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MARKET-LED REFORMS AS INCENTIVES FOR MEDIA CHANGE, DEVELOPMENT AND DIVERSIFICATION IN THE BALTIC STATES

A Small Country Approach

Auksė Balčytienė

Abstract / The arguments in this article are structured around the normative ideal that the function of the news media is to support democratization, to ensure that different opinions are heard and to guarantee freedom of speech. First, the article assesses the relationship between the size of the media market and the official media policies in the three Baltic states. Second, it describes how liberal regulation, ongoing structural changes in the news market and a weak tradition of professional journalism have resulted in a proliferation of market-oriented logic in Lithuania, Latvia and Estonia. Indeed, liberal regulation and existing media policies promote a diversity of media actors as well as content; still, in such a context, new skills are needed by consumers to critically assess available information and make informed choices – in general terms, to be media literate. Finally, this article discusses the challenges of the Baltic media as a new chance to address old problems of professional journalism.

Keywords / hybrid media / liberal corporatism / marketization / media literacy / media pluralism / media policy / small market

Introduction: Media Ownership and Media Power

In any discussion of structural changes to the media or how the media perform, the question of market size with regard to the production of quality journalism is crucial. Within a free market economy, the level of resources available for the provision of media is constrained by two things: on the one hand, the size and wealth of the economy and, on the other hand, the propensity and habits of its inhabitants to consume media (Doyle, 2002: 14–16). In the same way, content pluralism depends on the availability of resources to support the origination and distribution of many different sorts of media output. Accordingly, larger and wealthier markets (with greater resources available for the provision of media) can afford a greater diversity of output than smaller markets. What is significant to note here is the fact that the total resources available for media provision in a small market may be even fewer than those available for a minority in a larger market (Doyle, 2002: 16–18). Therefore, a particular concern for smaller countries is the availability of resources to support

the production of original content by domestic media groups as opposed to imported (i.e. cheaper) production. A fundamental policy dilemma arises here: what to support – diversity among suppliers (for example, by liberalizing market entrance conditions for new actors) or diversity of content (for example, by state subsidy of the media)?

Indeed, no well-established formula exists. Across Europe, many forms and ways of policy implementation are available. For example, in the Nordic countries (as well as in Austria), the state intervenes in the print media sector by promoting diversity of media actors through different kinds of subsidies: for example, by giving support to small local newspapers so they can survive (Gustafsson, 2007; Lund, 2007). In the Baltic countries, particularly in Estonia, a different strategy has been applied: in order to create better advertising opportunities for private broadcasting and to strengthen development and competition among domestic providers, advertising was seized on by public service television (Estonian Television, ETV). As a result, ETV has gradually strengthened its position in the market by offering public service rather than commercially oriented content (OSI and EUMAP, 2005).

Discussion on media pluralism and diversity essentially focuses on two issues: structural diversity of the media and diversity of content. A very common approach to studying media pluralism is to concentrate on media ownership plurality. As claimed by many, the process of media concentration leads to an enormous opinion-forming power and its outcomes may be dangerous for democracy (Humphreys, 1996: 71–4; Meier and Trappel, 1998). These worries may be justified; however, the fact that only a few media players are operating in a small market may not in itself threaten media pluralism. The way media content is produced – namely the range of voices that are represented, whether media companies have codes that promote diversity of opinion, etc. – also has an impact on the overall level of plurality in the media. However, at the same time, a few large and wealthy media firms could provide better quality and more innovative media products as well as ensure better working conditions for journalists than a plethora of small and highly competitive local media suppliers with very limited resources (a situation that can still be noted for the Baltic states). The main perceived danger is that excessive concentration of media ownership and business logic based on economic management of news production and distribution pose a threat to pluralism by concentrating more economic power in the hands of just a few suppliers. Giant media groups may find it easy to take over and drive out smaller companies. Also, large companies may strategically deploy their resources to undercut the price of weaker competitors in target markets (Humphreys, 1996: 72).

One way to ensure a healthy diversity of voices in media could be a system of protection measures (adequate regulation, quality management mechanisms deployed by the media themselves, audience control of the media through informed criticism, academic research and analysis, strong support of public service programming, etc.) to prevent media power being monopolized.

The Baltic Media Market – One or Many?

‘Three countries – one market’ was a popular saying in the early 1990s to describe the media climate in Lithuania, Latvia and Estonia. Two decades later, although clear

differences exist between the media structures of the three countries, which can be attributed to economic and technological (e.g. openness to innovations) as well as historical and cultural (e.g. reading culture) differences, this saying still holds true. Certainly, since the transition to a free market economy and a consolidated democracy there have been many divergences (due to historical, social, technological reasons) observed across the media systems of the three countries. At the same time, media systems and journalistic practices in the Baltic states can be studied and researched as belonging to a single cluster with shared characteristics: each country has a small market (with populations varying from 1.34 million in Estonia to 3.38 million in Lithuania), liberal media regulation and weak media accountability, for example. Some of the parameters defining these characteristics are objective (size and wealth of the market, differences in major linguistic groups in the country), while others are subjective (reading culture and people's propensity to consume media).

Comprehensive comparisons between Baltic media structures as well as media performance are lacking however. A comparative research perspective is particularly interesting for several reasons. As widely discussed, contemporary media systems are changing rapidly, with economic as well as technological factors affecting news production cultures and culminating in more or less similar results worldwide. The most obvious sign of media systems convergence is an increase in media commercialization and marketization (Curran and Myung-Jin, 2000; Esser and Pfetsch, 2004; Hallin and Mancini, 2004a, 2004b; Humphreys, 1996). With increasing claims about journalistic homogenization, a number of important questions arise: How are global developments reflected in the media of small countries? What is the impact of market-led reforms (liberal regulation, weak state) on media performance in a small country?

An adequate analysis of media plurality – diversity of media actors as well as voices in the media – requires a combination of quantitative and qualitative parameters. More precisely, to assess the preconditions for the democratic performance of the media it is not sufficient to count media actors and analyse available regulation. It is not enough to look into media content either. Rather, it is crucial to investigate the historical and political as well as the sociocultural causes behind the implementation of certain policy goals shaping the performance of the media. In other words, it becomes crucial to ask: What are the consequences of the historical and political contexts in the Baltic states for media pluralism and diversity of informational content as well as for citizens' participation in public discourse? Has the presence of Scandinavian capital in the Baltic media had any impact on how journalists perform their jobs? Do the Scandinavian models of media self-regulation when applied in Lithuania and Estonia help the media there to achieve consolidation?

Deconstructing Media Policies: Initial Visions and Present Outcomes

Generally, the media policies in the Baltic countries are structured around the ideas of liberal corporatism. In each country, liberalism in media policy shows itself in many ways and forms. For example, participation of the state in matters to do with the media in all three countries is rather limited; in addition, media ownership and

performance regulation are very liberal. At the same time, elements of corporatism are observed in how consensus among different groups in society is achieved and how decisions are handled in different media-regulating institutions such as press councils, broadcast commissions, foundations, etc.

Liberalizing the Baltic Media: A Historical Retrospective of Political Decisions Made in the Early 1990s

In the early 1990s in the Baltic states, in a similar way to other post-socialist countries of Central and Eastern Europe (Poland, Hungary, the Czech Republic), the primary goal was to end the media's subordination to government and to create national media systems. The change of media ownership was among the most important steps taken in the wake of the political transition.

In the Baltic countries, privatization had its own particular characteristics. Scholars variously describe it as a 'spontaneous privatization', 'closed privatization' or a 'privatization from within' (Lauk and Harro, 2003; Nagla and Kehre, 2004; Nugaraitė, 2004). In the early 1990s, the media establishments were simply transferred from party ownership into the hands of national and local editorial teams. The most widespread form of ownership was a joint-stock company with a larger number of shareholders, each having only a few shares. This process of privatization – the so-called 'domestication of the mass media' – was costly. The new owners lacked money and, most importantly, the knowledge and expertise of how to manage a media enterprise and compete with others in a young market. Thus, these fledgling media companies experienced rapid turnover of owners and economic hardships of various kinds. Later, local business people and bigger companies bought up the shares and a consolidation stage followed when a handful of larger national or foreign companies were formed (Balčytienė, 2006: 38–48; Briškė et al., 2002; Paju, 2004).

Unlike other post-socialist markets, the Baltic countries remained on the periphery of the global map. Their small markets, weak and changing media structures and volatile economic situation was not attractive to large foreign firms. Other Central and Eastern European countries, with bigger media markets, immediately attracted the attention of international conglomerates (Passauer Neue Presse, Axel Springer, Bauer, Ringier, Westdeutsche Allgemeine Zeitung, Gruner und Jahr among others). In the Baltic countries, foreign investment took time to arrive. Only in the late 1990s, when the main national companies began to take shape and the market situation was stabilizing, did the first investors appear – all from the neighbouring Scandinavian countries (Modern Times Group in television and Bonnier Media, Schibsted and Orkla Media in the print industry). Linguistic barriers, geographic location and limited advertising possibilities have preserved the Baltic countries as closed systems in terms of global competition.

In parallel with privatization, media policy was being drafted. It was crucial to forge the right regulation to support the development of domestic media actors. At the same time, by promoting the development of domestic actors, radical steps were taken to eliminate the power of the state over the media. All such attempts to liberalize the market and to limit state intervention were influenced by the memory

of the Communist past, when everything was under the strict control of the government. In the Soviet era, the government had an exclusive right to decide on the establishment and closure of publications, to appoint and dismiss the editors-in-chief and to issue special instructions to the media. Memories of censorship, black-listing and bias were still foremost in people's minds and any proposals (even the most innocent ones) for the participation of the state in media matters were a very sensitive issue. Therefore, the process of drafting statutory regulation was a result of conscious decision-making in order to gradually destroy the power of the state over the media and to grant the media the freedom to regulate themselves (Tapinas, 2000).

In Lithuania, a few years passed before this goal was realized (the 'laissez faire' ideal was incorporated into the legislation). In 1996, the new Law on the Provision of Information to the Public was passed: government control was removed, information provision acknowledged as a commercial activity (with media registered in the Company Register and the Law on Competition regulating competition between media) and self-regulatory institutions were established. The Law on the Provision of Information to the Public (amendments as of 2006) was declared by foreign experts as the most liberal media law in Europe. In Lithuania (in Latvia and Estonia also) there is no regulation of media concentration or cross-ownership. There are also no restrictions on foreign capital investment in the media. So far, only the restrictions to political advertising have caused concern. Estonia still has no strict rules with regard to political advertising, but the situation in Lithuania and Latvia is different (in Lithuania, for example, the requirements for political advertising and the requirements for differentiating it as such are laid down by the Law on Funding of Political Parties and Political Campaigns and Control of Funding of 2004).

Learning Lessons from Scandinavian Neighbours

The Nordic countries have always considered the Baltic states as belonging to the same informational space. Immediately after the political transition, Scandinavian ideas promoting social partnership were imported. This is also reflected in media self-regulation. The Lithuanian model of 'regulated self-regulation' – embodied in the Inspector of Journalist Ethics and the Ethics Commission of Journalists and Publishers – was based on the Swedish Press Ombudsman and Press Council. The Estonian model took elements from Finnish and Norwegian self-regulation. Latvia is the only country that does not have a Press Council or Ombudsman (media companies there have invested in developing in-house systems of self-regulation).

Scandinavian media policies (built on ideals of social partnership, public service, pluralism and respect for others' interests, and favouring autonomy of media professionals) had a strong influence, and media transparency, accountability and consensus finding were enshrined (to a greater or lesser degree) in the laws of their Baltic neighbours. Also, the democratic legitimacy of self-regulators was built upon the principles of corporatism stressing that group interests must be compatible with the interests of society at large and collegial agreements must be found to prevent conflicts and political intervention (the Lithuanian self-regulation institution, namely

the Ethics Commission, whose members represent journalists, publishers and different public groups, contrasts with the more 'closed' Estonian model).

In spite of such positive influences, certain drawbacks can be observed. In theory, corporatist principles are promoted in policies and reflected in the media regulation of the Baltic states. In practice, however, not every media establishment adheres to the requirements enshrined in regulation (e.g. to publish audited circulation figures) or to a code of ethics.

Alongside ideological and idealistic influences, the Baltic markets were also seen by their Nordic neighbours as offering the potential for market expansion. However, actual experience fell short of expectations. In the very beginning and with the first signs of Nordic capital investment in the Baltic media, hopes emerged in the industry that the new media owners from the Nordic countries would also transfer high journalistic standards to their small neighbouring markets. However, the 'export' of professional culture does not happen automatically. A belief that just the arrival of foreign capital will have a positive impact on journalism is erroneous. There are studies to show that media companies behave differently in foreign countries than at home. The same happened in the Baltic states: very often foreign companies were only concerned with profits and distanced themselves from issues of social responsibility (Balčytienė and Lauk, 2005).

The Virus Named Commercialism

Baltic journalism has faced profound changes in recent years: the overall circulation of tabloids and specialized magazines has multiplied and the number of news channels (free dailies, broadcasting time, online news portals) has increased in all three countries. In spite of the increase of media channels, scholars have begun to point to the homogenization of journalism, to the rise of sensationalist and more entertainment-oriented reporting as well as to the blurring of boundaries between news and advertising (Balčytienė and Harro-Loit, 2007; Harro-Loit and Saks, 2006). The decline, even collapse, of journalism as a public service is apparent in every facet of the media: hybrid discourses (mixed genres of journalism and advertising) proliferate in magazines and broadcast and Internet media. In addition, claims are made that many media firms are competing with the same content: in broadcasting, increased competition results in programme duplication, while in other fields it results in a decline of content diversity and quality (Balčytienė, 2006: 145–57).

Generally, the media climate in the Baltic countries seems to be ruled by popular preferences for free news and entertainment. With some exceptions (such as the dailies *Diena* in Latvia, *Eesti Päevaleht* in Estonia and *Kauno diena* in Lithuania), the majority of dailies seem to be trying to maintain their market share through a diet of political scandal, general human interest stories and increasing sensationalism. When questioned about such policies, the editors express a belief that scandal sells, while more mundane news, for example, receives minimal interest. A common understanding was voiced by the editor-in-chief at one of Lithuania's largest dailies: 'the media market in Lithuania is small, so there is no reason to expect that a newspaper can make business just by reporting'. As a result of fierce competition, many

conventional media groups have become content-production companies simply duplicating available content and 'translating' it to fit the different media.

To conclude, the Baltic media operate under their own market-focused logic, which favours media empire building and cheap production. As a regulator, the state in Lithuania, Latvia and Estonia has not engaged in intervention to modify the market, for example by regulating cross-media ownership and concentration or imposing stricter regulation on advertising (aside from Lithuania where strict rules apply to political advertising as well as advertising of spirits). While the state rhetorically stresses the importance of public service, consensus finding and transparency, there is little practical application of these principles. The Baltic media themselves seldom observe the principles of public accountability; in addition, they are suspicious of outside intervention in their field (such as public discussion or academic criticism of media performance), so they behave more like a dog on the attack than a watchdog. The situation is indeed complicated and journalistic professionalism suffers because of it. On the one hand, openness and accountability are values declared by the media (self-regulation), but on the other hand, the logic of the market is highly valued, thus leaving the rhetoric of media transparency to be used mainly for the purpose of defence.

This contrasts with the situation in the Scandinavian countries, whose self-regulatory models were 'imported' into the Baltic states. In the Scandinavian countries, media have traditionally been seen as social institutions. But as already mentioned, the direct 'translation' of developed practices from a foreign context does not lead to the expected results. At the same time, as optimistically proposed by Rosslund (2005), media self-regulation has a lot of potential in the Baltic states and could in fact turn into a model (e.g. by addressing ethical dilemmas arising from Internet media use) for the older systems in Scandinavia.

What Will Happen Next?

The climate for media regulation in the Baltic countries can be characterized as economically very liberal, promoting fierce competition and a consumerist approach. A few critical questions relating to policy development arise in this context: How to support and preserve professional journalism? What can be done to ensure the democratic performance of the media?

Modern democracies employ several mechanisms to watch over the media. In some countries, there is a long tradition of media companies using quality management mechanisms to ensure that democratic performance objectives are met. In other countries, the media themselves increase public awareness of media performance related matters – while in the Baltic countries this has only recently been applied in practice. For example, in Lithuania, the Journalists' Union broadcasts the weekly programme *Žinių radijas* (News Radio), which is a discussion forum on media issues. And in Estonia, media matters are regularly covered by external commentators in the national daily *Eesti Päevaleht*. It is not customary for media companies to have their own in-house ombudsman and code of ethics, but some do (e.g. in Latvia, the daily *Diena*, the public service broadcaster LTV, as well as other media

firms employ a common code of ethics). In short, various means – academic research and publication of surveys, media literacy education in schools, etc. – to encourage and support journalistic responsibility are going some way to counter the pressure of market-driven journalism.

Alongside an academic research tradition that indeed contributes to public knowledge of media performance, there is another factor that has recently stimulated debate about the quality of journalism and media professionalism, and this is the advent of the Internet. In Lithuania, over a dozen online news portals have joined the project '*Neburnok!*' (Don't Swear!) with the aim of promoting free speech, constructive critical dialogue, discourse and a communication culture online; there are also other projects where journalists comment on media performance: '*Projektas Ž*' (Project 'J' – 'J' for journalism) and '*Atvirai ir garbingai apie žiniasklaidą*' (Openness and Fairness in the Media), for instance. In Latvia, in 2006, the online media created the coalition 'Internet Free from Hate', which all the major news media joined. Activities on the Internet signal that with its increasing popularity new questions must be addressed in media policy debates related to the reliability of content published online, the professionalism of online journalists and the funding of online content.

To conclude, the three Baltic states constitute multi-channel societies – different media actors are active both offline and online; still, at the same time, citizens in the Baltic states have to learn to understand the meaning of freely accessed content. Free media are widely available (free dailies, commercial broadcasting, free news accessed online). Alongside these developments, one has to understand that media completely funded by advertising are affected by product placements, sponsorships, etc. These strategies are proliferating in the broadcast media but are also becoming very prevalent online. In addition, there is an increase of user-generated content that is also available online through blogging, specialized news portals, etc. Government, too, contributes to the diversity of voices by giving support to media products and in this way correcting the failures of the market. Thus, the wide availability of content supported through different mechanisms (initiated by business, government and consumers) requires a new kind of literacy, which places its own demands on both news production and consumption. With regard to production, economic factors impact the roles and functions of journalists: in a competitive environment (where news is produced under the logic of 'as fast and as cheap as possible'), journalists are tempted to overlook the production of hybrid media, therefore media professionals must be prepared to resist temptation and confront possible pressures (from advertisers and strategic communicators). With regard to news consumption, the availability of diverse media and diverse voices places demands on better informed choices by media users. Therefore, promotion of media literacy could be seen as a logical move forward. Steps undertaken in this respect in the three Baltic countries vary greatly. For example, in 2005, in Lithuania, a schools programme on civic education and media literacy was launched. Its goal is to train students in information literacy skills, to stimulate critical thinking as a reaction to the oversupply of entertainment-oriented production and to educate children to use the new IT and other media products. The programme aims to educate children (and their parents) in areas such as the media system and how it functions, what media self-regulation and journalist ethics mean and what kind of media regulation exists.

Discussion and a Way Forward

In less than two decades, the Baltic media have developed from a single monopoly to liberal and competitive markets in the northeastern corner of Europe. As discussed, certain factors have shaped media policies towards the promotion of a liberal, market-oriented thinking in the Baltic states. If assessed historically, in the early 1990s, following the political transition, the ideal of market liberalization was initiated by immediate need (to promote the development of domestic actors) as well as memories of the recent Communist past (media control, lack of autonomy, censorship). Thus, certain bans and restrictions in media regulation were lifted. The promotion of corporatism, in contrast, comes from a different impulse – an ‘import’ from the three countries’ Nordic neighbours.

Indeed, in the early 1990s, liberalism was the only option as the way to proceed. Statutory media regulation was considered politically unacceptable. Therefore, at present, any attempt to impose stricter regulations and deliberalize media markets by, for example, putting restrictions on cross-media ownership would be interpreted as a step backwards. In the wider European media politics, too, a general tendency towards neoliberal policy promoting deregulation, competition and openness can also be observed.

In the Baltic states, the model of a free market is highly prized. Many factors come into play here, for example the historical past (the reading and publishing culture in Lithuania is recovering from a historical ‘heritage’ where a century ago all publications in the Lithuanian language were banned by czarist Russia), the lack of a tradition of professional journalism, dramatic changes in the process of transition from planned to market economy, to mention but a few. The three Baltic states (so-called former planned economies) have introduced a more or less liberal ‘laissez faire’ approach: the journalistic culture of these countries is affected by the ideals of the liberal model (through such processes as secularization, individual consumption and consumerism). However, the recent professionalization of journalism and a developing system of self-regulation have meant divergence from a purely liberal media model.

Two other important aspects of Baltic journalism must be mentioned here, namely, weaker journalistic professional unions and signs of clientelism in journalists’ relationships with their political or economic news sources. Although the media in the Baltic countries declare themselves as free and independent (political affiliations were ‘erased’ from the Baltic newspapers in the mid-1990s; also, there are strict regulations, in Lithuania for example, prohibiting political ownership of the media), in practice, the media are carefully observing, monitoring and adjusting to the political agenda. This, however, may be a ‘natural’ outcome relating to the issue of proximity: in a small market, journalists’ relationships with their sources are built differently from a larger market (often in a small country there are only a limited number of sources available for journalists to comment on a particular political or economic matter). In spite of the effects of proximity, the Baltic culture of political communication is certainly distinct from the situation in the Scandinavian countries (which are also considered small media markets), where journalistic professionalism and editorial independence are revered as essential elements of the democratic-corporatist model.

To conclude, the three Baltic countries are in a unique situation – their populations are small, their languages are themselves distinct (Lithuanian and Latvian belong to the Baltic language group while Estonian language belongs to Finno-Ugric) and they do not share a language with a giant neighbour. Liberal regulation creates possibilities for a wide spectrum of actors to take part in the media business. Content diversity is promoted and achieved through moderate intervention, such as subsidies for culture and minority media. Other forms of public funding exist as well, for example independent public finance: in Lithuania, since 2005, any individual may transfer up to 2 percent of the amount of the income tax paid to the state to any public or business organization. This has allowed for the public financing of some traditional media projects (such as monthlies, political and cultural weeklies) as well as specialized online news media (Bernardinai.lt or other exclusively online media portals). Such strategies increase content diversity and foster competition in a small market. Still, as resources are limited, small markets will always be faced with different dilemmas from larger countries. In a small country, the demand for non-mainstream information is potentially smaller than in the bigger markets. Thus, with increasing competition, there is a greater reluctance to invest in new products. Consequently, quality and professionalism suffer. Certain content becomes marginalized, for example, foreign reporting and investigative journalism – some media companies (mostly local media suffering from bottom-line pressures) simply cannot afford it.

Indeed, media diversity is a serious problem for small markets and, as practice reveals, it is difficult to find one single, adequate solution for every situation. In some countries, an interventionist form of regulation is used to promote media diversity; but, in the Baltic states, such a formula has been rather difficult to apply. The free market and liberalism was the ideology chosen to promote the development of domestic media actors. In addition, as the Baltic states do not share a language with their giant neighbours (Poland and Russia), media regulation does not follow the protectionist path (foreign ownership is allowed and even encouraged, especially favouring the media owners from the neighbouring Scandinavian countries). However, tolerance towards foreign owners should be applied with caution: a different kind of ownership (e.g. capital from Russia) would need to be treated totally differently.

All the aforementioned issues (market-driven transformations such as changing journalistic discourses, lack of public service thinking, increasing power of news sources) signal a need to re-examine available media policies, for example by putting a stronger emphasis on the aspects of corporatism (favouring principles of media accountability, social corporate responsibility). Thus, a new kind of media literacy needs to be promoted. A small market places higher demands on both news producers and consumers. News producers are required to achieve quality content with limited resources. Consumers, too, must be better equipped to access information, make informed choices and judge the received content: if media concentration takes place, audiences will be better prepared to anticipate potential dangers. The role of the state also needs to be reconsidered as memories are fading and new experiences are emerging.

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