

Comparing Nordic media systems: North between West and East?



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ABSTRACT: The objective of this article is to further examine Nordic media systems beyond the tentative Democratic Corporatist Model introduced by media scholars Daniel C. Hallin and Paolo Mancini in their important work *Comparing Media Systems. Three Models of Media and Politics*. Furthermore, the article discusses distinct features of media and politics-relations in the Nordic countries and attempts to identify key factors constraining or promoting a possible liberalization or hybridization of the media systems in Nordic countries. The empirical data is based on a secondary analysis of available media statistics in Denmark, Finland, Norway and Sweden. A comparative approach is used to analyze whether the Nordic countries actually meet the standards of the Democratic Corporatist Model or if they are drifting towards a more liberal media model. The main conclusion of this article is that the Nordic media systems are becoming more liberal due to diminished influences from governments and political parties. However, traditional Nordic media institutions remain strong and have been successful in adapting to new conditions thus creating new hybrids of the Nordic and the Liberal media models.

KEYWORDS: Nordic media, media systems, liberalization, hybridization, media policy



A NORDIC UNITY – OR DIVERSITY?

‘On behalf of the Nordic delegations’ is a proud phrase often heard in the UN General Assembly or at other international conferences. For an outsider the small Nordic countries sometimes appear to be rather similar and are thus simply referred to as one single country. To some extent, this may be reasonable. The Nordic area is one custom zone and passports are not required for Nordic citizens travelling to a neighboring country. The Nordic countries have a common history, with Norway being in unions with both Denmark (1400–1814) and Sweden (1814–1905) and Finland belonging to Sweden (1239–1809). However, in the period after the Second World War the Nordic neighbors have failed to cooperate in such basic areas as defense policy and economic integration and also in more specific fields such as launching television satellites and hosting Olympic Games.

Politically, the Nordic countries have much in common. They are all rather small democracies, characterized by multiparty parliamentary systems, a well-developed social welfare state, comparatively high taxes, and a huge public sector. The populations are relatively homogenous particularly in Finland and Norway, while Denmark and Sweden have received significant numbers of immigrants during recent decades. However, at the same time, the different political associations are obvious when comparing the four countries. In particular, Denmark and Norway (as well as Iceland) are members of the NATO defence alliance, while Finland and Sweden still proclaim a non-allied position. Norway has twice (1972 and 1994) voted in referenda against joining the European Union, while Denmark, Finland and Sweden are all member states. In addition, Denmark and Sweden have decided to stay outside the euro currency zone, while Finland joined the euro group in 2002 (see Table 1).

Table 1. Basic facts about the Nordic countries

	Denmark	Finland	Norway	Sweden
Area (km ²)	43,069	338,145	325,000	449,964
Population (mil.)	5.3	5.2	4.5	9
Government	Liberal	Big coalition (soc dem + cons.)	Labor-center	Center-right
EU	Member 1972	Member 1995	Non-member	Member 1995
Euro zone	Non-member	Member 2002	Non-member	Non-member
NATO	Member 1949	Non-member	Member 1949	Non-member

The issue of Nordic unity or diversity is also relevant when the Nordic media systems are considered. International reviews of media systems often emphasize the similarities of the Nordic countries in this aspect (Meier, Trappel, 1992; Curran, 2002). Among the most distinctive features of the Nordic media systems often mentioned are the high newspaper circulation, the party press system and press subsidiaries in printed media and the strong position of public service broadcast media (Holtz-Bacha, 2004).

OBJECTIVES AND RESEARCH QUESTIONS

The theoretical objective of this article is to further examine Nordic media systems beyond the tentative Democratic Corporatist Model introduced by media scholars Daniel C. Hallin and Paolo Mancini in their important work *Comparing Media Systems. Three Models of Media and Politics*. Furthermore, the article will test, refine and adjust Hallin and Mancini's typology of media systems by conducting a comparative sub-study of the Nordic media systems. The applied objective of the article is to analyze distinct features of media and politics-relations in the Nordic countries

and to identify key factors constraining or promoting a possible liberalization or hybridization of the media systems in Nordic countries.

Accordingly, this article focuses on a comparative analysis of the Nordic media systems, their development and the factors explaining this development. Three central research questions based on the previous research by Hallin and Mancini are asked: Does a specific Nordic media system exist? To what extent, and how, are the Nordic media systems influenced by the international media development? Which distinct national features prevail and which disappear or coexist with external influences on the media system?

The article is based on a secondary analysis of available statistics for the Nordic media systems. The study includes the four biggest countries in the Nordic area: Denmark, Finland, Norway and Sweden. The fifth Nordic country, Iceland, is perceived to be too small to be compared in this area. The theoretical point of departure is the Hallin and Mancini's book *Comparing Media Systems. Three Models of Media and Politics* (Hallin, Mancini, 2004). In this book the authors describe the Nordic media systems as typical examples of the Democratic Corporatist Media Model. The ambition of this paper is to further develop the Hallin and Mancini model by conducting an in-depth analysis of the Nordic countries. Such efforts to modify the model are also encouraged by the authors in the last paragraph of their book: 'It is likely that substantial modifications would need to be made to our models to apply them, and indeed that they would be useful primarily as inspiration for creating new models based on detailed research into specific political and media systems' (Hallin, Mancini, 2004, p. 306).

THEORETICAL APPROACHES TO MEDIA SYSTEMS

In their classic work *Four Theories of the Press* (Siebert et al., 1956) the authors discussed four different normative media theories from around the world: liberal theory, social responsibility theory, authoritarian theory and Marxist theory. Their theoretical framework has influenced media scholars for decades, the main reason being that it was addressing multiple aspects of the media: the historical development of media and politics-relations, the degree of media freedom, and the different functions of media in contemporary societies.

The referred work of Daniel Hallin and Paolo Mancini (Hallin, Mancini, 2004) uses *Four theories of the press* as its analytical point of departure. However, their approach is comparative and empirical in its nature. The authors compare the functions of national media systems in 18 developed countries in Western Europe and North America and identify three different models. In the figure below the names of the three models are located at the corners of the triangle (Figure 1).

16 Western European countries plus the US and Canada are located at different positions inside the triangle in accordance with the media characteristics of each country. The Nordic countries are those located in the *Democratic Corporatist* cor-

ner. In this general direction the Central European countries of Austria, Netherlands, Switzerland, Germany and Belgium can also be found. The Southern European countries of Greece, Spain, Portugal, Italy and France are located in the *Polarized Pluralist* corner. Finally the mainly English-speaking countries in this sample are all to be found in the *Liberal* corner. The countries mentioned are the United Kingdom, Ireland, Canada and the United States.

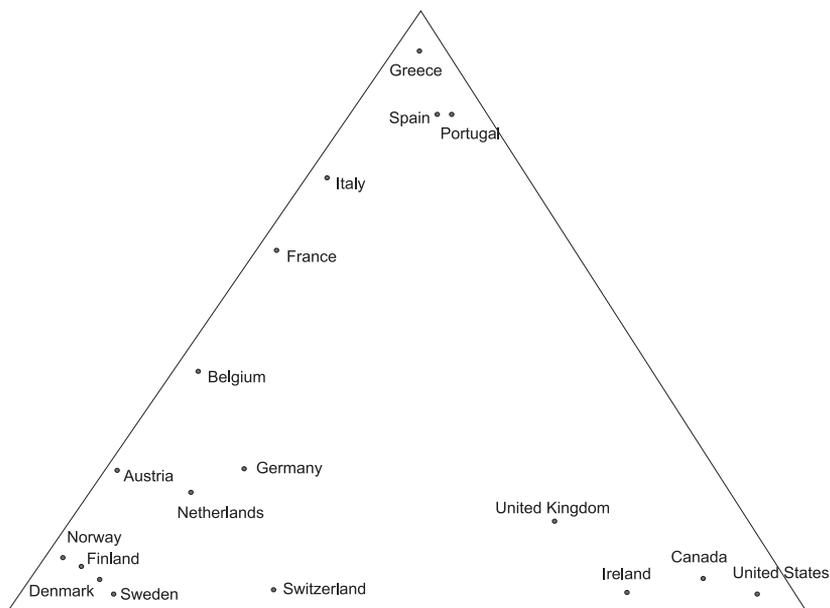


Figure 1. Relations of individual cases to the three models

Hallin and Mancini define all the four Nordic countries as the most similar countries of all and as the most typical examples of the Democratic Corporatist model. According to Hallin and Mancini’s model the Democratic Corporatist media-system carries these common features (p. 67):

- newspaper industry: early development of a mass-circulation press and a high relative circulation of newspapers even today,
- political role: historically a strong party-press thus providing external pluralism, a shift towards neutral commercial press and broadcasting relative autonomy in political issues,
- professionalism: strong professionalism and institutionalized self-regulation,
- role of the state: strong state-intervention at a structural level, press-subsidies, strong public service broadcasting.

This model differs from the Polarized Pluralist Model where newspapers are less frequently used and the degree of professionalization is lower. The model also differs from the Liberal Model where state intervention is less common and the degree

of political parallelism is lower (*Ibid.*, 299). The main distinctive features of the three models are illustrated in the table below (Table 2).

Table 2. Pattern of variation in four media systems dimensions

	Polarized Pluralist	Democratic Corporatist	Liberal
Development of Mass Press	Low	High	High
Political Parallelism	High	High	Low
Professionalization	Low	High	High
State-Intervention	High	High	Low

Source: (Hallin, Mancini, 2004, p. 299)

In the concluding chapter Hallin and Mancini find that the 18 countries can be analyzed within their framework. However, at the same time, they acknowledge the existence of a continuous homogenization process regarding technology, political structure, economy and commercialization that appears to affect all media systems and which causes them to converge in a more liberal direction. As with many other scholars, Hallin and Mancini reject the idea of a one-directional ‘Americanization’ and argue in favor of an analytical exchange model where modernization and globalization are adjusted with distinctive national features such as existing laws and regulations and traditional political culture (Negrine, 1996; Blumler, Gurevitch, 2001; Plasser, Plasser, 2002; Nord, 2006). Thus, there are constraints and national tendencies in all countries which influence different media systems in a variety of ways (Hallin, Mancini 2004, p. 301). This mixture of influences may be of decisive importance for systematic analyses of changes within media systems.

Accordingly, there may be reasons to analyze the development of the four Nordic media systems as such a process of homogenization. Even if there are significant similarities when comparing the four national media systems, they are to some extent all influenced by external factors and global trends (Lund, 2005). As a result, they may develop in different or similar directions in accordance with a dynamic interplay between international and national factors. Interestingly, two recent large research projects dealing with power and democracy in the Nordic countries also demonstrate substantial differences regarding both institutional and political factors. For example, the Norwegian Media and Democracy Report (Østerud et al., 2003) had a more negative view regarding the future of public service broadcasting than did the corresponding Danish report (Togeby, 2003).

In an effort to recognize the recent development and changes of the Nordic media systems this article analyzes whether a convergence of the democratic corporatist systems in a liberal direction may exist and to what extent this is true for the four different countries. The following analytical scheme has been used, based on the Hallin and Mancini’s framework (Table 3).

Table 3. Comparing the Nordic and the liberal media models

	The Nordic Model	The Liberal Model
Newspaper Industry	High circulation	Moderate circulation
Political parallelism	From party press and external pluralism to more neutral and commercial press; regulations of broadcast media	Market-orientation of printed and broadcast media
Professionalization	High degree; institutional self-regulation	High degree; non-institutional self-regulation
State intervention	Frequent; press subsidies and regulations	Less frequent; market-orientation

In the following chapter the development of the Nordic media systems will be analyzed in accordance with this scheme. Is there a tendency of the Nordic model towards liberalization, and if so, is it homogeneous in all countries? How can different mixtures of Nordic media models be explained? In the following empirical chapter the existing trends in newspaper markets and broadcast media markets will be analyzed in addition to the degrees of political parallelism, professionalization and state interventions.

RESULTS: THE DEVELOPMENT OF THE MASS PRESS

Traditionally, the Nordic countries differ from most other democracies with reference to newspaper circulation per inhabitants. A mass press market, to a large extent based on subscriptions and reaching a considerable number of readers on a daily basis, has been the main characteristic of the four Nordic countries. Newspapers reach a huge audience in northern Europe, in contrast to the southern part of the continent where television is the most important mass medium and newspapers are mostly read by the political elite (Norris, 2000). Globally, newspapers appear to have lost readers over recent years in contemporary democracies and most developed nations report declining audiences for printed media throughout the last few decades. Statistical data for the Nordic countries for recent years confirm the same development in this region (Figure 2).

The Nordic newspaper trend is obvious during the period between 1994 and 2004. The circulation per 1000 inhabitants is declining in all countries. The curves have not decreased dramatically, but the newspapers are definitely reaching a smaller audience than previously. Thus, it is reasonable to assume that newspapers now play a more minor role in present day Nordic societies than during the 'golden years' of the 1970s and 1980s when circulation figures reached an all time high (Nordicom, 2003).

However, there are considerable differences between the Nordic countries with regard to this aspect. Denmark has always had a less developed newspaper market than its neighbors and this is still the case today. The level of newspaper circulation in Denmark during recent years has definitely placed it more in a European tradi-

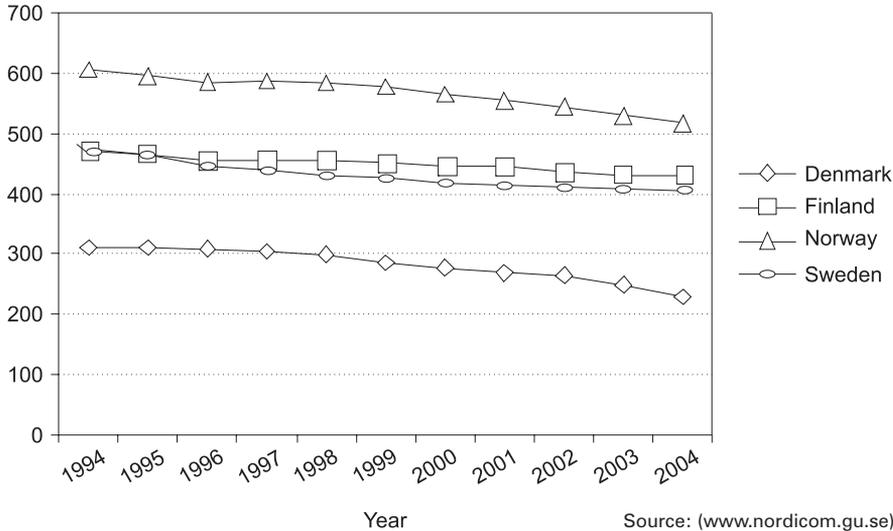


Figure 2. Daily newspaper circulation per 1000 inhabitants in the Nordic countries 1994–2004

tion than in a Nordic media context. The other three countries are all struggling with reduced audiences within their newspaper markets respectively, but the process is more gradual than dramatic. Finland, Norway and Sweden still qualify as Nordic exceptions to the rules for democratic states while the present moderate newspaper circulation in Denmark today is more in line with the characteristics of the liberal media model. For example, Denmark is still ahead of the United States and France with regards to this aspect, but now lies close behind both Britain and Germany (Swedish, 2006).

In addition to the circulation figures, the current number of newspaper titles in a country and their development may be another relevant factor to consider when analyzing the development of the national newspaper markets. In general agreement with the decline of the circulation figures, so the number of newspaper titles in most democratic states is also falling. The reasons for this development may vary, but some general explanations include structural changes in newspaper markets, joint ventures and ownership concentration (Bagdikian, 2000; Croteau, Hoynes, 2001; Baker, 2002). As shown below the Nordic countries are affected by this international trend to some extent (Figure 3).

A comparison of newspaper titles in the Nordic countries must take into consideration the main difference between Sweden and its neighbors, namely the size of the populations with Sweden being twice as large as any of the others. Accordingly, Sweden still has the largest number of newspapers, followed by Norway, where the newspaper market is definitely strongest in relation to its more limited market. Surprisingly, Finland is almost unaffected with regard to the newspaper

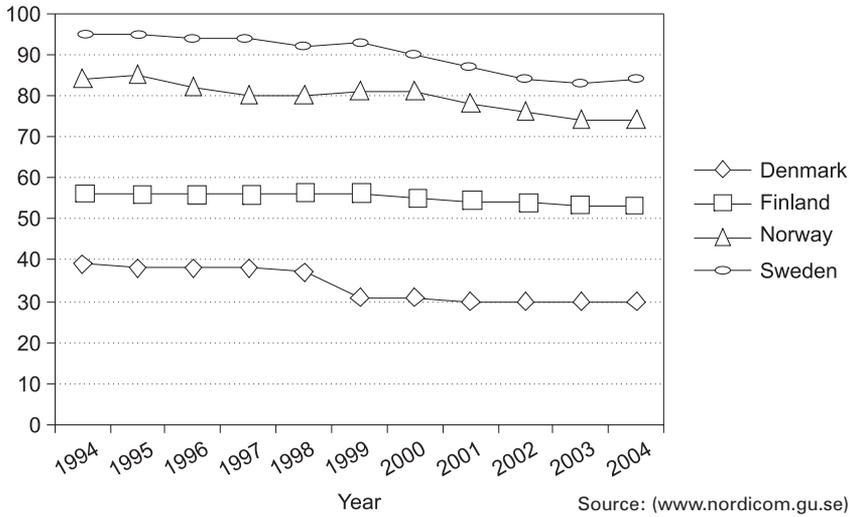


Figure 3. The number of daily newspapers in the Nordic countries 1994–2004

market structure, while Denmark deviates once again as the least developed newspaper market and is continually losing ground in relation to the other countries. Thus, the overall picture of the Nordic newspaper markets still prevails, with traditional distinctive features still remaining – but gradually being challenged – in Finland, Norway and Sweden, and with Denmark now definitely a part of the more liberal media family.

POLITICAL PARALLELISM

The second criterion introduced by Hallin and Mancini is political parallelism or, to put it more simply, the existing links between the political system and the media system. In this paper political parallelism in the Nordic countries is analyzed by observing the strength of the party press system (focusing on political affiliations among national dailies) and the strength of the public service broadcast media (focusing on the strength of politically regulated radio and TV stations). Accordingly, the number of party press newspapers and public service markets shares are analyzed during the period 1994 to 2004 in Denmark, Finland, Norway and Sweden.

National dailies in the Nordic countries have traditionally been affiliated to a particular political party. The so-called party press system was originally based on three links between parties and newspapers: ownership, content and readership (Hadenius, Weibull, 1991). However, over the last few decades the political affiliation has only been attached to the editorial page where certain party position has traditionally been defined, especially during election campaigns, while news journalism has been characterized by professional, objective values (Simensen, 1999;

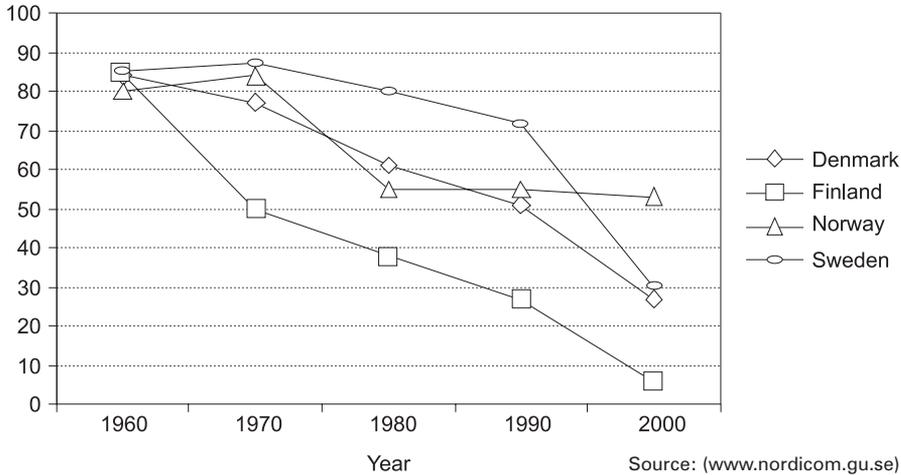


Figure 4. Daily newspapers with political affiliation in the Nordic countries 1960–2000 (%)

Nord, 2001; Høyer, 2005). In this article the number of politically affiliated and independent newspapers in the four Nordic countries has been compared during the period 1960 to 2000 (Figure 4).

As shown above, the party press papers largely dominated all four countries 40 years ago. Since then, there has been a general rapid development leading to more independent newspapers in all countries but with the most dramatic changes in Finland. However, even in Denmark and Sweden independent newspapers completely dominate the market and the biggest dailies in these countries all define themselves as independent and their share of the total circulation has become even more overwhelming. Norway is the only exception to this as the number of party papers has remained almost constant since 1980. However, the overall trend during the period is consistent for all countries. The party press has faded away almost entirely as well as the idea of external pluralism in the press. The Nordic countries are all drifting towards the more neutral press systems, thus confirming the changes described in the Hallin and Mancini's definitions of the democratic corporatist media systems.

With reference to broadcast media, the Nordic countries were long characterized by monopolistic public service traditions until technological development and deregulations of media systems allowed for the arrival of more dualistic broadcasting systems with competing public channels (financed by license fees) and private channels (financed by commercials) during the 1980s and 1990s (Bardoel, d'Haenens, 2004). The outcome of this new competition in radio and television media markets in the Nordic countries has been compared during the period 1994–2004. The following figures illustrate the market shares of the public service broadcasting channels, measured as the share of daily listening or viewing (Figures 5 and 6).

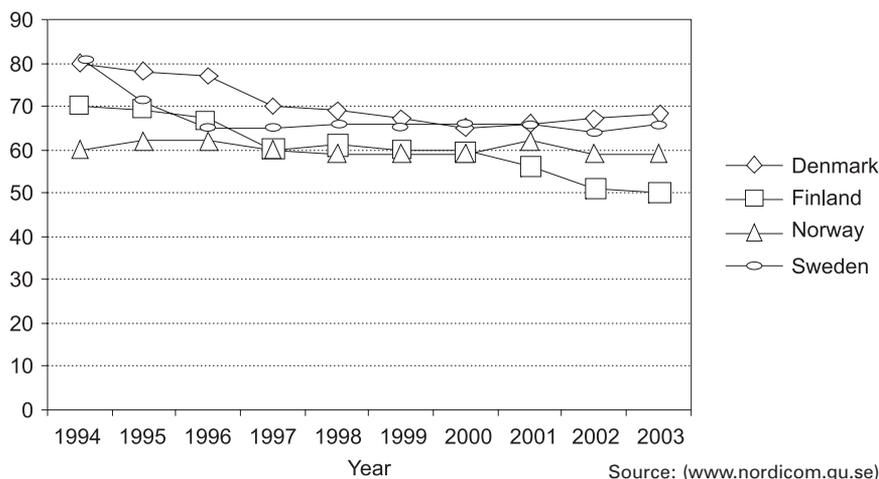


Figure 5. Public service radio market shares in the Nordic countries 1994–2003 (%)

The general European trend in dualistic broadcast markets is that listening figures for public service channels are decreasing and this trend is, to some extent, confirmed when analyzing recent trends in the Nordic broadcast markets. Generally, market shares for the public service radio channels in the Nordic countries have been reduced from about three quarters to about two thirds of the total market. Public service radio has lost most market share in Finland, while the situation in the other three countries can be described as a consolidation or even a strengthening of the market position after an initial drop. Thus, public service radio remains the biggest player in the Nordic radio markets, despite increased competition and lost market shares.

The Nordic television market trends are about the same. Overall, public service TV channels have lost part of their daily audiences during the period, except for Denmark where the market share is actually increasing but from a low initial level. This is mainly because of the introduction of new successful public service channels during this period. Thus, there is more conformation regarding the overall Nordic picture of public service TV market share. Another interesting observation is that market losses are most remarkable in Sweden, while public service TV in both Finland and Norway is recovering and starting to gain more market share.

To conclude, the increased competition in Nordic broadcast media markets has affected the public service media to some extent. New commercial players in the markets have attracted sections of the audience, particularly the young audience. However, public service channels have generally been successful in defending their market positions over the long run. After an initial drop, when new actors entered the scene, the public service radio and television channels appear to have been successful in recapturing their market positions. Public service radio in Finland and

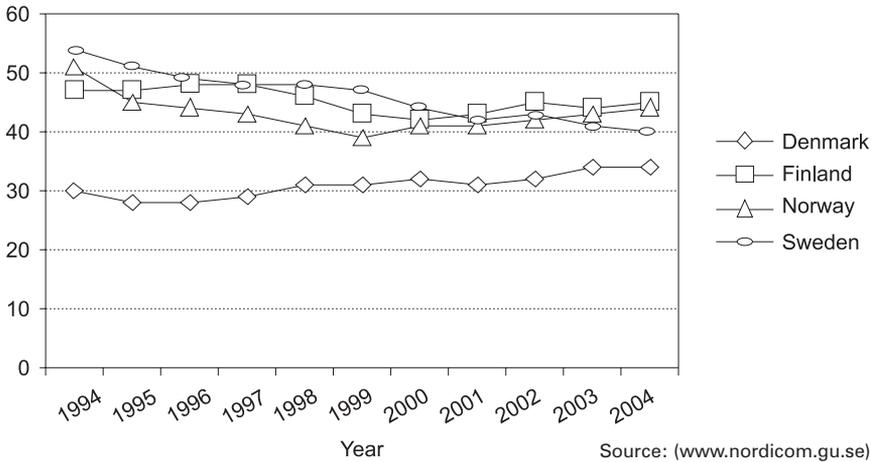


Figure 6. Public service TV markets shares in the Nordic countries 1994–2004 (%)

public service TV in Sweden may be exceptions to this rule, but otherwise public service media has retained its dominant role and has thus slowed down the development of a more market-oriented broadcast media system common in the liberal media model.

PROFESSIONALIZATION

According to Hallin and Mancini the Nordic democratic corporatist media model and the liberal media model do not differ dramatically regarding the degree of journalistic professionalization. Comparative research in this area also confirms that journalists in the Nordic countries regard neutral reporting as very important in their journalistic work. Finnish reporters were among the strongest defenders of impartial writing in a worldwide study and Swedish journalists were rather similar to their American and British colleagues in this aspect in a comprehensive five-country comparison (Weaver, 1998; Patterson, 1998; Donsbach, Patterson, 2004). Several national surveys among journalists in the Nordic countries show no evidence of declining support for a professional journalistic role (Pedersen et al., 2000; Nord, 2004; Høyer, 2005).

The only distinction between the Nordic model and the liberal model regarding professionalization mentioned by Hallin and Mancini is the characteristic of self-regulation within the media systems. The authors argue that democratic corporatist media systems favor institutionalized self-regulation, while liberal media systems are more likely to rely on non-institutionalized self-regulation. An overview of the current self-regulation systems in the Nordic countries indicates that strong support remains for the well established press councils: The Danish Press Council,

The Council for Mass Media in Finland, The Norwegian Press Council and the Swedish Press Council. The systems in the four countries have distinct similarities. They are not affiliated to the government; they have a corporativistic structure; they make decisions concerning media ethic issues in public and they publish regular reports with their considerations and explanations regarding their policy positions.

Unfortunately, there is little comparative research with regard to the functions and roles of the Nordic Press Councils and the public perceptions of their legitimacy. However, so far there has been little public debate in the Nordic countries regarding the benefits of a more non-institutionalized self-regulation system. Furthermore, a general impression is that governments and parliaments in the Nordic countries, to a large extent, appreciate these independent but still authoritative bodies whose mission is to supervise media ethics.

STATE INTERVENTIONS

The corporative model of the press councils does not exclude state intervention in other areas of the media system. On the contrary, one distinct feature of the democratic corporativist media model is the different kinds of state interventions in media markets in order to promote diversity or facilitate equal access to media. This type of state intervention is used to a less extent within liberal media systems, due to their belief in the benefits of media freedom and market solutions.

Internationally, the most well known aspect of the media markets of the Nordic countries may have been the existence of selective press subsidies, with governmental financial support given to newspapers with a second-ranked position within a particular market. However, both the character and direction of press subsidies varies within the Nordic media markets. In addition to press subsidies, state intervention may occur in other forms such as laws regarding advertising rules and ownership regulations (Roppen et al., 2006). The common perception of the Nordic countries may be that of media markets characterized by effective state interventions in many areas. However, in reality the choices of state intervention differ in crucial areas within the four countries (Table 4).

Table 4. State interventions in the media in the Nordic countries

	Denmark	Sweden	Finland	Norway
Selective press subsidies	No	Yes	Yes	Yes
Media ownership regulations	No	No	No	Yes
Commercials in public service TV	No	No	Yes	No
Advertising on public service text-tv and Internet	No	No	No	Yes

Source: (Roppen et al., 2006)

Firstly, selective press subsidies are not used in Denmark. Furthermore, these selective press subsidies have been gradually reduced in the other three countries and they remain a controversial political issue with the left-centre political parties traditionally arguing in favor of the subsidies and the right-liberal political parties opposing them or arguing in favor of heavy reductions. Nowadays, selective press subsidies play a much more minor role in contemporary Nordic press markets than previously and more significantly, the existence of such subsidies has not prevented significant structural changes in regional press markets with regard to the number of dailies.

The option to stop market concentration by limiting ownership has only been implemented in Norway, while there are no such regulations in the other three countries. State regulations concerning the prevention of commercials in public service media are still important, but the picture is not unequivocal. Finland has had commercial blocks in public service TV for decades and Norway allows commercials in new media formats such as public service text-TV and public service websites.

What can definitely be deduced from the table above is that on crucial issues the Nordic countries are not aligned on any single issue. Comparing Denmark and Norway, the ban on commercials in public service TV is the only common feature between the two countries, while Sweden and Finland fall somewhere in between with reference to alignment concerning these issues. Stress will not be placed here that these four features are the only factors necessary to state that the Nordic nations are completely different in their media systems. However, the table suggests the Nordic countries are far more different than might be thought from Hallin and Mancini's original placement of the four countries with regards to this aspect.

FINAL DISCUSSION: CONVERTING TO THE METRE, INCH BY INCH...?

The empirical data presented above illustrate that the Nordic media markets differ from each other in a variety of aspects. Firstly, a single Nordic media market does not really exist even if basic similarities are still evident. International media market trends have affected the Nordic media systems, but this has not been the same in all four countries and has not occurred with the same strength. Hallin and Mancini discussed the Nordic media systems as being somewhat archetypical of the democratic corporatist model characterized by a highly developed newspaper market, political parallelism still remaining, a high degree of professionalization and considerable state intervention in media markets. At the same time, the authors admitted a homogenization process in which it is reasonable to summarize the shifts in European media systems as a shift toward the liberal model (Hallin, Mancini, 2004, p. 252).

Thus, is the media in the North still something special or is it drifting away and becoming another copy of the western model? The results in this paper are to some extent contradictory. The Nordic newspapers have definitely lost their party press character and the majority can be described as modern independent newspapers

without any clear political party affiliation. At the same time, the previous central governmental press subsidies have been reduced and no longer play an important role in shaping the national newspaper markets. Governmental support has not been able to stop structural market changes, to slow down a reduction in external pluralism or to prevent a concentration of ownership of printed media.

However, daily newspapers in the Nordic area are still important players in their respective markets. The number of newspapers and the daily circulation per inhabitant still exceeds the figures for most other European countries even if Denmark has adapted to European standards in this aspect. However, the Nordic dailies generally have a strong position: they attract a large audience even in the age of the Internet, they have a bigger share of advertising income than their European counterparts and the majority of households in most regions and municipalities subscribe to them (Swedish, 2006).

The Nordic broadcast media scene has generally experienced significant structural changes, as new competitors have been able to challenge public service companies during recent decades. Accordingly, public service audiences have shrunk and some private radio and television channels have been successful in gaining strong market positions. However, public service media in the Nordic countries still dominates the markets in spite of heavy competition within the most attractive audience segments. Generally, public service radio has a market share of approximately 60% of the daily listening time and public service TV approximately 50% of the daily viewing time.

Furthermore, the professionalization processes of the Nordic media markets have not turned democratic corporativistic traditions into more liberal models. The Nordic Press Councils remain central in interpreting and evaluating media ethics and there is no real debate to change the self-regulations systems to a more non-institutionalized direction. Finally, state intervention in the Nordic media markets has become less common and the system of selective press subsidies is a less distinctive feature of contemporary Nordic media systems.

To conclude, the Nordic media systems have developed as hybrids of the Democratic Corporatist and the Liberal Media Models. The relative strength of the newspaper market and the strong position for public service media make the Nordic media markets special even in times of globalization and modernization. At the same time, state intervention has become much less important and political parallelism appears to be overlaid.

These observations may be summarized as key indicators of a process where the transformation of the Nordic media systems can be described more as a simultaneous de-politicization and institutionalization than as an absolute market-orientation towards liberalization. Accordingly, political influences on the media appear to be completely at odds in all Nordic countries. State intervention, selective press subsidies and party press connections obviously belong to the past. Regulatory media policy has been abandoned by most Nordic contemporary governments regard-

less of their ideological orientation. If the de-politization process of the media was the only criterion involved in deciding the direction of the Nordic media systems, they could definitely be described as becoming more liberal.

However, traditionally strong national media institutions in the Nordic countries may have survived these political changes without becoming completely adapted to the market logic. Traditions and political culture seem to matter, and high public confidence in the historically most well-known media institutions may prevent a process where liberal market values turn the existing order upside down. 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 mainly through political support, governmental grants or tax favors. On the contrary, they maintain their contemporary positions by utilizing their institutional reputations and company brands as reliable news content and entertainment features providers.

Accordingly, daily newspapers are rather successful in defending their positions in the advertising market. They are losing market shares to new media, but not to the same extent as in other parts of the continent. Generally in Europe, 30% of advertising investments is in the newspaper market, but in the Nordic it accounts for almost 40% of advertising money (Institut 2005). Furthermore, the most successful newspapers are also the most important news providers on the Internet in the Nordic countries. The public service broadcast media companies offer the most developed websites and are market leaders with reference to media convergence and digitalization. Thus, the oldest actors in the media markets appear to be the winners of the future; but more for institutional rather than political reasons. They do not need governmental support to remain in politicized media systems, but instead use renewed market strategies to keep up with public expectations. They may have many different and diverging interests, but their key to success in more hybrid media markets is to use the Nordic media traditions to their advantages in a more liberal environment.

The final conclusion may be that there remains no typical, single Nordic market, but rather four different variations of a mixture of democratic corporatist national structures and more external liberal influences. Furthermore, this integration process is driven more by media institutional factors such as public service ideals and professional norms than by proactive governmental policies. Media policies may be more or less ineffective in the new media markets, while media institutions may survive or even strengthen their positions.

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