



## CS2. Country case studies on critical junctures in the media transformation process in Four Domains of Potential ROs (2000–2020)

The aim of the second case study is to provide analysis of risks and opportunities concerning the diachronic changes in four domains defined by the project in the 21<sup>st</sup> century.

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# AUSTRIA

## Critical junctures in the media transformation process

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### Executive Summary

Although comparative media systems research often emphasizes characteristics that place Austria in the same category with other democratic-corporatist media systems in Northern and Western Europe, an analysis of critical junctures in the media transformation process since the turn of the millennium reveals a number of challenges that put such a classification into question. However, not all of them are typically Austrian. In the context of legal and ethical regulation, the case study points out several shortcomings of the regulatory safeguards that exist and deplores a lack of incentives for more media self-regulation. In the field of journalism, the most significant challenges relate to recent developments of the media market and lead to the insight that media plurality in Austria is currently under threat. Regarding media audiences, the study discusses the recent deregulation of the broadcasting sector and the impact of foreign media products as being typically Austrian context factors. These factors shape media usage, while challenges such as the general trend towards digitization and media convergence and, more recently, the impact by the Covid-19 pandemic have a broader scope and are also prominent in other countries. The examination of risks and opportunities for media-related competencies turns the spotlight onto the ongoing transformation from traditional mass media to social media and emphasizes the resulting challenges for the educational sector. The presented findings offer a starting point for a more nuanced comparative evaluation in the European context.

## 1. Introduction

For comparative research into international media systems, Austria represents a special case: On the one hand, the country displays many parallels to the big democratic-corporatist media systems in the Northwest of Europe – such as a strong public service broadcaster, the continuing relevance of printed newspapers, and a comparatively high degree of journalistic professionalization. On the other hand, a lengthy standstill of institutionalized media self-regulation in Austria and recurring examples of political parallelism – particularly when the far-right Freedom Party of Austria (FPÖ) joined the government between 2017 and 2019 – indicate similarities with many polarized-pluralist media systems in Southern and Eastern Europe. Further typical characteristics make it even more difficult to categorize Austria in the well-known typology of media systems by Hallin and Mancini (2004; 2012). These include a high concentration in almost all media segments as well as the fact that media usage in Austria is strongly influenced by news offerings from Germany – the neighbouring giant with the same language basis. Such peculiarities motivated previous comparative media researchers to label Austria as a “border-crosser” (Karmasin et al., 2011) among the media systems on the European continent – a concept that seemed thoroughly justified when it was first presented. But is such an assessment still valid today?

Answers to this question can draw on a comparatively large corpus of data from the most different sources. As previous research for the Mediadecom project has shown, media and communication sciences in Austria have generated a broad bandwidth of research publications and other data sources that are relevant for an analysis of risks and opportunities for deliberative communication (Eberwein et al., 2022). Particularly in the fields of journalism and media usage studies, a large variety of empirical sources is available and research initiatives have reached a high degree of specialization. However, the quality of the available data is often marred by the interests of commercial research institutions – and criticism of a lack of data for long-term observations remains. In the area of legal regulation, the basis of available data also appears to be well advanced, although empirical research is underrepresented. By contrast, research on media ethics and media literacy is less differentiated, due to a relatively weak institutionalization and a lack of continuous funding, among other things.

While this case study report attempts to identify critical junctures in the media transformation process between 2000–2020 and investigate different risks and opportunities in this context, such deficiencies need to be taken into account. Thus, the following analysis not only relies on published research data, but also includes additional interviews with national experts in the domains of media law, media ethics, journalism, media usage, and media literacy, in case the available sources are considered insufficient.<sup>1</sup> In order to contextualize the findings, the report opens with a background chapter on social and political change in Austria – with a focus on the time span after the turn of the millennium. The subsequent main section that presents a more detailed inquiry into the critical junctures for media development in Austria is subdivided according to the four major domains that are covered by the Mediadecom project: a) legal and ethical regulation, b) journalism, c) media usage patterns, and d) media-related competencies. The final section, consisting of the conclusions, will attempt to explain the agency of various actors in propelling certain risks and opportunities. In sum, it will show that, in the course of the past two decades, the Austrian media system had to face a considerable number of challenges both from within and without that demand further attention by both media practitioners and researchers. The presented insights are intended to offer a starting point for a more nuanced comparative evaluation in the European context.

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<sup>1</sup> The open-ended interviews were organized with the help of a semi-structured interview guide, intending to identify major transformations of the Austrian media system in the past 20 years. Altogether, 12 interviews with experts from academia, media industry and other institutions were realized between June and November 2022. Participating experts included (in alphabetical order): Corinna Drumm (VÖP – Association of Austrian Commercial Broadcasters), Harald Fidler (*Der Standard*), Prof. Dr. Fritz Hausjell (University of Vienna), Prof. Dr. Andy Kaltenbrunner (Medienhaus Wien), Dr. Daniela Kraus (Presseclub Concordia), Michael Ogris (KommAustria – Austrian Communications Authority), Andreas Riepl (National Competence Center eEducation), Prof. Dr. Uta Rußmann (University of Innsbruck), Christian Stögmüller (*Life Radio*), Prof. Dr. Christian Swertz (University of Vienna), Prof. Dr. Josef Trappel (University of Salzburg), and Dr. Klaus Unterberger (ORF – Austrian Broadcasting Corporation). The interviews lasted 74 minutes on average (in one case: up to 165 minutes) and were transcribed, before being subjected to a systematic analysis. The authors would like to thank Julia Frank for her assistance in the process of transcriptions.

## 2. Social and political change

The new millennium saw Austria entering a new political era. After three decades of governments led by social democratic chancellors, the year 2000 marked a radical change in the political landscape. It culminated in a conservative government, supported by the right-wing populist Freedom Party (FPÖ) with its leader Jörg Haider (Heinisch, 2016). Having gained more than a quarter of the electorate in the 1999 parliamentary elections, the FPÖ became the second strongest party after the Social Democrats (SPÖ). Since the SPÖ held on to its principles not to form a coalition government with the Freedom Party, the third-placed conservative Austrian People's Party (ÖVP) under the former Minister for Foreign Affairs, Wolfgang Schüssel, took the Social Democrats by surprise and formed a government with the FPÖ. Haider's deal with Schüssel was to forego government office himself and at the same time make the leader of the third-largest party, Schüssel, chancellor. However, this coalition with a populist right-wing party – even without Haider – was globally perceived as highly negative and caused political sanctions from the European Union (Mitten, 2017). The main reason was the fact that the FPÖ, under its leader Haider, was perceived not only as a far-right party but also as a movement with a dubious attitude towards Austria's National Socialist past. Since its foundation, the FPÖ struggled to find its position between the liberal and right-wing orientations. Still, after Haider had become the new party leader in 1986, he and his supporters ended this inner-party struggle immediately in favour of a nationalistic, anti-European right-wing policy (Mudde, 2007, p. 42). However, when measured by actual political work and outcomes, the coalition government with the FPÖ was controversial and caused ongoing political instability for the years to come.

After the split of the populist right into two separate parties due to the formation of the BZÖ (*Bündnis Zukunft Österreich*) by Jörg Haider in 2005, both the FPÖ and the BZÖ could no longer be considered to form a coalition government. As a result, a revival of the much-hated “grand coalition” of Social Democrats and Conservatives was needed. Moreover, since the elections of 2008, the former two dominating parties, SPÖ and ÖVP, had to share the voters' support with the right wing (see Table 1).

**Table 1: Composition of the Austrian National Council since 1999 (based on the respective election results)**

Election day	ÖVP	SPÖ	FPÖ	Grüne	NEOS	PILZ	TS	BZÖ
03.10.99	52	65	52	14	-	-	-	-
24.11.02	79	69	18	17	-	-	-	-
01.10.06	66	68	21	21	-	-	-	7
28.09.08	51	57	34	20	-	-		21
29.09.13	47	52	40	24	9	-	11	-
15.10.17	62	52	51	-	10	8	-	-
29.09.19	71	40	31	26	15	-	-	-
current	71	40	30	26	15	-	-	-

Source: Austrian Parliament (n.d.)

After Haider's death and the dissolution of the BZÖ, his successor as FPÖ leader, Heinz-Christian Strache, managed a successful relaunch of the FPÖ a few years later (Heinisch, 2016). Having to explain his involvement in paramilitary manoeuvres by neo-Nazi groups in his youth, Strache subsequently tried to hide the ideological base of himself and his party. However, this effort did not always succeed, not least because party members constantly presented themselves in public as being somehow affiliated with Nazi ideology.

One milestone of this ongoing success of the populist right-wing FPÖ was the success of its candidate Norbert Hofer during the presidential elections in 2016, gaining almost half of the votes (Fuchs, 2016). Like the 1986 elections and the associated *Waldheim affair*, a term conventionally applied to the controversy surrounding the disclosure of the previously unknown past of the former UN secretary-general Kurt Waldheim during his campaign for the Austrian presidency (Wodak & Pelinka, 2017, p. xi), the ideological confrontations during the campaign in 2016 resurrected long-hidden or at least not publicly pronounced arguments from the past. With explicit references to the ideology of National Socialism, the populist radical right could take off their disguise.

During the refugee crisis in 2015, the young conservative Minister of Foreign Affairs, Sebastian Kurz, was busy positioning himself as a new strong man on this issue, thus snatching votes from the right-wing FPÖ (Rheindorf & Wodak, 2018). At the same time, as we know now, Kurz was eager to remove his boss, ÖVP leader and Vice-Chancellor Reinhold Mitterlehner. After Kurz had achieved this aim in 2017, Kurz called for new elections. As a result, the now called *New People's Party* emerged as the strongest party in the elections (see Table 1). Kurz tried to oust the Social Democrats from the government; the ÖVP once again formed a coalition government with the right-wing FPÖ. Thus, history repeated itself, but everything became even worse this time.

Less than two years later, after the so-called *Ibiza affair*, the publication of a secretly recorded video at a Spanish villa, in which Strache (later Vice-Chancellor) was involved, showed him drunk, talking about plans of illegally financing his party and the “takeover of Austria’s most widely read newspaper” (Karner, 2021, p. 253), the right-wing coalition broke up again. However, the opposition parties did not benefit from this. Kurz distanced himself from Strache, and after a short provisional interim government, he formed a new coalition government with the Green Party. Two months later, the Corona crisis started to unfold. During the difficult management of this crisis, Kurz’ past and the tricks he had played back then caught up with him, and he was forced to resign at the end of 2021. However, this ÖVP corruption affair must also be described as a corruption scandal within the media industry (see section 4 below). Due to the problematic proximity of political and journalistic elites in the capital Vienna, political corruption also impacts the media system.

Austria’s ranking in the World Press Freedom Index, which fell from 7th in 2015 to 17th in 2021, also illustrates this development to some extent. The newest report by the NGO Reporters Without Borders from 2022 shows an even worse result, ascribing rank 31 to Austria and explaining: “Attempts to influence the press are constant in Austria. There is a suspicion that politicians have bought coverage in the tabloid media with taxpayers’ money, while others have tried to intervene by visiting editorial offices” (RSF, 2022).

Accordingly, Austria also falls down the Corruption Perception Index (CPI). In 2021, it only received a total of 74 out of 100 points. This is the worst result since the 2014 CPI, and the trend is pointing downwards (CPI, 2021). The most obscure form of institutionalized corruption, which was not taken seriously for a long period, was the disproportionate financing of the media through political advertising (see below).

Today, consequently, we are confronted with a fundamental loss of trust in politics and the media. For example, the SORA Institute for Social Research and Consulting claims in its recent Austrian Democracy Monitor that almost six out of ten people (58%) are convinced that the political system in Austria works less well or not at all. Moreover, around 90% of people are convinced that Austrian politics has a corruption problem (SORA, 2021). Alarming, this perception is currently being confirmed by the Democracy Report 2022, published by the V-Dem Institute at the University of Gothenburg: “For Austria, a significant decline in the indicator for transparent laws and predictable enforcement is a decisive change that contributed to Austria

falling below the criteria for liberal democracy” (Boese & Lindberg, 2022, p. 14). This results into a downgrading from liberal democracy to electoral democracy.

The socio-economic changes during the years in question were strongly influenced by the ongoing European integration of Austria and the effects of globalization. Hence, the (former) neutral state (Bischof et al., 2001), which somehow was perceived by its people as being an “island of the blessed” (Obinger et al., 2010), became increasingly involved in the meta-process of globalization. By this means, the welfare state of the 1970s, established under Bruno Kreisky, also came under pressure in Austria. Introduced in the late 1990s by the last social-democratic chancellor, Viktor Klima, the ensuing right-wing conservative governments promoted neoliberal approaches to the social and economic policies.

Austria’s economic development was relatively constant, with a plus of 2% on average during the years under investigation. Only in 2009, because of the global financial crisis the year before, did the data show a negative growth of -3.765%, and in 2020 due to the pandemic, the negative growth (-6.735%) was even worse (World Bank, 2020). Austria’s unemployment rate was relatively stable at around 6% in most years of the study. Since the middle of the last decade, however, the numbers have steadily increased, with a clear peak in the pandemic years (see Table 2).

**Table 2: Unemployment rate in Austria 2000–2021**

Year	Registered unemployed		Unemployment rate
	Number	Changes compared to previous year	
		absolute	in %
<b>2000</b>	194,314	- 27,428	- 12.4%
<b>2001</b>	203,885	+ 9,571	+ 4.9%
<b>2002</b>	232,418	+ 28,533	+ 14.0%
<b>2003</b>	240,079	+ 7,661	+ 3.3%
<b>2004</b>	243,880	+ 3,801	+ 1.6%
<b>2005</b>	252,654	+ 8,774	+ 3.6%
<b>2006</b>	239,174	- 13,481	- 5.3%
<b>2007</b>	222,248	- 16,925	- 7.1%
<b>2008</b>	212,253	- 9,996	- 4.5%
<b>2009</b>	260,309	+ 48,056	+ 22.6%
<b>2010</b>	250,782	- 9,527	- 3.7%
<b>2011</b>	246,702	- 4,080	- 3.7%
<b>2012</b>	260,643	+ 13,941	+ 5.7%
<b>2013</b>	287,207	+ 26,564	+ 10.2%
<b>2014</b>	319,358	+ 32,151	+ 11.2%
<b>2015</b>	354,332	+ 34,975	+ 11.0%
<b>2016</b>	357,313	+ 2,981	+ 0.8%
<b>2017</b>	339,976	- 17,337	- 4.9%
<b>2018</b>	312,107	- 27,868	- 8.2%
<b>2019</b>	301,328	- 10,779	- 3.5%
<b>2020</b>	409,639	+ 108,312	+ 35.9%
<b>2021</b>	331,741	- 77,898	- 19.0%

Source: Arbeitsmarktinformationssystem (2022)

Since Austria has always been a country of immigration, this topic was also crucial in the period under review. The significant increase in population between 2000 and 2020 of just over 10% is mainly due to immigration (for exact numbers, see Statistik Austria, 2021b). Although Austria is undoubtedly prosperous, the gap between rich and poor has widened. Thus, poverty is also an issue here: 13.9% of the Austrian population (1,222,000 people) are at risk of poverty, i.e. they have an income below the poverty line (Armutskonferenz, 2021).

Hand-in-hand with the consequences of globalization and seen from a media historical point of view, the ongoing digitization (Bock-Schappelwein et al., 2021), the rise of the network society (Castells, 2010), and the development of social media (Schwarzenegger, 2019) have had a decisive impact on the years since 2000. However, this applies to Austria and almost the entire globe.

### 3. Risks and opportunities of legal and ethical regulation domain

#### 3.1. Development and agency of change

Legal regulation has a traditionally high impact on the outlines of the Austrian media system (for an overview, see Berka, 2010). Particularly the broadcasting sector is tightly regulated by a number of laws – such as the Federal Act on the Austrian Broadcasting Corporation (ORF Act), the Federal Act on Audiovisual Media Services (Audiovisual Media Services Act), and the Federal Act enacting provisions for private radio broadcasting (Private Radio Broadcasting Act). Since the liberalization of the Austrian TV market in 2001, the Austrian Communications Authority (KommAustria) is responsible for supervising broadcasting media as an independent collegial body, with operational support by the “Rundfunk und Telekom Regulierungs-GmbH” (RTR). Austrian print media, by contrast, enjoy greater freedom to organize matters of quality management according to the principles of media self-regulation. In line with the Press Promotion Act of 2004, KommAustria provides an annual subsidy to support self-control measures of the press and of the related advertising sector (commercial communication). Besides this framework of media laws in the narrower sense, however, an analysis of risks and opportunities for deliberative communication in the legal domain also has to take into account the provision of fundamental rights – particularly with regard to freedom of expression and freedom of information. The following section provides a review of key issues in this domain by not only describing important regulatory safeguards that exist, but also scrutinizing their implementation in practice.

#### 3.2. Freedom of expression

*Freedom of expression* must be regarded as an essential prerequisite for deliberative communication: There cannot be an open exchange of opinions among members of democratic societies if certain points of view are restricted by law or otherwise. In Austria, freedom of expression can be considered as well protected. It has been anchored in Austrian Basic Law since 1867 (StGG, Art. 13). Austria also ratified the European Convention on Human Rights (ECHR) and the International Covenant on Civil and Political Rights (ICCPR). Accordingly, the most recent country analysis of the Media Pluralism Monitor infers that “legal remedies against violations of freedom of expression can be considered largely effective” (Seethaler & Beaufort, 2021, p. 9).

Freedom of expression could not be enjoyed deliberatively without the freedom of the media. The media is the context in which the constituent elements of human rights – namely the right to receive and impart information – need to be exercised. In this regard, the rating by the NGO

Reporters Without Borders that describes the state of media freedom in Austria as “satisfactory”, despite its slump to rank 31 of its 2022 World Press Freedom Index (RSF, 2022), largely coincides with the overall freedom of expression assessment. However, several questionable developments of the recent past thwart a higher score: For example, the platform Mapping Media Freedom by the European Centre for Press and Media Freedom recorded a growing number of attempts to intimidate journalists and media outlets after the right-wing FPÖ joined the government in 2017 (Mapping Media Freedom, 2018). Similarly, criticism arose in the context of the Corona pandemic when the government only allowed a limited number of journalists to participate in its press conferences (Siebenhaar, 2020). Even more recently, the system of state subsidies for the press became a matter of public debate in the course of the political crisis that forced Chancellor Kurz to resign (for background: Kaltenbrunner, 2021) – an issue that was also highlighted in many expert interviews conducted for this study.

Such instances of political parallelism entail certain risks for the implementation of freedom of expression in Austria, which are even aggravated by the fact that the Austrian Criminal Code (StGB, § 111) allows for an increased prison sentence for *defamation* when it has been made accessible to a wider public by means of the mass media (Seethaler & Beaufort, 2021, p. 10). As this provision is explicitly extended to national and regional parliamentary bodies, army and government offices, it clearly restricts freedom of expression because certain public officials have a procedural advantage in criminal defamation cases. At the same time, however, Section 29 of the Federal Act on the Press and other Publication Media (Media Act) indicates that a predominant public interest in the given information may justify its publication, as long as basic journalistic duties such as due diligence are applied. Furthermore, researchers of the Media Pluralism Monitor (Seethaler & Beaufort, 2021, p. 10) emphasize that the Austrian Supreme Court generally applies the case law of the European Court of Human Rights (ECtHR), which regularly sets a higher standard to the protection of freedom of expression than national courts. In fact, the ECtHR overturned a considerable number of decisions by national courts (Voorhoof et al., 2017), setting precedents relevant to Austria. Recently, for example, in the case of Standard Verlagsgesellschaft mbH v. Austria (No. 3, application no. 39378/15), the ECtHR signalled that Austrian courts were in breach of Article 10 ECHR when ordering journalists to disclose user data from an anonymous forum because of alleged defamatory comments.

In order to combat *illegal and harmful speech online*, Austria has introduced a bundle of laws – consisting of a new Act on Measures to Protect Users on Communications Platforms (Communication Platforms Act – KoPI-G) and amendments to existing legal provisions – in the beginning of 2021. However, it was criticized by civil society actors for delegating new censorship powers to private companies and failing to protect freedom of expression (e.g., Article 19, 2018, 2000; RSF, 2020). Furthermore, the applicability of the measures on users’ protection towards platforms was challenged. While KommAustria has come to the conclusion at the end of 2021 that a total of nine communications platforms from eight different service providers were to be subject to the requirements set by the law (falling under the scope of the KoPI-G), four of them have challenged the decision. The Federal Administrative Court (BVwG) confirmed the applicability of the KoPI-G on the platforms, but suspended the enforcement of the rules based on appeals by the platforms. Currently, the appeal proceedings are pending before the BVwG (RTR, 2021).

On the other hand, initiatives to counter the specific problem of *disinformation*, although it has had a notable impact on the public discourse in Austria throughout the Covid-19 pandemic, remained weak. The general civil law framework as well as the media-specific regulatory instruments have failed to address the disinformation phenomena in a comprehensive manner, and the current rules criminalizing the dissemination of false news are only applicable during an election or referendum (StGB, § 264). Despite a resolution by the Austrian National Assembly in December 2021 to develop a strategy for making the population aware of fake news and conspiracy theories in the context of Covid-19, a consistent policy framework is still missing.



This is a striking problem since policy interventions against disinformation (in forms of media literacy measures, support to quality journalism, and to public service media) have been proven as the most efficient measures worldwide (ITU, 2020). It remains to be seen in how far small-scale fact-checking projects by media outlets (such as APA – Austria Presse Agentur) or civil society groups (such as Mimikama) can help to balance this deficit.

In order to support the aim of *protecting personal data*, Austria implemented the General Data Protection Regulation (GDPR) of the European Union with the Data Protection Amendment Act 2018, providing for an exemption for journalists and media owners “[i]f it is necessary to reconcile the right to the protection of personal data with the freedom of expression and information” (§ 9). This provision explicitly establishes the priority of the special expression derogation and limits the applicability of the GDPR provisions in case of personal data processing for direct journalistic purposes (except to the provisions on the confidentiality of such data). However, Austria reserved the exemption exclusively to “media undertakings, media services and their employees”, restricting the notion of the journalist and, thus, the accompanying protections and privileges. This approach is neither in line with CJEU jurisprudence (see, e.g., the *Buivids* case) nor with European standards (see the Recommendation CM/Rec(2022)4 of the Committee of Ministers to member States on promoting a favourable environment for quality journalism in the digital age) which held that the role of ‘watchdogs’ was not to be confined to professional journalists. It is to be noted that Section 11 of the current Data Protection Act requires the Austrian Data Protection Authority to respect the principle of proportionality in imposing fines pursuant to Article 83 GDPR, by applying remedies such as issuing warnings instead of imposing fines, in case of first-time violations. The Media Pluralism Monitor reports that the Austrian Data Protection Authority takes sufficient account of proper use of personal data (Seethaler & Beaufort, 2021, p. 23).

### 3.3. Freedom of information

Within the theoretical framework of the *Mediadelcom* project, freedom of information is discussed as a separate conceptual dimension related to risks and opportunities for deliberative communication. Although it is closely related to freedom of expression, this view helps to broaden the perspective by explicitly addressing aspects related to *access to information*. In Austria, the right to information is guaranteed by Federal Constitutional Law which states that: “All organs entrusted with Federation, provinces and municipal administrative duties as well as the executive officers of other public law corporate bodies shall impart information about matters pertaining to their sphere of competence”, but only to the extent that “this does not conflict with a legal obligation to maintain confidentiality” (B-VG, Art. 20). Moreover, the law clearly states that the obligation of administrative authorities (at a national, regional and local level) to maintain secrecy takes precedence over the obligation to disclose information. Thus, freedom of information is only supported within a very narrow scope and information held by public authorities is only disclosed upon request (and in a rigorous procedural manner). Also, the 1987 Act on the Duty to Grant Information obliges federal authorities to provide information to citizens “without unnecessary delay, but within eight weeks at the latest” in response to an oral or written request – “unless a legal obligation to maintain secrecy precludes this”, such as “official secrecy”, but also, for example, the protection of privacy. In a global comparison, Access Info Europe and the Centre for Law and Democracy (n.d.) describe the Austrian Duty to Grant Information Act as “one of the weakest ‘right to information laws’ in the world”. Debates about a new Freedom of Information Act have been ongoing for years, but it remains unclear as to how far the draft law from February 2021 will take into account persistent critiques (e.g., Access Info Europe, 2021). Although legislation for freedom of information is lagging behind, several Austrian initiatives are noteworthy even under the current legal framework. For example, NGOs such as the *Forum Informationsfreiheit* (Forum Freedom of Information) operate open platforms

for information requests by citizens (e.g., FragDenStaat.at) and support legal procedures in case of non-compliance with those requests.

By contrast, the right to *protection of journalistic sources* is thoroughly established and recognized in Austria. Section 157 of the Austrian Code of Criminal Procedure (StPO) allows a journalist *expressis verbis* to refuse to testify as a witness, in order to protect the identity of his source. Apart from that, the right of journalists not to disclose their sources is also guaranteed in Section 31 of the Media Act. The significance of this provision lies in the fact that, in contrast to the provisions of the StPO, it may be invoked in all judicial proceedings (criminal, civil and administrative). Its legal status was confirmed by the Austrian Supreme Court of Justice in 2010, when it ruled that the protection of journalistic sources is an aspect of the freedom of expression and must therefore be recognized as a constitutional right. The decision also shed light on the question of the balance of interests between protecting the source and obtaining relevant information, as the Court held that no balance of interest was required in the context of the right to protect journalistic sources; in other words, no matter how essential the information could be (e.g., for the success of investigations of a serious crime), a breach of the right guaranteed by the Media Act is not justifiable (International Legal Research Group on Freedom of Expression and Protection of Journalistic Sources, 2016, p. 66).

A specific law to protect *whistleblowing in the media* is still missing in Austria, although existing laws include partial provisions and procedures for whistleblowers in the public and private sectors (Seethaler & Beaufort, 2021, p. 10). However, the process to implement the European Whistleblower Directive is still ongoing. In fact, the European Commission has launched infringement proceedings against Austria after failing to meet the December 2021 deadline to transpose the directive into national law. Civil society experts are calling on policy-makers to ensure a responsible adaptation of the new EU rules in Austria, including an extension of the scope of the Directive to protect reports of national as well as EU law and a facilitation of anonymous reporting (Transparency International Austria, 2020). Meanwhile, criminal charges against the whistleblower whose leak of the *Ibiza affair* video took down Austria's government in 2019 (see above) are expected to discourage other informants and endanger media freedoms, multiple NGOs argued in a joint statement. Fifteen Austrian and international organizations, including Reporters Without Borders, Amnesty International and the Centre for Investigative Journalism, expressed "considerable concerns" over the trial of Julian Hessesenthaler that "the investigations are based on partly fabricated allegations" (Klingert, 2021). In March 2022, the whistleblower was found guilty by an Austrian court and sentenced to 3.5 years in prison.

One of the biggest threats for the Austrian media system remains the particularly high degree of news media concentration (see also section 4) and, thus, the legal protections and guarantees of media pluralism are of specific concern. All the more important it is to make relevant information about *media ownership* available to the public. The Austrian Media Act (§§ 24 and 25) requires all media companies to publish relevant ownership information on their website or in another easily accessible form. This not only includes information on ownership, shareholding, share and voting rights proportions of all persons holding a direct or indirect share in the media owner, but also any undisclosed shareholdings and fiduciary relationships ("ultimate-ownership principle") (see also Directorate-General for Communications Networks, Content and Technology, 2020). The Austrian study for the Media Pluralism Monitor concludes that "[t]ransparency of media ownership is largely provided" (Seethaler & Beaufort, 2021, p. 22). However, information on the ultimate ownership structures of media companies is generally not available (Berka et al., 2019), partly due to a vague formulation in an amendment to the Media Act (the German word *Inhaber* can be interpreted as "100% owner"). The Media Pluralism Monitor (Seethaler & Beaufort, 2021, p. 12) also highlights further limitations such as exemptions for small websites or foreign media that lawmakers should rectify. In an interview for this case study, Fritz Hausjell concludes that accessibility of ownership information would need

to be improved to enable foresightful media regulation: “We need a decent amount of media statistics. For example, we need systematic and regularly updated information on the economic development of all media – not only journalistic media, but also possible competitors in the digital realm. This is necessary to understand at an early stage how the industry develops and how it is possible to take countermeasures.”<sup>2</sup>

### 3.4. Accountability system

#### 3.4.1. Development and agency of change

In addition to the legal regulation of media and communication, the state of media ethics, media self-regulation and media accountability also plays a pivotal role for the quality of deliberative communication. In a European comparison, the infrastructures of media accountability in Austria have recently received fairly positive assessments: In the European Media Accountability Index (Eberwein et al., 2018b, p. 297), which measures the diffusion of different media accountability instruments (MAIs) throughout Europe, Austria shares the 4th rank with Germany and is only outflanked by the Scandinavian countries Norway, Sweden and Finland. However, national state-of-the-art reports (Karmasin et al., 2011, 2018; Weder, 2010; from the perspective of the whole German-language region: Eberwein, 2020a) come to more critical conclusions with regard to the effectiveness of self-regulatory processes in Austria. Likewise, an earlier survey among journalists in 12 European countries showed that traditional instruments of media self-regulation (such as press councils, ethics codes, ombudspersons or media criticism in the daily press) are consistently ascribed a lower impact in Austria than the European average (Alsus et al., 2014, p. 106). Such discrepant results underline that any comparative analysis of different MAIs must not only distinguish between mere existence and efficacy, but also take into account developments over time. The following overview differentiates MAIs according to four “accountability frames” as proposed by Bardoel and d’Haenens (2004; similarly: Fengler et al., 2022): professional accountability, political accountability, market accountability, and public accountability. It will demonstrate that both the existence and the efficacy of MAIs strongly varies in each of these frames, which is also mirrored in the highly unbalanced state of research.

#### 3.4.2. Existing media accountability instruments and an evaluation of their effectiveness

With regard to the field of professional accountability, Gottwald et al. (2006) stress the importance of functioning organizations of media self-regulation as motors in the process of journalistic quality management. In Austria, this role is ascribed to the Austrian Press Council, which was originally founded in 1961 and, thus, has a long history, compared to many other media councils in Europe (Puppis, 2009b, pp. 204–206). However, the year 2001 marks a major turning point in this history because the participating publisher associations retreated from the Press Council after a dispute over the notorious tabloid *Kronen Zeitung* which effectively led to its dissolution. It took almost a decade before the organization could be re-established in 2010 (Zimmermann & Kraus, 2007; Warzilek, 2013). The temporary void in the field institutionalized press self-regulation may explain why many Austrian journalists eye their Press Council with suspicion, according to a survey in 2011/2012 (Fengler et al., 2014). Today, the Austrian Press Council can be regarded as a small, but stable organization – with an annual budget (administered by the Communications Authority) that is sufficient for the basic complaints-handling work (Harder & Knapen, n.d.). It is responsible for periodic print media and their online editions, but not for broadcasting media. In the years from 2011 to 2020, the number of adjudicated annual cases rose from 80 to 418 (Österreichischer Presserat, n.d.). Decisions on these cases are prepared by currently three “Senates”, consisting of 11 members each which are nominated

<sup>2</sup> All direct quotations from the expert interviews conducted for this case study report were translated into English by the authors.

by Austria's most important journalist and publisher associations. Audience members are not represented. The persistent problem that some media outlets (such as *Kronen Zeitung*) ignore the Council's decisions remains unsolved (Harder & Knapen, n.d.).

The Press Council relates each of its decisions to the professional standards set out in the *Ehrenkodex für die österreichische Presse* (Code of Conduct for die Austrian Press). This ethics code was first put down in 1971 and has been adapted on an irregular basis ever since – the last time in 2019 (Österreichischer Presserat, 2019). However, it is mainly conceived as a collection of standards for print journalists, and surveys have repeatedly shown that its contents are not well known among members of the profession (Karmasin, 1996, 2005; Masip et al., n.d.). Until now, there is no general code of ethics for broadcasting journalism – and the opportunity to expand the *Ehrenkodex* into an ethics code for all media types in the course of the re-establishment of the Press Council (as recommended by Gottwald et al., 2006) has not been seized. Instead, several ethical guidelines for different areas of professional public communication – sometimes also at the level of single media companies – are used in parallel (Paganini, 2018). Researchers highlighted their concern that most of the existing codes and guidelines do not adequately take account of current ethical challenges caused by digitization and technological change (Eberwein et al., 2016; Porlezza & Eberwein, 2022; Masip et al., n.d.).

While the principles of professional self-regulation have a rather strong presence in the Austrian print media sector, electronic media have always faced tight regulation by the state. In the case of the public service broadcaster ORF, all relevant provisions are laid down in the ORF Act (see above), which guarantees formal autonomy to the broadcaster, but – as Karmasin et al. (2018, p. 10) note – “politicians traditionally try to gain control over the ORF, for example by influencing staff decisions.” This notion is also confirmed by the expert interview with Klaus Unterberger who states that he considers “government influence on the ORF bodies as illegitimately high.” Nonetheless, the structures of the ORF enable certain elements of journalistic self-organization. The *Redakteursrat* (Journalists Assembly), for example, is an internal instrument of the ORF that gives journalistic employees the possibility to participate in certain decision-making processes (e.g., regarding the programme structure). Its rights are defined in the *ORF-Redakteursstatut* (Editorial Statute; ORF, 2002). In 2011, moreover, an additional code of conduct (*Verhaltenskodex*) for journalistic activities within the ORF was ratified (ORF, 2011). Compliance is monitored by an internal Ethics Council (*Ethikrat*). However, all of these measures are stipulated by the ORF Act and, thus, rather follow the idea of co-regulation than pure self-regulation (Wenzel, 2012).

In contrast to the rather lively discourse about professional instruments of media accountability, particularly in the years after the re-foundation of the Press Council, the field of market accountability plays a less important role in Austria. Even though several studies stress the relevance of media companies as actors in the debate about good journalism (Weder & Karmasin, 2009; Koinig et al., 2019), only few of them make use of the various organizational MAIs that can be observed in many other parts of the world. For example, the daily newspaper *Der Standard* is one of the few Austrian media houses that employ an ombudsperson (*Leserbeauftragter*) to explain editorial decisions to the readers in cases of complaints (Föderl-Schmid & Ranftl, 2008). Regular sections or programs for media journalism – in the sense of a critical reporting about media issues in the media – are also rather an exception than the rule (Trautner, 2008; Breuss, 2017). At least, there are a number of trade journals (such as *Österreichs Journalist:in*, *Extradienst*, *Horizont*, *MedienManager*, *Medianet*, etc.) that regularly publish contributions with regard to professional conduct. However, they only reach comparably small audiences (Karmasin et al., 2018).

Similarly, the potential of initiatives in the realm of public accountability has been realized only partially, until today. Some media houses offer best-practice examples for successful audience

engagement. For example, the ORF has an Audience Council, created on the basis of the ORF Act, that serves to protect the interests of the listeners and viewers of the broadcasting company (ORF, 2019). Less strictly formalized, the Reader Advisory Board of the regional daily *Vorarlberger Nachrichten* allows subscribers to voice their views on the coverage in regular meetings (Riedmann, 2007). A lively online community that motivates users to participate in the process of media criticism can be found at *derStandard.at* (Wiesinger, 2019). Besides, various actors from outside of the industry offer regular contributions to discuss matters of journalistic quality, e.g., the “Initiative Qualität im Journalismus” (IQ – Initiative Quality in Journalism), the private “Medienhaus Wien” (Media House Vienna), or the numerous media and communication researchers organized within the Austrian Society of Communication (ÖGK). In the online realm, the media watch-blog *Kobuk* highlights instances of journalistic misbehaviour. Along with other, more short-lived examples, this blog illustrates the undisputed potential of web-based media accountability processes that build on user participation – also on social media such as Twitter (Schönherr, 2008; Hutter, 2009; Bichler, 2012; Bichler et al., 2013). However, their impact on the practice in Austrian newsrooms remains mediocre at best (Powell & Jempson, 2014).

In sum, the analysis of legal and ethical regulation of Austrian media hints at several risk factors that demand attention. With regards to the legal framework, basic regulatory safeguards for freedom of expression and freedom of information are well established in Austria, thus offering a favourable context for deliberative communication. However, failure to introduce and implement effective measures to counter current problems such as disinformation as well as a lack of legislation to support freedom of information and protect whistleblowers pose a threat for social cohesion and provoke criticism from the most different kinds of actors. Further constraints are found in a comparably restrictive criminalization of defamation and limitations in the disclosure requirements for media ownership information. Although the concept of regulated self-regulation has been identified as an ideal (Gottwald et al., 2006), there are still only few incentives to realize measures of self-control and accountability in practice. This shortcoming is mirrored in the erratic history of the Austrian Press Council, which was dysfunctional for almost a decade, and a lacking acceptance (or knowledge) of central ethical codes among members of the journalistic profession. At the same time, media accountability initiatives at the newsroom level are still underdeveloped, while MAIs driven by the audience offer no effective alternative until now. Nonetheless, several best-practice examples guide the way towards possible improvements in the future.

## 4. Risks and opportunities of journalism domain

### 4.1. Development and agency of change

Probably the most significant and lasting changes regarding democratic developments and turning points in the field of Austrian journalism concern the areas of the media market and political influence. Thus, conditions for economic as well as social sustainability have become more problematic. Serious criticism arises from the high concentration of media, which has tended to increase over the past 20 years. Even the emergence of new media outlets can be traced back to the same owners and can mostly be noted in the tabloid media sector with the widest reach anyway. Besides the public service broadcaster ORF, in each of the federal states, a couple of private media companies have established themselves as market leaders, resulting in low competition. Apart from the capital Vienna, media diversity is almost non-existent. In addition, there is a high market share of foreign companies, which pose a risk of little national influence. At the same time, political influence on journalists has increased significantly, especially since the inauguration of the Chancellor Sebastian Kurz (in office with a short interruption 2017–2021). Consequently, Austria has fallen 17 places in the Reporters Without Borders (RSF)

Press Freedom Index in 2022. The following overview, therefore, highlights specific characteristics of these areas in greater detail, which can be fully grasped against the background of the introductory remarks on social and political change (see chapter 2).

## 4.2. Market conditions

Regarding critical turning points concerning the Austrian media market, several mergers of major private media companies are significant milestones effecting the sustainability of journalism. In 2000, the precondition for print media was an already highly concentrated market, which had been shaped by the amalgamation of the largest publishing houses: In 1987, the German media company WAZ (now Funke Mediengruppe) bought 50% of the tabloid *Kronen Zeitung*, which is Austria's highest-circulation daily newspaper since the early 1970s (market share of 46.9% in 2005, below 30% in the course of the 2010s, daily reach of around 24% in 2021; see section 5 below for more background on media usage). WAZ also acquired a 49.4% stake of the broadsheet newspaper with tabloid tendencies *Kurier* (until 2003/4 among the top four daily newspapers in Austria in terms of circulation) in the following year, to found the Mediaprint complex as a joint production and sales subsidiary. Mediaprint is responsible for their production, distribution, joint marketing, advertising sales, as well as for other weekly and monthly titles (Kaltenbrunner et al., 2007, p. 43). As a result, horizontal and vertical concentration was further amplified.

Another major fusion followed later in 2000, when again the then two largest media companies, the News publishing house and Mediaprint, united. Steinmaurer (2009, pp. 78f.) assessed “that regulation failed in this case, allowing for an unacceptable concentration rate in the media market”. These mergers have had a lasting impact on the media market, cementing power relationships and structures. Moreover, the already dominant newspaper publishers operate the most successful private radio stations and, together with public broadcasting, dominate Austria's online media.

Digital media have hardly been able to defuse media concentration. Apart from the use of social networking sites, no new journalistically organized platform of relevance can be found on the Internet (Trappel, 2019, p. 223). In an interview conducted for this study, Andy Kaltenbrunner highlights this lack of innovation as typical for Austria when he comments: “We ... see the attempt to cling to the old. Even though the old is eroding ... because digitization and globalization have changed the conditions. Austria is lagging far behind in the development of new journalism, new forms of distribution, new forms of organization, forms of financing journalism ... And that, of course, is a disadvantage and can become very alarming in socio-political terms.”

Finally, since 2018, the politically well-connected real estate investor René Benko (Signa Holding) has held around a quarter of the shares in the two main Mediaprint newspapers. The Dichand family, the most powerful media family in Austria to date, has also always held large stakes – after all, Hans Dichand, who died in 2010, founded the *Kronen Zeitung*. The only serious rival of Mediaprint remaining is another media group which belongs to a Catholic foundation, the Styria Group owning the *Kleine Zeitung* (market leader in the South – in Styria and Carinthia). In each of the Western states, one market leader was ultimately able to prevail without significant competition – all of which are owned by family publishers (Kaltenbrunner, 2019, p. 186). When the *WirtschaftsBlatt*, a national Austrian daily newspaper with a focus on the economy, was also discontinued in 2016, a total of only 13 titles remained in the daily newspaper market. The already small number of newspapers is in danger of shrinking further, as the funding basis for the *Wiener Zeitung* (incidentally, the world's oldest daily newspaper still published) could be eliminated. This “threatened demise ... would further weaken pluralism” (RSF, 2022), which bears the risk of further decrease of competition and media diversity.

In terms of revenues, the four biggest media companies account for 65% of the total media market. In addition to the public broadcaster ORF and Mediaprint, these are the Red Bull Media House (founded in 2007, operating the TV station *ServusTV* since 2009) and the Styria Media Group (Seethaler, 2021, p. 724). At the regional level, media diversity can only be said to exist in the capital Vienna and its surrounding area (Trappel, 2019, p. 223).

The mergers have changed the media landscape in Austria with lasting effects towards a less democratic media system. This is amplified by developments of tabloidization and political influence, especially through financing, as further explained below.

A second development with a significant impact on the Austrian media landscape is the steady tabloidization. The print press' widest reach is achieved by tabloids. In addition to the established yellow press, the tabloid *Österreich* has been published predominantly as a freesheet by Mediengruppe Österreich, which is essentially attributable to the Fellner family, since 2006 (Kaltenbrunner, 2019, p. 185; Kaltenbrunner & Kraus, 2008). Since 2016, *Österreich* has been operating a TV station closely linked to the newspaper newsroom, making it a competitor to the *Kronen Zeitung* in the digital and video sector as well. In terms of readership, the latter was overtaken in the capital Vienna for the first time in 2010 by the free daily *Heute*, which was launched in September 2004 (Kaltenbrunner, 2019, p. 185) and is also owned by the Dichand family. This development of tabloidization represents a risk in terms of quality journalism. The growth in the number of media outlets must be viewed critically, as the ownership structures have remained the same.

Broadcasting is characterized by the recent liberalization of the television market and – similar to the print market – by monopolies and a high proportion of German media companies. It was not until 2001 that the dual system for television broadcasting was implemented when the TV station ATV was granted a license for nationwide broadcasting. However, it had a difficult start. In 2006, for example, its market share did not exceed 2.5%, while the two public service media (ORF) channels held 47.6%. Almost the entire balance of the media market (45%) was dominated by German stations (Steinmaurer, 2009, p. 80). To date, the ratios have changed to the disadvantage of the public broadcaster (see section 5). In 2004, another station with an Austrian license, *Puls TV* (later renamed *Puls 4*), was founded and bought by the German media group ProSiebenSat.1 just three years later. ProSiebenSat.1 eventually took over the only remaining national private station, ATV, and partially merged both stations in 2017 (Seethaler & Beaufort, 2021).

While the national television companies are based in Vienna (with the sole exception of *ServusTV* in Salzburg), the radio market is dominated by regional stations. In addition to the public service media, only the two stations *Kronehit* (since 2003; part of the *Kronen Zeitung/Kurier* family) and *Radio Austria* (since 2019, part of the Fellner family) have a nationwide private radio license. Although the market leader in all nine provinces is the public service mainstream program Ö3 (market share between 29% and 39%), the concentration varies by region. Here, too, a high degree of concentration is notable, especially at company level. According to the Media for Democracy Monitor 2021, the top 3 media companies dominate between 86% and 99% of the market (Grünangerl et al., 2021, p. 119).

It is hardly surprising that the latest Media Pluralism Monitor states: “Market Plurality is under threat” (Seethaler & Beaufort, 2021, p. 12). More precisely, the horizontal as well as cross-media concentration is so significant that it represents a high risk for democratic processes: “All concentration measurements for ownership and audience concentration in the audiovisual, radio and newspaper markets are between 71 and 91%” (ibid., p. 12). These concentration processes are supported and reinforced by the evolved media structures (namely family and monopolistic publisher relationships and powerful tabloids) and problematic media policy decisions. The Media for Democracy Monitor 2021 even concludes that “[b]y law, journalists’ independence is

protected, but ownership structures ... limit this freedom in practice" (Grünangerl et al., 2021, p. 130). Furthermore, one of the main risks that can be seen in smaller media markets with a large neighbour of the same language seems to apply to Austria: the likelihood of a foreign takeover of media companies, implying a declining domestic influence over the media (Puppis, 2009a, p. 11).

A fundamental problem that arises in analyses of the Austrian media market is the poor data situation. Obtaining valid market data for the various media segments is a complex process, as there are no official media statistics. Existing data is often difficult to compare and changes are hard to track retrospectively. While media companies are required by law to disclose their ownership structure, challenges arise in practice: Changes in ownership can usually only be reliably traced in company register extracts. These documents are sometimes subject to a fee and do not adequately reflect complex corporate structures (e.g., subsidiaries). The reconstruction of corporate structures therefore involves a great deal of effort.

The precarious state of the media market in Austria leaves few options for key opportunities, despite the fact that the use of synergies is cited as a central advantage of group structures resulting from consolidations. It must be noted, however, that such mergers generally contribute to a decrease in journalistic diversity (Zwicky, 2012, p. 219), which is deemed to be true in Austria. There was also an increase in competition on the daily newspaper market, especially from free newspapers, and from the liberalization of broadcasting on the TV and radio market. However, this has been accompanied by increased tabloidization, an increase in the number of foreign media companies, and – as will be discussed below – a risk of political influence.

### 4.3. Public service media

The ORF is the largest media company in Austria with a market share of 33.2% (2020), an annual turnover of 1,016.8 million Euro, and 2,894 full-time employees (VÖZ, 2021, p. 311). Generally, the corporation is financed by advertising revenues together with broadcasting fees, which vary from state to state between 22.45 Euro and 28.65 Euro per month. In principle, the independence of journalists at ORF is protected by law and the Editorial Statute. However, the legally anchored 'politics-in-broadcasting' system (Hallin & Mancini, 2004, p. 167; Steinmaurer, 2009, p. 83) favours state and party-political attempts to exert influence. Thus, key positions are nominated by the government or state governments: "[T]he close relationship to political parties and authorities becomes obvious in staff decisions taken by the board (*Stiftungsrat*), which is also in charge of appointing the director general" (Grünangerl et al., 2021, p. 130).

Quality standards are regulated and protected by law. The public service mission includes the provision of information and cultural programmes for autochthonous ethnic groups via TV, radio and the Internet and the broadcasting of a television programme for the European audience. In 2010, a quality assurance system was introduced to ensure the fulfilment of the public service mandate.

Although detailed analyses regarding journalists' trust in PSM are lacking, it can be generally stated that trust in social and political institutions is rather low. This finding, however, can be seen as positive in the sense of a critical and functional attitude (Hanitzsch et al., 2019b, pp. 250f.).

Investigative journalism generally does not have a long tradition in Austrian media, including PSM. Nevertheless, the radio feature "#doublecheck" has been running since 2017, addressing "communication matters with a critical view" (Grünangerl et al., 2021, p. 130). Such a format does not exist for the public television programme.



#### 4.4. Production conditions

Journalistic production conditions have been in a process of change for years, closely related to processes of digitization and convergence affecting “journalistic practices, routines, norms, and strategies that shape news production” (Menke et al., 2019, p. 946). In general, a constant transformation in news production can be noted, followed by changes in “newsroom organization and journalistic work” (García Avilés et al., 2009, p. 301). Such changes lead to additional demands that are not of genuinely journalistic nature, like administrative tasks. The increased workload means that time resources are becoming scarcer, which is likely to affect journalistic quality negatively (Kaltenbrunner et al., 2020, p. 212; Zwicky, 2012, pp. 218f.). Increasing digitization is one of the most extensive projects in this area. In the radio sector, in particular, the network for reception was digitized as of 2018, enabling nationwide broadcasts of significantly more radio programmes and thus restructuring broadcasting (Kaltenbrunner et al., 2020, pp. 55f.).

Regarding foreign correspondents, there is relatively little research available. However, it can be noted that the number of correspondents is quite high and the production conditions seem to be stable (Brüggemann et al., 2017; Terzis, 2015). In 2007, 107 journalists worked as foreign correspondents, while the total number of journalists (including employees and freelancers) was 7,067 (Kaltenbrunner et al., 2007, p. 139). Ten years later, Brüggemann et al. (2017) obtained a similar number of foreign correspondents.

According to the Worlds of Journalism study, the number of journalists who see themselves in the watchdog role has increased from 33% in 2007 to 45% in 2019. Yet only about one-fifth of journalists see themselves in the position of acting as a counterbalance to the government. This does not mean, however, that Austrian journalists intend to act in the government’s interests, as the overwhelming majority say they do not see their role as supporting the government or portraying it favourably (Hanitzsch & Lauerer, 2019, pp. 146f.). Practicing criticism is thus one of the key characteristics with which Austrian journalists identify (Kaltenbrunner et al., 2020, p. 253). However, when it comes to anchoring critical guidelines in media companies, they are reluctant to do so, as corresponding mission statements are hardly to be found outside of PSM, as the Media for Democracy Monitor 2021 notes (Grünangerl et al., 2021, p. 134).

Concrete data on the share of investigative journalism in relation to overall reporting is difficult to find. Newsrooms claimed to invest more in investigative journalism in 2019 than in 2009, but funding is limited and financial and human resources are achieved mainly on an ad-hoc basis. Journalists even complain that resources have diminished in recent years and financial support is lacking (Grünangerl et al., 2021, pp. 132/136). In 2019, 51% of journalists said they were dissatisfied with the time resources available for investigative reporting (Kaltenbrunner et al., 2020, p. 253). Nevertheless, there have been successes of investigative journalism that have had drastic political consequences. One such is the publication of the so-called Ibiza video in 2019, which compromised the moral integrity of then-Vice-Chancellor Christian Strache of the right-wing party FPÖ and resulted in a new government being formed (see section 2 above). Collaborations of competing media have also come together in favour of investigative journalism. However, participation in international networks for investigative journalism remains the exception (Grünangerl et al., 2021, p. 135).

#### 4.5. Agency of journalists

The vast majority of the approximately 5,350 full-time journalists (96%) are employed by a media company. The number of freelance journalists in Austria cannot be stated precisely, as they are not required to be members of specific professional associations or interest groups. However, it can be assumed that about 600–900 freelance journalists are active in Austria

(Kaltenbrunner et al., 2020, p. 75f.). In an international comparison, the high proportion of journalists in part-time employment (14%) is notable (Lauerer et al., 2019, p. 97). Within the last ten years, autonomous journalistic jobs are continuously being lost because more media titles are being abandoned than founded. Also, existing editorial teams are regularly downsized (Kaltenbrunner et al., 2020, p. 209). The lack of young journalists raises questions such as the representation of the population, but also how posts should be filled in general, which could be accompanied by a weakening of the sector.

#### 4.6. Journalists' working conditions

In principle, no specific education is needed to work as a journalist in Austria. Nevertheless, the proportion of journalists with an academic education has risen steadily since the 2000s. In 2018/19, 48% of journalists held a university degree (Kaltenbrunner et al., 2020, p. 73). However, Austria is lagging behind in terms of academization, both in the German-speaking countries and internationally. The educational difference between women and men is particularly striking, with 76% of female journalists having a university degree compared to only about 54% of their male colleagues (Dietrich-Gsenger & Seethaler, 2019, p. 61).

The workload in particular has increased. About half of journalists are dissatisfied with their daily workload (Kaltenbrunner et al., 2020, p. 253). Accordingly, job satisfaction has also decreased significantly: In 2008, 75% of journalists were still satisfied with their working hours, in 2019 only about 50% (Kaltenbrunner et al., 2020, p. 82).

Offline and online harassment is quite rare in Austria and is therefore only dealt with by media companies on an ad-hoc basis (Grünangerl et al., 2021, p. 111). Similar to other countries, women are more affected by harassment than men. However, the Covid-19 pandemic had a negative impact on the safety of journalists. Especially "far-right activists and opponents of vaccination have not hesitated to threaten and assault journalists during demonstrations. ... Reporters' coverage of protests faced increasing obstruction from police threatening legal action or harassment through repeated identity checks. Women journalists are particularly at risk. Threatening letters sent to newsrooms are also commonplace" (RSF, 2022).

Recent increases in harassment, combined with a sharp rise in job dissatisfaction, could make the already shrinking job sector of journalism even more unattractive.

#### 4.7. Intra-organizational diversity of human resources

Newsrooms are making progress in terms of organizational diversity. Since 2009, sensitivity to diversity has increased. This is reflected in internal discussions and the choice of experts (Grünangerl et al., 2021, p. 129), although women are still clearly underrepresented in reporting (Riedl et al., 2022). It is encouraging to note an increased number of women in journalism who now account for almost half of the Austrian journalists. However, 45% of them work part-time (compared to 20% of male journalists), which is not conducive to either career or income. As a result, women reach middle management levels, but hardly ever the top positions in editorial departments. Finally, the rapid increase in the average age of journalists to 44.5 years in 2019 is viewed with concern and seen as a possible sign of too little regeneration and thus less future viability (Kaltenbrunner et al., 2020, p. 213).

#### 4.8. Journalistic competencies, education and training

Professionalism in Austrian journalism is growing: In parallel with the higher level of education, the degree of critical, professional self-reflection has increased, as has the knowledge of ethical rules in journalism and the willingness to engage in dialog with the audience (Kaltenbrunner et

al., 2020, p. 212). There are 22 education and training institutions for journalists listed for 2020, 10 of them at university level. The high rate of academization means a turnaround in the development of Austrian journalism, which has lagged behind in European comparisons for years (Kaltenbrunner et al. 2020, p. 172).

#### 4.9. Professional culture and role perception

Regarding a risk analysis of the professional culture, the comparatively close relationship between politicians and journalists comes to mind for Austria – even though political influence on journalists is rarely discussed publicly (Maurer & Riedl, 2020). This becomes a concern, as journalistic dependence and political influence have intensified recently to such an extent that it contradicts and risks basic democratic values (Seethaler & Beaufort, 2021, p. 14; Kaltenbrunner, 2021). This worrying trend seems to be a result of political strategies that are frequently applied by political actors, namely “intensive networking, approaching politically aligned journalists, and intimidating journalists through threats and complaints” (Maurer & Beiler, 2018, p. 2036). The most recent Press Freedom Index by Reporters Without Borders states fittingly, that “[a]ttempts to influence the press are constant in Austria. There is a suspicion that politicians have bought coverage in the tabloid media with taxpayers’ money, while others have tried to intervene by visiting editorial offices, like former Chancellor Sebastian Kurz” (RSF, 2022). The President of RSF’s Austrian section, Fritz Hausjell, urged that the conditions for journalistic work run counter to the proper relationship between government and journalism in a liberal democracy (Reporter ohne Grenzen, 2022). Because of this affair, the Chancellor finally had to resign in 2021. However, there were no new elections, and the same party continues to provide the Chancellor.

The close connection between journalists and politicians is also related to the financing of media companies and thus the concentration of resources for journalism: The private sector depends on state press subsidies, which are tied to quality criteria, but also, problematically, on revenue from arbitrarily awarded advertising contracts commissioned by political institutions. These political advertising expenditures mainly benefit the yellow press, with more than four times the amount of state media expenses (Seethaler, 2021, p. 725). In a way, the precursor for this was the 2011 advertising affair, in which the then Chancellor was accused of exerting pressure on the management of Austrian Federal Railways to book advertisements in his political interests while he was still Transport Minister (Kaltenbrunner, 2021, p. 17). The result was the Media Transparency Act, which came into force in 2012.

The year 2020 brought another alarming change of direction in funding policy. The political handling of the Corona pandemic involved two media strategies. First, more political advertisements were placed in the media. The approach was argued to be based on an increased need for communication due to the pandemic. The biggest profiteers by far were the largest media companies with the most widespread tabloid media (just under half of the advertising revenue went to Mediaprint and Styria, according to Kaltenbrunner, 2021, pp. 33–47). Secondly, there was a special Corona subsidy for daily newspapers, which was assessed according to the circulation of the previous year. This was contrary to the usual press subsidies up to that point, which were awarded according to criteria of diversity and quality. In general, 2020 brought a budget increase for press and broadcasting subsidies, which was particularly strongly geared to the needs and production conditions of the tabloids (Kaltenbrunner, 2021, pp. 86f.).

Moreover, the relatively great importance of entertainment and audience orientation among journalists in Austria as well as the ambition to provide assistance in coping with everyday life is striking. Here, Austrian (together with German) journalists stand out in comparison with their colleagues in other Western countries, as the results of the study *Words of Journalism* (Hanitzsch et al., 2019a) show. Austria also joins the ranks of countries where journalists are

least interested (specifically 51%) in giving people the opportunity to express their views. Furthermore, social engagement among journalists is low. The understanding of the role of an advocacy journalism aiming at social change has drastically lost importance (from about 60% in 2007 to just 32% for 2019) (Hanitzsch & Lauerer, 2019, p. 159). In contrast, supposedly objective reporting (“reporting things as they are”) has become more relevant. While agreement was 79% in 2007, it has now risen to 96% (a similar conclusion was reached by Kaltenbrunner et al., 2020). By contrast, the role of the observer has become somewhat less relevant (down from 92% to 88%). The desire of journalists to classify and analyse events for their audiences remained almost unchanged at 90%. Yet, the number of journalists who consider a critical stance toward the government important has increased from 33% (2007) to 45% (2019). That said, the influence journalists want to exert on day-to-day political events shows a significant decline (from 31% in 2007 to only 10% in 2019) (Hanitzsch & Lauerer, 2019, p. 150). This could be related to the relatively high activity of Austrian journalists on the SNS platform Twitter: They seem to be thematically oriented towards political campaigns and thus follow the selection of agendas of political parties (Hanitzsch & Lauerer, 2019, pp. 150f.; Seethaler & Melischek, 2018).

In summary, major critical developments in Austrian journalism can be identified as a result of the mergers of media companies, which have led to an unacceptably high level of media concentration, to concentrations of power in a few mostly family-run media companies and to tabloidization, all of which is not compatible with a democratic understanding of the media. In addition, there is a high market share of foreign companies, which pose a risk of little national influence. However, this could also present an opportunity for market stimulation in the sense of competition. A second, increasingly alarming development is the rise of political influence on the journalistic field, especially by means of unregulated allocation of disproportionately high funding through political advertisements. In reference to journalistic practice and working conditions, a decreasing number of autonomously working journalists is noticeable – as well as a low number of young journalists. While the level of education and professionalization of journalists has increased in recent years, parity between female and male journalists has almost been achieved, even if the latter is not reflected in the job positions. Nevertheless, opportunities for reflective and diverse journalism could definitely arise in this area.

## 5. Risks and opportunities of media usage patterns domain

### 5.1. Development and agency of change

The analysis in the previous sections has shown that the Austrian media landscape has been subject to profound transformations during the past two decades. Of course, these developments also had an impact on the prevailing patterns of media usage. However, not all of them are typical for Austria alone. For example, the omnipresent trend towards digitization and media convergence undoubtedly influences media usage habits, but is by no means restricted by national borders (Stark & Kist, 2020). On the other hand, the analysis above has pointed to several special characteristics of the Austrian media system that are also relevant for research into media audiences. Among them are the comparably recent introduction of private broadcasting, the continuing relevance of daily newspapers, and the traditionally strong impact of media products from other countries, particularly Germany.

Unfortunately, long-term change processes in Austrian media usage have rarely been in the focus of media and communication research until now (Stark, 2009a, 2009b). The lack of diachronic analyses is regularly criticized by academic media researchers – for example by Uta Rußmann, who emphasizes in an interview: “It would be essential to start conducting representative long-term studies on usage behaviour. It would also tell us a lot about how the media system and media literacy are changing.” Until now, however, no sustainable solutions for this

problem are in sight. The following analysis, therefore, has to rely on fragmentary evidence. Based on the availability of reliable data, it will highlight different aspects with regard to: access to media and diversity in the media system; functionalities of media and relevance of news media; and trust in media.

## 5.2. Access to news and other media content

Questions regarding access to media and diversity in the media system can be answered with the help of usage data from applied audience research, which is available for all media segments, as well as a number of secondary analyses:

In international comparisons, Austria has long been considered as a “country of newspaper readers” (Stark & Karmasin, 2009; see also Seethaler & Melischek, 2006). Meanwhile, however, usage of print media is on the decline. According to the most recent Media Analysis (Media-Analyse, 2021), there are currently 13 daily newspapers in Austria, reaching 56.3% of the adult population (14 years and older). The tabloid *Kronen Zeitung* is still the newspaper with the highest reach (23.9%), co-existing with freesheets such as *Heute* (8.8%), both of which are managed by the Dichand family. The biggest regional newspaper, *Kleine Zeitung*, is read by 9.9% of the Austrians. Quality newspapers such as *Der Standard* (7.3%) or *Die Presse* (4.1%) have comparably small circulations, even though they could increase their readership over the past decade. Generally, newspaper reach has dropped significantly from 73.0% only ten years ago (Media-Analyse, 2011). Since then, interest in printed media decreased particularly in the younger age groups – similar to previous trends in other countries (Stark, 2009a). According to an interview with Fritz Hausjell, one cause for this development can be found in the inflexibility of many Austrian media houses: “Media have not taken demographic change in the population into account. Society has become more and more diverse quite rapidly ... but the traditional journalistic media have not actually responded to this. For example, they could have strengthened diversity within the editorial teams and shown the audience that they make media for the whole society. But the industry has remained very inflexible.” The advent of freesheets in Austria since 2004 has been described as an opportunity to recruit new audiences for the newspaper segment (Hagenah et al., 2015), although it also entails the danger of a further tabloidization of this media type (see also section 4 above).

By contrast, audience shares of broadcasting media have been stable and even increasing in the same time frame. From 2011 to 2021, the daily reach of television among Austrians (aged 12 and older) has risen from 63.5% to 69.2%, according to the Arbeitsgemeinschaft Teletest (AGTT, cit. in ORF, 2022b). Among the active media outlets, the Austrian Broadcasting Corporation (ORF) still reaches the biggest market shares with its two main channels ORF1 (10.2%) and ORF2 (22.1%) (AGTT, 2022) – presumably a result of the late liberalization of the Austrian broadcasting sector that only allowed private competitors for the radio segment in 1998 and for the TV segment in 2001. However, the dominance of the ORF has been slowly eroding since then, while market shares for private competitors (such as ATV or Puls 4) have stabilized at a low level. The biggest competition for the public service broadcaster still comes from German TV (both public and private channels) which reached a cumulated market share of 54.9% in 2020 (RTR, 2021). The fact that the biggest Austrian private TV channels ATV and Puls 4 are both owned by the German ProSiebenSat.1 Media SE has been considered as a major threat to pluralism of the Austrian TV landscape (see also section 4). In the radio segment, the market shares of the public service broadcaster are even more dominant (59.6%), according to the data from Radiotest 2021 (RMS Austria, 2022). Here, however, private competitors could significantly increase their share of listeners to 27.7%. The overall daily reach of radio content among Austrian media users has stabilized at 75.2%. However, both television and radio have to face the challenge of attracting younger audiences (Stark & Kist, 2020).

Compared to the traditional media segments, the Internet has reached the highest usage shares in recent years, particularly in the younger age groups. According to the Austrian Internet Monitor (Integral, 2022), the percentage of Austrians (aged 14 and older) that uses the Internet at least sometimes has reached 91% in 2021; an (almost) daily usage is reported for 80% of the population. These shares have been continually rising since the first wave of the study in 1996. However, the distribution of daily users still slightly differs between men (84%) and women (76%) as well as between those with (87%) and without (77%) a general qualification for university entrance (*Matura*). While the number of households with a desktop PC has been slightly decreasing in the past decade, more and more users go online with a mobile device: In 2020, 85% of the Austrian population owned a smartphone (Integral, cit. in ORF, 2022a). Prandner and Glatz (2021) infer that social inequalities continue to have an impact on media usage, although they are not as pronounced as they were a decade ago (Stark, 2010; Stark & Rußmann, 2009). Among the Austrian websites, the contents offered by the *ORF.at* network are the most popular and attract a share of 78.3% unique users per month among the Austrian Internet users (aged 14 and older). Further news websites with a high traffic are maintained by media companies from the print sector, most notably *Kurier Online* (52.4%), *derStandard.at* (50.3%), and *krone.at* (49.6%), according to the Austrian Web Analysis (ÖWA, 2022).

### 5.3. Relevance of news media

With regard to the functionalities of media, and the relevance of news media in particular, the annual Austrian country reports within the Digital News Project (most recently: Gadringer et al., 2021) offer further insights (for many items even longitudinally since the first wave of this user survey in 2015): The current data illustrate a high interest in journalistic news among Austrian adults (aged 18 and older). 92.8% stated they were generally interested in news content, 26.8% were even “extremely interested” – which is well above the European average. Only 11.0% use news less than once a day. The most important news sources are news programmes on TV (36.0%). Websites and apps by newspapers (15.3%) as well as social media (12.3%) are becoming more important as news sources (particularly among younger users), printed newspapers are losing relevance (9.4%). The willingness to pay for online news, however, is still low: 12.0% of the Austrians stated they had paid for online news during the previous year. Of those that did not pay, 84.7% indicated that it was unlikely they would change their attitude in the future. The Digital News Project also confirms that the TV and radio channels by the public service broadcaster ORF are the most important “news brands” in Austria – with 49.3% noting they had watched ORF2 to get access to news in the previous week. The relevance of public service news programmes from an audience perspective is underlined by recent qualitative studies (e.g., Gonser et al., 2017; Gonser & Reiter, 2018) which highlight that the ORF is perceived as a key source for information and news programming and that many users attribute a high quality to it.

### 5.4. Trust in media

Besides a broad scope of further data, the Austrian Digital News Report (Gadringer et al., 2021) also illustrates that trust in news has reached a maximum value since the launch of the annual study: 46.3% stated that they generally trust the news in their country in 2021 – which is a thorough increase of 6,6 percentage points compared to the previous year. This result is slightly above the European average and seems to confirm findings from the regular Eurobarometer surveys (most recently: European Commission, 2021) that measure trust in the media and regularly find higher ratings in Austria (2021: 49%) than in the rest of the European Union (2021: 41%). The most trusted news brands are the public service broadcaster ORF (which 74.0% of the Austrians describe as a trustworthy news source) as well as the quality newspa-

pers *Der Standard* (69.3%) and *Die Presse* (67.0%), according to Gadringer et al. (2021). News on social media, on the other hand, are only trusted by 17.6% of the population. As research for the comparative Media Performance and Democracy project has demonstrated, a high level of trust goes hand in hand with quality criteria such as relevance, diversity and contextualization (Hasebrink et al., 2021). At the same time, a qualitative study among young adults (aged 18–25) in Austria shows that their trust in traditional media is considerably lower than the Austrian average and that they often tend to handle news on social media uncritically (Russmann & Hess, 2020). A similar preference for information on social media (particularly Facebook) has been described for Austrian users with a migration background (Perlot & Filzmaier, 2021). Both findings can be read as a call for more media literacy measures for these particular age groups or social milieus (see also section 6).

Besides, it must be noted that the recent trend towards an increase in news trust may well be influenced by news usage habits propelled by the Covid-19 pandemic. As a survey by MindTake Research (2020) has shown, news portals – along with home office tools and online supermarkets – were the biggest “winners” among Austrian websites in the course of the first Covid-related shutdown in spring 2020. In line with the findings of the Digital News Project, Gallup Austria (Gallup Institut, 2020) diagnosed a “renaissance” of traditional media, particularly television, as a source for news about the pandemic, while mistrust in social media is skyrocketing. Results from the Austrian Corona Panel Project (ACPP) even show that audience trust in the media coverage of the Corona crisis is generally higher than trust in the coverage of other topics (Prandner & Eberl, 2020). At the same time, the ACPP collected hints at conscious acts of news avoidance in the further course of the pandemic (Lecheler & Aaldering, 2020). At any rate, such results offer good reasons to consider Covid-19 as another critical juncture with a momentary impact on media usage in Austria, even if the future effects of this influence are still unclear.

Taken together, the analysed data on media usage patterns in Austria highlight several turning points in the course of the past two decades. Some of them are by no means typical for the Austrian media system – such as the general trend towards digitization and media convergence, the resulting characteristics in the media usage of younger adults that have grown up as digital natives, and, more recently, the impact by the Covid-19 pandemic. Others must be interpreted as specific national trends that create special risks as well as opportunities – most notably the continuing dominance of public service media as a consequence of the late deregulation of the broadcasting sector, the above-average relevance of daily newspapers, accompanied by the advent of freesheets, and the continuing impact of media from the German neighbour. Above all, the lack of uniform and reliable data for long-term observations remains a problem that future audience researchers need to tackle.

## 6. Risks and opportunities of media related competencies domain

### 6.1. Development and agency of change

The ongoing transformation from mass media to social media (see also section 5 above), from mass communication to something that Castells (2013, p. 55) calls “mass self-communication”, has shaped the main critical junctures for the domain of media-related competencies. According to Castells, this historically new form of communication continues to be mass communication because global platforms such as YouTube or Facebook make it possible to reach a global audience. At the same time, this type of media communication differs from traditional mass communication, as user-generated content has become an essential part of media production. The definition of potential recipients and the selection of messages on the web are also carried out individually. Following Castells, “the articulation of all forms of communication into a composite, interactive, digital hypertext that includes, mixes, and recombines in their diversity the whole range of cultural expressions conveyed by human interaction” has “considerable consequences for social organization and cultural change” (ibid). These consequences also affect risks and opportunities regarding media-related competencies. Social media, however, challenge democracy and deliberative communication as a broad basis of knowledge is required to understand the increasingly complex contexts in both mediatized and interpersonal communication. These findings apply to Austria but are, of course, a global phenomenon.

### 6.2. Overview of media-related competencies in policy documents

Austria’s formal education system has been focusing strongly on improving media literacy. Media has been part of education since the 1930s. However, the first media decree was published only in 1973. In its most recent revision, the “Grundsatzterlass zur Medienerziehung” (Basic Decree on Media Education) was published in 2012. Media education in Austria is still supported and shaped by the respective ministries responsible for education. In practice, however, it is mainly committed teachers who dedicate themselves to media education or media didactics (Blaschitz & Seibt, 2008).

Media literacy was a widespread buzzword in the 1990s and early 2000s and the subject of various societal discussions. The ‘hype’ about media literacy has subsided. Instead, digital skills (however formulated) have moved into the focus of the debates (Trültzsch-Wijnen & Brandhofer, 2020, p. 7). Thus, starting with the forthcoming academic year in September 2022, the compulsory subject “basic education in digital skills” will be implemented for lower secondary education (BMBWF, 2022).

Since media literacy is a broad category (Buckingham, 2003), an exclusive focus on digital competencies is far too narrow to cover all aspects of media-related competencies. Nevertheless, media education is increasingly restricted to *digital competencies* and *user skills* (Cwielong et al., 2021; Oppl et al., 2021; Swertz, 2021; Brandhofer et al., 2018). Moreover, today, media education focuses on promoting *digital skills* to achieve better “employability” for the citizens (OECD, 2021b, PIAAC Design).

### 6.3. Information about the media literacy programs in formal and/or in non-formal education

Media literacy programs are an obligatory part of the curricula. Extracurricular activities are offered as part of support programs for students and adults (further education) and are available at all levels of education. Media literacy programs in formal education are generally availa-



ble for different social classes and media users in different regions of the country. However, information about the quality of media literacy programs is insufficient.

The programs to improve media skills in Austria are aimed at younger people, the employed, and the unemployed. Programs for older people are rare and in need of improvement. These findings confirm that promoting media literacy is primarily about improving employability. Christian Swertz argues similarly in an interview conducted for this study when he emphasizes that digital skills are mostly focused on preparing students for the job market: “It’s not about education, it’s about preparation for the job market.” Understanding media literacy in this way and degrading the acquirement of competencies for democratic participation and debate to a nice-to-have is undoubtedly a considerable risk. The same applies to *communication ethics*. However, the call to integrate ethics (particularly communication and media ethics) into curricula for media and communications is almost 20 years old (Krainer et al., 2020, p. 238).

#### 6.4. Actors and agents of media-related competencies: risks and opportunities

Regarding media-related competencies, we have to ask who has which competencies, who can have them, and who promotes them in which way? Is there a country-level policy on implementing media education, and what kinds of national strategies are there for improving people’s media competencies?

Adult education is even more geared towards employability than schools and universities. Looking at the courses offered at the Austrian VHS (adult education centre) in the category “Computer, Internet & Multimedia”, there are courses related to *digital skills*: Internet & security, graphics & multimedia, Office, operating systems ECDL, etc. (<https://www.vhs.at/de/k/computer-internet-und-multimedia>). Regarding Austria’s most relevant institution for adult education, *WiFi* (Economic Development Institute of the Austrian Economic Chambers), of course, it is not surprising that its focus regarding media-related competencies is exclusively on *digital skills*, since the relevant category – similar to the VHS – is called “IT, Medien” (<https://www.wifiwien.at/kategorie/e-it-medien>). Thus, adult education in media (and media-related competencies) is overwhelmingly – not to say exclusively – dedicated to *digital skills* and propelling employability (Roth-Ebner, 2015). Moreover, regarding *social contexts of media and communication-related competencies*, Zilian and Zilian (2020, p. 11) emphasize “that existing patterns of inequality are reflected in the distribution of digital problem solving skills in Austria”. Risks and opportunities of digital communication go hand in hand with phenomena of socially unequal diffusion and appropriation of the Internet and social media by civil society audiences (Bonfadelli & Meier 2021, p. 421).

#### 6.5. Assessment of media-related competencies among citizens

*Cognitive abilities* are undoubtedly the basis of any form of media-related competencies. However, the question arises as to how these skills can be defined and measured? Hand-in-hand with establishing a ranking society (Ringel & Werron, 2020) during the past 20 years, institutions nationally and internationally have developed measuring instruments and rankings for comparison purposes (Edelmann, 2010). The most prominent example is the “Programme for International Student Assessment”, also known as PISA. Arguably, PISA can provide indicators of *cognitive abilities* – at least for students. Certainly, PISA provides rankings that make it possible to compare national performance and corresponding changes over time. Looking at the results of the previous PISA studies, Austria mainly was around the OECD average (OECD, 2018).

Austria also takes part in other international studies like PIRLS (Progress in International Reading Literacy Study) and TIMSS (Trends in International Mathematics and Science Study), which are conducted by the IEA (International Association for the Evaluation of Educational Achievement). In 2023, Austria will participate in the ICILS (International Computer and Information Literacy Study) for the first time (<https://www.iqs.gv.at/themen/internationale-studien>). “The study measures international differences in students’ computer and information literacy (CIL). This type of literacy refers to students’ ability to use computers to investigate, create, and communicate to participate effectively at home, at school, in the workplace, and in the community” (<https://www.iea.nl/studies/iea/icils>). On a national level, iKM PLUS (*individual competence measurement PLUS*) is an instrument for recording subject-related and assessing schoolchildren’s interdisciplinary competencies (<https://www.iqs.gv.at/downloads/nationale-kompetenzerhebung/ikm-plus>). All in all, these kinds of studies aim to provide information about the strengths and weaknesses of education systems in an international comparison. The data are mainly presented as quantitative indicators, allowing conclusions about specific skills.

Another way to measure a population’s *cognitive competencies* could be to look at the number of tertiary degrees. Regarding “25–64 year-olds who have completed tertiary-type A and advanced research programs”, the OECD education report 2000 speaks of “less than 10% in Austria” (OECD, 2000). Even after implementing the Bologna Process, tertiary degrees in 2019 in Austria were below the EU23 average. However, in the range of 25–34 year-olds, Austria could match up to 41% compared to the EU22 average of 45% (OECD, 2021a). Nevertheless, does this mean that media-related competencies have improved over the past 20 years?

However, “critical media and techno-literacies are an imperative for participatory democracy and citizenship because digital information communication technologies and a market-based media culture have fragmented, connected, converged, diversified, homogenized, flattened, broadened, and reshaped the world” (Kellner 2021, p. 261). Undoubtedly this goes far beyond skills that are primarily aimed at promoting employability.

## 7. Analytical conclusions

The analysis presented in this case study report aimed at identifying critical junctures in the media transformation process between 2000–2020 and investigating key risks and opportunities for deliberative communication in Austria. In each of the research domains under study, various challenges could be highlighted, although not all of them are typically Austrian:

- Regarding the legal framework, for example, failure to introduce and implement effective measures to counter current problems such as disinformation as well as a lack of legislation to support the right to information and protect whistleblowers pose a threat for social cohesion. Further constraints are found in a comparably restrictive criminalization of defamation and the limited impact of safeguards on media pluralism (including the limitations on media ownership transparency), although basic regulatory safeguards for freedom of expression and freedom of information are well established and implemented in Austria.
- In the context of media ethics and accountability, the study deplores a lack of incentives for more media self-regulation. This problem is mirrored, among other things, in the erratic history of the Austrian Press Council, which was dysfunctional for almost a decade, and a lacking acceptance (or knowledge) of central ethical codes among members of the journalistic profession. Media accountability initiatives at the level of the newsroom or driven by societal actors offer no effective alternative up till today.

Nonetheless, several best-practice examples guide the way towards possible improvements in the future.

- In the field of journalism, the most significant challenges relate to recent developments of the media market. The analysis demonstrates that several mergers of media companies after 2000 led to a notable aggravation of concentration tendencies – and results in the insight that market plurality in Austria is currently under threat. Besides, manifold political influences on journalistic practice (also in the case of public service media) as well as questionable trends in the field of journalistic production and working conditions are a source of concern. In the course of digitization, for instance, practical news work is increasingly characterised by a scarcity of time resources and a higher workload, while journalistic quality, especially the extent of resource-intensive practices such as investigative journalism, suffers due to lack of funding. At the same time, job satisfaction has decreased drastically, especially due to the growing amount of work, and the security situation of journalists has worsened – also because of the Covid-19 pandemic. While the level of professionalism and the education of journalists have generally improved, particularly young journalists are scarce. The number of female and male journalists is almost balanced; nevertheless, women still rarely reach top positions and are restricted to rather precarious working conditions.
- With a view to media audiences, the report discusses the recent deregulation of the broadcasting sector, resulting in the continuing dominance of public service media, and the impact of foreign media products as typically Austrian context factors that shape media usage. The above-average relevance of daily newspapers, accompanied by the advent of freesheets, can also be highlighted as a noteworthy feature. Further challenges – such as the general trend towards digitization and media convergence, the resulting characteristics in the media usage of younger adults, and, more recently, the impact by Covid-19 – have a broader scope and are also eminent in other countries in Europe and across the globe.
- The examination of risks and opportunities for media-related competencies turns the spotlight on the ongoing transformation from traditional mass media to social media and emphasizes the resulting challenges for the educational sector. It shows, among other things, that Austria's formal education system has been focusing strongly on improving media literacy for decades. Today, however, there is a predominant interest in promoting digital skills and propelling employability – particularly in the field of adult education. Risks and opportunities of digital communication go hand in hand with phenomena of socially unequal diffusion and appropriation of the Internet and social media by civil society audiences.

Overall, the case study displays a complex interplay of stakeholders that participate in the processes shaping media change. These include actors and actor groups at all levels of influence – i.e., according to Shoemaker and Reese (2014), individuals, routine practices, media organizations, social institutions, social systems, both media-internal and media-external (e.g., political, economic, academic, etc.). Of course, the precise nature of their interactions and their impact are difficult to measure and assess with the sole help of a literature study, particularly since their roles are subject to change in the historical phase covered by this report, just as the media are changing. Still, the collected insights provide an overview of current and recent trends, highlighting pressing concerns, but also presenting good practices from the Austrian context. A more nuanced evaluation demands specialized (and comparative) analytical techniques, such as fuzzy-set qualitative comparative analysis and agent-based modelling, which are reserved for a later stage of the Mediadecom project.

Ultimately, the study collects ample proof that an assessment of the Austrian media system is a complex task which evades easy categorizations. Indeed, the report could highlight characteristics that are typical for many democratic-corporatist media systems in Europe (such as the prominent role of public service media), while others (such as a high degree of political parallelism) rather resemble descriptions of polarized-pluralist systems. Regarding the media transformations since the turn of the millennium, thus, it still seems valid to describe Austria as a “border-crosser”, as proposed by Karmasin et al. (2011). On the other hand, an analysis of risks and opportunities for deliberative communication brings to attention various broader trends and challenges (such as digitization and media convergence, but also Covid-19) that are similarly relevant for other countries, too. In the long run, these influences may lead to an approximation of international media systems, even though the outcome of many current changes processes is still difficult to foresee. It will be a key task for comparative media and communication research to juxtapose national and transnational influences on deliberative communication in differing media systems more systematically, to fully understand the agency of different actors in propelling certain risks and opportunities.

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