

Media power in the Lithuanian news market reconsidered*

Kristina Juraitė

Assoc. Professor, Dr.
Department of Public Communications
Faculty of Political Science and Diplomacy
Vytautas Magnus University
Daukanto str. 28-202, LT-44246 Kaunas, Lithuania
Phone: +370 37 327869
Fax: +370 37 327891
E-mail: k.juraitė@pmdf.vdu.lt

The media as a social actor is particular in the sense that its activities are both economic and political. The production of goods and services is often both private and public; therefore, the media is playing an important political function in informing and consolidating the public, as well as the economic one of generating revenue. Thus, apart from their democratic responsibilities, the media are also run as business enterprises. However, dominance of the market mechanisms and of commercial media makes the fulfilment of democratic functions complicated enough. Since late 1980s, the evolution of the Lithuanian media has passed four phases including liberalization, diversification, marketization and the second phase of diversification. Reflecting on the recent developments of the media in Lithuania, the article focuses on the media organizations and audiences, also increasing role of the media system in political and social life. What is the role of media in a democracy? What is its relationship to the power institutions? What does it make the media powerful? What kind of problems do emerge in executing the power? These and other questions are contextualized and discussed in the article.

Key words: Lithuanian media market, advertising, liberalization, marketization, diversification, concentration, popularization.

Introduction

Addressing the state of democracy in the European countries, the Parliamentary Assembly of the Council of Europe emphasized the misuse of media power:

The increasing role of the media, which in many cases tend functionally to replace political parties by setting the political agenda, monop-

lizing political debate and creating and choosing political leaders, is a matter of concern. Media are too often primarily business-driven institutions and, by prioritizing their business interests over the service to the citizens and their democracy, they inevitably contribute to the distortion of democracy. (Council of Europe, 2007, p.8)

The particular character of the media as a social actor is that its activities are both economic and political. Since the production of goods and services is often both private and public, the media is playing an important political function in informing

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and consolidating the public, as well as generating revenue. Thus, apart from their democratic responsibilities, the media are also run as business enterprises (McQuail, 1996). Slovenian researcher Slavko Splichal (2002) argues that economic functions of the media have been unfairly disregarded and excluded from the normative media discourse because of some subjective factors. Increasing power of media institutions in postcommunist societies is very much related to the development of the media business activity as ‘another business’ (Corner, 2004). Therefore, it is important to analyze media development in the new media markets, including the countries of the post-communist system.

Following a normative understanding, the mass media are “indispensable to a democratic society because they make information available at all social levels and in all its geographic corners. They are essential as critics of government, as investigators of wrongdoing, as advocates of good (as well as not-so-good) causes. They are a forum for discussion and debate. They create and define the separate constituencies whose compromises make democracy work.” (Bogart, 1995, p. 10) However, dominance of the market mechanisms and of commercial media makes the task complicated enough. The main aim of the paper is to provide an overview of the latest developments of the Lithuanian media, which disengaged from the authoritarian control of the state two decades ago. Contemporary media world raises a number of questions on the role of media and the distribution of power in contemporary democracy. What is the relationship between the media and power institutions? What does it make the

media powerful? What kind of problems do emerge in executing the power? These and other questions are being discussed in the paper.

Political scientist Pippa Norris (2000) has blamed today’s news media for increasing public disengagement, ignorance of public affairs, and increasing public cynicism in many Western democracies. She has distinguished three core functions played by the news media in a representative democracy in a following way:

1. *Media as a civic forum* which provides with a constructive and thorough coverage of political and social issues. In Habermasian terms, media is a public arena needed to debate the main approaches and facilitate communication process between the state and its citizens. The public sphere implies on how and to what extent the mass media can facilitate the public in learning about the world, debating their opinions, reaching informed and consolidated decisions on further actions (Dahlgren, 1991).
2. *Media as a mobilizing agent* to generate practical knowledge, to inspire public interest and civic engagement. To be informed and participate in public debates, one should, first of all, be aware of the current processes in one’s environment. The ‘right to know’ is based on two key responsibilities of the media, i.e. free flow of information and representation of public interests. It is important to assure that a wide range of different interests, ideas, beliefs and values are covered by the media, which is as important for a democratic society as the electoral system.
2. *Media as a watchdog* to keep in check for abuses of civic rights and to hold

officials accountable for their activities. Following a normative conception of the media functions in a democracy, the most fundamental value of the media in a democracy is to facilitate the development of independent and open viewpoint in society by providing citizens with well-balanced information on the issues of public concern, and controlling those who are in power to make the decisions of public importance. Swedish media researcher Kent Asp (2007), puts it shorter by emphasizing that “in a democracy media should work for the realization of the will of the people by facilitating the free exchange of ideas. The principal task of the media in a democracy is to contribute to *free and autonomous opinion formation* in society.” (p. 32)

The role of the media in a representative democracy has been well summarized by James Curran (1991):

A basic requirement of a democratic media system should be, therefore, that it represents all significant interests in society. It should facilitate their participation in the public domain, enable them to contribute to public debate and have an input in the framing of public policy. The media should also facilitate the functioning of representative organizations, and expose their internal processes to public scrutiny and the play of public opinion. In short, a central role of the media should be defined as assisting the equitable negotiation or arbitration of competing interests through democratic processes. (p. 30)

From authoritarian to liberal media system

For more than five decades, i.e. until 1989 Lithuanian mass media system was a part of the whole Soviet media apparatus. The

Soviet media has been one of the best examples of the authoritarian or state-protected media model. Its main feature is state censorship and control in the broadest extent. The Soviet media, especially television, were instrumental in ‘feeding’ the public with the myths to support and celebrate the communist ideology. A huge state censorship apparatus was involved to control the media and ‘prevent’ their audience from a harsh reality. Apparently, silence was kept about Soviet reality of economic and environmental crises, unemployment and ethnic clashes, mafia and organized crime, industrial accidents and natural calamities, etc. Consequently, issues which people were facing in their daily lives were ‘non-existing’ for the Soviet media.

Structural transformations in the end of 1980s and beginning of 1990s, were critical to the Lithuanian media system marked by the abolishment of censorship, media pluralism and privatization. Consequently, the mass media started reporting on the issues which could not reach the audience before, eg. ethnic clashes, environmental disasters, criminal cases, etc. The transition from a totalitarian to the democratic system provided with new opportunities and challenges both, for the media and society. Media rediscovered its own place and duties by serving for the national integrity and public engagement. The national movement *Sajūdis* was strongly supported by the press and TV which played an important mobilizing role at that moment (Balčytienė, 2006). New legal regulations and professional standards have been introduced to ensure media’s independence, however, even rather liberal media legislative frameworks have not been able to guarantee a

free and autonomous opinion formation in a society.

Following Lithuanian media and journalism researcher Auksė Balčytienė (2006), the evolution of the Lithuanian media after the national revival has passed four phases including *liberalization*, *diversification*, *marketization* and the second phase of *diversification*. Conceptualization of the Lithuanian media paradigm change is illustrated in Figure 1. The first phase of media development coincided with the beginning of the national revival in 1987, which brought new topics into the news media agenda and supported the ideas of political independence of the country. *Liberalization* phase ended up with the official abolishment of censorship in 1990.

The second period – *diversification* - was marked by the economic transformations in the media organizations until 1995. Privatization of the newspapers was accomplished

in a “closed” way by dividing the shares among the organization’s employees. The beginning of the media marketization encouraged rapid growth of newspaper titles, changes in their content, as well as accelerating growth of advertising market.

Media marketization phase (1996–2003) was some kind of stabilization period for those media which successfully learnt the first lesson of surviving in liberal market conditions. On the other hand, substantial changes took place in media ownership structure, as new owners entered the Lithuanian media market, including both, national and foreign. For instance, national business daily *Verslo žinios* was acquired by the Swedish company Bonnier Group, while national investors retrieved their interest in the local media business development by initiating new projects, eg. the first tabloid daily *Lietuvos žinios* introduced in 1998.

Media development phase	Period	Main features
<i>Liberalization</i>	1987–1990	New topics and titles introduced in the media Media served as a major instrument of political mobilization of the national movement <i>Sąjūdis</i> Abolishment of censorship
<i>Diversification I</i>	1991–1995	Privatization of the media outlets Economic hardships related to the frequent change of the owners New media titles established or re-opened Advertising market emerged
<i>Marketization</i>	1996–2003	Decline in newspaper titles and circulation Foreign capital entered the Lithuanian media market National media corporations emerged The first tabloids and online newspapers established
<i>Diversification II</i>	2004–present	Proliferation of popular press Free press emerged Media convergence

Figure 1. Lithuanian media paradigm change (Balčytienė, 2006)

The current stage of the Lithuanian media development is a follow up of the previous processes and is characterized by the new efforts of media *diversification*. Apart from new tabloid-format titles, the first free daily newspaper *15 min* has been successfully introduced into the Lithuanian media market and obtained by the Norwegian media group Schibsted. On the other hand, the broadsheet format has been switched to compact format by the main national and regional dailies. Popularization of the media includes not only changes in the format of the media, but also its content, as more soft and entertainment-focused news are proliferating in all types of media.

Lithuanian media landscape

To provide a profile of media usage in Lithuania, audience research data collected by TNS Gallup, one of the leading public opinion and market research companies in Lithuania, will be discussed. Apparently, despite increasing diversification in media usage, TV viewing prevails among the Lithuanian population. In 2007, the vast majority of Lithuanian population aged

4 years and older declared that they are viewing TV (97.9%). The average time of TV watching was 3 hours 22 minutes, or 10 minutes longer than one year ago. Older population is the most loyal group of TV audience, viewing TV longer than 4 hours daily. Place of living is also an important indicator in analyzing TV audience, eg. national TV channels are more popular among the rural population than the urban. Residents of the cities with more than 100 thousand inhabitants tend to spend more time while viewing cable, local or foreign rather than national TV channels (Annual Review of Media Surveys, 2007, p.12).

Radio listening has been also increasing recently. In 2007, 90.1% of Lithuanian population aged 12-74 listened to the radio for at least 15 minutes daily, which is 8% more than in 2004 (83.4%). In average, a person listens to the radio for 2 hours 59 minutes (9 minutes longer than in 2006). Again, older population spends more time while listening to the radio, i.e. 3 hours 18 minutes daily (*ibid.*, p.16). Penetration of radio and television is illustrated in Table 1.

While analyzing press reading in Lithuania, a general tendency of increasing read-

Table 1. *Radio and television penetration in Lithuania, 2007*

Population	3,384,879
Households with a TV set	1,338,300
Households with cable TV	346,004
Households with satellite TV	34800
Radio broadcasters	49
Radio programmes	55 (10 national, 2 regional, 43 local)
TV broadcasters	30
TV programmes	37 (11 national, 1 regional, 27 local)
Cable TV broadcasters	52

Source: *Radio and Television in Lithuania 2007/2008*, p.12.

ership of dailies, weeklies, monthlies and bimonthlies can be stated. In 2007, almost 95% of the population aged 15–74 read at least one periodical. The largest increase in readership was observed in case of weeklies. For instance, weeklies were read by 54.2% of population and dailies – by 50.5% in 2002, while in 2007, 71.3% of adult population read a weekly and 57.9% read a daily. The share of monthly and bimonthly magazine readers stabilized in 2007 (49.4%) and almost reached the level of 2004 (50%) after a drop in 2005-2006 (ibid., p.22).

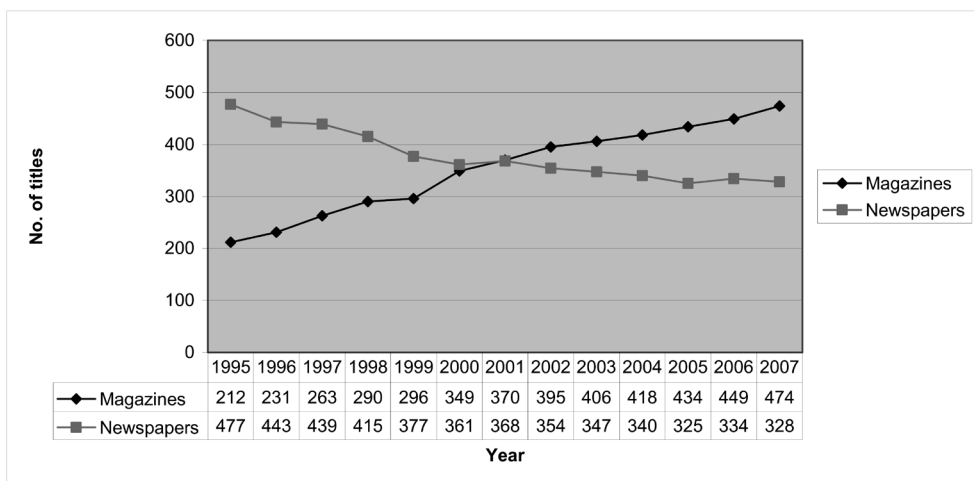
Development of the Lithuanian press market is illustrated in Figure 2, which is indicating the number of magazines mounting up and the number of newspaper titles slowly declining since the mid 1990s.

When analyzing a social profile of the press readers, age is an important characteristic to be considered. Research data show that younger population aged 20-39 represents the most loyal press readers in Lithuania. Although the share of readership

increased in all age groups in 2007, older generation continues to be the most passive readers (ibid., p.24).

Lithuania is a TV-centric society with a relatively low newspaper reading level and increasing number of Internet users. In 2007, one third of the population (34.2 %) used Internet on a weekly basis (Internet World Stats, 2008). Internet usage has been increasing in all age groups, as well as all geographical areas. Most often computers are used to browse the Internet, send emails, play computer games, for word processing, work with special software, programming, etc. In addition, online banking, phone calls via Internet, online radio and TV, as well as online shopping are gaining popularity (Annual Review of Media Surveys, 2007, p.28).

Rapid online media development and increasing penetration indicate proliferation and diversification of the Lithuanian media market. Apparently, we can witness emerging a new media environment with a more diverse media content, where quality



Source: Lithuanian Department of Statistics, www.stat.gov.lt

Figure 2. Lithuanian press market

journalism, serious news and public affairs prevail more often than in the mainstream media, particularly TV channels. The importance of Internet in the Lithuanian society can be illustrated by the increasing amount of advertising in this medium.

Advertising market

Since early 1990s, advertising market development in Lithuania shows a steady increase in investments. The volume of advertising has been growing in all media channels. However, the most intensive growth in advertising income has been observed in TV market (see Table 2).

Total growth in advertising income was estimated 18% in 2006 and almost 16% in 2007 (Annual Review of Media Surveys, 2007, p.8). Internet has been a channel where advertising market was growing most rapidly from 1,5 million LTL in 2002 to 16 million in 2007. Changes in income share by different media channels also indicate steadily growing advertising share in TV, also Internet (see Table 3).

When comparing advertising market in three Baltic countries last year, it is apparent that the most intensive growth in advertising market was observed in Estonia, followed by Latvia and Lithuania (see Table 4). In 2007, spendings for media advertising per

Table 2. Advertising income by media channels, 2002-2007 (in million LTL)

Media / million LTL	2002	2003	2004	2005	2006	2007	Change 2007 vs. 2006 %
TV	96	109	146	155	187	227	21.4
Newspapers	74	80	100	106	120	124	3.3
Magazines	28	33	38	44	53	63,5	19.8
Radio	18	19	25	25,5	28	34	21.4
Outdoor	16	17	21	25	29,6	32	8.1
Internet	1,5	3,7	4,6	8	12	16	33.3
Cinema	0,2	0,1	0,2	0,1	0,5	0,5	0
Total	233,7	261,8	334,8	363,6	430,1	497	15.6

Source: Annual Review of Media Surveys 2007, p.8

Table 3. Share of income by media channels, 2003-2007 (%)

	2003	2004	2005	2006	2007
TV	41.6	43.6	42.63	43.5	45.7
Newspapers	30.6	25.0	29.5	27.9	24.9
Magazines	12.6	15.2	12.10	12.3	12.8
Radio	7.3	7.5	7.01	6.5	6.8
Outdoor	6.5	6.3	6.88	6.9	6.4
Internet	1.4	4.6	2.20	2.8	3.2
Cinema	0.04	0.1	0.03	0.1	0.1
Total	100	100	100	100	100

Source: TNS-Gallup, www.tns-gallup.lt

capita was 42.54 EUR in Lithuania, 58.75 EUR in Latvia and 84.82 EUR in Estonia.

Media ownership

The structure of the Lithuanian media ownership is quite homogenous from the national ownership point of view. The major owners of the Lithuanian media include Achema Group concern operating in the fields of chemistry, pharmaceuticals, mining, food industry, trade, energy, construction, logistics, financial operations, hotel management, health care, education and mass media (Nugaraitė, 2004). Balto Media of Achema Group owns different national media channels, including daily *Lietuvos žinios*, TV channel *Baltijos TV* and radio stations *Radiocentras*, *RC2*, etc.

Another important Lithuanian media market player is MG Baltic concern with a number of popular lifestyle magazines, as well as national and regional TV network *LNK* and *TV1*. A well known journalist and editor Vitas Tomkus, one of the key actors of the national independence movement in 1988–1990, is an important Lithuanian media market player today. His company Respublika Publishing owns one of the major national dailies *Respublika*, tabloid *Vakaro žinios*, a few local newspapers, as well as 90% of ELTA (Lithuanian news agency)

shares. Lietuvos rytas media group includes national daily, national TV channel, weeklies and online media (see Figure 3).

A number of media outlets owned by foreign capital is relatively small, however, they are quite important in the Lithuanian media market, including the most popular national TV channel *TV3*, owned by the Swedish concern Kinnevik Modern Times Group, the top online media *delfi.lt*, owned by the Estonian company Ekspress Group or free daily *15 min* owned by the Norwegian media group Schibsted.

Foreign capital share in the Lithuanian media market has remained stable despite an increasing interest among local business groups to acquire media companies. Analyzing changes in the Lithuanian media market, media researcher Audronė Nugaraitė (2004) points out that “ownership concentration has taken place in the press sector and played an increasing role in the privatization of radio, TV and telecommunications <...>. The repurchasing of the media during recent years shows an increasing tendency of industrial capital to enter the media business. This trend is most obvious in the television business.”(p.283) Lithuanian media market has seen more investments from local rather than foreign capital recently (see Figure 3).

Table 4. *Baltic advertising market, 2007*

	Lithuania	Latvia	Estonia	Baltic Total
Total (million EUR)	144	134	114	392
Total (local currency)	497 LTL	93.94 LVL	1788 EEK	NA
Growth % in local currency	16%	24%	29%	23%
Population in 2007 (in million)	3,385	2,281	1,344	7,010
Total (local currency per capita)	43	59	85	56

Source: *Annual Review of Media Surveys 2007, p.9*

Media Owners	Newspapers	Magazines	TV	Radio	Online media
Alga Group, Lithuania	-	Weeklies and monthlies: <i>Veidas, Moters savaitgalis, TV gidas, Computer Bild, Mažylis, Lietuva</i>	-	-	-
Balto Media of Achema Group, Lithuania	National daily <i>Lietuvos žinios</i>	-	National network <i>Baltijos TV</i>	National stations <i>Radiocentras, RC 2, ZIP FM</i>	-
Bonnier Group, Sweden	National daily <i>Verslo žinios</i>	Monthly <i>Iliustruotasis mokslas</i>	-	-	<i>Vz.lt</i>
Diena Group of Hermis Capital, Lithuania	Regional dailies: <i>Kauno diena, Vilniaus diena, Klaipėda</i>	-	-	-	<i>Diena.lt</i> to be launched in 2008
Ekspress Group, Estonia	-	Monthlies: <i>Panelė, Moteris, Antra pusė, Namai pagal mus, Aha, Naminukas, Penki, Justė, Žvaigždės, Pagunda, Perlas, 50 panoramų bei Superbumas, Tavo vaikas</i>	-	-	<i>Delfi.lt</i>
Lietuvos rytas, Lithuania	National daily <i>Lietuvos rytas</i> , local dailies <i>Laikinoji sostinė, Panevėžio rytas</i>	Weeklies: <i>Ekstra, MM, Ekstra panelė, Moters savaitė</i>	National network <i>Lietuvos rytas TV</i>	-	<i>Lrytas.lt</i>
M-1 Group, Lithuania	-	-	-	National stations <i>M1, M1 plus</i> , Regional stations <i>Laluna, Raduga</i>	-
Media Group Schibsted, Norway	Free daily <i>15 min</i> , tabloid newspaper <i>L.T.</i>	Weeklies and monthlies: <i>Laima, Edita, Girl, TV gidas, Ji, Žmonės</i> , etc.	-	-	<i>Plus.lt</i>
MG Baltic Media, Lithuania	-	Monthlies: <i>Nuo Iki, Istorijos, Stuff, A-Zet</i>	National network <i>LNK</i> Regional network <i>TV1</i>	-	<i>Alfa.lt</i>
Modern Times Group, Sweden	-	-	National network <i>TV3</i> , Regional network <i>Tango TV</i>	National station <i>Power Hit Radio</i>	-
Pukas Group, Lithuania	-	-	Regional network <i>Pukas TV</i>	National stations <i>Pukas, Pukas 2</i>	-
Respublika Publishing, Lithuania	National dailies <i>Respublika</i> and <i>Vakaro žinios</i> , local newspapers <i>Šiaulių kraštas, Vakarų ekspresas</i>	-	-	-	-

Sources: Balčytienė (2006), Nugaraitė (2004), The Radio and Television Commission of Lithuania: www.rtk.lt, company websites: www.alga.lt, www.achemosgrupe.lt, www.egrupp.ee, www.schibsted.com, www.m-1.fm, www.pukas.lt

Figure 3. Major Lithuanian Media Ownership Groups

Summing up: From media censorship to media power

Media has become 'another business' for most major business groups in Lithuania. Growing income in media market attracts investments from the local business. What are the implications of increasing interest in media among the corporate institutions?

Recent transformations taking place in the Lithuanian media market could be named by the horizontal integration, i.e. concentration of ownership across different types of media (Croteau, 2000). Media market concentration also includes convergence of different media, for instance, *Lietuvos rytas* media group which includes press, TV and online media (see Figure 3). Cross-promotion is one of the driving forces behind the growth of horizontally integrated media companies, as it allows the owners to achieve maximum effect with optimal resources (p.44). However, this usually leads to increasing homogenization and decreasing pluralism in the media. Concentration of media ownership also provides key market players to exercise more political power:

The process of using media to promote political agenda is more complex than simply feeding people ideas and images that they passively accept. Owners can use media sites to disseminate a specific position on a controversial issue or to help legitimize particular institutions or behaviors. Just as important, owners can systematically exclude certain ideas from their media products. While control of information or images can never be total, owners can tilt the scales in particular directions quite dramatically. (Croteau and Hoynes, 2000, p.50)

Small media market of the country makes the competitiveness among media market players rather aggressive and affects media production, as more emphasis is put on the consumer

entertainment rather than provision of well balanced news. Proliferation of popular press has been observed recently, as some kind of blend of quality and tabloid press producing more life style issues, providing with entertainment and criminal stories apart from the hard news. For instance, the largest national daily *Lietuvos rytas* has recently changed its format from a broadsheet paper to a tabloid format with more popular news, including personal and sensational stories are being placed on the front page.

Observing media developments in Central and Eastern Europe, Romanian researcher Mihai Coman (2000) points out that "the inability of local media groups to develop solely on the basis of the capital invested in the press and the revenues won in the media market [that] produces these mergers with foreign groups, or the integration of these indigenous media groups into corporations with diverse commercial activities." (p.42) The latter process has been recently developing in Lithuania, as most media companies have become a part of the major local business groups. The interest has been evolved by increase of media power observed since late 1990s and expressed in the form of confrontation between media and political elites. Following Peter Gross (2004), "the Eastern European media's relationships with their institutional and individual constituents are difficult if not impossible to define, unlike in Western Europe, where media roles and the culture of owners and media personnel are more stable, changing slowly and in tandem with changes occurring in the culture of their audiences." (p.122)

Liberal laws, increasing media commercialization, a lack of professionalism and

journalistic autonomy and lack of public debates about media performance create favorable conditions for the mass media to set the news agenda according to their own political or business interests. Following Auksė Balčytienė (2006), “the contemporary media system is a result of historic experience and traditions. The Lithuanian system was formed and affected in historical turns by press banning and censorship, and later, penetration with business and technological innovations as well as rapid assimilation to international standards of public information. However, accepting the innovations, factors like openness to innovations and civic values are encoded in the political culture of the country and gain significance.” (p.172)

The metaphor of the media as the forth power has been very much liked by the public, political power and media professionals. However, liberalization of the media and transition from the state censorship to the market-driven model has made the media very sensitive to the market mechanisms. The mission of informing the society became a secondary task for the media, concentrating on its commercial objectives to gain profit and promote corporate interests. Therefore, it is important for media to regain and develop its openness and publicity as the basis of a democracy. In other words, the media has to acquire new functions of serving the public in a new market-driven society, as well as journalism has to become more mature to progress from purely commercial and political into more societal in scope (ibid.).

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ŽINIASKLAIDOS GALIOS LIETUVOS NAUJIENŲ RINKOJE VERTINIMAS

Kristina Juraitė

S a n t r a u k a

Žiniasklaida, kaip visuomenės institucija, ypatinga tuo, jog jai būdinga tiek ekonominė, tiek ir politinė veikla. Privatus ir viešas prekių ir paslaugų gamybos pobūdis sąlygoja tai, kad žiniasklaida atlieka svarbią politinę funkciją, informuodama ir konsoliduodama visuomenę, o taip ekonominę – pajamų generavimo – funkciją. Todėl šalia demokratiinių įsipareigojimų, žiniasklaidos organizacijos yra taip pat ir verslo įmonės. Tačiau rinkos dėsnių ir komercinės žiniasklaidos dominavimas apsunkina demokratiinių funkcijų įgyvendinimą. Nuo 1980-ųjų metų pabaigos Lietuvos žiniasklaidos raida

gali būti skirstoma į keturis etapus: liberalizacijos, diversifikacijos, marketizacijos ir antrąjį diversifikacijos etapą. Pagrindinis dėmesys straipsnyje skiriamas Lietuvos žiniasklaidos organizacijoms ir auditorijoms, taip pat augančiam žiniasklaidos sistemos vaidmeniui politiniame ir socialiniame gyvenime. Kokį vaidmenį atlieka žiniasklaida demokratinėje visuomenėje? Koks jos santykis su galios institucijomis? Kas lemia žiniasklaidos galią? Kokios problemos iškyla realizuojant šią galią? Šie ir kiti klausimai yra kontekstualizuojami ir diskutuojami šiame straipsnyje.