LINARDS UDRIS AND JENS LUCHT

Public communication in transition? The transformation of media structures and content from a transnational and diachronic comparative perspective

This paper analyzes the transformation of media structures during the period 1960 to 2005 and the possible effects this had on public communication. To build a basis for the evaluation of trends and situations in the various media systems within the democratic corporatist model (Hallin/Mancini 2004), this paper will systematically analyze and compare the Austrian situation with Switzerland and Germany, by classifying media suppliers and media supply using an ethic approach. Such an approach allows the extensive transformation of media structures to be charted: including the differentiation of the press from its former political and social ties, increased press concentration and the general trend towards tabloidization. Against the background of increasingly commercialized media systems, this paper argues for a research design that connects the structural and content side of the media, presenting indicators and first results of an ongoing comparative content analysis.

BIRGIT STARK AND MELANIE MAGIN

„Oesterreich“ – the Launch of a New Daily Newspaper in Austria. Success or Failure?

The Austrian newspaper market is almost unique in that practically no other newspaper market has such a high degree of editorial and economic concentration. Successfully launching a new newspaper onto such a highly competitive market therefore requires innovative strategies and ideas. The new daily paper Österreich defines itself as an innovative multimedia product, bridging the space between print and online product. For this reason, Österreich is intended to be a daily paper for the ‘young e-generation’. Its content and layout, and above all its online appearance, are targeted at a young readership. On top of this, the paper claims to be a quality newspaper. The study focuses on how successfully Österreich has translated its strategies into practice and how competitors have reacted to the new newspaper. Two different comparative content analyzes
gathered the required material. The results show that the newspaper’s two aims have not been achieved; neither the combination of online and print (e.g. workflow and news flow) nor the quality (e.g. diversity and amount of political coverage) of the newspaper is outstanding.

PIET BAKKER AND JOSEF SEETHALER

Supporting Concentration or Promoting Diversity? The Impact of Free Dailies on the Austrian Newspaper Market

Recently clear signs of saturation in the free newspaper segment can be observed in numerous European countries. The Austrian free dailies market is facing a similar trend. Therefore, as an example of a mature European market, it provides the opportunity to examine the structural conditions that may have determined the conduct of existing firms and the market entry barriers for new firms. In order to assess the impact of the firms’ conduct on the overall performance of the newspaper market, the authors use the structure-conduct-performance model as a heuristic framework to explain how market structure influences firms’ strategies which themselves may affect ownership concentration, editorial concentration and consumer behaviour. The results of this study offer conflicting assessments of the impact of free dailies on the Austrian newspaper market. By focusing on the overall performance of the market, the wider needs of society referring to the democratic role of the media are taken into account.

ANGELA FRITZ AND JOHANNA GRÜBLBAUER

Business models for weekly newspapers in local markets

Local free and paid-for weekly newspapers would seem to play a significant role on the Austrian newspaper market. They appear regularly and are organised in a wide, supra-regional compound, which can be used for advertising as well as supra-regional production of pages. In other countries, local newspapers are relatively insignificant in comparison and economically solitary at a national level. In order to find an answer to the proposed research question “Which factors will determine the success of weekly newspapers on local markets at present and in the future?”, a “Market Model for Newspaper Publishing Companies” has been developed, which establishes an interrelation among the relevant factors of influence including their – hypothetical – mutual interdependencies.
As a result, it becomes evident that successful (free) weekly newspapers on local markets are not a specifically Austrian phenomenon. Holistic content management in combination with media-driven working of the reader market eventually entails market penetration and success. In Austria, best practice examples are to be found which can, without doubt, set an example for other markets.

Patrick Segalla

Broadcasting law and the dual broadcasting system in Austria

This paper gives an overview of the evolution of broadcasting law in Austria over the past 15 years, focusing in particular on the transformation from a public service broadcasting monopoly to the current dual system of public and private broadcasters. After an introduction to the Austrian constitutional framework for broadcasting law, the paper analyzes the major political and legal factors that led to the start of the liberalization process at the beginning of the 1990s. It then describes the major steps in this process, starting with the first legal framework for private radio, up to the establishment of private terrestrial television in 2001. Following this historical round-up, an introduction to the current Austrian regulatory framework for private broadcasting is given, together with the main legal differences between the private and the public service broadcasting systems. Finally, a short conclusion maps out a number of future challenges that can be expected to influence the competitive relationship of private broadcasting vis-à-vis public service broadcasting as well as the future evolution of broadcasting law.

Christina Ortner, Ingrid Paus-Hasebrink and Alois Pluschkowitz

Digitalization of Television as a Challenge for the Austrian Public Service Broadcaster (ORF)

This paper describes how the implementation of digital TV is changing the general conditions of the Austrian public service broadcaster ORF. On the one hand, it deals with modifications of the Austrian political framework accomplished in the course of digitalization and its implications for ORF in the national television market. On the other hand, the changing market position of ORF is analyzed taking into account increasing competition in the television market resulting from a growing number of programmes offered by digital platforms. These developments are creating new challenges for the public service broadcaster, which has reacted with an increasing commercialization of
its programmes. This has recently led to public debates on the justification of public financing for ORF.

**THOMAS STEINMAUER**

**Public Service Broadcasting beyond licence fees. The Impact of EU Competition Policy on Public Service Broadcasting**

In recent years, public service broadcasting has come under increasing pressure from EU competition law. In Germany and in Austria, it was the publishing houses and the private broadcasting stations who complained about the market activities of public service broadcasters, accusing them of misusing public funded licence fees for commercial activities. In this context, regulation policy issues are discussed as well as the activities of public service broadcasting within the online sector. Along with a short presentation of the general framework of EU competition law and its relevance for public service broadcasting, as well as a comparative outline of the German (ZDF/ARD) and Austrian (ORF) cases, the question is raised as to how the relationship between public service and private broadcasters could be set in due proportion to meet the requirements for diversity and pluralism in broadcast media. The concluding thesis argues that the rules of EU competition law define the parameters of the discussion about market demarcation and that the scope of EU competition law alone is not wide enough to preserve media diversity and content plurality for society within the broadcasting sector.

**JULIA WIPPERSBERG**

**Mobile TV in Austria**

Thanks to a progressive media policy, Austria is in an outstanding position in comparison to most European countries with regard to mobile TV. Launched in June 2008, mobile TV is being distributed by DVB-H to mobile phones not only on a trial basis, but also as a regular service. Not only has mobile TV been implemented in Austria within a very short time span, it has also been done in an elaborate and trendsetting way (including regulatory, technical and commercial regulations). The infrastructural provider, mobile network operators, broadcasting companies and other content-providing companies have worked together successfully using a reasonable business model to provide mobile TV via DVB-H. A large-scale survey conducted by the University of Vienna in January 2008 shows that Austrians, while a little reserved, are interested in the future use of mobile TV on their mobile phones. Within a few years it can be
expected that every mobile phone will be DVB-H-capable, and consequently watching TV on mobile phones will become common behaviour.

BIRGIT STARK AND UTA RUSSMANN

Digital Divide in Austria - Trends of Internet Use (1999–2007)

Although there is much discussion on the Internet development process in Austria, profound analyzes are missing. This paper addresses the research gap through a longitudinal study that examines data from Media-Analyse between the years 1999 and 2007. The overview of past and current Internet usage patterns among the Austrian population focuses on the effects of Internet use in growing and changing groups of users, especially asking for type and frequency of use. Taking into account the theoretical potential of the digital divide perspective, the authors expand the understanding of the digital divide to more nuanced measures of use by examining differences for a) type of use; and b) between rural and urban populations' online activities. The secondary analysis reveals a double digital gap for Internet access and Internet use depending on socio-economic factors and regional influences. The results provide empirical evidence for a growing fragmentation of the Austrian Internet population.

ROMAN HUMMEL AND SUSANNE KASSEL

The Development of Journalism in Austria. An Analysis of Structural Data 1946–2008

This paper provides an overview of the development of journalism in Austria from 1946 to 2008. Based on structural data from the Journalists’ Union, it shows changes and continuities in the field, regarding the regional distribution of jobs in the media, the shift from employment to freelancing, the impact of private broadcasting and new media technologies, and the increase in academic qualifications. The long-term perspective also allows a prognosis to be made for various issues, such as the development of the labour market and the perspectives for female journalists.

DANIELA KRAUS

The Austrian Journalist: Professional background and values

This paper describes the state of journalistic practice in Austria. It is predicated on a study on size and structure of the journalistic workforce and on a
telephone survey of 500 journalists, both conducted by a team from Medienhaus Wien. Core findings include a first time data collection for a population of 7,100 full-time journalists working in general and special interest media in Austria. The statistical profile is similar to neighbouring Germany and Switzerland. The typical Austrian journalist is a 40-year old male working as a print journalist on a salary of about 2,200 Euro per month. The participation level of women within the profession has increased, and women now account for 42% of the journalistic workforce. An academic education is still an exception to the rule, with only 34% of those engaged in the profession having graduated from university. Beyond structural data, this paper provides some insight into working conditions, women journalists, education needs and professional values of the profession.

Andy Kaltenbrunner, Klaus Meier, José A. García Avilés, Daniela Kraus and Miguel Carvajal

Newsroom Convergence – A transnational comparison

More and more journalists in newsrooms are producing content for multiple media: print, radio, television, the Internet and so on. This trend, a result of media companies’ change-strategies, is still in its infancy. Nevertheless, the percentage of (Austrian) journalists working for two or more platforms continues to grow. With the aim of achieving a broader comparative view, this paper explores changes in journalistic practice and workflow in the newsrooms of six European media companies: Österreich and Der Standard in Austria; La Verdad and El Mundo in Spain; and Die Welt/Morgenpost Group and Hessische/Niedersächsische Allgemeine in Germany. Aspects of project scope, newsroom management, journalistic practices and work organization are analyzed using a matrix of convergence descriptors. Three different models of newsroom convergence are developed and described in this paper, focusing on processes and perspectives of media-convergence in Austria: full integration, cross-media collaboration and coordination of isolated platforms.

Paul Murschetz

Examining Financial Subsidies to Daily Newspapers in Europe – Do Subsidies Avoid Market Failure?

This paper compares public financial subsidy schemes to daily newspapers in Europe. It examines whether these subsidies have averted competition failure in the European markets surveyed. It argues that the ability of subsidies to
withstand current pressures of change within these print media markets is limited. A renowned market failure model test is applied of when, how, and with what effects subsidies do restrict or distort competition. The paper finds empirical evidence that subsidy schemes fail to stimulate and strengthen competition.

FRANZISCA WEDER AND MATTHIAS KARMASIN

The Corporate Communicative Responsibility of Austrian Media Business. Self-Regulation as a Corporate Social Responsibility and Instrument of Media Business

In the modern-day media and information society, media firms have a special communicative responsibility; on the one hand, they have to integrate the concerns of their stakeholders in a ‘dialogical’ way and to get the ‘license to operate’ in a social, economical and ecological dimension (‘Triple Bottom Line’ of Corporate Responsibility (CR)). On the other hand, they produce the public sphere and, at the same time, they are in a privileged position (facilitation by the political system, allocation of licenses etc.). Media firms enable ethical reflections and the development of social norms and ethical principles (sustainability etc.) when they are responsible for publishing CR strategies and instruments of the societal organizations and firms. This paper presents the results of a research project on media ethics and Corporate and Social Responsibility (CSR) in the media business. An analysis of the ten biggest firms in Austria and Europe shows that while there is a connection between the two management systems, all actions still take place at an institutional level without consideration of the connections between individual and structural ethics at a micro- and macro-level.