352	38	3,096	35	3,808	35
Total cable reception	3,996	46	4,087	47	4,253	48	3,925	44	4,081	46	3,172	42
Total satellite reception	2,152	25	2,202	25	2,207	25	2,133	24	1,927	22	1,877	21
Total IPTV reception	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	599	1
Other way	380	4	73	1	143	2	573	6	90	1	60	1

*Note:* Television digitization process nationally completed in autumn 2007. No figures available on proportion of digital distribution. Before 2008, IPTV was included in "Other way". Approximately 600 Swedish households have two main platforms for television reception.

HH = Households; TVHH = Television-owning households; n/a = Not available.

*Source:* Editors calculations based on data from Médiamétrie, Eurodata TV Worldwide and ITU.

Digital terrestrial television (DTT), satellite, and cable are almost equally important during recent years, while IPTV (Internet Protocol television) may be of growing importance in the future.

General access to digital media is not only facilitated by the availability of technology and accessible platforms, but also by the fact that prices for digital television and the internet are reasonable and affordable. The annual license fee for public service television was €237 in 2010, slightly lower than in comparable Nordic countries.<sup>10</sup> Swedish households spend, on average, much more money on private television, and pay-TV is the fastest-expanding financing model in the television market. Television viewers paid almost five times more for television in 2006 than they did 10 years earlier, despite the fact that the total television viewing time has been roughly constant, at some two hours per day.<sup>11</sup>

Internet penetration is among the highest in the world. The net infrastructure is well developed and broadband connections are available for a majority of households. In 2008, 82 percent of all internet customers were connected via broadband (see Table 5).

10. U. Carlsson and E. Harrie, *Nordiska public service-medier i den digitala mediekulturen* (Nordic Public Service Media in the Digital Media Culture), Nordicom, Gothenburg University, Gothenburg, 2010, p. 100.

11. L.Å. Engblom and N. Wormbs, *Radio och TV efter monopolen* (Radio and TV After the Monopoly), Stockholm, 2007, pp. 145–146 (hereafter L.Å. Engblom and N. Wormbs, *Radio och TV efter monopolen*).

Table 5.

Internet and mobile penetration rate 2005–2009 (% of population)

	2005	2006	2007	2008	2009
Internet	74	80	83	84	90
of which broadband	59	69	80	82	N/A
Mobile telephony	93	95	95	96	97

Source: Nordicom Internet Barometer (2010); Findahl (2010)

The 3G (third-generation mobile telecommunications) net covers major parts of the country. The next generation, 4G, is implemented in some metropolitan regions, and the plan is to develop the net throughout the country in the future.

## 1.2 Media Preferences

Traditionally, newspaper reading has been a pillar of media consumption, and circulation figures are still among the highest in the world, even if readership levels are gradually declining (see Table 6). Newspapers are well spread throughout the country, and regional newspapers particularly still have a strong position in their markets.<sup>12</sup>

The overall consumption of broadcast media has slightly decreased in the last five years. The habit of watching television is highly concentrated in the evening peak hours (7 p.m. to 10 p.m.) and the average time spent watching television is about 166 minutes daily.<sup>13</sup> In contrast, internet usage has increased most significantly at the beginning of this period.

Table 6.

Daily media use 2005–2009 (% population, ages 9–79)

	2005	2006	2007	2008	2009
Newspapers	81	81	80	77	77
Radio	74	74	77	74	73
Television	86	86	85	85	83
Internet	42	62	64	68	65

Source: Nordicom (2010).

12. D.C. Hallin and P. Mancini, *Comparing Media Systems: Three Models of Media and Politics*, Cambridge University Press, Cambridge, 2004, pp. 149–150 (hereafter D.C. Hallin and P. Mancini, *Comparing Media Systems*); U. Carlsson and U. Facht, *MedieSverige 2010*, p. 163.

13. T. Flisen and E. Harrie (eds.), *Medietrender i Norden 2010* (Media Trends in the Nordic countries 2010), Nordicom, Gothenburg University, Gothenburg, 2010, p. 31.

Television was the most used media in 2005, and it remains so today. However, some former television viewers, radio listeners, and newspaper readers seem to have moved to the internet. Still, the overall picture confirms that no dramatic changes have occurred as to the use of traditional media. It is also worth noting that traditional media are rather popular on the internet; accordingly, a change of platforms may not trigger any change in consumption habits. Since all leading national media companies offer web services, changes in the *range* of news are not easy to determine. For example, the most popular Web TV service—the Web TV platform of the public broadcaster, SVT Play—had about 1.4 million unique visitors in an average week in 2011.<sup>14</sup> This indicates that old media companies have become the most important players on new platforms.

### 1.2.1 Main Shifts in News Consumption

A study of the total reach of daily news outlets in Sweden shows that relations between different media have remained quite stable in recent years, despite rapid media development in general. The main source for news consumption is television, followed by newspapers, with digital media platforms playing a supplementary but increasingly important role (see Table 7). The comparably high result for newspapers can be explained by their relatively high penetration of Swedish households, at regional and local levels.

*Table 7.*  
Daily news media reach 2005–2010 (% population, ages 9–79)

	2007	2008	2009	2010
Television news	83	84	83	83
Newspapers	77	76	75	74
Radio news	26	26	27	24
Online news	32	34	33	42

Source: Holmberg et al. (2011).

Television news reaches 83 percent of the population every day. Daily news is only offered on the main public service channels and on the largest private channel, TV4. Most other television channels are mainly used for purposes other than news and information.

### 1.2.2 Availability of a Diverse Range of News Sources

All national—and leading regional—print and broadcast news outlets offer online services. Basic news is free everywhere, but additional content, oriented more to entertainment or “soft” news, sometimes requires monthly subscriptions. National news media, and some of the major regional news companies, also offer mobile news for free. Previous studies of news media consumption in different groups of the population indicate that the younger generations are much more inclined than the older ones to rely on online news.<sup>15</sup>

14. See KIA-index, 2011, week 6, available at <http://kiaindex.net//y:2011/w:6/o:1> (accessed 3 August 2011).

15. J. Sternvik, “Ungas nyhetskonsumtion i en föränderlig nyhetsvärld,” in S. Holmberg and L. Weibull (eds.), *Nordiskt ljus*, p. 378.

## 1.3 News Providers

### 1.3.1 Leading Sources of News

#### 1.3.1.1 Print Media

Sweden's media system is based on high newspaper penetration and the dominance of public broadcasters.<sup>16</sup> Traditional media markets are characterized by stability and continuity. Recent years have seen no significant change in the ranking of the most popular news providers. This is particularly the case for the newspaper market, where five national newspapers (four in Stockholm and one in Gothenburg) dominate national news production (see Table 8).

Table 8.  
Top five ranking newspapers 2005–2009 (paid circulation)

	2005	2007	2008	2009
Aftonbladet (T)	429,000	368,000	389,000	349,000
Dagens Nyheter (M)	363,000	336,000	340,000	311,000
Expressen (T)	339,000	289,000	303,000	276,000
Göteborgs-Posten (M)	246,000	242,000	245,000	235,000
Svenska Dagbladet (M)	187,000	193,000	195,00	196,000

Note: T = tabloid; M = morning daily. No data available for 2006.

Source: Nordicom (2010).

The general trend is of declining paid circulation, at least for four of the five top ranking newspapers. This does not, however, necessarily reflect a similar decline in the *reading* of newspapers. First, newspapers may be read for free at public spaces or the workplace in times of economic crisis. Second, the free metropolitan newspapers distributed in urban areas are not included in the statistics of paid circulation. The best known of these free tabloids, *Metro* (distributed in the subway system), has filled a reader gap in the Stockholm area, particularly among those who are not able to afford a newspaper subscription. Third, newspapers are increasingly read online.

Two of the three top ranking newspapers are tabloids. Certainly, the news content in *Aftonbladet* and *Expressen* tends to be more speculative, celebrity-focused, and oriented toward personalities than the morning dailies.<sup>17</sup> On the other hand, they are more serious than other international tabloids and should not be automatically dismissed as sensational and superficial. In some areas, such as investigative reporting and interviews, they are as important as other newspapers.<sup>18</sup>

16. D.C. Hallin and P. Mancini, *Comparing Media Systems*, p. 169.

17. G. Nygren, *Skilda medievärldar* (Separate Media Worlds), Symposium, Stockholm, 2005, pp. 163–165 (hereafter G. Nygren, *Skilda medievärldar*); J. Strömbäck, *Den medialiserade demokratin* (The Mediatized Democracy), SNS Förlag, Stockholm, 2004, p. 175 (hereafter J. Strömbäck, *Den medialiserade demokratin*).

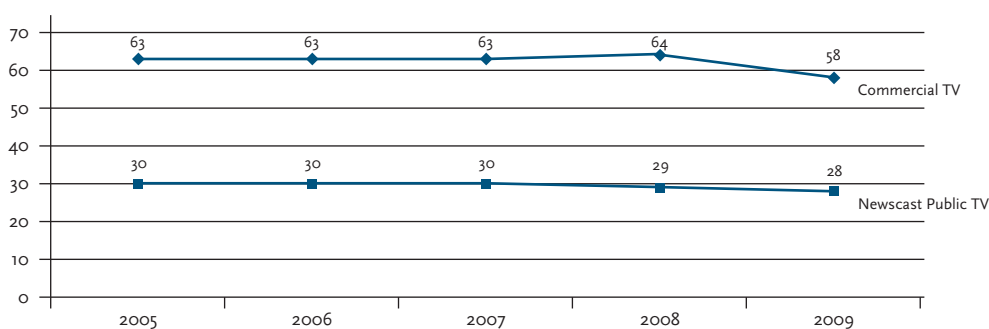
18. S. Hadenius and L. Weibull, *Massmedier* (Mass Media), Stockholm, 2003, p. 64.

The main debate about newspaper development in Sweden is whether there is a “tabloidization” process affecting all newspapers in the market. The main argument is that increased competition for advertisers and readers, as well as increased demands for profitability, have resulted in less advanced and less costly news journalism.<sup>19</sup> Still, the overall high circulation figures confirm that newspapers are a backbone of the Swedish media system and play a key role as main news and information providers. This strong position may change in the future as a younger audience turns to free digital media instead of paying for newspapers.<sup>20</sup>

### 1.3.1.2 Radio

The radio market differs considerably from the newspaper market. There is only one main radio news provider, Sveriges Radio, the public service network, with both national and regional stations. There is no commercial national radio, only private local radio stations with very limited news services. Some private local stations have been successful among younger listeners in urban areas, but public service radio still has a monopoly position as a news provider on the national level.<sup>21</sup> This may be the main reason why public service still dominates the radio market (see Table 9).

Figure 4.  
Radio audience market shares, breakdown main players, 2005–2009 (%)



Source: Carlsson and Harrie (2010); Carlsson and Facht (2010).

### 1.3.1.3 Television

Compared to the radio market, the national television market is much more competitive. Since the deregulation of analog terrestrial television in 1991, public service television has lost considerable audience market share as well as, temporarily during some years, its position (at least in some years) as the most viewed television channel (see Table 9).

19. G. Nygren, *Yrke på glid. Om journalistrollens de-professionalisering* (Occupation on the Skids. The De-professionalization of the Journalist Role), Stockholm, 2008, p. 10 (hereafter G. Nygren, *Yrke på glid*).

20. I. Wadbring and A. Bergström, “Mediers värde för olika generationer,” in S. Holmberg and L. Weibull (eds), *Nordiskt ljus*, p. 415.

21. M. Forsman, *Lokal radio i konkurrens 1975–2000* (Local Radio in Competition 1975–2010), 2010, p. 242.

Table 9.

Top five ranking television channels 2005–2010 (audience shares in %)

	2005	2006	2007	2008	2009	2010
SVT1 (public)	24	22	19	19	21	23
TV4 (private)	23	22	22	20	20	19
TV3 (private)	10	10	9	9	8	8
SVT2 (public)	14	14	13	10	8	7
Kanal 5 (private)	9	9	8	8	7	7

Source: Carlsson and Harrie (2010); European Audiovisual Observatory (2010); Medieutveckling (2011).

A general trend is that the “big five” television channels maintain their leading positions, even if their total audience share is gradually declining as more niche channels enter the market. The stiff competition for audiences has created new dilemmas for public service television. To keep up its audience share, it has to provide programs that appeal to a wider audience but which may jeopardize the brand of public service television. A too “narrow” program profile would distinguish public television from commercial competitors, but would risk both heavy losses of viewers and, in the long run, the legitimacy of public television.

Regular content analyses of the leading television channels’ program output confirm that public service television in general is more informative than the commercial channels. News and information are more prominent in public service television, while entertainment and movies are more prominent in commercial channels.<sup>22</sup> There is also a discussion as to whether the existence of a relatively strong public broadcaster influences other channels as much as the increasingly commercial environment affects public television.<sup>23</sup> Such influence is difficult to verify, but there is no doubt that the recent development of the television market has made it much easier for viewers to avoid news and information, as a tremendous and expanding amount of other material is available at any time.

#### 1.3.1.4 Online Media

Online news media use is growing rapidly. The leading online news service is provided by *Aftonbladet*, a tabloid newspaper, whose website *Aftonbladet.se* was successfully established in the early stages of the internet era and has maintained its significant popularity (see Table 10).

22. K. Asp, *Svenskt TV-utbud 2009* (Swedish TV-Content 2009), Haninge, 2010, p. 24.

23. A.M. Jönsson and J. Strömbäck, *TV-journalistik i konkurrensens tid* (TV Journalism in the Age of Competition), Stockholm, 2007, pp. 264–265; I. Silvo, “Public service i ett fragmentiserat landskap” (Public Service in a Fragmented Landscape), in K. Almqvist and I. Thomas (eds.), *Framtidens public service* (Public Service in the Future), Stockholm, 2008, p. 65.

Table 10.

Top five ranking online news media (unique visitors), 2007–2010

	2007	2008	2009	2010
Aftonbladet.se (T)	3,866,162	4,039,029	4,884,269	5,254,426
Expressen.se (T)	1,665,946	1,758,951	n/a	2,349,682
Svt.se (PS)	1,015,618	1,235,210	1,147,582	1,734,279
Dn.se (M)	996,317	1,015,845	1,290,911	1,585,070
Tv4.se (Pr)	n/a	820,258	n/a	1,049,779

Note: T = tabloid; M = morning daily; PS = public service; Pr = Private; n/a = not available.

Source: KIA-index, 2007–2010, week 40.

The leading position of Aftonbladet.se may be partly explained by its early introduction as a website and its continuous expansion of online services. On the other hand, its strong position may also be a result of weak competition, particularly from the broadcast media which have generally been slow to develop news services online until now. Today, all the main news providers offer a wide range of web services, but as Aftonbladet.se was the leading actor, people have become so used to consulting it that they prefer not to break that habit by going to other sites. In addition, as public service in Sweden is organized in different companies for radio and television, different public service websites are offered. In a way, these websites compete for the same audience, making general public service online positions weaker.<sup>24</sup>

It should be noted that content on news media websites generally is more commercial than the content provided by the same media companies on traditional platforms. Online news tends to be more focused on personalities, celebrities, entertainment, sports, and “human interest” stories. As online news consumption is much higher among younger generations, there are reasons to believe that “news gaps” between different segments of the Swedish population are widening.<sup>25</sup>

### 1.3.2 Television News Programs

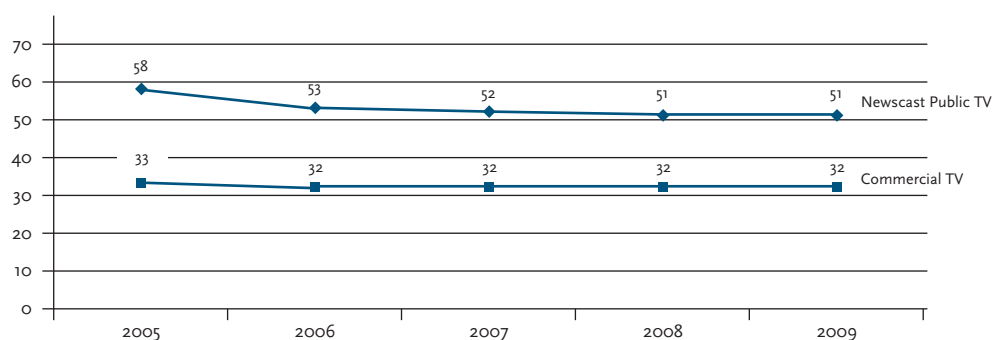
During the analog television era until 2008 there were three primetime television news programs: *Aktuellt* and *Rapport* on public service television and *Nyheter* on the third terrestrial channel, commercial TV4. A comparison of audience figures before and after digitization (see Figure 5) shows that market positions have remained stable, while audience share has diminished.

24. A.B. Lund et al., *Nye udfordringer for gamle medier* (New Challenges for Old Media), Copenhagen, 2009, p. 141 (hereafter A.B. Lund et al., *Nye udfordringer for gamle medier*).

25. M. Karlsson, *Nämyheter* (Net News), Stockholm, 2010, p. 27 (hereafter M. Karlsson, *Nämyheter*); S. Homberg and L. Weibull, *Nordiskt ljus*, pp. 370–371.

Figure 5.

Regular use of TV news programs 2005–2009 (%)



Source: Holmberg and Weibull (2010). Percentage shows proportion of daily use (at least five times/week).

As Figure 5 indicates, there has been a notable decline in the consumption of public service news, while the commercial news program attracted about the same proportion of viewers during the whole period. This change may reflect the increased competition, with more primetime options being offered as a result of digitization. However, the audience figures also indicate that news media habits seem to be settled, as primetime news programs have been quite successful in maintaining their audience market positions.

### 1.3.3 Impact of Digital Media on Good-quality News

Finally, the expansion of digital media may also have contributed to news quality. Even if the majority of new channels and websites are commercially oriented, there are some examples of more information-rich content. Due to DTT, there are now two public service niche channels available for all households: one for popular science (Kunskapskanalen) and another for children (SVT Barnkanalen). The former may be described as a less spectacular version of the Discovery Channel, and the latter is a children's channel.

There are examples of rich and innovative content being made available on the internet, using interactive approaches. In the latest national election campaign, in autumn 2010, public service radio and public service television collaborated on the internet for the first time and offered a common website where users could find all manner of information about political candidates, never before available: their background, views on political issues, and some personal information.

News offered on DTT consists mainly of services that have migrated from offline news and, of course, international news channels such as BBC World News, CNN, and Sky News that are offered in cable and satellite packages. News offers online are associated with traditional news media companies.

## 1.4 Assessments

Swedish media markets have seen considerable changes in recent years. The overall picture is influenced by increased competition and commercialization, with digitization playing a key role. The supply of digital media outlets has increased media consumer options, even if there are more alternative choices offered in other areas than news and information. While the importance of the internet is growing in general, it has not been established as a main news source, except among the younger generations.

Despite these changes of consumer patterns, viewers tend to stay with traditional media—newspapers and the public broadcasters—when it comes to news. The battles over movies, sports, and fiction seem largely to be lost to commercial media, but public service radio and television have maintained their position as trustworthy and reliable news providers. In the broadcast market, there are almost no other providers of news, with the exception of commercial channel TV4.

Generally speaking, the digitization process in Sweden seems to have changed general media preferences much more than news media preferences. On the other hand, digitization has had more of an impact on the *number* of available media outlets for households with terrestrial television. Despite this, there has been little change in news consumption patterns. On the contrary, available audience data confirm that news media habits rooted in the traditional media landscape may persist amid fundamentally new technological conditions. In the long run, internet use may develop as the central source for news and information for most Swedes, but a gradual generational change is much more likely to occur than a dramatic and complete migration from old to new platforms.

## 2. Digital Media and Public or State-Administered Broadcasters

Broadcast media markets in Sweden have historically been characterized by the de facto monopoly of public service radio and public service television across the whole nation.

The increased contemporary competition in the broadcast markets has affected the public service media to a considerable extent. New commercial players have attracted sections of the audience, particularly the young audience. However, over time, public service channels have been rather successful in defending their market positions. After an initial drop, when new actors entered the scene, these appear to have recaptured their market positions; they continue, however, to feel strong market pressure from commercial competitors.<sup>26</sup>

### 2.1 Public Service and State Institutions

The public service media are Sveriges Radio (SR) and Sveriges Television (SVT), as well as Utbildningsradion (UR), which produces educational programs for radio and television. All three public service broadcasters are financed by license fees. Advertising is not permitted in public service media, and sponsoring is very restricted. Directors and board members are appointed by a public foundation, reflecting different interest groups of Swedish society.<sup>27</sup>

News is produced by all the main public service channels. The main news program on SVT is *Rapport*, with the main bulletin at 7:30 p.m. and regular short news bulletins during the day. The other news program is *Aktuellt*, at 9 p.m., which focuses more on in-depth coverage. SR is on offer around the clock, with a longer news program, *Dagens Eko*, on one of the channels, P1. This channel is mainly reserved for “spoken” radio and offers a large amount of programming on current affairs, culture, economics, and science.

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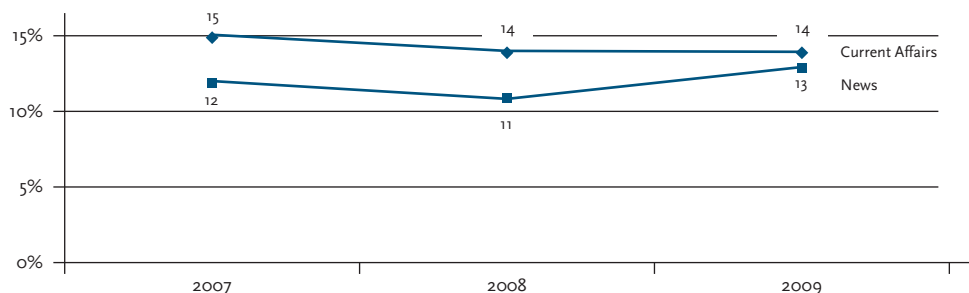
26. S. Hadenius, *Kampen om monopolet* (The Battle of the Monopoly), Prisma, Stockholm, 1998, p. 312 (hereafter S. Hadenius, *Kampen om monopolet*); L.Å. Engblom and N. Wormbs, *Radio och TV efter monopolet*, p. 152.

27. U. Carlsson and E. Harrie, *Nordiska public service-medier i den digitala mediekulturen*, Nordicom, Gothenburg University, Gothenburg, 2010, p. 99 (hereafter U. Carlsson and E. Harrie, *Nordiska public service-medier i den digitala mediekulturen*); Government proposal, Prop. 2008/09: 195, *Utveckling för oberoende och kvalitet* (Development for Independence and Quality), Stockholm, pp. 61–62.

### 2.1.1 Overview of Public Service Media; News and Current Affairs Output

The share of news and current affairs programs is modest compared to the total amount of public service content, but has not changed during recent years (see Figure 6).

Figure 6.  
Public Service News and Current Affairs Programs, 2007–2009 (% of total content)



Source: SVT Annual Report 2009.

As noted in the previous section, the audience for public service news is also almost unaffected by the increased number of channels available due to the digitization process.

Due to the introduction of new distribution platforms and digital media technologies, the available radio stations and television channels have increased dramatically. In 2008, there were 53 public service radio stations (four FM, seven digital, 27 regional, and 15 on the web). The same year there were seven public service television channels.<sup>28</sup> The two new public service television channels offered in every household are Kunskapskanalen (popular science programs) and SVT Barnkanalen (childrens' programs). Regarding Web TV, SVT Play is the most popular service in Sweden.<sup>29</sup>

### 2.1.2 Digitization and Services

SVT and SR established separate web pages in the mid-1990s, and the content was originally the same as the broadcast content. The two web pages are not independent, full service news pages. Access to radio and television programs is still one of the most important features of the websites, but in recent years a number of additional services have been offered such as “theme areas” for children and youth, YouTube channels, blogs, Facebook, and Twitter.<sup>30</sup>

28. U. Carlsson and U. Facht, *MedieSverige 2010*, pp. 221, 258.

29. Radio- och TV-verket, *Medieutveckling 2010* (Media Development 2010), Stockholm, pp. 42–43 (hereafter Radio- och TV-verket, *Medieutveckling 2010*).

30. Information provided by Nordicom research and documentation centre, April 2011.

In the internet market, SVT and SR have ranked among the 10 or 20 most visited websites since they were established.<sup>31</sup> Unlike in some other countries, the public service operators have not tried to earn revenue from their online activities. Advertising is not allowed, and internal policies have been restricted with regard to expansion of services beyond the traditional public service remit.

### 2.1.3 Government Support

Today, the core challenge facing public service broadcasting is the transition to public service *media*.<sup>32</sup> This transition includes both opportunities and threats. Opportunities, because digital technology offers better conditions for fulfilling public service missions, reaching the public, and meeting diverging audience demands. Threats, because other media actors claim that such new public service operations are destroying private media business activities and distorting the market with unfair competition (see section 7.3.1).

There has not been much political debate on the role of public service media in the digital age in Sweden. Politicians have generally been very supportive of the expansion of public service onto new platforms. As noted by Lena Adelsohn Liljeroth, the Minister of Cultural Affairs and a member of the Moderate Party, “public service should be present where the public is.”<sup>33</sup>

The government has argued that, in principle, public service should be perceived as a national issue. A Government Commission report in 2008 concluded that public service internet activities were legitimate and should aim at reaching as many people as possible.<sup>34</sup>

Following recent criticism from the European Commission regarding public service market distortion on the internet, the government has declared that public service online services should have a clear connection to content associated with broadcast radio and television. What is meant by “clear connection” has not been elaborated in public documents.<sup>35</sup>

Not surprisingly, the government decided in December 2010 to introduce *public value tests* of new services by public service media in order to check market impact and public service value. What this means in practice is that all new public service radio and television channels as well as new online services have to be announced in advance by public service companies and investigated by the regulator, the Swedish Broadcasting Authority (*Myndigheten för Radio och TV*, SBA). Private media companies are invited to comment on the proposals, after which the government is to decide whether to permit the new service. This test gives public service

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31. A.B. Lund et al., *Nye utfordringar för gamle meider*, p. 116; U. Carlsson and E. Harrie, *Nordiska public service-medier i den digitala mediekulturen*, p. 81.

32. J. Bardoel and G.F. Lowe, “From Public Service Broadcasting to Public Service Media. The Core Challenge,” in G.F. Lowe and J. Bardoel (eds.), *From Public Service Broadcasting to Public Service Media*, Nordicom, Gothenburg University, Gothenburg, 2007, p. 9; M. Debrett, *Reinventing Public Service Television for the Digital Future*, Intellect, Bristol, 2010, p. 30.

33. L. Nord, *Medier utan politik* (Media Without Politics), Stockholm, 2008, p. 265 (hereafter L. Nord, *Medier utan politik*).

34. Government Commission Report SOU 2008:64, *Kontinuitet och förändring* (Continuity and Change), Stockholm, 2008, p. 234.

35. *Ibid.*, p. 233.

companies the right to decide which services to announce. Consequently, private media have complained that the authorities are being very easy on public service media when they employ the test. Still, the introduction of such tests should be seen as a limitation on the development of new public service activities.

#### **2.1.4 Public Service Media and Digital Switch-over**

However, the overall impression is that the processes of digitization have not affected the position of public service significantly in terms of audience reach, content, and influence.<sup>36</sup> Basically, the total expansion of available television channels has reduced the time people spend with public service television. Public service ratings have declined due to digitization, but SVT and SR remain the dominant players.

The successful development of web features such as Web TV has given public service media a market-leading position in the Web TV area. The same development may be noticed in the radio sector, where public service radio is the dominant actor in the area of radio podcasts. The implementation of these services has strengthened public service positions among specific audience segments, not least among younger people.<sup>37</sup> Even if further restrictions are imposed on public service media in the future, the established and popular functions indicate a continued strong role for public service operators in the digital media landscape.

## **2.2 Public Service Provision**

A substantial majority of politicians has historically defended public service media as a decisive instrument for free information and fair reporting.<sup>38</sup> As in many other countries, leftwing parties have generally had a more positive approach to public service media than have centrist and rightwing parties.

### **2.2.1 Perception of Public Service Media**

A recent survey of Swedish journalists shows that they consider public service broadcasters as the most important media in terms of influencing the public (see Table 11).

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36. A.B. Lund et al., *Nya utfordringer for gamle medier*, p. 127.

37. SVT Annual Report 2010; SR Annual Report 2010.

38. S. Hadenius, *Kampen om monopolet*, p. 325; L. Nord, *Medier utan politik*, p. 264.

*Table 11.*  
Swedish journalists' perceptions of media influence on the public

	Mean (Sd)	N
Swedish Television (SVT)	8.50 (1.36)	603
Swedish Radio (SR)	7.70 (1.71)	603
TV4	7.40 (1.77)	602
Metropolitan dailies	7.35 (1.69)	599
Local dailies	6.86 (2.03)	599
Tabloids	6.71 (1.99)	600
Other commercial television channels	4.63 (2.13)	600
Commercial radio	3.83 (1.92)	603

*Note:* Scale to evaluate influence ranged from 1 to 10. N = number of respondents on this item. Sd = standard deviation.

*Source:* Strömbäck et al. (2011).

It is interesting that SR is regarded as more influential than the other major television channel, TV4. In this sense, the type of organization appears to matter more than the media type in terms of perceptions of influence.

Public confidence may be measured by people's willingness to pay the license fee. Approximately 90 percent of households pay the license fee, with an annual increase of about 7,000 new households paying every year. Current opinion polls indicate that the public in general supports the license fee system and 83 percent of respondents claim that it is unacceptable to evade the fee.<sup>39</sup>

National surveys confirm that SVT, SR, and TV4 are the most trusted outlets in Sweden. Regional newspapers and daily papers maintain a middle position in this respect, while tabloid newspapers and private radio stations are not considered as especially trustworthy.<sup>40</sup>

## 2.2.2 Public Service Provision in Commercial Media

The separation between public and private media has been very clear, with the exception of TV4. This channel was introduced as the third television channel available to all households when the public service analog terrestrial monopoly disappeared in 1991. TV4 could be described as a "hybrid" commercial channel: private, but operating under public service conditions. It is financed by ads, while its program policy was initially defined by a legal act with substantial similarities to the public service concept. TV4 was obliged to offer a national news service and to follow the same guidelines for objective and impartial reporting as public service media.

39. A.B. Lund et al., *Nye utfordringer for gamle medier*, p. 105.

40. S. Holmberg and L. Weibull, *Nordiskt ljus*, p. 62.

However, TV4's special position was completely associated with the former distribution system. When the digitization of television was completed in 2007, the unique role of the hybrid channel was over, as there were now more commercial channels in the basic supply of television channels offered to households. Since then, TV4 has operated on a purely commercial basis and has developed a number of niche channels for sports, film, and documentaries, and public service obligations have been dropped. Despite this, the former public service character of TV4 still is somewhat of a brand for the company and distinguishes it from other commercial competitors.

## **2.3 Assessments**

While much has changed in the Swedish media landscape during recent decades—the deregulation and digitization of broadcasting, increased competition and commercialism, and so forth—the traditional media are still perceived as having great influence. Whether the increased importance of the internet and social media will change this remains to be seen.

Public service media are supported by politicians from different camps and are perceived as influential by journalists. Criticism of these media by private media interests has increased in recent years. The implementation of public value tests may undermine the position of public service media in the long run. Public service media have been driving forces in developing such new media services as podcast radio and Web TV, but have been less influential in the political processes of digitizing radio and television.

## 3. Digital Media and Society

### 3.1 User-Generated Content (UGC)

User-generated content (UGC) on the internet in Sweden appears in different ways. Most important are blogs and social media websites, but audience participation is also expanding on news media websites.

Public commentaries in association with news articles have gradually become more frequent on established news media websites. Generally, news media companies have become more positive and supportive of offering their audiences this possibility to react to news. A comparison of the four leading national newspapers' user contributions on the internet between 2005 and 2010 shows a substantial increase in interactive functions.<sup>41</sup>

National interviews contain some examples: *Aftonbladet* (a tabloid) listed 34 separate mechanisms for user participation on its site. The newsroom rewards reporters who are active in comment sections and engage readers in dialogue. *Svenska Dagbladet* (a morning paper) has developed a prizewinning investigative project online, built on a combination of traditional reporting and user suggestions and participation.<sup>42</sup>

Even so, many journalists and editors remain skeptical about the democratic value of this feedback, and public service media have been particularly restrictive in offering this possibility. UGC on news media websites never appears without prior editorial moderation. Thus, audience participation has to be in line with existing laws, as on freedom of expression and non-harassment of minorities. Publishers are concerned that some of this content may violate laws and sometimes exert pressure to restrict content.

#### 3.1.1 UGC Overview

Media users' contributions on the internet are most common on blogs and social media websites. The main purpose of this activity is not to comment on current events in society, but to interact with friends, relatives, and colleagues on a personal basis.<sup>43</sup> However, this picture is mixed: sometimes "hot" topics become main

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41. M. Karlsson, *Nämyheter*, p. 73.

42. J. Trappel et al., *Media Democracy Monitor*, Gothenburg (forthcoming).

43. A. Bergström, "Personligt och privat i sociala medier," p. 439.

themes in individual conversations, and sometimes the nature of digital networks becomes a theme in political debate. In any event, it is clear that UGC in Sweden appears more often in a private context than in a societal one (see Table 12).

*Table 12.*  
Top 10 websites in Sweden in 2011

	Type of site	Unique visitors
MSN Network	Portal	10,113,181
Aftonbladet	News	5,625,242
MSN.se	Portal	5,603,787
Hotmail	Mail	5,245,813
Blocket	Unclassified ads	4,670,258
Wyatt Media / Blogg.se	Social media	4,358,607
Hitta.se	Catalogues and maps	3,725,358
Aller Net	Media / Social media	3,403,559
Blogg.se	Social media	3,205,734
Enrio.se	Catalogues and maps	2,668,958

Source: KIA-index 2011, week 7.

As the table indicates, the most popular websites are not established news media, but portals and navigators mainly used for private purposes. In fact, only one news media website features among the top 10, and that is the tabloid *Aftonbladet*. The most popular morning daily and public service radio and television websites rank among the 20 most popular, and are not as frequently used as non-media websites.

However, this does not mean that news media owners are absent from the internet scene. Even if the traditional online news services do not attain the same popularity as other websites, there are substantial news media interests in commercial digital platforms. The most obvious example is the owner of *Aftonbladet*, Norway's Schibsted Group, which also owns the two successful websites Blocket.se and Hitta.se. Aller Net is also a web portal created by the popular magazine company Allers and combines social media with magazine websites.<sup>44</sup>

### 3.1.2 Social Networks

Overall, UGC seems to be more frequent in the traditional forms of mailing and social media activities: blogging, video and photo sharing, and chatting (see Table 13).

44. U. Carlsson and U. Facht, *MedieSverige 2010*, p. 156.

Table 13.  
Top 10 social networks in Sweden

	Unique visitors
Wyatt Media / Blogg.se	4,358,607
Blogg.se	3,205,734
Bloglovin	991,968
Bilddagboken	894,434
Devote.se	568,877
Finest.se	404,447
Myshowroom.se	262,662
Jesper.nu	234,167
Posh24.se	134,530
Hamsterpaj.net	130,328

Source: KIA-index 2011, week 7.

It is worth noting that the most-used social networks, such as Facebook, Twitter, YouTube, and Flickr, are not included in the national statistics. There are no official consumption figures of these networks available, as they have not agreed to co-operate with established research centers or commercial agencies in this field. Consequently, there are only estimations of their impact and importance for Swedish internet users. In 2011, there were approximately 4.1 million Facebook-users in the country, which means slightly more than one-third of the entire population. Roughly 40 percent were aged between 13 and 25. Since its introduction in Sweden in 2006, Twitter has been the fastest-growing social media website.<sup>45</sup>

### 3.1.3 News in Social Media

Table 13 also indicates that there is no leading social website that focuses on news or current events. On the contrary, those leading social media are focused on private life and individual relations. A national survey of citizens' social media activities in 2009 reflects what is indicated in Table 13: nearly half of the population, 49 percent, used social media on a daily basis; 22 percent said that they followed at least one blog every day; and 19 percent chatted. More advanced use of social media, including writing a blog post or debating politics, were less common. Only 4 percent of the respondents said they had been blogging themselves and 3 percent had participated actively in a political or societal discussion on the net.<sup>46</sup>

The role of social media was discussed intensively during the national election campaign in 2010. All political parties were present on social media platforms and perceived them as important for internal communication, interaction with voters and supporters, and campaigning. As all leading news media were talking about the importance of social media during the campaign, it is possible to describe this as social media "hype". And

45. See <http://www.checkfacebook.com> (accessed 13 April 2011).

46. U. Carlsson and U. Facht, *MedieSverige 2010*, p. 314.

indeed, studies show that only a very modest share of the voters used social media for political activities: only 8 percent of respondents had read at least one political blog on a weekly basis, 4 percent had followed a political party or candidate on Facebook, and 1 percent had followed a party or candidate on Twitter. To a large extent, political content on the web was consumed by *a priori* politically interested citizens.<sup>47</sup>

There is no empirical evidence that Facebook has played a direct political role in Sweden. Sometimes the blurred lines between private and professional roles of political persons have been discussed, as in 2010 when a press secretary in the Prime Minister's Office decided to resign after posting an inappropriate comment on his Facebook page.

In sum, social networks do not involve news consumption to a significant extent. On the contrary, they are almost completely focused on other types of communication. There are no clear signs that this will change in the future.

## 3.2 Digital Activism

As Sweden has a long democratic tradition and high internet penetration, one would expect a high degree of political digital activism and a large number of websites dedicated to civil society activism. Yet there are no significant examples of isolated digital activism developing on the internet with the power to influence the political process.

This does not mean that there are no social interest groups with well-developed websites and a variety of social media activities. They connect people and promote debate, particularly among themselves. They are also a very valuable source of information for news media, potential supporters, and other interest groups. But this is not to say that these websites are spaces for social activism or mobilization, originating from digital media platforms. More interesting is their interplay with traditional news media in the formation of public opinion.

### 3.2.1 Digital Platforms and Civil Society Activism

Some examples of this interplay between media types may be described. A hot issue in the 2010 election campaign was the rules for social security payments in the welfare system. A single citizen who was not able to work because of a disease, and who did not qualify for public support, wrote on her private blog about what she perceived as the unfair decision by the authorities. Nothing happened until a journalist from the biggest tabloid, *Aftonbladet*, discovered the blog. When the newspaper ran the story on its front page, the social security system was highlighted in the last days of the campaign. The blog would never have attracted a significant audience, and the newspaper would never have found the story on its own. Together, they influenced significant political activities in the most important stage of the campaign.<sup>48</sup>

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47. DEMICOM Election Studies 2010 (unpublished material).

48. T. Nilsson, *Därför vann dom* (Why They Won), Stockholm, 2011, pp. 341–342.

### 3.2.2 The Importance of Digital Mobilizations

Perhaps the most interesting example of digital activism occurred in 2008 and 2009, when there was a long and heated national debate about the increased surveillance of cross-border telecommunications traffic and the right to download internet material without paying for it. These debates started on the internet and developed there as a result of the digital mobilization of citizens opposed to this proposal. The issue was picked up by the mainstream media before it was debated in Parliament. Eventually, the disputed law was adopted after slight revisions; but more interestingly, the digital mobilization both increased public interest in issues of personal integrity and inspired the formation of a new political party, the Pirate Party.<sup>49</sup>

The Pirate Party was the big surprise in the European Parliament election in Sweden in June 2009. This single-issue party, only campaigning for the right to download intellectual property on the internet for free, received 7 percent of the votes and picked up two seats; its strongest support came from young voters. The Pirate Party has not been successful in the longer term. In the 2010 national election, it attracted only 0.6 percent of the electorate. The rise and fall of this party illustrates that it is very difficult for political newcomers to remain popular when based on single political issues. On the other hand, it also shows that popular mobilization on the internet around issues that are neglected by established political parties may lead to considerable changes in the political landscape, at least in the short run.

### 3.3 Assessments

The digitization process has increased the availability of news and information. This may be explained partly by the introduction of new websites with this content, and partly by the extension of traditional news outlets to new digital platforms. It is also important to remember the interplay between different media. More news is offered to the public than ever before, and consumers have more possibilities than ever to satisfy their diverging needs and interests.

Despite this increase, news consumption is not the main driver of this development. Most new content offered is associated not with news and political activism, but with lifestyle and entertainment. Media consumers prefer to use digital media for non-political purposes. UGC websites are dominated by personal content. Currently, there are few signs that digital media are facilitating democratic deliberation and participation. When political processes started on digital platforms, they were soon exploited by mainstream news media, as described above.

This may, of course, change. However, in a context where membership of political parties has generally declined, increased political activism on the internet would do more to widen the digital divide than to strengthen democracy.

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49. M. Grusell and L. Nord, *Syftet är alltid att få spin* (The Purpose is Always to Spin), Sundsvall, 2009, p. 6.

## 4. Digital Media and Journalism

While Swedish journalism has been traditionally inspired by liberal ideas of press freedom and freedom of expression, it has coexisted with political parallelism and wide acceptance of state activities in the media sphere.<sup>50</sup> More specifically, Swedish news practices have been influenced both by the idea of freedom and the idea of social responsibility, meaning in particular diversity and equality.

Journalists are highly professionalized, and the country has a developed and institutionalized system for self-regulation as well as state regulation regarding, for example, public service media, impartial and neutral programming in the broadcast media, programming for children, and press subsidies to second-ranking newspapers in the regions.<sup>51</sup> Roughly 17,000 out of 20,000 active journalists belong to the Union of Swedish Journalists.<sup>52</sup>

However, Swedish journalism is not only a product of diverging historical perspectives of journalistic missions and roles. It is, now more than ever, affected by current media developments and dramatically changing newsroom practices.

### 4.1 Impact on Journalists and Newsrooms

Digital media in general, and the internet in particular, have brought substantial changes to journalism in Sweden. The most popular news sites are online services produced by traditionally leading national news media companies. Consequently, news production processes have become more oriented toward multi-platform publishing. In this digital media convergence culture, journalists have to become more multi-skilled.<sup>53</sup>

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50. L. Weibull and A.M. Jönsson, "The Swedish Media Landscape," in G. Terzis (ed.), *European Media Governance. National and Regional Dimensions*, Bristol, 2007, pp. 369–375. ("Political parallelism" exists when loyalties in the media sphere closely reflect those in the political sphere.)

51. O. Petersson et al., *Mediernas integritet* (Integrity of the Media), SNS Förlag, Stockholm, 2005, p. 167.

52. See the Swedish Union of Journalists website, available at [www.sjf.se](http://www.sjf.se) (accessed 13 April 2011).

53. G. Nygren, *Yrke på glid*, p. 74.

The changes wrought by the development of new media have had profound effects on the working conditions of journalists and on news production processes.<sup>54</sup> A recent survey of Swedish journalists confirms this: 40 percent describe themselves as reporters, 16 percent as managers, 7 percent as copy editors, 7 percent as web editors, 5 percent as photographers, and 3 percent as editorial writers or commentators. The remaining 22 percent describe themselves as producers, researchers, or as working with other functions.<sup>55</sup>

One major factor behind this development is the internet and the rise of digital media. Although only 7 percent of the journalists describe themselves as web editors, the proportion working with online publishing is significantly higher. In fact, 27 percent work with online publishing on a daily basis, and an additional 20 percent do so several days a week. Only 25 percent say that they never work with online publishing. This clearly suggests that online publishing and digital media have become heavily integrated in the daily news production and publishing processes.

Thus, journalists admit that newsroom working practices have changed, as almost one-third now are involved in online publishing practices. Their work on different platforms is not perceived as bringing better quality journalism to the public. When results in national journalism surveys from the last decades are compared, it is clear that fewer journalists than before think that diversity has increased in the news media, despite the increased supply of content due to digitization. This is true for all categories of journalists, but particularly among the older generations and journalists with leftwing ideological loyalties.<sup>56</sup>

#### 4.1.1 Journalists

The increasingly digital and more competitive media environment also affects news journalism practices in terms of news values and selection. A comprehensive study in 2007, combining content analysis, editor interviews, and participation studies, analyzed the newsrooms at four leading national dailies and three main television news stations. It found that all news departments organize their work with two parallel newsrooms: one for the traditional media and another for the new media platforms (principally news websites). All news practitioners confirmed the importance of online news production and said that it affected offline production, as there were conflicts within their organizations on publishing decisions. The main news policy was always that news should be published as soon as possible. However, in reality, the most exclusive news stories were often “saved” for the traditional media outlets. Web journalists wanted to publish top news stories, while the majority of responsible news editors decided to publish exclusive news in print and broadcast media before they were passed on to the new media.<sup>57</sup>

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54. M. Karlsson, *Nätjournalistik* (Net Journalism), Lund, 2006, pp. 60–61.

55. Global Journalist Survey 2010, Swedish part (unpublished).

56. I. Wadbring, “Journalistikåren och kommersialiseringen,” in K. Asp (ed.), *Den svenska journalistkåren* (Swedish Journalists), Gothenburg, 2007, p. 134.

57. L. Nord, “From Breaking News to Making News,” paper presented to The International Communication Association Conference, 2009 (hereafter L. Nord, “From Breaking News to Making News”).

Most news stories, however, are not that exclusive and have to be published instantly in the competitive digital media environment. Still, this influences news values and news selection processes in newspapers, radio stations, and television channels. As internet news generally covers current events and what has happened very recently, offline news must be redefined and packaged with some new characteristics. This redefinition process may sometimes risk journalistic quality, according to news editors:

If we publish something that is already known, we definitely have to take the story one step further. It may be such a big story that we have to publish; however, we always try to package and present it in a completely new way.<sup>58</sup>

The “new way” may include efforts to emphasize new perspectives around an event. However, as with the exclusive news decisions, the “twisting around” of news may be perceived as resulting in a product that seems too manufactured and artificial; too much pseudo-news. An example is when there is a new state budget decided by Parliament, and the tabloids the next day mostly report on how the Finance Minister relaxed with his family after giving his speech.

#### 4.1.2 Ethics

Digitization also affects the ethical behavior of journalists. As in many other countries, news stories have appeared as rumors on the web and then spread to mainstream news outlets. For example, in the 2006 election campaign, a Social Democratic party worker blogged that the Moderate Party leader had not paid taxes in relation to his housekeeper. The accusations proved to be false, the party worker was fired from his job, but the story was initially reported in most leading media.<sup>59</sup>

One of the most significant changes in journalists’ ethical behavior is their understanding of the rules relating to publishing names of people suspected of crimes but not (yet) convicted. Traditionally, Swedish news media have been very strict in this area, not divulging names before trial, and often not even afterwards. This has changed in recent years, and one main explanation is probably that non-media websites generally are less strict and publish the names of suspected criminals earlier in the process.<sup>60</sup> As names are then available to the public, some editors-in-chief think there is no reason to follow the strict traditional rules.

However, digitization may also offer new opportunities that *improve* ethical behavior. It is now possible to post extra background material when controversial stories are published and the public may post comments when they are critical of editorial decisions. This may be effective, as expressed by one editor in a recent study of media accountability systems: “My mailbox was filled at a furious speed with the same message: You have crossed a line. Enough is enough.”<sup>61</sup>

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58. Interview with news editor B. Johansson, *Vid nyhetsdesken* (At the News Desk), Sundsvall, 2008.

59. E. Stúr, “Nyhetskommentatorer, spionskandaler och nyhetsdramer,” in L. Nord and J. Strömbäck (eds.), *Väljarna, partierna och medierna* (The Voters, the Parties, and the Media), Stockholm, 2009, p. 197.

60. No systematic research in this area. But popular websites such as “Flashback” specialize in this field and claim they offer freedom of speech “for real” (see [www.flashback.org](http://www.flashback.org)).

61. Interview with the editor of an evening tabloid, in T. von Krogh, *Media Accountability Today and Tomorrow*, Nordicom, Gothenburg University, Gothenburg, 2008, p. 123 (hereafter T. von Krogh, *Media Accountability Today and Tomorrow*).

There is no empirical data confirming increased public influence on newsroom publishing decisions. However, digital development has provided more areas where ideas on such decisions can be exchanged.

Digital-related factors have affected most journalistic working routines. More journalists than ever are expected to work on different platforms. There are also consequences for newsroom work, as digital competition changes the norms for news and news selection processes. A study in this field confirmed the increased importance of news stories with exclusive content or stories that were easy to follow up and develop further in digital media formats.<sup>62</sup> Finally, digitization influences ethical behavior, as the procedures for checking news stories are not fully developed in online journalism.

## 4.2 Investigative Journalism

In a national survey of journalists, conducted in 2002, 83 percent of the journalists agreed that “scrutinizing the most influential in society” was a very important journalistic task for journalists covering politics and government affairs.<sup>63</sup>

However, this great support in principle for investigative journalism among practitioners does not lead to a substantial amount of investigative journalism. On the contrary, a content analysis of news coverage in local media in Sweden in 2002 indicated a very modest share of investigative journalism. In this study, investigative journalism was defined as journalism based on some kind of investigation, a critical approach, and a focus on influential groups in society. In total, only 105 of the 1,100 articles, or 9 percent, satisfied these criteria. Additionally, some particular topics, such as public schools and social welfare, were extensively covered, while others, such as private enterprises and local planning, were largely neglected.<sup>64</sup>

Another national content analysis on election news coverage by news media in 2002 found that only 1 percent of election news could be described as investigative journalism. In this case, almost none of the analyzed news articles and news features could be described as actually scrutinizing the political party in the position of government.<sup>65</sup>

Consequently, investigative journalism in Sweden has so far been, to a large extent, an idealized concept without significant importance for daily journalistic practices. Contradictory media traditions may have contributed to this development in the past, but today the main explanation is probably the more commercialized media system where professional journalistic values and ambitions are less appreciated and less rewarded by media owners, publishers, competitors, and perhaps even by the public. At least, this is what journalists say when they are asked.<sup>66</sup>

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62. L. Nord, “From Breaking News to Making News.”

63. L. Nord, *Alla tycker om granskning* (Everybody Likes the Watchdog), Sundsvall, 2006, p. 10.

64. G. Nygren, *Granskning med förhinder* (Problems With the Watchdog Function), Sundsvall, 2004, p. 51.

65. J. Strömbäck, *Den medialiserade demokratin*, p. 223.

66. Global journalist survey, Swedish part, unpublished.

The studies referred to above are rather old, but they are the only ones analyzing investigative journalism in Sweden. They were all conducted without a special focus on digitization processes. It is relevant to ask, therefore, whether digitization has improved these conditions or not.

#### **4.2.1 Opportunities**

First, it is clear that computer-aided tools have considerable potential to improve journalistic practices. This holds true for different stages of the news production process, such as finding and checking sources and facts, and acquiring additional material. International studies confirm that the internet plays an important role for journalists, particularly younger journalists. Further, there are clear signs of a “Google-ization” of research, where the search engine exerts a crucial influence on the entire journalistic process, which may lead to one-sided reporting or the neglect of certain perspectives.<sup>67</sup>

There are reasons to believe that digitization has mainly been a positive force in strengthening this kind of journalism. First, it multiplies the opportunities to reach the public. This is most true for public service media, which traditionally offers investigative journalism programs on both radio and television. As broadcast competition increases, the audience may migrate to other commercial channels to a larger extent. However, due to the offering of investigative journalism programs on digital platforms such as Web TV or radio podcasts at any time, the number of listeners or viewers may still be quite high. This improved dissemination of investigative journalism, more in touch with individual media habits, may affect the impact of investigative journalism in a positive way. There has always been space for investigative journalism in leading news media and this is even more true in the digital age, even if it is also easier to avoid this content. Investigative journalism has never been a major part of media production in Sweden, but its relative importance and status have not been particularly reduced by digital media developments.

#### **4.2.2 Threats**

Generally speaking, recent surveys confirm that Swedish journalists make increasing use of digital tools in their work.<sup>68</sup> This does not necessarily improve diversity and accuracy. It is true that in-depth working with databases and the large amount of information in digital archives may lead to more investigative journalism as information is more easily accessible. But there is no evidence that this is happening yet.

#### **4.2.3 New Platforms**

To date, there has not been any important investigative journalism on non-media blogs.

#### **4.2.4 Dissemination and Impact**

Investigative journalism is always more expensive than routine journalism, and commercial considerations were the main explanation for the lack of investigative journalism in the analog era. Whether or not this is

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67. M. Machill and M. Beiler, “How Does the Internet Change Journalistic Investigation and How Should Communication Science Deal with this Issue?” in S. Papathanassopoulos (ed.), *Media Perspectives for the 21<sup>st</sup> Century*, Routledge, London, 2011, pp. 188–189.

68. Global journalist survey, Swedish part, unpublished.

true in the digital age has yet to be established by research. However, there are single examples of news media, such as the upmarket tabloid *Svenska Dagbladet*, where a combination of “agenda-setting” journalism and homegrown investigations has boosted circulation figures.<sup>69</sup>

## 4.3 Social and Cultural Diversity

Despite Sweden’s relatively homogeneous population and common language, there are social divisions and underprivileged groups. But the long development of the welfare state, and an early acceptance of women’s rights both in attitudes and in law, may have contributed to the calm and rational conduct of public debate on these issues. The same may be said generally about religious issues. As Sweden is one of the most secular societies in the world, such issues do not often attract wide interest (see Context).

### 4.3.1 Sensitive Issues

The most sensitive issue in relation to social and cultural diversity is immigration and ethnicity. Historically, the number of immigrants has been low. In the 1960s and 1970s, it was almost entirely related to the needs of the labor market. More recently, the situation has changed dramatically, and now asylum-seeking refugees from outside Europe predominate. In recent years, Sweden has received more immigrants per capita than most other countries within the European Union. For example, a single city outside Stockholm (Södertälje, with about 100,000 inhabitants) has received more refugees from Iraq than the whole of the United States.<sup>70</sup>

The media for the most part do not cover these minorities, and they are not particularly well represented in news output.<sup>71</sup> Public opinion, however, has been rather positive about immigration, and still is.<sup>72</sup> On the other hand, polarization on this issue has increased and has also changed the political landscape. A new rightwing populist party, the Sweden Democrats (*Sverigedemokraterna*), has been very successful in recent elections (see Table 1). The party platform is based principally on immigration and ethnicity, and the basic demand is a more restrictive immigration policy. It associates domestic problems such as crime and high public spending with the country’s liberal immigration policy. It gained a lot of seats in local regional elections in 2006, and is now also represented in the national parliament, *Riksdagen*, having garnered about 6 percent of all votes in the 2010 election.<sup>73</sup> While its greater prominence has not had a great impact on any central political issue so far, the polarization between liberals and nationalists represents a new political cleavage.

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69. E. Wilson, “Newspaper’s key to boosting circulation is planning to be better,” *The Guardian*, 9 May 2011, available at <http://www.guardian.co.uk/media/organgrinder/2011/may/09> (accessed 31 May 2011).

70. See <http://www.fokus.se/2008/03/anders-lago-om-sodertalje-och-usa/> (accessed 16 June 2011).

71. G. Nygren, *Skilda medievärldar*, p. 267-268; G. Hultén, *Främmande sidor* (On the Strange Side), Stockholm, 2006, p. 214 (hereafter G. Hultén, *Främmande sidor*).

72. S Holmberg and L. Weibull, *Nordiskt ljus*, pp. 107–108.

73. See [http://www.val.se/in\\_english/previous\\_elections/2010/index.html](http://www.val.se/in_english/previous_elections/2010/index.html) (accessed 7 August 2011).

### 4.3.2 Coverage of Sensitive Issues

The sensitivity of the issue is also manifested in media coverage of ethnicity and immigration, particularly when these issues have been associated with the Sweden Democrats. Political journalism in Sweden has traditional roots in left- and rightwing perspectives on economy and welfare, and old party press ideals have gradually been replaced by impartiality and neutral presentation of both sides. The new conflict dimension challenges these norms, as most news media have perceived the Sweden Democrats as a threat to democratic values. Consequently, media have had problems dealing with the issues of asylum seekers and immigration in daily news reporting.<sup>74</sup>

### 4.3.3 Space for Public Expression

SR and SVT offer programs in immigrant languages. News programs in the Finnish language predominated for a long time, as Finns were the largest group. Today, immigrant programs, for example in Arabic, Bosnian/Serbian/Croatian, and Spanish, are more equally divided among the major immigrant populations. The obligation to offer content for minority groups is specified in the charter between the state and the public broadcasting companies, and may only be changed by a parliamentary decision. The public broadcasters are rarely criticized for insufficient coverage, even if programs for new immigrant groups are sometimes requested in public debate.

Newspapers and weekly magazines in minority languages may receive state subsidies for production and distribution if they fulfil general requirements. However, the system works mainly on the national level, so the supply of regular news is still relatively limited in the suburban areas where many immigrants live. The Press Subsidies Council (*Presstodsnämnden*), a government authority, is responsible for supporting the minority press and for implementing political decisions in this area.<sup>75</sup>

This sensitive debate has expanded and intensified partly on new platforms, where new conditions exist. This may facilitate public participation in the debate, but may also exacerbate the ongoing polarization, as online debate is often one-sided and directed by powerful offline interests.<sup>76</sup> For the Sweden Democrats, digital media were an invaluable alternative to mainstream media in the 2010 election campaign:

Without the internet, we would never be in the Parliament today. We are a small party, but we were one of the strongest on the net. Thus, we could use social media to bypass old media which were unfavorable for us.<sup>77</sup>

Additionally, digital media have of course enlarged the possibilities for minorities to stay informed about their countries of origin. The large numbers of digital television channels available and the unlimited amount

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74. P. Mattsson, *Sverigedemokraterna in på bara skinnet* (The Sweden Democrats Up Close), Stockholm, 2009, p. 165.

75. See the Press Subsidies Council website, available at [www.presstodsnamnden.se](http://www.presstodsnamnden.se) (accessed 7 August 2011).

76. M. Hindman, *The Myth of Digital Democracy*, Princeton University Press, Princeton, 2009, p. 17.

77. Interview with Björn Söder, Party Secretary, Sweden Democrats, 24 November 2010.

of web news services in different languages have improved the media situation for minorities. Generally speaking, social and cultural diversity are reflected to some extent across the media, even if the situation could improve in specific areas. Still, mainstream media coverage of minorities in Sweden is insufficient and conformist.<sup>78</sup>

To conclude, media coverage of immigrant populations and ethnic minorities has not kept pace with the importance of these groups in Swedish society. At the same time, daily news journalism in general has had difficulties dealing with asylum seekers and immigration, as these issues trigger conflicts that challenge established professional norms and practices in editorial work.

## 4.4 Political Diversity

Political journalism relies increasingly on polls, which results in more reporting about possible winners or losers and speculation about the political future. Reporting and commenting on polls is a fairly easy form of political journalism, not too expensive, and with great possibilities to dramatize the stories and attract audiences. Another driving force behind this development is the rise of the 24-hour news cycle that has dramatically increased media output. But newsworthy events do not occur by schedule. Thus, there is constant need for so-called “horse race” journalism (focusing on opinion polls, differences between candidates, etc.) to fill the void. Not surprisingly, this kind of political journalism during election campaigns is increasing in all types of news media in Sweden (see Table 14).

*Table 14.*  
“Horse race journalism” in election campaigns in Sweden 1998–2010 (%)

	Media	1998	2002	2006	2010
Aftonbladet	Tabloid	45	36	63	74
Expressen	Tabloid	48	50	58	75
Dagens Nyheter	Daily	28	26	42	48
Svenska Dagbladet	Daily	45	37	45	47
Rapport	Public service	33	21	34	54
Aktuellt	Public service	29	28	45	46
Nyheterna	Private TV	33	48	63	64
Total	All	38	35	49	62

*Note:* Numbers show the share of “horse race” news stories in all election news three weeks before Election Day.

*Source:* DEMICOM Election Studies 1998–2010.

78. G. Nygren, *Skilda medievärldar*, p. 356; G. Hultén, *Främmande sidor*, p. 216.

#### 4.4.1 Elections and Political Coverage

The increase of horse race journalism is a general trend in Swedish political journalism during election campaigns. The share has increased significantly across media types. One common explanation is, according to editors, the intensified competition created by digital media:

Very often the news text in the paper only reflects what has already been reported many times on television and the internet during the previous evening. Thus, it is essential for us to develop the story in some way. Then, there is a risk that the article becomes too interpretative or speculative.

(Political journalist, *Dagens Nyheter*)

Digitization may explain some of the changing practices in political journalism.<sup>79</sup> The pressure from instant publishing in digital media seems to produce less qualitative and less issue-oriented journalism.

Another consequence of the digitization of television is that political advertising on television is now permitted. Due to the analog switch-off in 2007, a majority of Swedish households—equipped with digital boxes, cable, and satellite—were offered an increased number of digitally-distributed television channels. Some of these channels, most importantly TV4, were not regulated by the existing Radio and TV Act with regard to political “neutrality”. Consequently, they could broadcast political spots. Political advertising on terrestrial television first appeared during the European Parliament election in 2009.

Generally speaking, there are no regulations of media coverage of elections and politics except for public service media where political reporting should be impartial and reflect political diversity in all kinds of programs. There are no signs that digitization has triggered any changes in these regulations.

#### 4.4.2 Digital Political Communications

The internet has become a more important arena for political communication during election campaigns. Party websites are gradually becoming more advanced and interactive, though they still play a minor role in campaigns. Blogs are only slightly more important as a campaign tool for politicians and political commentators, presumably because the public shows little interest in blogs as a forum for political and civic engagement (see section 3.1.3).<sup>80</sup>

However, the most important campaign tools on the internet are probably the *party selectors* that are offered by news media. These can be broadly defined as a web-based tool that compares a visiting voter’s answers to a set of topical questions with those given by the different political parties.<sup>81</sup> The selectors then suggest to the

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79. B. Kovach and T. Rosenstiel, *Warp Speed. America in the Age of the Mixed Media*, The Century Foundation Press, New York, 1999.

80. C. Panagopoulos, *Politicking Online*, Rutgers University Press, New Brunswick, 2009, p. 12.

81. K. Strandberg, *Parties, Candidates and Citizens On-Line—Studies of Politics on the Internet*, Åbo Akademi University Press, Turku, 2006, p. 69.

voters a selection of parties which are the likeliest to share their opinions. These selectors have become more popular in recent elections and were distinctive features of all main news media websites during the latest election campaigns. They attracted a substantial public.

A national survey on party selector use during the national elections in 2006 suggested that the heavier selector users tended to be young (under 25), and more educated than the average (see Table 15).

*Table 15.*  
Web Party Selector Use in Different Segments of the Population 2006 (%)

Category	Yes	No, never	Total N
Female	119 (23.9%)	358 (71.7%)	499
Male	90 (21.2%)	325 (76.7%)	424
55+	45 (13.1%)	298 (86.9%)	343
35–54	69 (22.2%)	242 (77.8%)	311
25–34	52 (34.9%)	97 (65.1%)	149
18–24	43 (48.3%)	46 (51.7%)	89
Grammar school	19 (10.4%)	152 (83.1%)	171
High school	75 (19.8%)	293 (77.5%)	368
College	111 (31.5%)	235 (66.6%)	346

*Source:* Holmberg and Nord (2008).

*Notes:* Numbers before the parentheses indicate number of respondents for each category.

\* Significant correlation at the 0.05 level.

\*\* Significant correlation at the 0.01 level.

The overall finding in this study was that almost a quarter of the population had tried selectors at some point, while 48 percent of the youngest voters had tried them during the election campaign. The data suggested that users in general—and more frequent users in particular—tended to be politically engaged, educated, and certain about their party choice. They were more optimistic and trusting of political life than the non-users, and appeared to be quite highly mobilized. This would suggest that selectors do not have a mobilizing effect, but rather that they reinforce existing participation patterns.

Recent studies of the last national elections in 2010 confirmed that young people accounted for the highest number of visitors of political party websites during the campaign. In 2010, 48 percent of the population aged 15 to 29 visited a party website, compared to 38 percent in the 2006 election.<sup>82</sup>

82. A. Bergström, “Valår på nätet,” in S. Holmberg et al., *Lycksalighetens ö, Fyrtioen kapitel om politik, medier och samhälle* (Island of Happiness, 41 Chapters on Politics, Media, and Society), Gothenburg, 2011, p. 483.

## 4.5 Assessments

The development of digital media platforms has changed basic conditions for news and political journalism during election campaigns.

Digitization has influenced the news paradigm for traditional media. Breaking news is now less important than making news. The increased competition on more media platforms demands more multi-skilled journalists. Twenty-four-hour news production changes conditions for news values and news selection in news media organizations. Rumors and gossip from the internet have become more difficult to avoid for mainstream news media.

Investigative journalism is rare, but digitization provides new opportunities to use more advanced tools. The limited amount of investigative journalism is mainly explained by high costs in relation to routine journalism.

In principle, political journalism is guided by impartiality and diversity. In practice, it is often characterized by speculative and interpretative content that jeopardizes political objectivity. The ideological bias during the party press era has been largely replaced by a structural bias, where news media confirm opinion poll trends and are dominated by one-sided reporting. The structural bias means that media pick the winners regardless of ideological preference. This development of political journalism may be explained as a result of more strategic party communications or by the increase in market-driven journalism.

# 5. Digital Media and Technology

## 5.1 Spectrum

### 5.1.1 Spectrum Allocation Policy

The government is empowered to make decisions as to spectrum availability for digital terrestrial television. The current decision covers the period from 2008 to 2014 and includes both national and regional channels.<sup>83</sup>

The government also decides about broadcasting licenses for public service television channels, while the Swedish Broadcasting Authority (*Myndigheten för radio och tv*, SBA) makes decisions as to broadcasting licenses for other digital television channels. The SBA was created in 2010 as a converged audiovisual regulator, replacing the former Radio and TV Authority (*Radio- och TV-verket*) and the former Broadcasting Commission (*Granskningsnämnden för radio och TV*). In order to get a broadcasting license, television channels have to agree upon principles of technical co-operation and access. All pay-TV channels in the digital net must be available using one program card. The SBA is obliged to consider diverse public interests and tastes when making decisions on broadcasting licenses. In contrast to some other countries, there is no spectrum reserved for non-commercial local channels. Public service companies have a privileged position as there are must-carry obligations for the SVT and UR channels on cable and IPTV platforms.<sup>84</sup>

### 5.1.2 Transparency

The process of broadcasting spectrum allocation is perceived as uncontroversial. This is mainly because there is a constitutional separation of powers between political institutions and public authorities. Public administration outside the government structure, such as public authorities or state companies, is highly independent, and members of the government are constitutionally prohibited from interfering with public administration activities.<sup>85</sup> The process guarantees that politicians are not directly involved, and that special interests are not favored. There are no cases of operators having tried to reduce broadcasting spectrum availability for potential rivals.

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83. Radio- och TV-verket, *Medieutveckling 2010*, p. 35.

84. Myndigheten för radio och TV, *Medieutveckling 2011* (Media Development 2011), Stockholm, 2011, p. 91.

85. Swedish Constitution, *Regeringsformen 1974*, 11:6.

### 5.1.3 Competition for Spectrum

Currently, there are 39 national and five local/regional channels (Standard-definition television, SD-TV) in the DTT network in Sweden. The SBA has recently declared that the digital television net needs to be upgraded technically in order to offer more channels and high-definition television (HD-TV). There is no history of operators trying to reduce broadcasting spectrum availability for potential rivals.

## 5.2 Digital Gatekeeping

There has been intense political debate about the adoption of standards for digital broadcasting. The outcomes of digitization for radio and television differ substantially.<sup>86</sup>

### 5.2.1 Technical Standards

In 2004, a public commission proposed that digital radio, DAB, should be launched in Sweden, including national and regional public service radio as well as local commercial radio. The private stations were promised reduced commission fees in order to participate in the development of digitization. However, the government rejected the idea in 2005; it said that digital radio was too costly to implement (see section 1.1.1). Moreover, the tests of digital radio in selected urban areas had not increased demand for digital radio equipment. The government declared that the digital radio technology development needed further analysis, not at least since alternative technical standards for radio and television existed. All radio stations, and particularly the public service radio SR, which invested about €40 million in DAB, criticized the government decision. Peter Örn, Director of SR at the time, noted:

No digital radio receivers were sold as long as they were associated with a market test and no plans for the future. Consequently, retailers were not interested in selling DAB radios and consumers were not interested in buying them. In contrast to countries like Great Britain, Denmark, and Norway there was no market pressure for digital radio.<sup>87</sup>

The rejection of DAB radio posed a significant problem for SR, both financially and with regard to the public. The company had been lobbying for digital radio for many years. It had perceived digital radio as absolutely necessary for reaching a much more fragmented radio audience in the future. Without digitization, SR feared it would be impossible to match diverging lifestyles and expectations by offering real time analog radio for a mass audience.

Since then, DAB has not been central in the radio debate in Sweden. The analog FM network is still the foundation, but web radio and radio podcasts are growing rapidly. The current center-right government has declared that digital radio may be implemented some time in the future, but no timetable has been presented.

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86. L.Å. Engblom and N. Wormbs, *Radio och TV efter monopolet*, p. 90, pp. 276–277.

87. Interview with Peter Örn, former director of Sveriges Radio, 17 January 2007.

The rise and fall of DAB radio in Sweden has probably not affected radio listening very much, even if this is hard to prove. SR remains in a strong position, and young listeners are increasingly reached by radio on new platforms, such as mobile, web, or MP3. Some 16 percent of listeners aged 15–24 use any of these platforms for listening, compared to 7 percent of the total population.<sup>88</sup> Thus, it seems to be possible to combine the oldest form of radio (analog broadcasting) with radio on new platforms.

At the same time, there have long been discussions between SR and SVT about the possibility of offering radio via digital terrestrial television. In autumn 2007, the two companies agreed a deal to make SR accessible via DTT. Officially, SVT holds the license, but SR is included in the package.

The development of DTT has been slightly more politically controversial than the issue of DAB radio. The non-socialist opposition bloc initially claimed that the digitization of television was completely unnecessary as the audience was already offered a large number of new television channels via cable and satellite. However, when they came to power in 2006, the four non-socialist parties stayed loyal to the former government's decision to digitize television.

DTT started to become available for interested viewers in 1997; after two years, four national public service channels, regional news, and commercial channel TV8 were offered. Analog switch-off was completed in 2007. Since then, the DTT network has been controlled by the state-owned company Teracom, and its subsidiary, Boxer, operates the platform. Thus, Teracom is the main digital gatekeeper as it is the only DTT multiplex operator. Its subsidiary company, Boxer TV-Access, is the only pay-DTT packager. In 2010, Boxer was further integrated within the Teracom organizational structure in order to make its operations more efficient.<sup>89</sup>

### 5.2.2 Gatekeepers

Generally speaking, there have been few gatekeeping-related problems in this area. When such problems have occurred, they have involved controversies over principles between gatekeepers and television companies. For example, one of the commercial players on the television market in terms of sales revenues, Modern Times Group (MTG), with significant interests in cable and satellite distribution, argued that digitization should concentrate on these platforms rather than on terrestrial television. MTG also strongly opposed plans for the DTT infrastructure to be controlled by Teracom and for DTT packages to be sold by Boxer. As a consequence, MTG's major television channel in Sweden in terms of audience share, TV3, was not offered on DTT multiplexes between 2001 and 2004. They then revised this decision and the channel is now offered on these multiplexes.

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88. U. Carlsson and U. Facht, *MedieSverige 2010*, p. 236.

89. L.Å. Engblom and N. Wormbs, *Radio och TV efter monopol*, p. 255.

### 5.2.3 Transmission Networks

The implementation of DTT in Sweden was very smooth, accompanied by an extensive government information campaign. No serious problems were reported during the process. Because of digitization, all households were offered more television channels than before and this was true also for the households which declined to pay for extra channels.

Successive governments have acted independently toward the major media players in both digitization processes. For instance, as noted, the final decision to stop development of DAB radio was resisted by the main radio market player, SR. And DTT was implemented despite heavy criticism from commercial media interests which preferred other forms of distribution. In sum, while it is hardly possible to argue that Swedish media policy on digitization has been coherent and consistent, it is probably right to say that media policy has been independent but not completely transparent.

The true digital gatekeepers are public players, such as the government and state-owned companies. Media companies, both public service and private, have tried to influence digitization, but with very limited success. Generally speaking, there has been little space for vested interests, except for state company interests. Transmission network operators have not intervened in the distribution of spectrum resources.

## 5.3 Telecommunications

The largest telecoms operator in the country, Telia Sonera, plays an important role, as its Telia platform dominates the IPTV market. The platform had 418,000 subscribers in 2010, making it the third-largest pay-TV operator behind ComHem (cable) and Boxer (DTT). Telia Sonera has its own communication infrastructure and offers customers “triple play” (IPTV, telephone, and broadband) packages. Among the other telecoms operators active in the IPTV market is the Norwegian company Telenor.<sup>90</sup>

The three mobile operator companies Telia Sonera, Tele2, and Hi3G offer 3G mobile television services. Since summer 2010, Telia Sonera and Tele2 have offered a number of packages of streamed TV4 channels. The market for mobile television is growing rapidly.<sup>91</sup>

There are no must-carry rules in this area.

### 5.3.1 Telecoms and News

Telecommunications and news services are two different markets with few common areas of interest so far. One company group, Stenbeck, is involved on both markets as the owner of Tele2 and MTG.<sup>92</sup>

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90. Radio- och TV-verket, *Medieutveckling 2010*, pp. 41–42.

91. European Audiovisual Observatory, “Television in 36 European States,” Volume 1, *Yearbook 2010, Film, Television and Video in Europe*, Strasbourg, 2010, p. 255.

92. The Stenbeck group also owns the free-of-charge daily *Metro* (see sections 1.3.1.1 and 6.1.3).

### 5.3.2 Pressure of Telecoms on News Providers

There are no significant examples of such pressures in Sweden.

## 5.4 Assessments

The history of broadcasting in Sweden is, to a large extent, the history of state control. SR and SVT were monopolies for many years, until media technology finally changed conditions sufficiently to facilitate the liberalization of media policies and the acceptance of commercial interests.

In the digital era, commercial media are more present than ever, on more platforms than ever before. However, state control of the media is more articulated in digital media distribution than in digital media content. Digital terrestrial distribution is controlled by a state-owned company, and so are the program packages offered by DTT.

Spectrum allocation is relatively unaffected by politics. There is generally a clear division between political decisions and political implementation. Governments may of course change conditions at any moment, but as the time periods for spectrum availability are not coordinated with election cycles, decisions are not easy to change quickly and without public debate.

The Swedish Broadcasting Authority is required to take account of the needs, interests, and tastes of all society when deciding about broadcasting licenses within the available spectrum, and this process is not disputed. Public interest is viewed by the authorities to be important for the process. However, it may be argued that state interests are more taken into account than civil society interests, as the dominating SVT channels are more emphasized in the regulatory framework than are the very few channels representing civil society or community interests (local television).

To conclude, the successful digitization of terrestrial television and the failure to digitize radio have not changed the Swedish media landscape in any fundamental way. The major analog media players also dominate the new landscape. The introduction of new media technology has not been used as an opportunity to favor or discriminate against particular media companies.

The changes have created challenges for some media outlets, but for a limited time. Public service radio suffered economically from the cancellation of DAB, but it has stayed in touch with crucial audience segments via web radio and podcasts. The major commercial media player, MTG, probably suffered economically from its decision to withdraw from DTT for five years in protest at the state company's control of the DTT infrastructure. In the long run, however, the company has emerged as one of the winners.

## 6. Digital Business

The media system in Sweden is changing rapidly due to digital media technology, an increased market-orientation, and deregulation. New commercial companies are appearing, and the competition for audience attraction and advertising money has increased on many platforms in the converging media landscape. However, the media market transformation process has been characterized principally, to this point, by a mixture of old and new media structures and by traditional distinctive features coexisting with completely new formats and settings.<sup>93</sup>

### 6.1 Ownership

#### 6.1.1 Legal Developments in Media Ownership

The trend described above is partly a consequence of the fact that Sweden has no law against media ownership concentration. There has been a long political debate about the necessity of such a law, but a majority in Parliament has rejected the idea, arguing that a law would be impossible to control and could be bypassed with unscrupulous business methods. A second argument is based on the strong respect for press freedom in the Swedish Constitution, according to which everyone should be able to publish a newspaper without restriction. Possible ceilings on ownership concentration are continually discussed, but are not expected to be implemented.

Digitization is related to ownership concentration but probably not the main cause for it. Changes in media technology facilitate increased competition in media markets. To be successful in these more competitive markets, media businesses need to be profitable by getting larger revenues or by cutting costs. Media mergers are mainly explained by demands for cost-efficiency and a more rational news production. Digital media platforms may reduce costs, but also increase competition and cause further ownership concentration.

Sweden is a relatively small media market in terms of number of foreign owners. The only important exception is the Norwegian media owner Schibsted, which is the majority owner of two national dailies, *Aftonbladet* and *Svenska Dagbladet*. There is no law against foreign media ownership, so the low level of foreign interest is probably explained by its size and the relatively successful domestic players on the market.

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93. H. Hvitfelt and G. Nygren (eds.), *Medievärlden 2020*, pp. 24–25.

## 6.1.2 New Entrants in the News Market

Media businesses in Sweden are quite stable and new entrants in the news market are rare. The only recent entrant of importance was the weekly news magazine *Fokus*, in 2005. Describing itself as a Swedish *Time* or *Newsweek*, *Fokus* was founded by three journalists and declared itself from the outset as politically independent. It has established itself as an important and respected voice on domestic politics.

## 6.1.3 Ownership Consolidation

Sweden is still a newspaper-reading country, even if the numbers of subscribers and readers are slowly declining. The biggest change for newspapers is the trend of ownership concentration that may be observed on both national and regional levels.<sup>94</sup>

In the national market there are three dominant players: Bonnier (*Dagens Nyheter*, *Expressen*, *Sydsvenskan*), Schibsted (*Aftonbladet*, *Svenska Dagbladet*), and Stenbeck (*Metro*). Bonnier is the largest owner group, and its business interests have expanded outside Stockholm. All national daily newspapers belong to one of the major owners, except for *Göteborgs-Posten* in Gothenburg, owned by the Stampen Company, which also owns a great many regional newspapers. However, there is intense market competition between newspapers from different groups, among both national morning dailies and national tabloids. As shown in Table 16, the two biggest owners—Bonnier and Schibsted—have maintained roughly the same combined market share over the last 18 years. Owner concentration has increased on other levels as well.

Table 16.  
Owner concentration in the newspaper market (% of total circulation)

	1993	2000	2008
Biggest owner	26.7	27.3	26.4
2 biggest owners	43.9	41.8	42.5
4 biggest owners	56.9	54.2	66.6
8 biggest owners	73.2	71.0	87.0
16 biggest owners	89.2	89.7	97.6

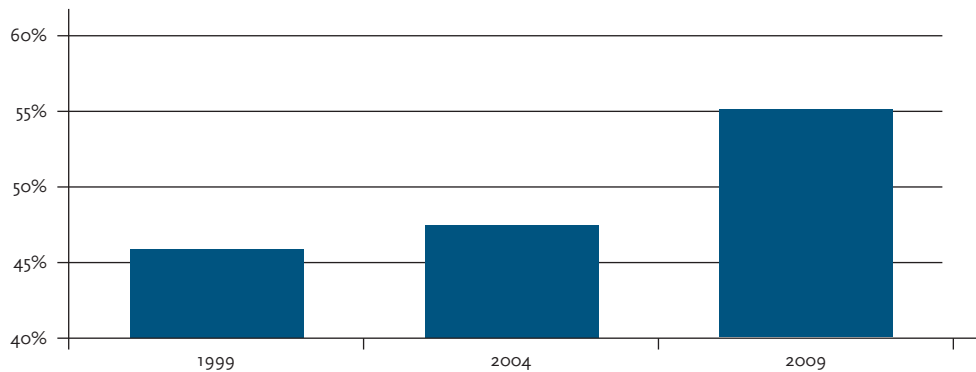
Source: Sundin (2010).

The national radio market is completely dominated by public service broadcaster SR, as there are no national private radio stations. The private national television market has two dominant players: Bonnier (TV4) and Stenbeck (TV3, TV8). They control a large part of the television market, but their share of the market has slightly declined due to the increasing number of “niche” channels specializing in sports, films, documentaries, and so forth (see Figure 7).

94. S. Sundin, “En mediemarknad i förändring,” in U. Carlsson and U. Facht (eds.), *Medie Sverige 2010*, pp. 46–47.

Figure 7.

Owner concentration in the private television market  
(three largest owners' combined % of total viewing time)



Source: Sundin (2010).

Owner concentration at the national level is a dominant trend in the newspaper and television markets. In the former, the biggest owners control about the same share of the market as before, but the increase in concentration is much higher if the 10 biggest owners in the market are analyzed. Private media owner concentration has increased most in the television market.

Ownership concentration on the regional level has not been discussed as much as the controversial mergers involving national players. The most controversial so far are the Bonnier purchase of *Sydsvenskan* in Malmö and *GT* in Gothenburg, and the Schibsted purchase of *Aftonbladet* and *Svenska Dagbladet* in Stockholm. However, the strong concentration of local and regional newspaper ownership is evident in regional media markets. The number of regional newspaper titles has not changed dramatically, but most regional newspaper markets are completely dominated by one single owner group (see Table 17). Today, there are many examples of diverging models of media mergers, ranging from complete takeovers to different forms of joint ventures with competing newsrooms and titles. True competitive regional newspaper markets exist in only five areas of the country; most of the other 95 regional/local newspaper markets are controlled by one dominant newspaper group.

Table 17 shows that a single newspaper has a market share of about 85 percent or more in about half of the newspaper regions in the country.

Table 17.

Newspaper companies' markets shares in newspaper region

Market share (%)	Number of newspaper regions	Accumulated numbers
≥ 98	25	
90–97	16	41
80–89	13	54
70–79	8	62
60–69	5	67
50–59	3	70
40–49	2	72
30–39	3	75
20–29	8	83
10–19	17	100

Source: Sundin (2010).

Regional public service radio offers 25 regional stations. The fourth public service radio channel, P4, is dominated by regional news and programs. The private radio market was deregulated in 1993, but the number of station owners has decreased significantly and today only two owner groups control local commercial radio stations: MTG Radio (Radio Rix) and SBS Radio (Mix Megapol). Regional television has only two major players: SVT and TV4 (Bonnier). Regional news is not offered on regional channels, but appears in the regional news “windows” in the national channels.

The vast majority of Swedish media owners are not active in other business sectors, and most non-media companies are not engaged in media activities. Newspaper companies have no other business interests and are traditionally owned by national or regional publishing groups. Most broadcast companies are essentially media companies.

The only important exception is the Stenbeck Group, which owns the free tabloid *Metro* and a number of commercial radio stations and television channels. This group has substantial interests in other industrial markets (see section 5.3.1), including forestry (Kinnevik) and telecommunications (Tele2). Its media division, MTG, is responsible for all media activities and market strategies.

The consolidation of ownership has affected media diversity negatively, not so much because of new directives from the owners, as from the fact that there are fewer competing newsrooms in the market and fewer articles and news features produced. A 2003 study explored the relationship between newspaper competition in local and regional markets and local news diversity in Sweden. It found that market monopolization affected news quantity, as the number of local news articles produced decreased significantly. The supply of local news fell when there were fewer local media companies on the scene. Based on numbers, local monopolies or more monopolized market conditions gave the public less high-quality local news.

Another important finding was that reduction in news diversity actually varied with different market changes. The news supply did not always correlate with the degree of diversity. Other important factors included news values, news management, news budgets, and owner publicity policies. This study gave some support to the claim that ruinous competition should be as carefully avoided as ruthless monopoly.<sup>95</sup>

#### 6.1.4 Telecoms Business and the Media

See section 5.3.1.

#### 6.1.5 Transparency of Media Ownership

Media ownership concentration in Sweden cannot be described as particularly transparent. Official data are available on a yearly basis, produced by research centers and media authorities.<sup>96</sup> However, public information on media ownership concentration is not easy to access. There are no legal restrictions on media ownership, and consequently no requirement of reporting ownership information to any public body.

### 6.2 Media Funding

The role of the state is traditionally strong in the media sector. State interventions have been frequent at the structural level: press subsidies to support the second-ranking newspaper in a region is a distinctive feature of the press system; and public service broadcasters have been the major players in radio and television markets. In 2009, total public funding support for the media stood at some €747 million (see Table 18).

Table 18.  
Public media funding in 2009 (€)

Radio and television license fees	689,233,219
Press subsidies (selective and general support)	58,015,000
Total	747,248,219

Source: Presstödsnämnden (2010); SVT (2010).

There are reasons to believe that public media funding will be of minor importance in the future. The press subsidy system is disputed. The system was introduced in 1971, when the media market was completely different from today and much more characterized by *external pluralism* (meaning the number and variety of contents available in a given market) in the daily press. The subsidies have helped some newspapers to survive, but they have not stopped the mergers and increased ownership concentration. Furthermore, the European Commission has criticized the subsidies, claiming that selective state support to newspapers poses a serious

95. B. Alström and L. Nord, *Den skånska modellen* (The Scandia Model), Sundsvall, 2003, pp. 143–144.

96. See the Nordicom Documentation Centre at the University of Gothenburg.

threat to free competition and should be perceived as a substantial market distortion. The government has, as a first step, decided to reduce support to subsidized newspapers in metropolitan areas.

## 6.2.1 Public and Private Funding

The lion's share of state media spending goes to broadcast media and this will surely be the case for the foreseeable future. Public service media have great support from politicians and there are no proposals for a mixture of commercial and public funding in this area. However, public funding by license fee seems to be obsolete in the new media environment. There is a general belief among politicians and public service media representatives that the system has to change and cannot be based on whether households have a television set or not.<sup>97</sup> Public service media companies have argued for a fee that is not associated with a particular platform, and some political parties have proposed that the public service outlets should be financed through the state budget. The eventual choice of financing system may affect the independence and legitimacy of public service media.

Public funding may look impressive, but it is still modest compared to private funding. Fifteen years ago, the license fee (the only source of revenue for public service media) was the dominant revenue for the television market. Today, the fee is less important than both subscriptions and advertising. The sums that private broadcasters bring in through advertising exceeds what the public broadcaster receives through license fees (see Table 19).

*Table 19.*  
Revenues on the television market in Sweden 1994–2006 (€)

	1994	1998	2004	2006
Advertising	230,823	346,235	388,202	472,138
Pay-TV	241,315	440,662	1,028,219	1,133,133
License fee	322,908	339,100	426,184	429,541
Total	472,139	786,898	1,416,416	1,605,271

Source: Engblom and Wormbs (2007).

In the commercial market, revenues from pay-TV have developed much faster than advertising revenues. However, the advertising spend in television has increased its share of total advertising from 2 percent in 1990 to 16 percent in 2009.<sup>98</sup>

97. Government proposal Prop. 2008/09: 195, *Kontinuitet och förändring*, pp. 30–31; A.B. Lund et al., *Nye utfordringer for gamle medier*, p. 131.

98. L.Å. Engblom and N. Wormbs, *Radio och TV efter monopolet*, p. 117.

## 6.2.2 Other Sources of Funding

Other forms of funding such as public–private partnerships are not common. Sponsorship is allowed, but strictly limited, in public service media. Despite its modest scale, sponsorship has been roundly criticized by private media as a market distortion. Sponsorship revenues were about €1.7 million in 2009, a figure that should be related to the total revenues the same year of approximately €400 million.<sup>99</sup>

## 6.3 Media Business Models

The recent economic crisis has not hit Sweden particularly hard, though unemployment rates have increased (see Table 2). Still, household budgets for media expenses are limited and there is strong competition for people's money. The declines in newspaper sales and subscriptions and the challenges of charging for online news have forced newspaper companies to think about new business models. Consequently, new digital platforms such as mobile phone applications and iPads are being rapidly introduced.<sup>100</sup>

### 6.3.1 Changes in Media Business Models

Media websites are also of central importance for future business strategies. Public service media *presence* on the internet is widely accepted by private media competitors.<sup>101</sup> At the same time, there is significant controversy over certain public service media *activities* online. For example, when SVT introduced free video-on-demand functions some years ago, leading commercial competitors complained that this was destroying future business models. SVT argues that its development of this service facilitated the expansion of broadband and has helped to establish proper technical standards.<sup>102</sup> Still, it is reasonable to state that no major successful business model has appeared in the past five years.

## 6.4 Assessments

The Swedish media market is under economic pressure. Digitization simplifies news production but increases media competition and demands for profitability. Ownership concentration is a fact in all market sectors and there are very few new and sustainable entrants. The development of media ownership concentration is not transparent for the public.

The most dangerous scenario for independent news media is the increasing ownership concentration and different forms of joint ventures between domestic media companies. There are only five cities in Sweden with real newspaper competition. In all other areas, local media are in the hands of one single owner with a

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99. SVT Public service report, Stockholm, 2009, p. 85.

100. H. Hvitfelt and G. Nygren, *Medievärlden 2020*, p. 21.

101. L. Nord, *Medier utan politik*, p. 270.

102. A.B. Lund et al., *Nye udfordringer for gamle medier*, p. 141.

monopoly newspaper or with competing titles, controlled by the same owner group.<sup>103</sup> This market-driven development is a threat to diversity and pluralism as fewer media alternatives are offered to citizens in most regions of the country.

For the future, the most sustainable financing model for the production of publicly relevant news content seems to be a mixture of public and private funding, but not necessarily in the same combinations as before. The old model of public funding worked well in the broadcast era, but these revenues are hardly enough to guarantee a successful presence on many more digital platforms.

State interventions, in the form of selective press subsidies based on party press connections, are expected to be reduced in the future. However, it may be that traditionally strong national media institutions have survived these changes without adapting completely to market logic. Traditions and political culture seem to matter, and high public confidence in the historically best-known media institutions may prevent a process where liberal market values turn the existing order completely upside down. The outcome of future media policy depends on the color of the government. Social Democrats see increased commercial media income as a threat to public service media, while conservatives perceive public service media expansion as a threat to commercial media.

Additionally, it is important to stress that the leading national media institutions, such as daily newspapers and public service broadcast media, no longer maintain their strong market positions through political support, governmental grants, or tax favors. On the contrary, they maintain their positions by utilizing their brands as reliable news content and entertainment feature providers.

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103. U. Carlsson and U. Facht, *MedieSverige 2010*, p. 48.

## 7. Policies, Laws, and Regulators

Sweden was the first country in the world to recognize a right to freedom of information. Its 1766 constitution contains such a right, and since then freedom of expression and freedom of information have continued to enjoy constitutional protection, which is a stronger protection than that provided in common law. The current Freedom of Information Act guarantees citizens' rights of access to public documents and protection of journalists' sources. According to the Act, every citizen who asks for any public document should have access to it as soon as possible. There are a few clearly defined exceptions to this rule, but the general principle is complete openness, and all deviations are strictly regulated. The Act also prohibits searches for leaks from official sources. All public officials have a strong legal protection and investigations into the identity of those who leak public information to the media may be subject to criminal prosecution.<sup>104</sup>

Additionally, journalists are not subject to prosecution for publishing offensive materials—only the compulsory editor-in-chief (who has to be appointed by all media organizations in accordance with the Freedom of Information Act) is legally responsible, and individual journalists bear no legal responsibility for publishing defamatory materials. Owners are only responsible if there is no editor-in-chief at hand. The exceptions to this strict rule do not concern content, but conduct while gathering information. Journalists can, for instance, be prosecuted for posing as officials or for trespassing on private property.

### 7.1 Policies and Laws

#### 7.1.1 Digital Switch-over of Terrestrial Transmission

##### 7.1.1.1 Access and Affordability

The digital switch-over of terrestrial transmission was completed in 2007 (see sections 1.1.1 and 5.2.1). The political process started in 2000, when a public body, the Digital TV Commission, proposed that DTT should be developed in order to cover 99.8 percent of Swedish households. The Commission argued that DTT would bring more regional news to the public and make more channels available with better technical

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104. Swedish Constitution, *Tryckfrihetsförordningen 1949*, 1:1, 7:3, 13:5.

quality than before. The decision by Parliament in 2000 underlined the importance of “a diverse TV supply” with a must-carry obligation for public service television. The reason for these rapid decisions was, above all, that many households at the time were offered satellite and cable television, and the government feared that it would be impossible to decide to switch off the analog net later if most households used these platforms.<sup>105</sup>

#### 7.1.1.2 Subsidies for Equipment

There was no significant debate in Sweden about the economic challenges posed by the digitization process. No subsidies for the purchase of digital reception equipment were provided, and households were generally expected to be able to afford to buy the necessary set-top boxes and optional program cards. Taking into account the amount of money Swedish consumers normally spend on hi-fi equipment, PCs, and television sets, the cost of buying a set-up box for DTT was, reasonably, not considered to pose a significant problem.

#### 7.1.1.3 Legal Provisions on Public Interest

The debate about DTT that took place focused more on the technological aspects of switch-over. Market players with a substantial interest in alternative distribution technology described DTT as unnecessary and a waste of public money. Some voices in this debate also expressed concern that some people would not be able to reset their equipment in order to watch digital television. As a result, an intense and substantial public information campaign by the government was conducted throughout the country, and no serious problems of adaptation to the new system were reported.

#### 7.1.1.4 Public Consultation

Digital switch-over was driven by a combination of important factors: the economic interests of the state (distribution control) and the major media companies (cost reductions, as well as a fear that the public would not accept a decision of analog switch-off if they were moving to cable and satellite platforms). Nevertheless, the decision-making process, including the fact that proposals were widely circulated for public consideration, must be described as open and transparent.

### 7.1.2 The Internet

#### 7.1.2.1 Regulation of News on the Internet

There are no special regulations covering news delivery on digital platforms. News on new platforms is perceived as similar to news in traditional media channels. The constitutional freedom of the press is the basic law for all media content, with the same conditions and limitations everywhere. There has been some debate about public commentaries on news media websites and, more generally, who is responsible for user-generated content. In the present system, news media have to check that all content published on their websites, including UGC, does not violate existing laws.<sup>106</sup>

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105. L.Å. Engblom and N. Wormbs, *Radio och TV efter monopolet*, p. 227.

106. M. Karlsson, *Nätmyheter*, p. 84.

### 7.1.2.2 Legal Liability for Internet Content

Public discussion about adapting existing laws and regulations to the new media landscape is ongoing. As the Swedish Constitution is, in relevant particulars, the oldest in the world, it has a symbolic importance for the freedom of the press, as it is perceived to afford very strong protection against other power-holders in society. Thus, most proposed changes to it are considered by publishers as significant departures from established and well-functioning democratic principles, even if there are no proposals for fundamental changes in this area. However, the parallel legal systems (one for the press and one for broadcast media) are generally considered as obsolete; a public commission (*Yttrandefrihetskommittén*) is currently preparing a proposal to make the legal context more appropriate to the digital media environment.

## 7.2 Regulators

### 7.2.1 Changes in Content Regulation

The governmental Swedish Broadcasting Commission (*Granskningsnämnden*) has been a department within the Swedish Broadcasting Authority since 2010, but be with the same tasks as before, when it was an independent public authority: essentially, it monitors public service broadcasting and private broadcasters based in Sweden for compliance with laws and regulations. When the Commission concludes that there has been a violation, the responsible media company has to announce this criticism in an appropriate way to its audience. The Commission's power is limited, but breaking the rules is taken into consideration when new licenses are decided. The work of the Commission is in principle unchanged in the digital era.

State regulations prohibiting the use of commercials in public service media are still very important and are extended to new media formats such as public service text-TV and public service websites. However, sponsorship in public service programs is allowed during a maximum of 20 events every year, under the law.<sup>107</sup>

### 7.2.2 Regulatory Independence

The Swedish Broadcasting Authority is part of the public administration but not directly dependent on the government. Traditionally, the political system has made a clear-cut division between legislative, executive, and administrative powers. This generally ensures the authority a high degree of autonomy, and ministers (or ministries) are, under the law, not permitted to interfere with its decisions.

### 7.2.3 Digital Licensing

As discussed in *section 5.1.1*, the mechanisms for allocating broadcasting licenses are generally independent from political institutions but not completely transparent to the public.

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107. Government proposal, Prop. 2008/09: 195, *Kontinuitet och förändring*, p. 57.

## 7.2.4 Role of Self-regulatory Mechanisms

There are well-developed mechanisms for self-regulation in the media sector. Aside from the legal system, with its strong constitutional protection for freedom of information and freedom of speech, Sweden is characterized by a system of institutionalized self-regulation with respect to codes of ethics and newspaper journalism.<sup>108</sup>

The first embryonic ethical recommendations were issued as early as 1900, and have since been updated regularly. They are very well-known in the newsrooms and often referred to in the debate on media performance. The code of ethics refers to democratic values and includes a right of reply. The code of ethics is issued by *Pressens Samarbetsnämnd*, an umbrella organization for the main publishers' associations and the journalists' union. *Pressens Samarbetsnämnd* also directs and finances the Swedish Press Council (*Pressens Opinionsnämnd*, PON).

The PON is an important part of this corporatist structure, representing different interests in society. It is not affiliated with the government; it makes decisions concerning ethical issues, and publishes regular reports with its considerations and explanations regarding its policy positions.<sup>109</sup> The Council was originally established in 1916 by the newspaper industry and the journalists' associations under political pressure, in order to deal with readers' complaints about the content of newspapers. Its rules have been regularly extended over the years, with major modifications in 1969 when the position of Press Ombudsman (*Allmänhetens Pressombudsman*, PO) was added, and economic sanctions were introduced for erring newspaper organizations. The Ombudsman facilitates complaints from the public and selects cases to bring to the PON. Together, the PO and the PON handle complaints regarding the newspaper organizations' print and online editions.

Broadcasters are also committed to the code of ethics, but have their own ethical guidelines that are supervised by the Swedish Broadcasting Commission, a committee of researchers and experts appointed by the government.<sup>110</sup> The guidelines are generally followed. During 2009, the Commission discussed more than 1,000 cases of possible violations of the ethical guidelines. But only 72 cases resulted in declared violations.<sup>111</sup> Every violation has to be reported to the public in the media where it appeared.

Sweden also has a number of specialized journalists' associations for different purposes (investigative journalism, environmental journalism, science reporting) which discuss ethical issues within these sectors. The journalists' union has a committee that, in theory but rarely in practice, can sanction members for unethical behavior. Sanctions in the Swedish model are, as noted in section 7, mainly aimed at the editor-in-chief, not the individual reporter. The Publicists' Club, which is a member of the umbrella organization *Pressens Samarbetsnämnd*, upholds a continuous function of self-criticism with regular panel debates on critical media matters.

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108. See D.C. Hallin and P. Mancini, *Comparing Media Systems*, pp. 172–173.

109. T. von Krogh, *Media Accountability Today and Tomorrow*, pp. 120–121.

110. L. Weibull, *The Swedish Media Landscape*, pp. 176–177.

111. Radio- och TV-verket, *Medieutveckling 2010*, p. 114.

Self-regulation mechanisms have a long tradition in Sweden and have not changed in any important ways due to digitization. There is continuous criticism of self-regulation by politicians and parts of the public, claiming the system is too tolerant and that the consequences for media breaking the rules are too trivial. At the same time, publishers have a strong incentive to follow self-regulatory principles, as there is a constant threat that new laws will replace them sooner or later if they are not followed properly. The Swedish Constitution may offer a very strong protection of the media, but there is always an intense political debate about media ethics and the need to change the legal framework.

## 7.3 Government Interference

### 7.3.1 The Market

As in most other European countries, the free-market argument has been made robustly that expanding public service media on new platforms creates an unfair distortion of national media markets.<sup>112</sup> Commercial broadcasters and newspapers, developing their online services, claim that public broadcasters destroy private media business opportunities by investing public money on the internet and offering content not related to broadcasting, such as local services and information and lifestyle websites.

The traction that this criticism has achieved in various countries explains the introduction of public value tests to measure the market impact and public value of new public service media activities (see section 2.1.3).

In Sweden, the government decided to introduce public value tests in December 2010. The public service companies have to announce any plans of new services to the SBA. Commercial media competitors are informed about the plans and have a chance to comment on their public value and market impact. Eva Hamilton, Director of SVT, argues that public value tests pose a significant threat to public service media:

What worries me most is the power of the Authority in deciding about public value. How would they be able to make such evaluations in a proper way? What outstanding visionary competence do they have? All new services are a bit of a gambling act. Furthermore, it is sometimes important to be first in the market. When we have to announce all new services about a year in advance, our competitors have time to prepare their own improved services of the same kind. How can we argue that public service is attractive for anyone who is paying for it, if we are always number two in the market?<sup>113</sup>

Public value tests are a new element in the regulation of Swedish media that empower the state to evaluate and restrict future activities of public service media. Overall, they put commercial media in a more favorable position than before.

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112. A.B. Lund et al., *Nye udfordringer for gamle medier*, p. 146; P. Iosifidis (ed.), *Reinventing Public Service Communication: European Broadcasters and Beyond*, Palgrave Macmillan, Basingstoke, 2010, p. 1.

113. Interview with Eva Hamilton, Director, Sveriges Television, 24 January 2011.

### **7.3.2 The Regulator**

As described in previous sections, the Swedish Constitution gives authorities an independent role in relation to the Government. Thus, interference by the Government with the media through the regulatory body is not happening.

### **7.3.3 Other Forms of Interference**

There are no other important forms of interference.

## **7.4 Assessments**

The basic framework of policy, law, and regulation has not changed much due to digitization. The law is still mainly focused on traditional, distinctive media platforms. The development of news media on digital and mobile platforms has been guided so far by the same legal principles as in the analog era. A political process has been initiated to review the media laws; this may result in new legislation affecting digital media. However, no dramatic change to the existing legal framework is to be expected, as the common principles agreed upon are central for Swedish democracy and its open society.

The most important legal changes may be the ones originating from the perspective of the European Union. The implementation of the public value test is probably the most obvious example of the European Commission's influence on Swedish media policy, and it may affect the future balance of power between public and private television.

Another example of the EU's influence is the more restrictive regulation on selective press subsidies. In response to heavy Commission criticism, metropolitan newspaper subsidies have been reduced. This first step may be followed by at least gradual reductions also for subsidized newspapers outside urban areas. In that case, there is a risk that the number of available news sources will decrease in different parts of the country.

# 8. Conclusions

## 8.1 Media Today

Most of the main trends noted in this report are more or less associated with digitization. This is most evident in the case of user-generated content. The expansion of digital media platforms has offered new opportunities for interactivity and citizen participation. However, UGC is dominated by non-news and entertainment content.

Digitization is also an important factor when discussing contemporary journalistic practices. It is implicated in the processes of news selection and production. Despite this, digitization has not affected basic news media structures and patterns of news media use. Despite the increased supply of media, citizens stay to a large extent with established news media for news and information.

### 8.1.1 Positive Developments

The most positive development is the fact that the most important news and information providers—newspapers and public service media, on old and new platforms—still offer high quality news and attract a wide audience, despite increased digital competition.

A distinctive feature of the Swedish media landscape is the strong position of public service media, despite increased market competition and demands for greater restrictions. There is a working consensus in society about the importance of public service media in the digital age.

### 8.1.2 Negative Developments

Market developments among private media indicate growing ownership concentration on all levels and in all sectors. This development makes more commercial media companies more dependent on fewer owners than ever. Increased market pressure on news media also seems to have resulted in more sensational and speculative journalism, less expensive to produce but easier to sell.

Pluralism of voices in the media is variable. On the one hand, UGC on digital platforms is increasing dramatically, both on social media and on news media websites. Thus, the number of voices is increasing and

more citizens are participating in public debate. On the other hand, there is still a considerable domination by elite sources in the most important news outlets. This pattern has not changed, despite the contradictory trend on digital media platforms.

## 8.2 Media Tomorrow

Over the next five years, certain digital developments in Sweden may be expected. It is likely that political initiatives will be taken to promote digital radio. The mobile 4G net will be developed in all parts of the country, and mobile broadband will be used more than fixed broadband. New business models will be developed by media companies to replace decreased traditional revenues. Pay-TV will remain as the central revenue on the television market, but newspapers will try to charge for exclusive material on their websites to a greater extent than before. Finally, we will see new partnership models, perhaps between public and private media, in order to meet demands for greater profitability in increasingly competitive markets and face the challenge from media content providers without public interests.

The traditionally strong position of newspapers will weaken, but the decline will not be as fast and definite as some media analysts argue. First, an ageing population will stay with the media they are familiar with. Second, this ageing population is richer than before and thus forms an interesting segment for advertisers. Younger generations will be online most of the time, but newspapers and online versions will exist on parallel platforms for a long time to come.

As one of the countries with the highest levels of internet penetration in the world, Sweden is well placed to confront a dramatically changing media landscape. Increased audience fragmentation and diverging patterns of media use are the likely results of the ongoing digitization process. However, in a democratic context these changes will not necessarily be profound, as traditional news media will face changes with great flexibility and remain significant players, as long as the expanding digital media sector remains mainly important for personal objectives and not for digital activism and political mobilization.



## 9. Recommendations

This report will be discussed with professional media representatives and policy makers, and recommendations will be drafted, published and presented for public debate.

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# List of Abbreviations, Figures, Tables, Companies

## Abbreviations

3G	Third-generation mobile telecommunications
4G	Fourth-generation mobile telecommunications
DAB	Digital Audio Broadcasting
DTT	Digital terrestrial television
EU	European Union
FM	Frequency Modulation
GDP	Gross Domestic Product
GNI	Gross National Income
HD-TV	High-definition television
IPTV	Internet Protocol television
MTG	Modern Times Group
PO	Press Ombudsman
PON	Swedish Press Council
SBA	Swedish Broadcasting Authority
SD-TV	Standard-definition television
SEK	Swedish Krona
SR	Sveriges Radio
SVT	Sveriges Television (Television of Sweden)
SVT Play	Sveriges Television web-TV service
UGC	User-Generated Content

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## Companies

Aftonbladet  
Aller Net  
Allers  
BBC World News  
Bilddagboken  
Blocket  
Blogg-se  
Bloglovin  
Bonnier  
Boxer AB  
Boxer TV-Access  
ComHem  
CNN  
Dagens Nyheter  
Devote.se  
Enrio.se  
Expressen  
Facebook  
Finest.se  
Flickr  
Göteborgs-Posten  
Hamsterpaj.net  
Hi3G  
Hitta.se  
Hotmail  
Jesper.nu  
Kanal 5  
Kinnevik  
Medieutvecklings  
Metro  
Modern Times Group  
MSN Network  
MSN-se  
MTG Radio  
Myshowroom.se  
Posh24.se  
SBS Radio  
The Schibsted Group  
Sky News  
The Stampen Company  
Stenbeck  
Svenska Dagbladet  
Sveriges Radio  
Sveriges Television  
Tele2  
Telenor  
Telia Sonera  
Teracom  
Twitter  
Utbildningsradion  
Wyatt Media  
YouTube

**Mapping Digital Media** is a project of the **Open Society Media Program** and the **Open Society Information Program**.

## Open Society Media Program

The Media Program works globally to support independent and professional media as crucial players for informing citizens and allowing for their democratic participation in debate. The program provides operational and developmental support to independent media outlets and networks around the world, proposes engaging media policies, and engages in efforts towards improving media laws and creating an enabling legal environment for good, brave and enterprising journalism to flourish. In order to promote transparency and accountability, and tackle issues of organized crime and corruption the Program also fosters quality investigative journalism.

## Open Society Information Program

The Open Society Information Program works to increase public access to knowledge, facilitate civil society communication, and protect civil liberties and the freedom to communicate in the digital environment. The Program pays particular attention to the information needs of disadvantaged groups and people in less developed parts of the world. The Program also uses new tools and techniques to empower civil society groups in their various international, national, and local efforts to promote open society.

## Open Society Foundations

The Open Society Foundations work to build vibrant and tolerant democracies whose governments are accountable to their citizens. Working with local communities in more than 70 countries, the Open Society Foundations support justice and human rights, freedom of expression, and access to public health and education.

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