

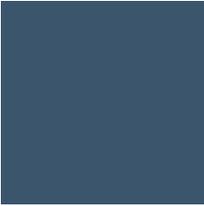


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Monitoring Media Pluralism in Europe: Application of the Media Pluralism Monitor 2017 in the European Union, FYROM, Serbia & Turkey

Country Report: Lithuania

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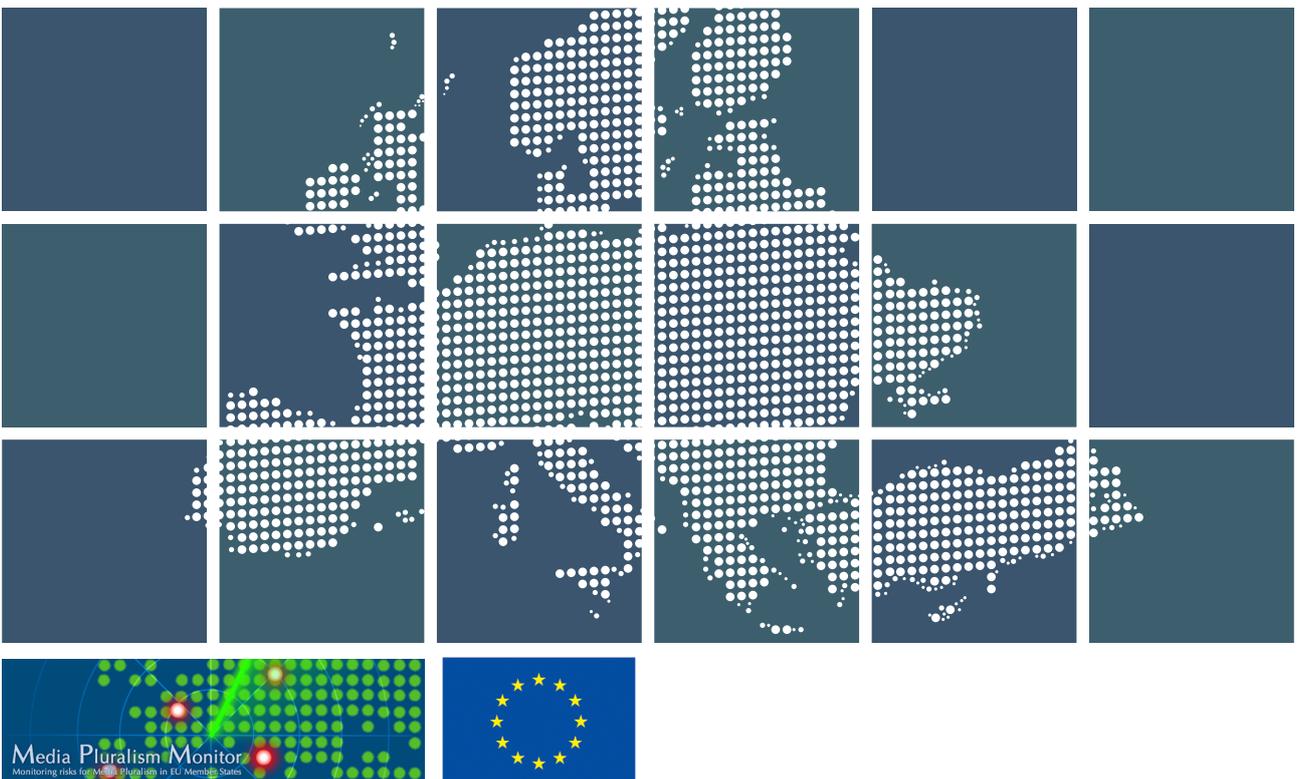




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1. ABOUT THE PROJECT

1.1 OVERVIEW OF THE PROJECT

The Media Pluralism Monitor (MPM) is a research tool that was designed to identify potential risks to media pluralism in the Member States of the European Union. This narrative report has been produced within the framework of the second EU-wide implementation of the MPM, carried out in 2017. The implementation was conducted in 28 EU Member States, Serbia, Former Yugoslav Republic of Macedonia (FYRoM) and Turkey with the support of a grant awarded by the European Union to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute.

1.2 METHODOLOGICAL NOTE

The CMPF cooperated with experienced, independent national researchers to carry out the data collection and to author the narrative reports, except in the cases of Malta and Italy where data collection was carried out centrally by the CMPF team. The research is based on a standardised questionnaire and apposite guidelines that were developed by the CMPF. The data collection was carried out between June and December 2017.

In Lithuania, the CMPF partnered with Auksė Balčytienė and Kristina Juraitė (both are professors at Vytautas Magnus University), who conducted the data collection and annotated the variables in the questionnaire and interviewed relevant experts. The scores assessing the risks for media pluralism were provided by the CMPF and calculated according to the algorithm developed by the Centre itself. The national report was reviewed by CMPF staff. Moreover, to ensure accurate and reliable findings, a group of national experts in each country reviewed the answers to particularly evaluative questions (see Annexe II for the list of experts).

Risks to media pluralism are examined in four main thematic areas, which are considered to capture the main areas of risk for media pluralism and media freedom: Basic Protection, Market Plurality, Political Independence and Social Inclusiveness. The results are based on the assessment of a number of indicators for each thematic area (see Figure 1 below).

Basic Protection	Market Plurality	Political Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political control over media outlets	Access to media for minorities
Protection of right to information	Media ownership concentration (horizontal)	Editorial autonomy	Access to media for local/regional communities and for community media
Journalistic profession, standards and protection	Cross-media concentration of ownership and competition enforcement	Media and democratic electoral process	Access to media for people with disabilities
Independence and effectiveness of the media authority	Commercial & owner influence over editorial content	State regulation of resources and support to media sector	Access to media for women
Universal reach of traditional media and access to the Internet	Media viability	Independence of PSM governance and funding	Media literacy

The results for each domain and indicator are presented on a scale from 0 to 100%. Scores between 0 and 33% are considered low risk, 34 to 66% are medium risk, while those between 67 and 100% are high risk. On the level of indicators, scores of 0 were rated 3% and scores of 100 were rated 97% by default, to avoid an assessment of a total absence or certainty of risk. For more information on the MPM methodology, see the CMPF report “Monitoring Media Pluralism in Europe: Application of the Media Pluralism Monitor 2016 in EU-28, Montenegro and Turkey”, <http://cadmus.eui.eu/handle/1814/46786>



Disclaimer: The content of the report does not necessarily reflect the views of the CMPF or the EC, but represents the views of the national country team that carried out the data collection and authored the report. Due to updates and refinements in the questionnaire, the MPM2017 scores may not be fully comparable with those of MPM2016. For more details, see the CMPF report on MPM2017, which will soon be available on <http://cmpf.eui.eu/media-pluralism-monitor/>



2. INTRODUCTION

Lithuania is one of the smallest Central and Eastern European countries, situated on the South Eastern coast of the Baltic Sea. Lithuania is a member of the European Union and NATO since 2004, and a member of the Eurozone as of 2015.

The country is described as ethnically homogeneous with Polish and Russian-speaking being the biggest minorities respectively (6,6% and 5,8% of the total population). The official language of the country is Lithuanian. With a population of 2,85 million (as of 2016), it can be defined as a small media marketplace, yet relatively varied and dynamic.

Aside to the country's size, the political culture acts as another decisive factor determining social and political identification as well as the specificities of media institutionalization and professionalism in the country (Balčytienė, 2012).

The media sector is one of those segments of business which lives under enduring pressure for change and restructuring. TV companies remain the leaders in the news media market in Lithuania, including the LRT group (public service broadcaster with an audience share of 11.7%), LNK group (overall audience share amounting to 30.7%) and All Media group with TV3 as the leading TV channel in Lithuania (overall audience share amounting to 22.8%). These three TV companies were leaders in terms of daily reached audience: TV3 gathered nearly 42% of consolidated daily reach (including "live" viewing and time-shifted viewing data), LNK reached 40% of daily audience, while LRT Televizija audience share amounted to 32%. Lithuanian radio service launched in 1926 remains one of the most important media with stable audience reach - daily radio reaches about 70% of the national population aged 16-74. The most popular radio stations include M-1, Lietus and LRT Radijas (public service radio) with an audience share of 19%, 17% and 13% respectively. The most popular online news portals include Delfi, 15min and Lrytas used by a majority of online media users (each of the portals reaching about 1 million monthly users), while print media circulation, readership and income is constantly shrinking. The main national daily *Lietuvos rytas* was read by 8.3% of population in 2017. When comparing different types of media use among the population, it is clear that TV reaches the biggest share of audience per day – 84%; the internet – 68%, radio – 49%, and press – 23%.¹

In general, political and economic factors remain among the top pressing issues for media functioning. Still, both (political and economic) weights on media diversity and pluralism cannot be analyzed separately. Both of them are highly interrelated and come 'hand-in-hand': as also acknowledged in other younger European democracies (predominantly in the CEE region), political thinking of elites in those countries, including Lithuania, is highly determined by the economic factor (Rupnik & Zielonka, 2013; Balčytienė, 2015; Balčytienė, 2016).

Lithuania is a consolidated representative democracy which functions in economically changeable conditions that are determined by both internal and external influences, namely the continuing effects of the global economic crisis on the state of country's economy, negative effects of continuing emigration and its impact on the demographic situation in the country, the presence of political corruption and existence of the 'grey zones' economy. These factors also have a direct impact on media institutional structures as well as its functioning and professionalism.

The Lithuanian media landscape displays a number of specificities. Media ownership concentration appears as indeed high in Lithuania and this is affected also by dominant regulatory approaches (media regulation which does not pose restrictions on cross media ownership and defines dominant position in media in the same way as in other business sectors). Ownership concentration affects the state of media plurality and its social inclusiveness. 'Hybridization' might be identified as another characteristic shaping the developments in the current media landscape. Though two media sectors remain as the strongest – that of TV and that of the Internet media – all media industries do not constrain their activities to conventional news channels, but heavily invest into various content integrating actions. This adds as another stress factor on newsrooms and working conditions of journalists. Additional exceptionality of the current media scene in the country is the dominance of the nationwide news media industries. All leading news media are based in the capital city of Vilnius (where daily politics is made, hence there is the main focus of the daily news). Regional media is marginalized in the country. The imbalance is obvious and can be detected also in other aspects, such as working conditions and professionalization of journalists (payment for the journalistic work produced, professional freedom and independence and professional motivation and ambitions of journalists and editors). One notable exception within these trends is the presence of few media start-ups financed through crowd-funding actions. And lastly, an additional factor determining the state of media functioning in the country is the lasting political-

1 KANTAR TNS (2018). Annual Review of Media Surveys 2017: http://www.tns.lt/data/files/Metines_apzvalgos/Kantar_TNS_Annual_review_of_Media_Surveys_2017.pdf; Gemius (2018). Online Media: <http://www.gemius.lt/leidejai.html>



economic influence. Political and economic constraints as direct pressures on media content and pluralism come both from media owners (and in some media sectors, predominantly in the regional media, these are indeed highly pressing) and editorial offices. 'Financialization of journalism' appears to be another serious matter in media business affecting media quality and, hence, diversity and pluralism (Balčytienė et al., 2015; Jastramskis, 2016).



3. RESULTS FROM THE DATA COLLECTION: ASSESSMENT OF THE RISKS TO MEDIA PLURALISM

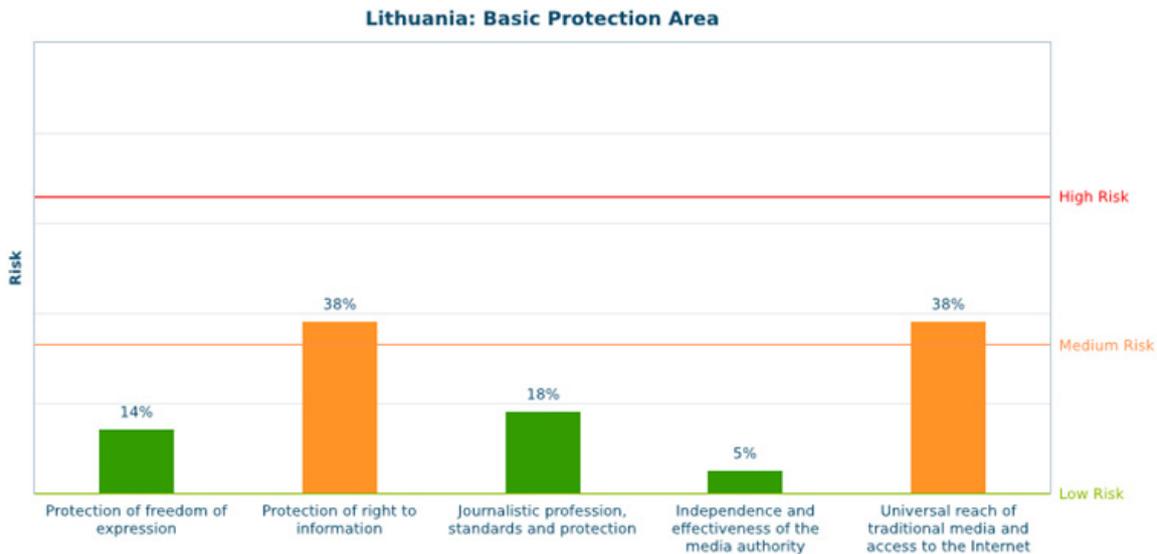
The MPM2017 for Lithuania shows low risk in the area of Basic Protection (23%), and medium risk in the remaining areas: Market Plurality (56%), Political Independence (48%) and Social Inclusiveness (48%). Among the most representative societal tendencies identified in the contemporary Lithuanian media marketplace are such deviations, as enduring political and business influence, on-going media ownership concentration, continuing audience fragmentation and social and political polarization, declining overall institutional trust, and rising societal uncertainty and scepticism.

The diagram below depicts the major dominant risks within spheres of political influence, market plurality and social inclusiveness. Although all these three aspects are identified within the range of medium risk, as will be discussed in the succeeding sections of this country report, neglecting some of the current problems (such as media ownership concentration and continuing influences on media editorial autonomy) might result in the creation of more critical outcomes in the future.



3.1 BASIC PROTECTION (23% - LOW RISK)

The Basic Protection indicators represent the regulatory backbone of the media sector in every contemporary democracy. They measure a number of potential areas of risk, including the existence and effectiveness of the implementation of regulatory safeguards for freedom of expression and the right to information; the status of journalists in each country, including their protection and ability to work; the independence and effectiveness of the national regulatory bodies that have the competence to regulate the media sector, and the reach of traditional media and access to the Internet.



In Lithuania, formally, the overall legal climate for the functioning of media is quite favourable: the basic rights of freedom of expression are preserved and protected (risks assessed is low: 14%).

What appears worrisome are the Protection of right to information that scores a medium risk (38%). The country does not have a legislation to protect whistleblowers.

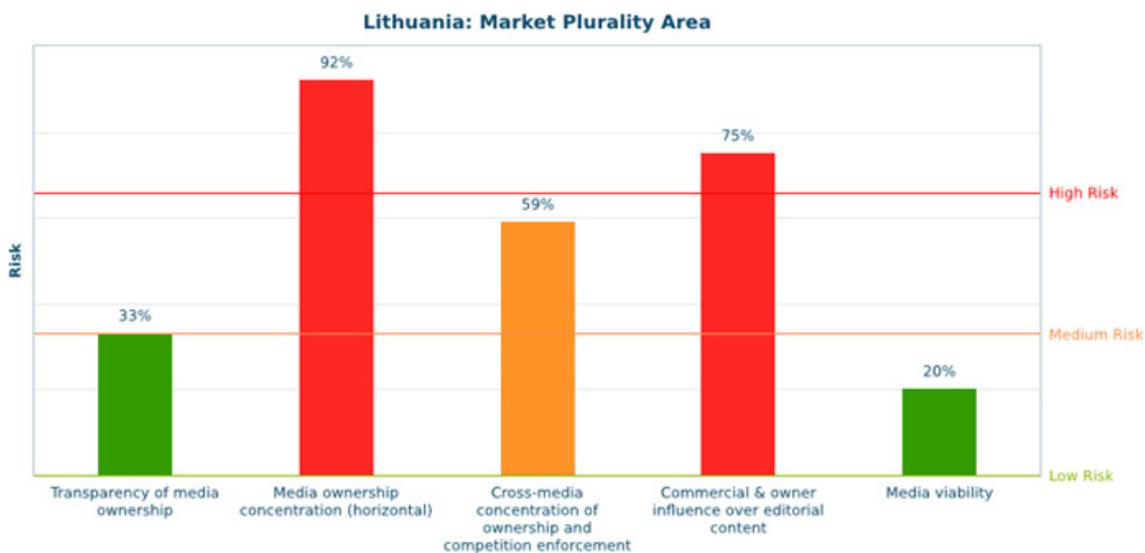
Though the indicator of Journalistic profession produces low risk (18%), journalistic profession is struggling with constant pressures most of which are determined by specific contextual particularities. Some of these are described as standard (such as economic instability and weakness of the market) whereas other requests (such as perceived lack of public credibility and the need to constantly update their skills) appear as new challenges. Though the overall environment for practicing journalism might seem as rather supportive (for instance, from the point of view of social guarantees), in reality, this is not the case. Media professionals are working in an environment that is highly competitive, economically insecure, professionally vulnerable, and hence is susceptible to professional flaws and corruption. Media organizational factors also contribute to this outcome: the majority of the media organizations have no clear rules regulating the work of journalists and editors; direct accountability of editorial offices is also insufficient as there is no regular practice of having editorial lines clearly declared, nor is there a tradition of having an ombudsman position to deal with consumer complaints. Solidarity among journalists is also weak, and the majority of professional journalists are not members of professional organisations. On the one hand, low membership signals that journalists are struggling and are mainly concerned with their individualistic professional aspirations (which in the long run lowers journalistic solidarity and might affect the general professional culture in the country). On the other hand, professional organisations are doing little to represent the interests of journalists. This affects any organisational reputation and leads to low membership.

The indicator on Independence and effectiveness of media authority is assessed as low risk (5%). Appointment procedures to media authority positions - Radio and TV Commission - are transparent and democratic. In the past years the media authority (the Radio and TV Commission) has taken measures for temporary suspension of retransmission of the Russian channels as sanctions performed in accordance with legal procedures recognized by the EU and national legislation.

The indicator Universal reach to traditional media and the Internet scores medium risk (38%). Though with digitalization the informational space turned out to be more easily accessible and diversified, such wholesome 'internetization', 'accessibility' and 'pluralization' might be only fictional or even made-up.

3.2 MARKET PLURALITY (56% - MEDIUM RISK)

The Market Plurality indicators examine the existence and effectiveness of the implementation of transparency and disclosure provisions with regard to media ownership. In addition, they assess the existence and effectiveness of regulatory safeguards to prevent horizontal and cross-media concentration of ownership and the role of competition enforcement and State aid control in protecting media pluralism. Moreover, they seek to evaluate the viability of the media market under examination as well as whether and if so, to what extent commercial forces, including media owners and advertisers, influence editorial decision-making.



Though the indicator of Transparency of media ownership (medium level risk of 33%) contributes to both assessments of concentrations – that of Media ownership (92%) and that of Cross-media ownership – it is not the dominant factor generating risks to media pluralism. The combined outcomes of indicators of Commercial & owner influence over editorial content and Editorial autonomy (as seen in the next section of this report) most cortically contribute to the fluctuating state of media pluralism.

The indicator on transparency of media ownership scores a low risk (33%). There are new regulatory safeguards and new policy measures enshrined in the new legislation (as of the end of 2017) with regard to disclosure of media ownership to the designated authorities, but since these will be taken into the account from 2018, it is expected that the impact will be seen in the next monitoring within the MPM.

The indicator on Media ownership concentration (horizontal) in Lithuania remains highly concentrated (risk level is assessed as high: 92%) with a small number of companies owning the majority of the news media market., Though tendencies towards concentration vary depending on the specific media sector, for a small and steadily decreasing market (especially in terms of gradually declining population numbers because of emigration and demographic reasons) the overall tendency of media concentration appears indeed challenging and even troubling.

One of the most obvious deficiencies observed in the Lithuanian media regulation is the fact that media diversity (and, consequently, pluralism) is not adequately promoted. All major factors – such as definitions of the ‘dominant position’ in the market, or requests to media to disclose, on a yearly basis, media ownership changes – appear to be in place in the existing media regulations; still these arrangements appear to be insufficient to promote adequate and healthy competition in the market.

To support media market pluralism, a stronger institutional supervision of largely media business related issues (as well as raising public awareness and interest in media business related matters), and transparency of media ownership appear to be of exceptional significance. As stated, in most cases, all legal requests appear to be in place, yet their enactment and implementation are generally missing.

All things considered, healthy media competition in Lithuania is missing and is not adequately supported through institutional instruments or through competition regulation. Such structural conditions are leading to a situation favourable for a high level of media ownership concentration in the country (as demonstrated in the figure above).

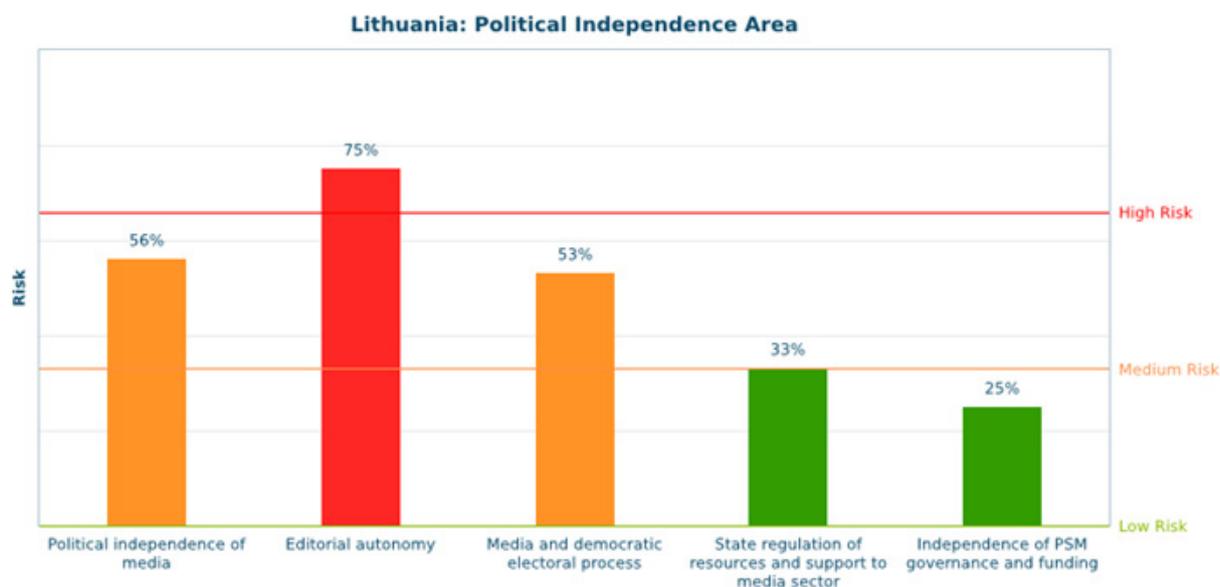
The indicator on Cross-media concentration of ownership and competition enforcement scores medium risk (59%). No sector specific rule is in place for the media sector. Competition law regulates cross media concentration.

Commercial and owner influence over editorial content scores a very high risk of 75%. Newspapers, magazines and other media controlled by private institutions are risking to be biased in favor of their owners (the situation is especially critical with regional media).

Lithuania scores low risk (20%) ad regards Media viability. In the country there is a limited number of initiatives aiming at developing alternative sources of revenue.

3.3 POLITICAL INDEPENDENCE (48% - LOW RISK)

The Political Independence indicators assess the existence and effectiveness of regulatory safeguards against political bias and political control over the media outlets, news agencies and distribution networks. They are also concerned with the existence and effectiveness of self-regulation in ensuring editorial independence. Moreover, they seek to evaluate the influence of the State (and, more generally, of political power) over the functioning of the media market and the independence of public service media.



Political independence of the media is guaranteed by the law in Lithuania. Political groups and actors cannot own any media outlet, however, political affiliations do exist in practice, usually in such cases when local or regional media are owned through subsidiaries with political interests. Therefore, the issue of indirect political ownership of media has been indicated as one of the most sensitive questions in media policy in Lithuania. Lack of media ownership transparency and editorial independence, also relatively weak self-regulatory instruments result in the medium risk scoring of the Political Independence Area (48%).

According to media regulation, media cannot be owned by the political groups and actors, however, political linkages to media ownership prevail especially in local and regional media through subsidiaries with political interests. Therefore, the indicator of Political independence of media scores medium risk of 56%.

Among the most critical tendencies is the finding that editorial autonomy is endangered to critical levels, as well as political interference in the media is under steady increase. The highest risk for media pluralism in this area is related to the indicator of Editorial autonomy (75%). Because of enduring political and economic pressures and rising media market challenges, entrepreneurial and profitmaking approach is most often applied in editorial decision making, particularly in commercial media outlets at the national, regional and local levels.

National laws and regulatory safeguards provide political actors with equal conditions for representation during election campaigns. However, the reality is more complicated, as more political and economic actors have been using their power to manipulate the media and public opinion. Hence, the indicator on Media and democratic electoral



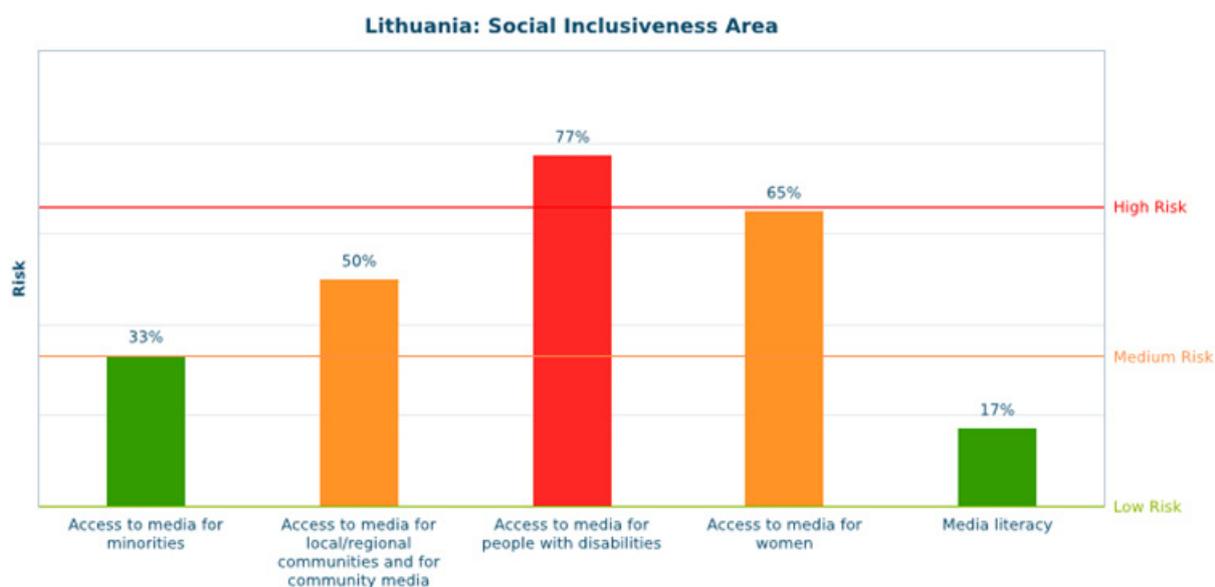
process scores a medium risk of 53%.

Among other risks within the area of Political Independence, the indicator on State regulation of resources and support to the media sector has to be emphasized. It scores a 33% of risk which makes it lower than previous indicators of Political independence, but close to medium risk. Due to financial instabilities, media industry, especially regional and print media are increasingly more dependent on the state and its support, which is not adequate to guarantee media viability in a longer perspective.

The indicator on Independence of PSM governance and funding scores the lowest risk within this area (25%). The PSM has acquired higher level of independence because of new funding regulations and procedures. Commercial advertising on the LRT has been prohibited since January 2015, and the LRT is being financed only from the state budget with the budget of 36,5 million Euros in 2017. However, signals of political pressure and control over the LRT were observed in late 2017, which requires monitoring the situation in the future with regard to media pluralism in case of the PSM.

3.4 SOCIAL INCLUSIVENESS (48% - MEDIUM RISK)

The Social Inclusiveness indicators are concerned with access to the media by various groups in society. The indicators assess regulatory and policy safeguards for community media, and for access to media by minorities, local and regional communities, women, and people with disabilities. In addition to access to the media by specific groups, the media literacy context is important for the state of media pluralism. The Social Inclusiveness area therefore also examines the country's media literacy environment, as well as the digital skills of the overall population.



The indicator Access to media for minorities scores low risk (33%). In Lithuania, the main media law does specify that the minorities have access to airtime on PSM channels (both, TV and radio); also, the state supports minority media projects through the media support scheme.

The indicator on access to media for local and regional communities, as well as for community media score medium risk (50%). This is due to the fact that there is no media-related legal mechanisms for equal opportunities to access media for local and/or regional communities and for community media in Lithuania.

Access to media for people with disabilities appears to be a question of high concern (risk score: 77%). The policy on access to media content by people with disabilities is underdeveloped and there is no legislation in place that requires access services for people with disabilities. Even though the main media law guarantees equal access to media for people with disabilities, only PSM has been ensuring (through subtitling and direct translation of selected news programs) the rights to information for people with visual and hearing disabilities.

Medium level of risk (65%) has been identified for the access to media for women. Lithuania is among the countries with highest representation of women in media management positions (the average in leading news media is 50% of

women working in management - editors, news editors, producers - positions). However, there is no explicit media-related policy on gender equality; the main regulatory framework on non-discrimination and equal opportunities (the Law on Equal Opportunities) is usually applied.

The lowest risk has been identified with the media literacy indicator (17%). This result is mainly linked with the recent action taken by the policy makers and other actors, including the media industry, NGOs, public and academic institutions to acknowledge the need for media and information literacy (MIL) as an answer to increasing challenges and risks.

All in all, situation in the area of Social inclusiveness area is worrisome, especially with regard to the representations of disabled people, women and local/regional communities. On the legal level, regulatory instruments are in place, however, they are not enough to ensure equal opportunities for all in relationship to media.



4. CONCLUSIONS

Though freedom of speech and expression is adequately taken into the account into the legislation, conditions for media pluralism and diversity are highly dependent on such factors as the size of the market as well as specificities of politico-economic context and culture.

The smallness of the country is both an asset and a condition of heightened risk for media functioning.

On the one hand, smallness of the market acts as one of the causal factors in media system re-structuring and dynamics. Additionally to mainstream established news channels such as broadcast, print or Internet media, the Lithuanian media landscape comprises a significant number of niche media (focussed Internet media portals) or start-up media channels among which 'Laisvės TV' happens to be the most noticeable (and influential)². On the other hand, smallness of the market also acts as critical determinant of media autonomy and quality and professionalization of journalism: only strong and independent media brands are capable to ensure required media autonomy and nonalignment with external influences (as registered, regional and local media appears less self-sufficient and highly dependent on political/business pressures); and only strong media brands can invest in investigative journalism production and watch over politico-economic dominances.

Generally, politico-economic context and particularities determining the media institutional functioning and professional norms appear the top significant issues affecting the state of media pluralism in Lithuania. As shown in the risk related analysis, highest threats are indicated in the spheres of media ownership concentration and editorial independence from (politico-business) influences. These trends and influences, as appears, are witnessed not only in Lithuania, but also throughout the CEE region countries.

Still, in addition to these issues of long-lasting concern, we would indicate three groups of strategic matters that are missing and should be taken into the account as policy recommendations, namely greater attention to (1) media accessibility (both in technical terms and aspects related to media openness and social inclusiveness issues), (2) media production (i.e. content quality and diversity), and (3) media professionalism.

To take into account these fundamental ambitions, a strategically coordinated and supervised policy-making by the designated bodies (the Ministry of Culture and other regulatory authorities), diverse media financial support mechanisms, and public inclusiveness and engagement into media related matters is needed:

- Media accessibility. Greater media social responsibility and openness need to be initiated here. Media policy issues (coordinated by the Ministry of Culture) should be framed taking into the account new information and communication rights of citizens. These rights should focus not only on the aspects of freedom of information and expression. They must take into the account such issues as rights of access to information, rights of content production, rights to communication. Additionally, media 'social inclusiveness' needs to be further strengthened by taking into the account the rights of different groups of citizens (women, people with disabilities, children, minority groups). To achieve these goals all media groups (commercial entities, niche media and start-ups, and not only PSM) should be mobilized.
- Media production. Within this action, questions linked with media production diversity as well as financial media support mechanisms must be assessed (VAT, media support projects and initiatives need to be reviewed here). Lithuania appears to be among those few countries where a functioning state support system for supporting media production exists. Though in times of its establishment in 1996 the system was quite innovative, it currently needs to be reformed (by taking into the account changing media structural conditions, i.e. its multi-mediality and hybridity, as well as changed media working conditions related to the influences of the global digital platforms which critically affect economic conditions of small national news markets).
- Media professionalism. In addition to classical understanding of media professionalism, issues linked with audience responsiveness and media education (MIL) appear significant here.

To conclude, the issue of media diversity and pluralism appears among the top matters and concerns in public policies linked with technological connectivity and information accessibility, content production and quality assurance, and

² 'Laisvės TV' (Liberty TV) is a non-profit online TV broadcast/streaming channel on YouTube which started its activities in 2016. Its main product is the political satire news and information show 'Keep It With Andrius Tapinas'. The channel is crowd-funded.



information dissemination and communication. Lithuania has a newly affirmed media policy document approved at the Ministry of Culture in 2018 where five strategically significant areas are listed. Among those indicated are issues related to the strengthening of the position of the Ministry in the coordination of actions and responsibilities in the media field, matters focusing on greater media independence and accountability, content diversity and quality, and media and information literacy. Since this country report observes and reviews media pluralism situation as of 2017, a closer analysis and impact of policy changes will be given in forthcoming monitoring actions within the MPM.

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ANNEXE 1. COUNTRY TEAM

The Country team is composed of one or more national researchers that carried out the data collection and authored the country report.

First name	Last name	Position	Institution	MPM2017 CT Leader (please indicate with X)
Auksė	Balčytienė	Professor	Vytautas Magnus University	X
Kristina	Juraitė	Professor	Vytautas Magnus University	

ANNEXE 2. GROUP OF EXPERTS

The Group of Experts is composed of specialists with a substantial knowledge and experience in the field of media. The role of the Group of Experts was to review especially sensitive/subjective evaluations drafted by the Country Team in order to maximize the objectivity of the replies given, ensuring the accuracy of the final results.

First name	Last name	Position	Institution
Irmina	Matonytė	Professor	ISM
Deividas	Velkas	Specialist, media expert	Ministry of Culture
Džina	Donauskaitė	Director, media expert	Lithuanian Journalism Center



