Media concentration in Poland

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Data sets

- Daily newspapers
- Radio
- TV
General media landscape in historical perspective

• Till 1989 fully state owned and state controlled
• 1990 – liberalisation of the press market
• 1992 – liberalisation of the TV market
• 1994 – radio market fully deregulated
General landscape

• All media sectors went through very dynamic process of change

• Public TV still dominating

• Strong political influences in selecting public media governing bodies

• High involvement of religious institutions (Catholic Church) through newspapers, radio and TV stations
### TV market – concentration indicators

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<th>2003</th>
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Concentration based on the advertising market share

- **C4**
- **HHI**
- **Noam Index**

Concentration based on the advertising market share.
Public vs. private TV

Digital switch planned for 31 July 2013
# Radio market concentration indicators

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Radio market: public vs. private

One private radio station has a greater market share than all public radio stations together
Newspaper market concentration indicators

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Concentration in the newspaper market

Expansive investments of Axel Springer, Orkla media and Bauer

Drop in readership leads to a number of closures
Preliminary conclusions

• Diverse concentration levels and role of public media in different sectors

• While the most dynamic changes happened in 1990’s, considerable changes in ownership still take place in the newspaper sector

• Few private conglomerates manage to get strong position in many sectors (horizontal integration)
Other sectors

- Magazines and periodicals
- Books
- Music distribution
- Telecom
- Cable TV

Lack of coherent data
- News Portals, Internet Portals, ISPs, Satellite
THANK YOU