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Media Ownership and Concentration in Switzerland

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Abstract

The Swiss media landscape reflects Switzerland's society. Although there are some debates over concentration, media concentration is not considered by many stakeholders to be a major issue in Switzerland: the Federal Council in 2010 rejected further regulation, saying that the sector was sufficiently self-regulated. Moreover, concentration is correlated with the market size: as Switzerland is a small country, high concentration indices should be expected. This article observes that, in general, concentration is relatively low, especially if we take into account this important specificity.

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PATRICK-YVES BADILLO AND DOMINIQUE BOURGEOIS

INTRODUCTION

The Swiss media landscape reflects Switzerland's society. Switzerland is a multilingual and multicultural society with four official languages—German, French, Italian, and Romansch—and about 22% of the population are not Swiss citizens. In consequence, the main broadcaster SRG SSR offers three German-speaking TV channels, two French-speaking TV channels, and two Italian-speaking TV channels, as well as some broadcast programs in the Romansch language. Moreover, many foreign TV channels are accessible in most Swiss regions in their respective languages. As has been observed, Switzerland is characterized by a high penetration of all the types of media, while

“on the other hand, the time of use of the media remains moderate.”¹

There are major debates in Switzerland concerning changes in regulation. The public monopoly over radio and TV broadcasting was abolished in the 1980s, but many questions remain regarding the direction that SRG SSR (the main audiovisual group, which is now a non-profit-making association with a public remit) should take and the means to develop commercial broadcasting. Telecom regulation in Switzerland was modified very late compared to other European countries: the telecom market was opened to competition only in 1998 by the Telecommunication Law of April 30, 1997, and there are calls for further revision of that law (which was last revised in 2006).

1. Cornu, Daniel, Borruat, Régis. “Structure des médias suisses,” in Cornu, Daniel, et al., *Les Médias en Suisse, Structure et audience*. 7th ed. Lausanne: FCJ/CRFJ, 2012, 9 (translation).

The print press also faces new challenges: in Switzerland the press benefits from preferential postal prices for local and regional newspapers, and from a reduced VAT rate for print publications. This assistance was estimated at US\$98.2 million (66.8 million euros) in 2008, which is far less than in other European countries: for example, for 2008 the total amount was estimated to be equal to US\$1.9 billion (1.3 billion euros) in France and US\$1.8 billion (1.2 billion euros) in Italy.² The debate about the role of the state emerged because of the ongoing economic deterioration of the paid-subscription newspapers sector.

And although there are some debates over concentration, media concentration is not considered by many stakeholders to be a major issue in Switzerland: the Federal Council in 2010 rejected further regulation, saying that the sector was sufficiently self-regulated.³ Moreover, concentration is correlated with the market size: as Switzerland is a small country, high concentration indices should be expected. We will observe that, in general, concentration is relatively low, especially if we take into account this important specificity.

PRINT MEDIA

Print media is seen as a key pillar of Swiss democracy. Having a wide variety of newspapers has long been viewed as part of political pluralism in such a small country with four official languages. According to the media monitor REMP:

Switzerland is a press country. The only media database of the Association of Swiss Advertising Companies (ASSP) takes

into account 436 newspapers, in the daily, regional weekly and Sunday press category. 347 titles, respectively 79.6%, are published in German, seventy-four (17%) are published in French and thirteen (3%) are written in Italian. Two titles (0.5%) are published in Romansch. This unique supply, in international comparison, is complemented by more than 2,333 general public, financial, economic, thematic and specialized press products.⁴

This can mainly be explained by the high level of print readership in Switzerland: in 2009, REMP reported that 92.4% of the adult Swiss population (14 years and up) regularly read newspapers, and 91.6% regularly read magazines. Switzerland has a high per capita print circulation for newspapers: there were 14 paid-subscription daily newspaper titles per one million inhabitants in 2008, twice as high as the figures for the United States, Germany, France, and Italy.⁵

In the past two decades, a trend for greater concentration has been observed at the ownership level. A few big publishing houses own most of Swiss print titles: Ringier, Tamedia, and NZZ (Neuen Zürcher Zeitung) Medien Gruppe. Nevertheless, there are still a large number of print titles and, from an editorial point of view, a diversity of opinions. That said, “content diversity is not insured by the multiplicity of titles.” Several of the smaller newspapers mainly reproduce news agencies’ content, and there are editorial collaborations at the national level.⁶ On the other hand, various titles belonging to the same company correspond to specific contents for selected audiences.

2. Swiss Federal Council, “Garantir la diversité de la presse: Rapport du Conseil fédéral en réponse au postulat Fehr 09.3629 et au postulat de la Commission des institutions politiques du Conseil national (CIP-CN) 09.3980.” Bern: OFCOM, June 29, 2011. <http://www.bakom.admin.ch/themen/radio_tv/01153/01156/03479/index.html?lang=fr&download=NHZLpZeg7t,lnp6I0NTU042lZ76ln1ae2lZn4Z2qZpnO2YUq2Z6gpjCDeoN3fWym162epYbg2c__JjKbNoKSn6A-->>. 23.

3. Ibid., p. 40.

4. Recherches et études des médias publicitaires—Researches and studies on advertising medias (REMP). *Presse écrite*. <http://www.wemf.ch/f/media/presse_ecrite.php>. Dec. 28, 2012 (translation).

5. World Association of Newspapers and News Publishers (WAN-IFRA). *World Press Trends 2010*. WAN-IFRA/ZenithOptimedia, 2010. <<http://www.wan-ifra.org/reports/2010/07/23/world-press-trends-2010-edition>>. Dec. 28, 2012.

6. Cornu, Daniel, Borruat, Régis, Léchet, Pierre-André & Nerini, Marlène. “Inventaire des médias suisses,” in Cornu, Daniel, et al., *Les Médias en Suisse, Structure et audience*. 7th ed. Lausanne: FCJ/CRFJ, 2012. 30.