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European Trends

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Abstract

This chapter compares the concentration processes in media and information-related industries in the European countries (Russia and Turkey are included in the analysis).

European Trends

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INTRODUCTION

This chapter compares the concentration processes in media and information-related industries in the European countries (Russia and Turkey are included in the analysis). As far as possible, we used five data for five years to envision the long-term dynamics of concentration: 1996, 2000, 2004, 2008, and 2012.¹ The graphs that follow use the HHI calculated in the preceding country chapters, taken as a quantitative indicator of concentration. In a few cases, we estimated HHI by interpolation of actual data.

The result found for several countries, and especially for France, is that industries with a higher technological content are more concentrated than the traditional media industries,

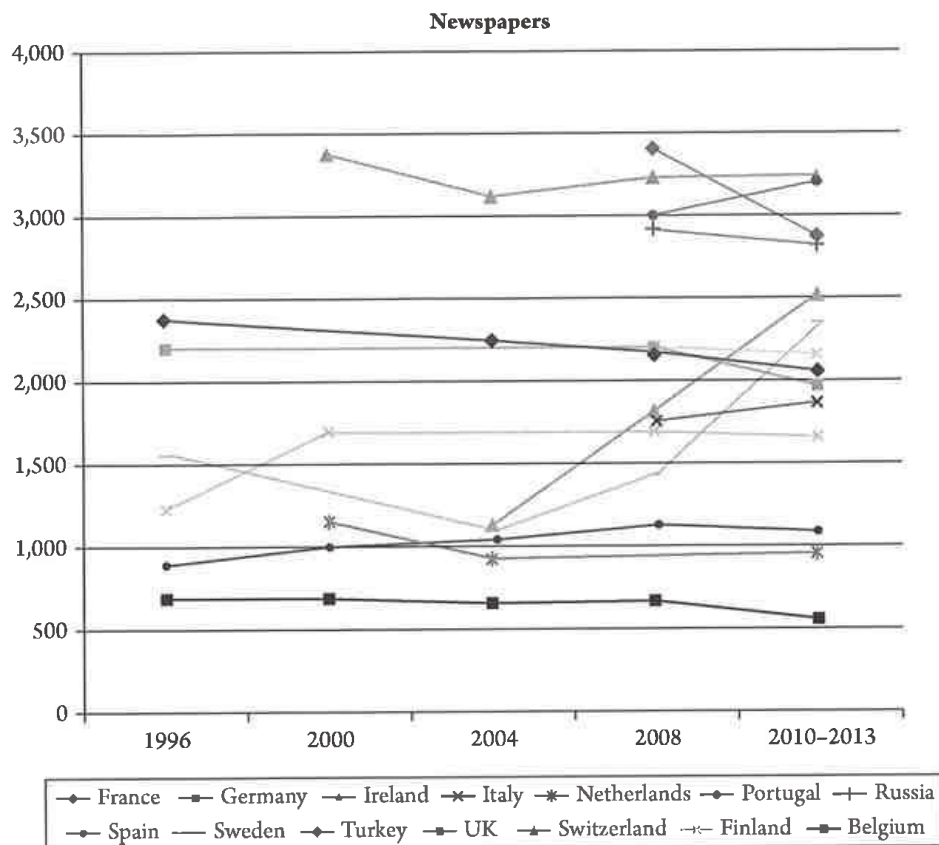
which are more labor-intensive. We will test that working hypothesis on an industry per industry basis.

THE INDUSTRY OF NATIONAL DAILY NEWSPAPERS

In many countries, such as the United Kingdom, the industry of regional newspapers is inexistent or small; in other countries, such as France or the United States, regional newspapers are more important, but highly concentrated in each region, with a monopoly or quasi-monopoly situation.

In Graph 33.1, we observe two groups of countries: a small group with high concentration indices, around 3,000, and a larger group with lower concentration indices.

1. We have sometimes used data from other proximate years where it was missing data, especially for 2012.



GRAPH 33.1 Daily Newspapers HHI for European Countries

The first group includes Portugal, Ireland, Turkey and Russia. Ireland and Portugal are comparatively smaller countries, for which a high concentration is logical from an economic point of view. Switzerland, a small country, has a lower concentration index, although it increased considerably on the considered period. Turkey and Russia are specific countries with specific media contexts.

Concerning the second group, a majority of countries has an HHI under 2,000.

The main results for the European newspapers industry is a high variability of the HHI.

BOOK INDUSTRY

Graph 33.2 shows that the European book industry is characterized by a majority of countries with HHI indices under 1,200. Nevertheless three countries have HHI indices around or over 2,500: Portugal, Russia and Finland. With the exception of these three countries the HHI in the book industry is stable and low.

MAGAZINES

In Graph 33.3 we observe three groups of countries in the recent years:

- the countries with high levels of the HHI, above 3,000: Russia, Portugal and Turkey;
- The countries with a concentration around 2,000: Finland, France, Switzerland and Sweden;
- The countries with moderate or low concentration: Netherlands (which has had a strong decline of its HHI), United Kingdom, Spain and Germany.

RADIO

One can classify European countries into four groups (see Graph 33.4):

- (1) two countries with comparatively low concentration, the HHI being under 1,500: France and Turkey;