



AVMS regulation and the new kids on the block

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Slovenia and AVMSD, but not only



- Small market, high penetration of pay-tv, significant share of localized channels from other MSs (subtitled and local advertising, but without national quotas and breaching the hourly adds limit)
- Linear viewing stable or slightly increasing, but on the account of the population aging (target audience for marketing shifted from 18-49 to 18-55);
- Children and young adults increasingly non-linear/online/social networking (negligible offer of quality domestic AV content); increasing share of smart TVs connected to the internet
- PSB's ratings lowering (reaching satisfying levels only when broadcasting big sports events)
- No level playing field (domestic/foreign, linear/non-linear/OTT, hybrid services)



Slovenia cont.



- Problems with application of the notion of the independent producer in Slovenia (as there are only a few domestic broadcasters able to purchase such content + lack of info needed to establish „independence“)
- Lack of new (independent) domestic AV works suitable for broadcasting on commercial TVs (e.g. non-responsiveness to the tender issued by the biggest commercial player)
- European content too expensive for new/small broadcasters that are not exempt of the obligation (0,3 % audience share in SLO translates to less than 800 viewers in terms of AMR abs)
- Lack of credible/detailed information on European works (e.g. relations between co-producers, executive vs. others)
- Problems with application of the 9.00 pm watershed for 12+ (due to the channels from other MS offering prime time content already at 8.00 pm or earlier)

+ Choice/Chaos/Control

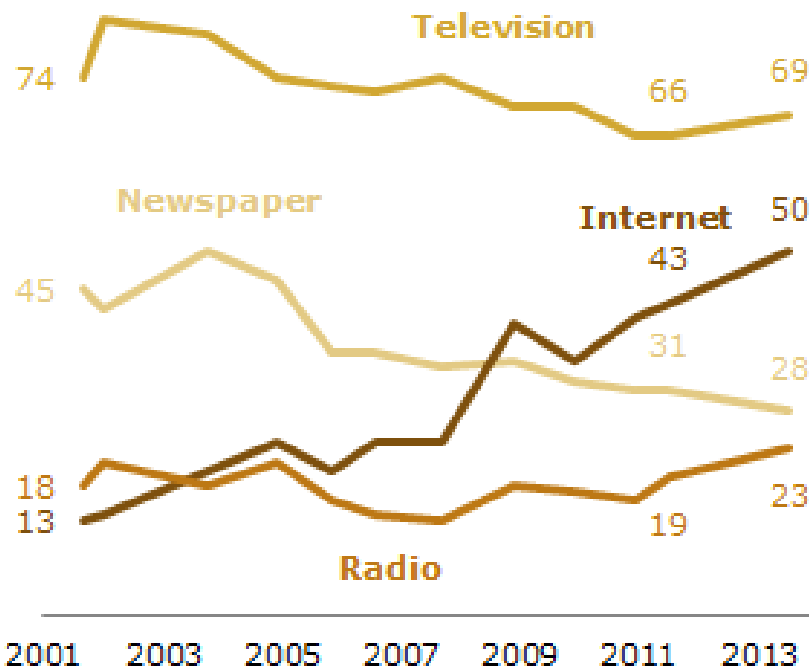
- Communicative abundance (Keane 1999), supersaturation (Gitlin 2002), cultural chaos (McNair 2006), almost infinite choice and an unparalleled pluralization of voices with access to the public sphere (Karpinnen 2013), but through the gates controlled by the new gatekeepers with power and no responsibility (Milosavljevic 2014)
- Hosting companies, ISPs, search engines, aggregators etc. perform a function similar to that of traditional gatekeepers as they preselect and filter the information available to users (Council of Europe 2012; Hargittai 2007; Hindman 2009; Machill et al. 2008) or they have an autonomous influence in directing web traffic (Hindman 2009, 80; Karpinnen 2013, 112) + affecting the business models of legacy media



New media as a new (news) source



Main Source for News



The most powerful distributor of news now is an algorithm governing display of stories to the billion users on Facebook. (Bell 2014)

PEW RESEARCH CENTER July 17-21, 2013. Q46.
Respondents were allowed to name up to two sources.

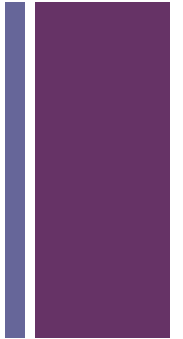
+ Digital Ad Revenue by Company

These companies are expected to be top earners in Internet ads this year.



Note: All data are estimates
Source: eMarketer
Rani Molla/The Wall Street Journal

+ Total revenues of a SLO media counterpart



By producing:

- 2 most viewed generalist TV channels, available also on DTT, 3 additional specialized TV channels, available on cable and IPTV, the most popular VOD/catch up TV service and the most clicked online news portal,

the company earned:

- 50 million EUR in 2013



What's at stake



- Cultural and societal aims of the national media policies (partly due to regulatory arbitrage and tax heavens, but also changing uses and business models)
- Cultural and societal aims of the EU media policies (due to unlimited strengthening of non-regulated global players)
- Focus of content regulation on services with a clear editorial dimension and ownership rules that continue to restrict who may hold radio / television (as they ignore the importance of the intermediaries as the new gatekeepers)



Review of the AV framework could



- Recognize the role of intermediaries as new media gatekeepers and develop suitable remedies
- (Re)define and enforce the role of regulators in the new media system(s) and new model(s) of media governance (shift from protect me to inform me... but also encourage me and help me)
- Explore the ways to influence media quality, accountability and accessibility of various content rather than merely measuring quantity (of EU works, independent productions, adds)



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Hvala!

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