THE STATE OF COMMUNITY MEDIA
IN THE EUROPEAN UNION

CULTURE AND EDUCATION

Policy Department Structural and Cohesion Policies

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IN THE EUROPEAN UNION

STUDY

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Policy Department Structural and Cohesion Policies

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Content:

"Community media" are non-profit, open to or accountable to the community that they serve and mainly staffed by volunteers. As such, they form a separate sub-group within the media sector. The purpose of this study is to outline how Community Media are organised across the EU and to underline their distinctive contribution to media pluralism and other socio-political objectives.

Executive Summary

I. Introduction

Community Media (CM) constitute a dynamic and highly diverse part of the European Union's media landscape. Yet, little information is available regarding the sector's scope, its potential and on the status of CM organisations in different Member States. The purpose of this report is to investigate the state of CM in the EU and to examine the factors that influence their development. Particular attention has been focussed on examining how CM activity meets EU policy objectives. Furthermore, an assessment of the sector's involvement at EU level is expected to inform future policy choices regarding CM.

II. The State of Community Media in the European Union

According to the client brief, the term CM is defined as "media that are non-profit and owned by or accountable to the community that they seek to serve. CM are open to participation in programme making and management by members of the community".

This study begins by examining a number of CM's contributions that are of public interest. These contributions are illustrated with several case studies of CM initiatives. The sector's activities are often of social, cultural, political and economic relevance. Its contributions towards the public interest form the basis of political support CM receive in several Member States. These contributions are perceived and prioritised differently by CM organisations and governments across the EU. Subsequently, the sector's public profile varies from country to country.

On the basis of a sector mapping, consultants estimated CM activity across the EU, indicating higher levels of activity in Member States in the North-West of Europe and modest levels of activity in many of the new Member States. Results of a country by country survey, and a total of 36 conducted consultations, show that levels of activity are closely related to public awareness and legal recognition of the sector as well as to the existence of underlying regulatory procedures. The mapping also confirms the high diversity of the sector and the different roles CM play in different Member States. Moreover, desk research exhibited that audience shares and the number of participants of CM vary significantly. Whereas some initiatives are well known across different communities, others operate on a much smaller scale and may cater for one specific community. However, research also shows that CM often reach out to large proportions of very specific audience groups.

The diversity described above is also reflected in how the sector is organised at national level, where CM are represented by a variety of different sector associations. As further outlined in Section 1, results of the mapping should be perceived as indicative due to the scarcity of available data regarding the sector.

Legal status of CM is important to the development of CM organisations. Research shows that a recognised legal status enables CM organisations to engage with regulatory authorities, funding partners as well as advertisers, thus contributing to their sustainable development. Organisations are registered as various legal entities while some broadcasters still operate as pirate stations.

The underlying regulatory situation in most Member States reflects low levels of awareness amongst policy makers regarding this sector and its potential societal contributions. While EU

regulation contains provisions that could enable recognition of CM at national level, the sector finds it difficult to make policy makers aware of its requirements. There are some countries that have implemented policies which support CM development; this study has used Hungary, the United Kingdom, France and Ireland as examples to demonstrate this.

Digital technology is an opportunity as well as a challenge for CM. Internet-based CM allows the sector to reach out to new audiences as well as to engage new participants in innovative ways. It also allows the sector to adopt new operational models as well as the ability to disseminate and exchange content. Furthermore, the future switch-over to digital broadcasting could free radio spectrum that could potentially be utilised for new CM services. However, there is a growing concern among the sector that switch-over policies of most Member States do not take CM into account. Moreover, transition to Digital – whether to internet or digital broadcasting – involves some high initial costs that many CM organisations (as well as many other small scale media organisations) cannot afford. Finally, digital broadcasting standards often do not cater for the needs of small media organisations such as CM and may exclude the sector from future platforms. The study shows that only few countries include must carry rules to prevent this from happening.

CM organisations rely on a variety of different resources. These include commercial revenues as well as state support. The sector also heavily depends on volunteers. Differing economic and social circumstances make it difficult to estimate an average budget for a Community Media organisation. Moreover, public policy sets the parameters under which the sector operates in each country. Though in some countries regulation promotes high flexibility and entrepreneurship from CM organisations, others adopt policies that lead the sector to operate in a more stable and institutionalised fashion.

In the context of all these differences and distinctions, the sector shares some common traits. Research has shown that there is currently momentum in the development of CM across the EU. The sector has embraced digital technology and CM organisations are trying to act collectively to articulate their positions before policy makers. Moreover, in the current climate of things, CM could certainly benefit from the increasingly stronger concept of emerging knowledge-based societies. For if society's future relies on the active involvement of informed, media literate citizens, CM can play a definitive role in facilitating such a future. A key challenge for the sector is to raise awareness among policy makers and the general public regarding this potential contribution.

III. EU Policies and Community Media

As part of the study, CM's relation to several EU policies as well as the impact of EU policy making on the sector was examined. The sector's societal contributions are in line with a range of EU policies which are listed in the main body of the report. However, the report also shows that many of regulations that would benefit the sector need to be implemented at Member State level:

- Regulations in the EU telecommunications regulatory package include measures regarding non-discriminatory spectrum allocation and general interest objectives for the establishment of "Must Carry" rules. Yet, the inclusion of CM in such measures depends on Member States.

- EU audiovisual regulation acknowledges that media pluralism and diversity are preconditions for democracy in the EU. The European Commission has recently highlighted the importance of media literacy to foster active citizenship. Nevertheless, it has to be noted that media policy remains a responsibility of national authorities and that the EU is quite limited in its involvement with this field.

- There are a number of EU policies relating to freedom of speech, racial equality and the non-discrimination of minorities that are of relevance to CM. Consultations revealed that the EU might be able to actively support the sector in these areas without impeding on the rights of Member States.

- The recently published Communication on Culture notes the importance of local creativity as well as the role of local culture in fostering social cohesion and innovation. The Communication could eventually lead to policy changes that may positively influence the CM sector.

- The EU institutions increasingly wish to enter into a dialogue with local and regional communities regarding important EU issues. The local nature of many CM organisations provides the Union with an opportunity to promote public dialogue on European issues via CM services.

Although there is no EU support programme specifically directed towards CM, the study shows that the sector benefits from a range of EU funding. Research showed that CM organisations participate in decentralised as well as centralised funding programmes such as European Social Fund initiatives or the Gruntving Programme. While decentralised funding offers the most opportunities for the sector, consultations showed that only a minority of the sector has the knowledge and experience to benefit from EU support and that funding officers are not aware of the breadth of CM's potential societal contributions. The scope exists to further integrate a concept of CM into future EU support actions.

There also appears to be momentum regarding the sector's endeavours to engage at EU-level. However, it so far has not been successful in developing a distinct profile among EU-institutions and policy makers. Increased awareness on both sides and more communication between the sector and EU institutions is therefore required.

IV. Opportunities for Future Engagement with the Sector

The study provides evidence that the sector has the potential to contribute to a wide range of EU policy objectives. In return, EU policy can play a major role in helping the sector tackle some key issues that can either foster or impede CM's development at national as well as at EU level. The sector needs to raise its profile at EU level in a more consistent and distinct way to gain recognition and acknowledgement. CM require further recognition in national media law as well as an increased awareness amongst regulatory authorities regarding its nature and its needs – specifically with regards to spectrum allocation and digital switch-over and must carry rules. Due to the high diversity of the sector, CM organisations and associations can learn from each other. The sector thus benefits from being very collaborative. Finally, dedicated funding support can help the sector to develop the capacities needed to operate in a more continuous and sustainable fashion.

It is the responsibility of the CM sector to achieve many of the above mentioned objectives. As already indicated, many of the challenges CM face need to be resolved at Member State level.

However, the European Parliament's CULT Committee can support the development of CM in the EU. The following lists a set of recommendations to the Client which are further outlined in the main body of the report:

- The Committee should highlight the sector's role in achieving various EU policy objectives: A reference should be made to CM in Parliament Resolutions regarding several planned policy initiatives of relevance to the sector (Review of the telecommunications regulatory package, Communications on media pluralism and media literacy, etc.).

- Support networking and presence of CM at EU level: Alongside the continuity of the Committee's engagement with the sector, it should issue an Own Initiative Report regarding the potential of CM to implement EU policy objectives. Such an initiative could be supported by a parliamentary hearing on CM where representatives of the sector and experts would present their case before the Parliament. Furthermore, CM should be put on the agenda of the audiovisual inter-group as a future topic for discussion.

- The Committee should encourage the sector to create a pan-European Community Media association that represents the sector before EU institutions and policy makers. It should be enquired whether EC support for European Cultural Bodies could be utilised to assist such a body. In addition, research regarding the sector should be promoted as part of the 7th Framework Programme to increase understanding of the sector.

- The Committee should support the sector in its endeavour to establish a European Union wide internet-based CM portal. This would help the sector to exchange best practices as well as to coalesce and raise CM's public profile. Such a profile could also foster further understanding regarding the potential benefit of using internet-based services, such as online repositories of free-to-download programmes among the sector.

- The sector's potential to connect the EU with local and regional communities should be highlighted. The Committee should raise awareness among European policy makers regarding the opportunity to promote public dialogue on EU issues via CM. This could be done by inquiring whether DG Communication is aware of the sector.

- Increased knowledge exchange among local, regional and national public authorities that govern the CM sector should be encouraged. The Committee should inform the sector of the possibility to apply for support that would enable CM organisations to engage in a dialogue with public bodies, regarding how to best develop policies that meet the needs of the sector (e.g. Regions for Economic Change, etc.).

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1. THE ASSIGNMENT

1.1. The Client Brief

KEA European Affairs ("KEA") has been retained by the Directorate-General Internal Policies of the Union, Directorate B, Structural and Cohesion Policies ("the Client"), on request of the European Parliament's Committee of Culture and Education, to conduct a Study on The State of Community Media in the European Union (the "Assignment").

The aim of the Assignment is to objectively portray the situation of CM in the EU.

1.2. Scope and Definition

The Client brief requests KEA to build a picture of the place occupied by CM in the overall media landscape. The study is to describe key issues in Member States. However, a comparative study has not been requested. Specific issues to be covered during the Assignment include:

- Legal status of Community Media ("CM")
- Regulatory situation
- Financial information
- CM's contribution to pluralism and cultural diversity
- Policy at the EU level

According to the brief, the term CM is defined as "media that are non-profit and owned by or accountable to the community that they seek to serve. CM are open to participation in programme making and management by members of the community". Therefore, in the context of this broad definition, the sector may also include activities at times labelled with different terms in different countries, such as "Free Media", "Civil Media", "Associative Media", "Open Media", etc. Furthermore, CM comprises radio, television, internet as well as press activities in the context of the Assignment.
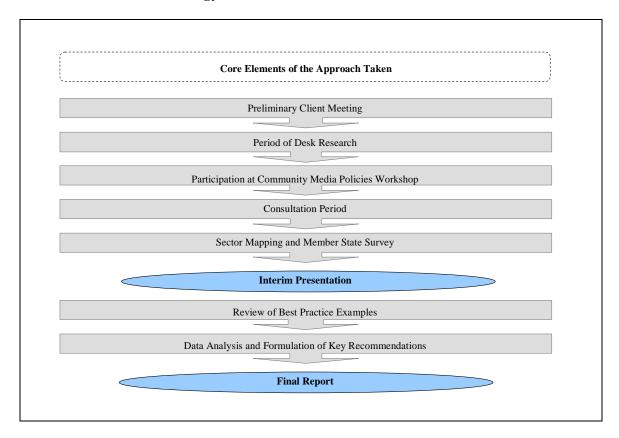
1.3. Approach

1.3.1. Summary Methodology

A two-pronged approach, consisting of desk research and primary research, was adopted to suit the objectives of the Assignment. The following illustrates key elements of the methodology:

Elements of the Methodology:

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1.3.2. Preliminary Client Meeting

Following the initial contract offer, a meeting with the Client was held to discuss the Assignment's objectives and intentions in detail. Based on preliminary research and experience, the Client brief was extended to also briefly highlight the impact of digital technology on CM.

1.3.3. Period of Desk Research

To develop an up-to-date and in-depth understanding pertaining to all the issues highlighted in the Client brief, the Assignment was launched with an extensive period of desk research. This exercise included a comprehensive review of all public domain material. Documents from academia, national and international interest groups, policy makers and regulators at regional, national and European level as well as civil society organisations were collected and reviewed. A list of selected sources is included in the appendices.

1.3.4. Participation at Community Media Policies Workshop

The consultants decided at an early stage to engage with the sector and registered to take part in a two-day workshop on CM Policies in the EU, organised by the Central European University's Centre for Media and Communications Studies in Budapest in May 2007. During the workshop, a range of sector stakeholders both from academia, umbrella organisations and individual initiatives were consulted.

1.3.5. Consultation Period

KEA conducted approximately 36 consultations covering 16 Member States of the Union. Consultations were conducted to develop a profound understanding of the real issues that CM initiatives face throughout the EU. They were also used to identify additional areas for further enquiry and to discuss possible scenarios for policy recommendations with the CM constituency. Individuals interviewed included representatives from the following organisations:

- CM organisations
- Local, national and international CM associations
- Policy makers from regional, national and international levels
- Academic researchers
- Representatives of Civil Society Organisations
- EU institutions

A full consultation list is included in the report's appendices.

1.3.6. Sector Mapping and Member State Survey

To provide a comprehensive picture of the situation of CM in the EU, KEA sought to complement some of the data discovered during desk research and the consultation period. The consultants designed a questionnaire with a view to collect information regarding the legal, regulatory and organisational situation of CM in each Member State. This questionnaire was sent out to CM organisations and/or media and cultural policy experts that were identified in each Member State. Completed or partially completed questionnaires were received for 20 Member States. Unfortunately, not all respondents provided answers to every question. A sample questionnaire and a summary sheet of answers to the key questions are included in the appendices.

The following matrix illustrates which countries have been covered by means of consultation and the survey exercise:

Country	At	Be	Bg	Cy	Cz	De	Da	El	Es	Et	Fi	Fr	Hu	Ie
Consultations requested	X	x	x			x	x		x	x	x	x	x	x
Consultations completed	x	x				x			x	x	x	x	x	x
Questionnaire sent out	x	x	x		x	x	x	x	x		x	x	x	x
Questionnaire completed	x	x			x	x	x	x	x		x	x		x
Country	It	Lt	Lu	Lv	Mt	Nl	Pl	Pt	Ro	Si	Sk	Sw	Uk	Eu
Consultations requested	x	x		x		x	x			x		x	x	x
Consultations completed	x					x	x			x		x	x	x
Questionnaire sent out	x	x	x	x	x	x	x	x	x	x	x	x	x	
Questionnaire completed	x				x	x	x	x	x	x	x	x	x	

1.3.7. Review of Good Practice Examples

Research and consultations helped to identify a range of examples of good practice that illustrate the societal contributions of CM in Europe. These good practices are included to highlight specific circumstances and elements of the sector consultants decided to point out in the report.

1.3.8. Data Analysis and Formulation of Key Recommendations

KEA compared and frequently discussed the different circumstances of CM throughout Europe during internal sessions with senior office staff and developed a set of preliminary conclusions that were tested with the Client during an interim-meeting in July 2007. Key recommendations were also tested with experts in the field of media policy and several sector stakeholders.

1.3.9. Availability of Data

In general, concrete data on the sector's activity throughout Europe and its legal, regulatory and financial situation is very limited and was difficult to obtain during the Assignment. In many countries, for example, only the numbers of existing Community Broadcasting (i.e. radio and television) organisations are available. Furthermore, some of the numbers collected regarding activity are based on estimations of national stakeholders rather than on statistic evidence and should therefore only be considered as indicative. The same holds for the legal and regulatory situations of the sector. As CM is defined differently throughout the EU, it is recognised in different ways by law, if at all. In some cases, sector representatives found it difficult to point towards the appropriate legal reference for their sector. To some extent this lack of data is based on the fact that many Community Broadcasting stations were illegal initiatives in their beginnings and therefore avoided engagement with public authorities.

2. THE STATE OF COMMUNITY MEDIA IN THE EU

2.1. Introduction

CM organisations are non-profit and of participatory nature. They give voice to different communities and encourage social cohesion, diversity, creativity and participation. The sector is diverse and operates differently across the EU. The following section seeks to identify some of CM's main characteristics and indicates current trends and developments regarding CM activity in the Union. It additionally highlights the legal, regulatory, financial and technological factors that contribute to the development of the sector.

2.2. Community Medias Contributions in the Public Interest

2.2.1. A Diverse Range of Societal Contributions

CM's contributions regarding public interest can be of cultural, political, social and economic nature and depend on each organisation's individual intentions and abilities. In the context of the sector's economic environment, however, it is increasingly important that it articulates these contributions to diverse stakeholders at local, national and European level[1].

There have been several attempts to describe CM's societal contributions with the aim of developing the profile of a "third" media sector (alongside private media and public service broadcasting) throughout the EU. The British Community Media Association has successfully established this notion in the UK. Though, the boundaries between public service broadcasting and CM are not as distinct in all Member States. Consultations demonstrate that local initiatives in some countries are considered to be part of the local tier of the public service broadcasting system and that a certain level of stability can derive from such arrangement (e.g. in the area of funding or relating to underlying regulations). In this context, the following concentrates on describing CM's societal contributions rather than its delineations with regards to other media.

2.2.2. Media Pluralism and Diversity

CM help to strengthen media pluralism and diversity: They provide alternative perspectives on issues that lie at the heart of a given community and are produced by non-professionals. They are therefore a significant component of participatory democracy in modern society.

La Maison des Media Libres

La Maison des Media Libres (The House of Free Media) is a French initiative that brings together four Community Television initiatives under one umbrella organisation in order to provide an alternative perspective on current affairs as well as social and cultural issues. Their primary objective is to establish an alternative media centre that includes television and radio production, book publishing, film distribution and online activities. The organisation combines capacities of

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[1] As agreed by the Client during the interim meeting the study goes beyond the brief's objective to describe the sector's contributions to pluralism and cultural diversity to also cover the social, economic and creative contributions of CM.

one Community Television initiative (Zalea TV), one Community Radio initiative (Radio Frequence Paris Plurielle), one Community Magazine (Les périphériques vous parlent) and one association distributing films (Co-errances). Together the four organisations pool their resources and collaborate on special projects. They also organise "action weeks" and workshops on alternative media strategies for other CM organisations.

http://souriez.info/La-maison-des-medias-libres

2.2.3. Community Cohesion and Cross-Cultural-Dialogue

CM help to strengthen the identities of specific communities of interest while at the same time enables members of those communities to engage with other groups of society. They therefore play a key role in fostering tolerance and pluralism in society. There are generally three types of communities that CM can serve: communities of interest, geographical communities and cultural communities.

Some share the opinion that a balance between catering for a specific community and the potential of isolating such a group needs to be struck.[2] Often, language plays a key role in this process. Thus, ethnic minority stations have recently experienced the need to broadcast bilingual programmes rather than solely broadcasting in a minority language so as not to isolate their audiences.

Angel Radio

CM sometimes serve communities of age. Angel Radio (UK) targets and is produced by senior citizens that seek to play a more active role in the community life of London. The station has developed many programmes that specifically deal with issues relating to the elderly. It additionally acts as a social hub and aims to provide a resource and information centre for older people. Angel radio tries to spark public debate on issues important to its constituency. It has, for example, produced CDs for local schools that seek to raise awareness regarding issues such as the neglect of the elderly as well as the physical and mental abuse of senior citizens[3].

www.angelradio.moonfruit.com

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[2] This view is also reflected in *Minorities and the media in Central and Eastern Europe workshop in Bratislava report,* Minority Rights Groups International, June 1999.

[3] For further details please see Moira Gatley, *The Community Radio Sector: Looking to the Future*, DCMS, November 2006.

2.2.4. Social Inclusion and Local Empowerment

CM can be an effective means to enable disadvantaged members of a community to become active participants in society and to engage in debates concerning issues that are important to them. Engaging participants in the creative process of media production includes articulating such issues for a wider community. Furthermore, many consultees noted that the involvement in media production often enables participants to develop remarkable levels of self-esteem and thus can lead to long-term civic engagement beyond the duration of a project.

Meta Europe
The Meta Europe project seeks to further develop CM's contributions to social inclusion. CM activists and specialists within the field of adult education, and researchers across Europe, developed a curriculum regarding media literacy and tested some of its modules during train-the-trainer seminars[4]. The developed concept of "tandem training" has been implemented by community initiatives in different countries including Finland (Radio Robin Hood), Germany (Association Freie Radios), Hungary (Civil Radio), Austria (Radio Orange 94.0). One of the main underlining objectives of the project was to create partnerships between CM activists and social workers in order to build a bridge between CM initiatives and organisations that cater for disadvantaged communities as part of their main objective.
http://www.digital-dialogues.de/

2.2.5. Media Literacy, Skills Development and Education

CM provide skills in a range of different contexts. First, CM raise media literacy rates among participants as they help to demystify the process of media production. The sector has also often been the training ground for future media professionals as it provides its volunteers with the creative, practical and technical skills needed to succeed in a highly competitive media industry. Additionally, the sector reaches out to people that are sometimes not within the natural reach of further education institutions. Here, it equips participants with soft skills - such as communication, planning and team working skills - as well as aiding them in developing their ICT-literacy skills. Finally, CM fosters the entrepreneurial acumen of its volunteers. It has the ability to teach individuals who will work in the non-profit sector how to setup fundraisers, plan social initiatives and the means to manage the expectations of multiple public and private stakeholders.

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[4]   For further information visit:
     http://www.wissenschaftwirtschaft-bw.de/index.php4?topic=universitaet&uni_id=10&profile_id=42

Radio Regen

Radio Regen is a Manchester based initiative with the goal to foster media and communication skills as a way to promote social inclusion and regional regeneration. The station has developed a three level training course to provide for the different needs of its constituency. In its training programme, Radio Regen first offers a certified 3 day "core training" in radio production to all its volunteers. It also created a ten week foundation course in radio production to help unemployed people develop technical and soft skills. Additionally, the organisation has setup a one year course catering to anyone that wants to pursue a career in radio production. Media literacy skills are also taught as part of the English National Curriculum. Radio Regen has implemented 6 partnerships with local schools to promote communication and IT skills through radio production and broadcasting sessions. Finally, Radio Regen has created the Community Radio Toolkit that provides advice on how to start, run and finance a CM initiative. This toolkit is available online and provides valuable advice to CM volunteers and activists.

http://www.radioregen.org/

2.2.6. Local Public Service Delivery

Some consultees - particularly in the UK and Ireland - believe that CM provide a link between local communities and local public services. It is believed that CM can make citizens more aware of existing public services and that they can likewise help public services to better cater to the needs of the community. Local public service institutions (from local government to educational institutions) can collaborate with CM organisations to engage with the local community.

Consultations showed that some CM initiatives have already entered into service agreements with local public institutions. Under such agreements, the media initiatives offer local institutions delivery of a specific media service in return for a fee.

Dublin Community Television Channel

This recently established Irish CM initiative is based on a three-fold strategy: 1) The channel contains a community programme element to ensure non-professional participation. 2) The educational element seeks to up-skill participants. Finally, a local governance element seeks to network members of the community with the specific aim to share information and good practice. 3) The latter aims to enhance effectiveness in, and transparency of, local governance activities. For example, the channel broadcasts local council meetings and can produce discussion and phone-in programmes with elected community representatives.

http://www.dctv.ie/

2.2.7. Promotion of Local Creative Potential

CM acts as a catalyst for local creativity and give resident artists and creative entrepreneurs a platform for testing new ideas and concepts with an audience. In this context, the local audience is a test-bed for alternative content that cannot be conveyed in the mass media. As innovation increasingly occurs at the fringes of the creative sector (the "long tail concept"[5]), local talent benefits in two ways: Artists and potential entrepreneurs get hands-on experience and may be promoted by the audience to be either further supported by public means or through market forces.

De Hoeksteen Live / Amsterdam Open Channel

Amsterdam Open Channel is a Community Television initiative. In the seventies, the first participative home movies, alternative adult programmes as well as experimental videos appeared on Amsterdam TV. Nowadays, TV shows like Hoeksteen Live continue to provide avant-garde creative programmes. Hoeksteen Live is a twelve-hour long show promoting a new approach to television production. The show adopts a participative approach to talk-shows as the camera is passed from hand to hand to anyone willing to film. People wishing to participate can enter the studio and contribute to the show live. Hoeksteen Live is also experimenting with the convergence of internet and broadcast media. They now have a "virtual TV crew" that films and broadcasts events taking place on "Second Life", a web-based virtual world. Hoeksteen Live additionally promotes local artists by broadcasting local experimental art videos.

De Hoeksteen Live:
http://www.hoeksteen.dds.nl/main.php3
Amsterdam Open Channel:
http://www.salto.nl/

2.2.8. Varying Degrees of Meeting the Public Interest

As requested in the Client brief, the above sections focus on describing the "positive" impact of CM regarding several public interest objectives. While many organisations contribute to some of the above objectives, few meet all of them. As one consultee stated, some CM are created by highly literate young academics (e.g. student radio). To exemplify this: Unless they have the specific aim to do so, such projects may contribute to promoting local creativity but do not necessarily concentrate on raising media literacy among minorities. CM also contributes little to media pluralism and diversity if the content produced only finds a small audience. Some consultees displayed little trust in the ability of CM to cater for a significant audience in some countries.

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[5] The phrase The Long Tail was first coined by Chris Andersen of Wired Magazine in 2004. According to the theory, innovation in entertainment markets increasingly happens at the fringes of the sector (hence the name: Long Tail, which derives from the fringes of the bell-shaped curve in statistics) due to digital distribution. See Wikipedia.org for an article on the concept: http://en.wikipedia.org/wiki/The_Long_Tail (accessed 20/05/2007).

Furthermore, CM initiatives may often follow the goal of meeting several of the above objectives but can fall short of doing so due to the limited time of volunteers and lack of skills. The delivery of public interest objectives thus depends as much on the skills of the people working in the sector, and on the quality of implementation, as on the intention of policy makers and CM activists.

Finally, it is important to understand that public interest benefits of CM are perceived differently in each country of the EU. While the sector's contribution to media pluralism and the development of a civil society may be most important for some Member States (e.g. many new Member States), its contributions to skills development and local empowerment may be prioritised in others (e.g. the United Kingdom).

2.3. General Information about the Community Media Sector

2.3.1. Introduction

Mapping the CM sector in terms of its place in the overall media landscape shows that CM activity differs in each Member State and that it is linked to a variety of historical, political and regulatory factors.

Data on the broadcasting sub-sectors (radio and television) of CM could be identified in many Member States. Hard data regarding CM activity in the press and on the Internet, in contrary, is hardly available in most countries. To some degree, this division of available data on CM activity is linked to the fact that broadcasting is strongly regulated due to spectrum scarcity. CM broadcasters, therefore, have had to build alliances in order to make themselves heard before regulators and policy makers. As a result, CM associations representing the interests of Community Radio or Community Television (or both) exist in many countries.

Due to the many different definitions of the sector in each country, and as harmonisation of data was not feasible in the scope of this Assignment, the collected data should be considered as indicative of the overall situation of CM. Moreover, it should be noted that the data may be skewed due to the inclusion or exclusion of pirate stations by country correspondents. Often, data is also based on estimations of a country's correspondent and not on statistic evidence of sector bodies. Evidence regarding overall sector activity is therefore weak. It does not allow for a detailed analysis of CM activity in each Member State. However, as requested in the Client brief, the overall situation can be illustrated by grouping territories according to similar characteristics[6]. The following presents KEA's estimation of CM activity based on the country by country survey and consultations with sector stakeholders.

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[6] It has to be noted that most Member States undertook great efforts to provide detailed information regarding the sector's state and that shortcomings on the following pages may rather be due to the limited scope of the assignment as well as to the short time frame within which it had to be completed.

2.3.2. Sector Mapping

> *A. Member States with comparably very active CM sectors are primarily countries from the EU 15. Some of these Member States benefit from relatively well established regulations pertaining to CM.*

Country	**The Netherlands**
Data collected	App. 264 local Community Radio services and app. 123 local Community Television services exist in the Netherlands. This is complemented by app. 284 Internet services considered as CM by the national association of Community Media OLON (Organisatie van Lokale Omroepen in Nederland). Approx. 90% of the Dutch population can receive a CM service.
Context	The sector is probably one of the most mature in Europe. CM are recognised by the authorities and by the general public as "local public service media". CM television services benefit from Must Carry obligations of cable operators and every local radio broadcaster is entitled to an AM frequency when feasible. Local initiatives are subject to comparably strong editorial control by a local editorial board that brings together representatives of public bodies that operate in the community. Municipalities that cater for CM initiatives receive a share of government resources allocated to public service broadcasting. This level of funding to municipalities is estimated at app. €7,5 Million per year. However, a considerable amount of municipalities fall short of distributing these resources to local CM organisations, which causes concern among the sector. OLON currently seeks to introduce a new scheme under which a local initiative would receive €1 of funds for each household of the municipality the service caters for.

Country	**Germany**
Data collected	The situation of the CM sector in Germany differs in each of the federal states (the "Laender"). In total, approx. 304 CM Broadcasting initiatives (both radio and television) were counted in a survey in 2003[7]. This number is heavily influenced by approx. 150 initiatives in North Rhine Westphalia, which primarily enable citizens to produce content but do not broadcast this content due to a lack of licences. In addition to this, the existence of a number of strong open television channels characterises the situation in Germany.
Context	Often, Community Broadcasting initiatives receive a share of the licence fee received by each regional media regulator (the Landesmedienanstalt) (app. 1,9%). The public service requirements, which each CM initiative has to fulfill is stipulated in regional laws passed by regional parliaments.

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[7] See http://www.buergerrundfunk.de/ (accessed June 2007).

Country	**France**
Data collected	The French Community Radio sector is one of the largest in Europe with 683 operators registered by the French broadcasting authorities in 2003[8].
Context	The country has a well developed CM sector that emerged at the end of the 1970s. Community Radio stations gained legal recognition and financial support in 1982, the year of the creation of the French Community Radio Fund (FSER). Community Television exists but it does not benefit from the same advantages and the same level of recognition as Community Radio. For example, there is no core funding for Community Television and few initiatives have received a full licence. Both the regulators and the sector see a real opportunity in digital switch-over and the expanded spectrum that will be available as a result. The CSA has already reserved one digital channel of the Ile de France regional channels to community initiatives.

Country	**Denmark**
Data collected	Denmark has a well established community sector with 159 Community Radio stations and 110 community TV stations.
Context	It is one of the countries in which Community Television is the most developed and protected. Must Carry obligations require commercial television stations to broadcast CM programmes from 9am to 12am. The Danish broadcasting regulator RTB is also the first European broadcasting authority to pave the way for a digital Community Television station. The last government reduced public funding for the sector from 6 to 4 millions DKR (€536.000).

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[8] For further details on the situation in France for Community Radio please see the report *La Radio Associative état des lieux et enjeux,* AVISE, January2005.

> *B. Among the Member States with comparably very active CM sectors there are some countries that have recently introduced legislation and/or policy changes (including support measures) that have led to further development of the sector.*

Country	**United Kingdom**
Data collected	Approximately 133 radio groups have been awarded Community Radio licences to date and up to 500 restricted service licences for temporary or small-scale Community Radio broadcasts are granted annually.
Context	Despite a lack of funding, the UK (which until five years ago had a relatively underdeveloped CM sector) recently implemented new regulation for the sector. This led to a steep increase of CM activity. The UK's communications regulator Ofcom has defined a set of "social gain" criteria which Community Radio's have to meet to gain a licence. Licences are reviewed every five years on this basis[9]. Consultations show that one of the challenges in the UK over the coming years will be to enable the large number of new initiatives to operate in a sustainable fashion.

Country	**Ireland**
Data collected	There are approximately 21 Community Radios and 3 Community Television stations licenced in Ireland.
Context	The Irish sector has experienced recent growth thanks to a comparably recent and well developed legislation. The Broadcasting Commission (BCI) of Ireland started a Community Radio pilot project in 1994 and in 1998 gave licences to 11 community groups. The Broadcasting authority has an entrepreneurial approach to CM and is cautious of supporting the sector by implementing a continuous support programme to support operational costs. It argues that such institutionalised support would interfere with the sustainability of the sector. As illustrated in the policy section, the BCI focuses rather on providing funds to increase the effectiveness of the sector by supporting evaluations or training.

Country	**Hungary**
Data collected	Based on its consultations, KEA estimates app. 100 Community Radio initiatives in Hungary.
Context	No data was available for Television, Internet or Press. The sector quickly developed after Hungary's transition to democracy. The 1996 Media Law recognises CM as an element of the media sector and led to the establishment of a fund to support the sector. However, there is a growing concern that CM will lose some of their status in the coming years. Particular concern exists regarding the sector's transition to an all-digital broadcasting environment.

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[9] Legal basis: Community Radio Order 2005 (Secondary Legislation under the Communications Act 2003).

C. There are some Member States with high CM activity thanks to legal recognition despite the absence of any specific public funding. In these countries there is a strong awareness regarding CM's positive contributions and the sector consequently benefits from a great amount of project funding for social and civil society causes.

Country	**Sweden**
Data collected	There is particularly high CM activity in Sweden, with approximately 700 active local organisations broadcasting radio programmes via 165 local low-power radio stations and an additional 30 active local Community Television channels (TV is transmitted via cable). There are approx. 10 Web-based CM initiatives.
Context	Sweden is an interesting example, as the sector is primarily supported through a bottom-up model: Local groups of interest as well as NGOs support the maintenance of equipment and programme production through membership fees and direct contributions. This leads to a strong linkage of the sector with civil society organisations that want to use CM to promote their causes. All local radios and television initiatives can, in theory, make some revenue through advertising. However, due to the low-power of most Community Radio stations, this is often not feasible as advertisers are not interested in purchasing airtime. There is no national system for funding CM. KEA's consultations showed concern among the sector regarding the ability of commercially oriented organisations to gain a Community Broadcasting licence as a recognised Community Broadcaster.

Country	**Italy**
Data collected	Although hard data is not available to KEA, consultations and the returned questionnaire showed considerable CM activity in **Italy**, where the Community Radio sector was established as early as the 1970s. There are more than a 100 community stations, out of which 30 or so are non-religious.
Description	The majority of local stations operate in the larger Italian cities and often also transmit to the surrounding region. The law that regulates CM is the "Legge Mami". It acknowledges the specific status of CM in relation to other media. While there is no national fund available for CM initiatives, radios are allowed to broadcast 3 minutes of advertising per hour. Additionally, many rely on project funding.

Country	**Spain**
Data collected	Anecdotal evidence shows that app. 130 unlicenced Community Radio initiatives and 3 Community Television initiatives exist in Spain.
Context	While a notable amount of Community Radio activity exists in **Spain,** only one initiative (radio Klara) legally carries a licence to broadcast radio programmes. Legislation regarding radio spectrum allocation is passed at national level. Yet, the regions (Comunidad Autónoma) manage the licensing process for granting spectrum to broadcasters. Tenderers for radio spectrum have to meet detailed criteria which are not tailored towards the needs of CM. As a result, CM organisations cannot bid for such licences[10]. Consequently, there is little public support available for the sector. Some organisations manage to receive local and regional project funding for social projects.

Country	**Poland**
Description	Based on the findings of a returned questionnaire, KEA estimates that CM activity in **Poland** is suprisingly active. Many of the CM initiatives are religious endeavours. Although there isn't any overall provision for CM in the law, the 1991 agreement on Relations between the State and the Catholic Church establishes that each diocese could apply for a local radio frequency. Several student radios are also present in the country.

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[10] In fact, one Spanish CM initiaitives on 3 MAY 2007 lodged a complaint with the Spanish Ombudsman highlighting this discriminatory situation, which is against the Spanish Constitution (articles 9.2 and 20.1).

> *D. There are some Member States where a moderate to active CM sector exists despite a lack of full legislative recognition and/or related regulations.*

Country	**Austria**
Data collected	Approx. 12 long-term Community Radio Initiatives, 3 Community Radio projects, 1 operating Community Television channel and 1 television project were identified in Austria.
Context	Such initiatives primarily rely on support from regional governments as there is no specific legal status (CM are categorised as private initiatives) neither any national funding mechanism that provides continuous support to the sector. Additionally, initiatives often rely on EU-project funding. Consultations show that the sector is promoting the idea of establishing a levy fund, similar to those existing in some German federal states.

Country	**Portugal**
Description	According to KEA's consultations, there is a considerable number of Community Radio stations present in Portugal. As there is no special legal recognition of CM, most of these initiatives are pirate radio stations. The majority of them being student or local initiatives. While there is a section in the broadcasting act that provides special licences for student radio, only one station actually benefits from it.

Country	**Belgium**
Description	CM first emerged in Belgium in 1978 but found it difficult to operate. Frequencies are given by the central Broadcasting Authority (Conseil Supérieur de l'Audiovisuel) on the basis of the regional Cultural Affairs mapping. Community Radio gain licences as independent radio initiatives - along with the private commercial radio stations. Neither the German, French or Flemish speaking parts of the country grant any specific Community Radio or TV funds. The situation is nevertheless easier for Community Radio in the French speaking part of the country thanks to the Fond d'Aide à la Création Radiophonique, a public fund for creative radio programme making. There are subsequently more CM initiatives in the French speaking part of the country than in the Flemish part, where one can find approximately 5 Community Radio Stations.

E. There are a number of countries which predominantly belong to the new Member States where only limited CM activity could be identified.

Country	**Slovenia**
Data collected	According to consultations, the first student radio in Europe appeared in 1969 in Slovenia. Today there are 3 Community Radio stations in the country.
Context	This situation can partly be explained by the confused media regulation that seeks to support CM but does not achieve it. Some form of CM is recognised in the national media law (stations are categorised as special purpose initiatives along with any local, regional, student or non-for-profit media). Moreoever, a small support body for these organisations does exist. However, independent initiatives find it difficult to access this fund.

Country	**Czech Republic**
Data collected	Hardly any data is available on the Czech CM sector. According to anecdotal evidence, there are approximately 3 Community Radio stations in the country.
Context	None of these initiatives are licenced and all are broadcast over the Internet. Radio Akropolis has been unsuccessful in applying for a licence for the past 6 years. Consultations show some concern among the small sector. So far the Council for Radio and Television Broadcasting has not shown any interest in supporting the CM sector in order to thus work more closely with.

Country	**Romania**
Data collected	There are app. 10 Community Radio stations (including pirate stations) and no television initiatives.
Context	The situation for CM is quite difficult in Romania. CM do not get access to broadcasting licences and consequently have to broadcast over the Internet. This greatly reduces audience numbers due to lack of awareness and – most importantly – lack of broadband penetration. The Soros Foundation, which is active in Romania, may consider supporting CM initiatives in the future.

Country	**Slovakia**
Description	Our consultation shows there are only two CM initiatives in Slovakia and they make use of the Internet for transmission. As in Romania or in Hungary, individuals and entities receive a tax rebate for up to 2% of their tax if they make allocations to NGOs. This is also applicable for contributions to CM.

Country	**Finland**.
Data collected	CM activity in Finland is limited. There are only 5 community stations in the country.
context	CM is not recognised by law in Finland. There are two student radio stations and three local Community Radio stations in Finland. Some of them offer programmes in different languages and target migrant audiences but there is not a specific minority community station in the country. The sector is now trying to organise itself in order to lobby more efficiently for its legal recognition.

Country	Greece
Description	There is limited CM activity in Greece. The licence procedure for radio does propose an amateur licence (Law 2328/1995par.9 art.6), open to anyone who fulfils the necessary standards: technical infrastructure, financial viability and respect of the journalistic code of ethics. Most of the private radio stations apparently broadcast without licences as the licence system installed in 1989 has never been completely implemented. According to the Minority Rights Group of Greece, many, hence illegal, minority radio stations are occasionally sanctioned by police and the courts for their actions.

Country	Malta
Description	According to KEA's collected data, Malta has an important Community Radio sector with 38 active stations in the country. The 1991 law provides explicit reference to "community media" and there are guaranteed provisions for it. However, a closer look at the legislation shows that the Maltese definition of CM does not provide for any restriction on commercial revenues, nor does it require any community participation in production. The only constraints for the Community Radio initiatives are to broadcast news or current affairs programmes of a particular community interest. The sector does not benefit from any public funds and therefore heavily relies on advertising revenues. Furthermore, KEA's research shows that there is no CM initiatives that would fall under the definition used during this Assignment.

Country	Estonia
Description	Consultations showed that the Estonian regulatory framework does not recognise CM and that no data is available regarding the broadcasting sector. However, four internet-based CM initiatives were identified in Estonia.

The following map illustrates our estimation of **CM activity across Europe**[11].

- Orange: very active, well established regulations
- Light Orange: very active, recently changed regulation
- Yellow: very active and public awareness, legal recognition but no funding
- Green: comparably active, lack of legislative recognition and regulations
- Blue: only limited activity
- Grey: no data available

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[11] No data to draw such indicative conclusions on the level of country activity was obtained for the following Member States: Latvia, Cyprus, Luxembourg, Bulgaria, Lithuania.

2.3.3. Audience Share of and Participation in Community Media

Only a small amount of research and data regarding audience share of and participation in CM is available. Consultations show that CM organisations, as well as policy makers, are increasingly interested in finding out the number of participants in CM initiatives in addition to audience share and audience tastes. However, the considerable costs of audience research often inhibit such detailed inquiries. To provide an overview, the following summarises some of the information discovered during desk research.

In most EU Member States, audience share of CM cannot be compared to that of the mainstream media (the Netherlands and few other countries may be an exeption). Often, data is only available with regards to single organisations. According to a study by CM Solutions for the British Community Media Association, a local CM organisation (Bradfort Community Broadcasting) estimated that there are app. 30.000 listeners of its service[12]. Yet, as is the case with many audience figures covering the sector, these figures appear to be estimations rather than results of primary research. OLON, the Dutch CM association, provides more detailed data about audience share of CM in the Netherlands. In 2005 the association questioned 5000 people about their media consumption – with a specific focus on CM. 12% of all participants had listened to a local Community Radio station in the past week. This compares with 27% regarding the most popular commercial service. On this basis, the association estimates that Community Radio reaches approx. 2 million listeners per week. Interestingly, listeners often tune in to listen to local music and local news programmes. The figures for local Community Television are also convincing. 34% of the people questioned had watched their local Community Television station in the past week and local information was the main reason for watching the channel. Next to the Netherlands, some audience figures exist in the case of France. According to Médiamétrie, the French inter-professional audience measurement and survey company, audience share for Community Radios were app. 1,9% during the week and 2,4% during the week-end in April – June 2007.

Participation in CM initiatives varies and is especially dependent on the nature of each initiative. In the Netherlands, OLON estimates that approx. 22.000 people participate in local CM activity each week. Next to this, approx. 500 people have paid jobs (part-time and full-time). In France, CNRA - the National Council for Community Radios – stated that about 2500 persons are employed by Community Radio stations and about 38, 000 people are volunteering on a project-to-project basis.

Readers are well advised to take into account the comparably high CM and Community Radio activity in the Netherlands and France when considering the above numbers. Surely, these estimations do not represent audience share of participation in CM across Europe. However, they can be considered as indicators of the impact CM could have if the support mechanisms and legislations pertaining to the sector were as favourable of CM across the EU.

2.3.4. Organisation of the Sector at National Level

CM is organised in various ways across the EU. KEA's country by country survey identified national organisations representing the interests of the sector (or parts of it) in 13 Member States. In general, Community Radio is the most organised sub-sector. This may be due to the

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[12] CM Solutions for the Community Media Association, *Making it work – Learning from successful Community Radio stations*, July 2005.

long history of Community Radio compared to television as well as the previously mentioned strong regulation of broadcasting.

In general, national associations for CM tend to be funded by a combination of grant aid, membership fees, service charges to members and project income. They tend to offer training and networking opportunities for the sector and sometimes publish news and advice via their websites. For example, each year, the Community Media Association (UK) commissions reports highlighting the sector's benefits and key issues regarding its situation.

In some countries, national associations are closely cooperating with governments, regulators and funding bodies. In France, representatives of the national association for Community Radio sit on the board of the French Community Radio Fund (the FSER). In the UK, the Community Media Association has played an important role in working with Ofcom to establish the current regulatory framework governing Community Radio.

National associations can help the sector to deliver services that single CM organisations could normally not achieve due to their small size and limited amount of volunteer time. The Dutch organisation OLON, for example, distributes a CD with new Dutch music releases to its members every fortnight. As with many other national associations, OLON also handles royalty payments for the sector. Other support organisations, such as Amisnet (Italy) offer online archives which enable CM organisations to stream or download programmes for non-commercial use or rebroadcast.

Often, the sub-sectors of CM (especially radio and television) are organised independently. In Germany, for example, open television channels are represented at national level by a different association than independent radios. However, media convergence has also had an influence on the representative structures of CM in some Member States. In the Netherlands, the national Community Media Assocation OLON (Organisatie van Lokale Omroepen in Nederland) and in the UK the CMA (Community Media Association) represent the interests of radio, television and internet-based CM.

Consultations show that, especially in smaller Member States and in countries where little support for CM exists, the sector finds it difficult to make available the resources required to establish a national interest group for CM.

Furthermore, the heterogeneous character of the CM sector, with its diverse political and social cultures, also influences the priorities of national CM interest groups. One consultee (a national CM representative) experienced difficulty in establishing a common ground regarding policy objectives when working together with other national CM interest groups. However, while acknowledging the cultural differences between different CM communities throughout the EU, many consultees from national associations highlighted the value of collaborating internationally. For many national CM representatives, international knowledge exchanges provided them with the information and arguments needed to better represent the interests of their sector at national level.

2.3.5. Historical Context

Taking a brief historical perspective on the development of CM helps to understand why the sector's situation is different in each Member State of the Union. The sector's development depends on political histories and the irregular development of media technologies in each country.

The press may have the longest CM history as newspapers were initially often created by non-journalists for specific communities of interest. However, much CM activity as it is practiced today first appeared in Latin America in the 1940s. It was then further developed in North America during the 1950s due to the continent's technological head start in broadcasting technology compared to Europe.

In Western Europe, CM emerged in the 1960s and 1970s and sought to provide alternative content compared to public service broadcasting channels, which – naturally and due to scarcity of spectrum – had to adhere to strict content regulations by the state through spectrum licensing mechanisms. Some sources refer to Denmark's Radio Mercury as one of the first pirate stations to offer a programme-mix of current affairs and popular music. Only with the liberalisation of the broadcasting sector in the 1980s were Community Broadcasting initiatives granted legal status in some countries. Since then, the sector has slowly but steadily experienced further recognition throughout Western Europe. According to some observers, in the past two decades the CM sector has experienced more support from governments in North-Western European countries, such as the Scandinavian countries, than in the South-West of Europe. For example, in many Scandinavian countries, CM was introduced to the national media landscape through government initiatives. In the South-West of Europe, as is the case in Spain and Portugal, the sector has had to struggle harder for recognition and developed bottom-up.

In many of the countries that today comprise the new EU Member States, the sector has experienced a slightly different history. Pirate broadcasting has been used as an instrument by civil rights movements to protest against governments. Examples for these movements are the Slovenian Radio Student which was founded in 1969 and has since then played a critical role in the Slovenian civil rights movement. Furthermore, the church has played an important role in the development of alternative media movements in some other Central European countries. In Poland, for example, catholic CM radio was closely linked to the Polish opposition that led to the changes in 1989. Following the transition of most of these countries to embrace democratic governance, many media laws were reformed in the mid 1990s. As can be seen from the Sector Mapping, not all legal frameworks of the new Member States recognise the specific character of CM until today.

Although historians may consider it to be too early to include the Internet in this short historic overview, the emergence of the World Wide Web over the past ten years has propelled the sector into what some call a Third Age of CM. The impact of digital technology on the sector will briefly be examined in the following section.

2.3.6. Impact of Technological Change

CM faces serious challenges and many opportunities due to the advances of technology. Today, digital technology reduces production, storage and dissemination costs and blurs the distinction between media creation and consumption.

Switch-over from analogue to digital transmission of radio and television signals is a great opportunity for Europe's audiovisual sector to cater for more diverse audience needs by using radio spectrum more efficiently. Potentially, CM broadcasters can benefit from switch-over by gaining access to further spectrum and reaching more audiences. Yet, as shown in the section on regulation in this study, current developments in most EU countries indicate that the sector is not taken into account by regulators that seek to implement policies to facilitate the transition to an all-digital broadcasting environment.
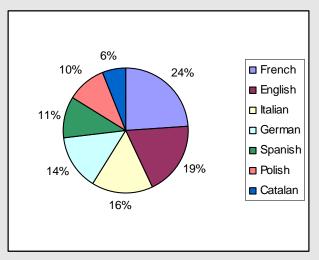
The Internet enables communities to participate in electronic media production and to organise themselves and raise awareness by means of electronic communications. It transforms the sector's operations on every level. Services similar to Youtube.com will increasingly be utilised by diverse user groups to create and disseminate content targeted at specific communities of interest. However, not all of these services fall under the definition of CM used for this study (i.e. many are not non-profit and users are not necessarily involved in editorial-/programme management). Yet, as the following case studies illustrate, many CM organisations already use the Internet as an outlet for their content and many see it as a future alternative to traditional media such as the Press and current broadcasting methods.

Café Babel

Café Babel is a grass-roots media initiative which claims to "revolutionise European media through participatory journalism, providing a unique platform of expression for all citizens". The initiative is based on contributions from more than 450 volontary contributors (professional and non-professional), 20 local teams in cities throughout Europe as well as from a European headquarters in Paris. [13]

Participants can contribute articles to Café Babel's portal or offer editing and translation services, which has enabled the portal to publish its news in up to seven European languages. The portal runs several Web 2.0 services, such as blogs, forums and polls. The local teams enable the initiative to connect online debates to real, live political debates.

The following graph presents the multi-national readership of the service, which – to some extent – could not be reached through traditional media.

Source: Café Babel Press Pack

The initiative is supported by a range of institutions and support programmes such as the Commission (DG Education and Culture – Youth Programme), the European Cultural Foundation, several national and regional governments as well as non-governmental foundations.

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http://www.cafebabel.eu/en/default.asp

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[13] On the day of editing this report, the headline articles covered Europe's new political leaders, a German media frenzy about a journalist that was made redundant, an Online debate about Microsoft's role in the European software market as well as an article about the geo-mapping of Romania.

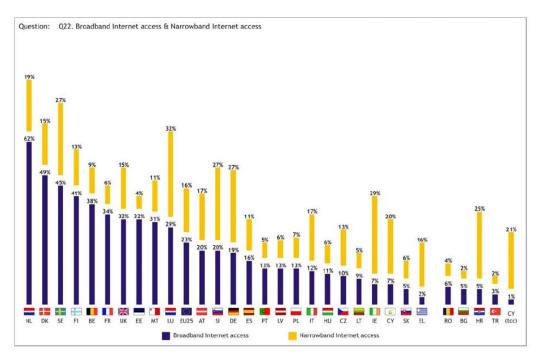amisnet.org – radio and multimedia

amisnet is a Rome-based CM initiative that illustrates the potential benefit of the Internet for the sector. At the same time, amisnet exemplifies how CM organisations often operate on a project-by-project basis as well as on a shoe-string budget - yet manage to produce remarkable results over a long period (the initiative has been active for 9 years).

amisnet produces community radio programmes and makes them available to the international CM community for free. All content is released via amisnet's server on the basis of a Creative Common's license, which enables other CM initiatives to download, edit and broadcast the programmes. The impact of this model is remarkable. In Italy amisnet's programmes manage to reach 1 Mio to 1,5 Mio listeners of approximately 35 CM radios per week. The pontential of such an Open-Content approach to programme sharing is especially fruitful in the CM sector, where organisations do not seek to gain profit from selling their programme rights to further distributors.

In addition to several further technical support services that amisnet offers to partner CM organisations, the initiative also runs a mobile radio service. amisnet supports CM activists in creating new content at live events. Their mobile service then enables them to broadcast their programmes via mobile uplinks.

http://amisnet.org/en/

Despite the above case studies, the Internet is unlikely to offer a single solution to all the challenges faced by the CM sector, since broadband penetration varies across the EU. The following illustrates the different levels of Internet and Broadband access in households across the EU:

Source: E communication Household survey, special Eurobarometer 249/Wave 64.4, July 2006.

As can be seen, broadband access varies considerably across Europe. However, fast Internet connections in households are a prerequisite for CM to thrive online. So far, online CM projects can effectively be launched among communities with comparably high broadband penetration. For example, the London based Southwark TV is an internet-based CM project for youth groups in Southwark, London. London is an urban area with high broadband penetration. Furthermore, teenagers are likely to possess the skills to access CM online. In comparison, a CM project for the elderly in Hungary, for example, is likely not be realised online. This example also illustrates the importance of media literacy among CM participants as well as the burden that purchase costs may play for certain communities. While the youth of London will be able to access the Internet in various ways, this cannot be expected from communities in other countries under different circumstances.

2.4. Legal Status of CM Organisations and Definition in Media Law

2.4.1. Legal Status of Community Media in Member States

The legal status of the sector varies across the EU. However, being registered as a legal entity and CM's further definition by law are important for the development of the sector. Both enable it to raise its profile among policy makers as well as to engage with possible advertisers or other funding bodies.

As part of the survey, the consultants sought to establish under what kind of legal status CM organisations were primarily registered in each country. Only a few correspondents answered this question. Yet, the results, as well as desk research, show that CM organisations are registered either as charities, associations, foundations or commercial entities throughout the

Union. In most countries, CM organisations have a non-commercial status. In countries where the sector is permitted to gain revenue by means of advertising or service contracts, CM organisations are also registered as private companies.

Often, having a registered legal status is a prerequisite to gain a broadcasting licence. Some CM organisations that once operated as pirate initiatives (e.g. transmitting radio signals without an official licence) still do not have any legal status.

2.4.2. Different Role of Community Media Depending on Definition in Media Law

Depending on how the sector is enshrined in media law, CM may play different roles in each country's specific media landscape. The following examples were chosen as they best illustrate how different legal and regulatory treatment can influence the characteristics of the sector:

CM as "third sector" media: In the UK the sector is often considered separately from other media such as commercial media or public service broadcasting: Based on the 2003 Communications Act, the Community Radio Order 2004 lists all characteristics of a Community Radio service. Among these characteristics are localness, social gain, non-for-profit status, the participatory nature of the sector as well as accountability to the community[14]. As a result, the British Community Media sector operates quite separately from other mainstream media, including public service broadcasting.

CM within the realm of public service broadcasting: In contrast, CM constitute a tier of the public service broadcasting system in the Netherlands. The Dutch Media Act defines local broadcasting as "public broadcasting aimed at the general public in a municipality"[15]. Consequently, the overall service requirements for local Community Broadcasters do not differ significantly from the requirements of other public service broadcasters and are of a wider educational, cultural, social and religious nature. Due to the inclusion of the sector in the public service broadcasting system, Community Broadcasters also benefit from government funding. In 2006, such level of funding constituted app. €7.5 Million[16].

Partial recognition of the sector: In Slovenia, Article 80 of the 2006 Media Act recognises student radio as CM: "A student organisation may be the publisher of a radio and/or television station if the majority of the programming is created and disseminated by students and is primarily aimed at a student audience, and if the surplus of revenues over expenditure is used only for executing the activities for which it was founded, in accordance with the act governing the operation and activities of students' self-managed communities in Slovenia and its basic legal act"[17]. However, this definition of student radio falls under the overarching category of "special purpose" radio, which also includes other commercial local radio stations. As a result, commercial local operators, as well as CM initiatives, compete for the same radio frequencies. They also compete for subsidies from the local television fund, which is financed by 3% of the public service licence fee. The Slovenian situation illustrates how legislation that is not fully developed and does not clarify the special purpose of CM may fail in bringing effective benefits to the sector.

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[14] See legal text at: http://www.opsi.gov.uk/si/si2004/20041944.htm (accessed: 27/06/2007).

[15] See legal text at: http://www.cvdm.nl/pages/english.asp?m=a&&flash=5&flash=5 (accessed: 27/06/2007).

[16] However, as OLON, the Dutch CM association pointed out, not all of this funding is distributed to the sector via its municipalities.

[17] View original translation of this legal text at:
http://mju.gov.si/fileadmin/mju.gov.si/pageuploads/mju_dokumenti/doc/Media_Act.doc (accessed 10/06/2007).

The above examples show how CM's definition in media law impacts the sectors development. Member States are therefore well advised to consider the role CM are to play in the overall media landscape if they develop or review related laws and regulations. Furthermore, the examples show that having a legal status, as well as being reffered to in media law, does not automatically translate into public funding.[18] Such circumstances should rather be considered as the basis on which CM can start to operate in a sustainable way. Being regitered as a legal entity is, for example, necessary in order to open a bank account or close contracts with potential advertisers or funding organisations. Section 3.6 will further examine the financial situation of CM in more detail.

2.5. The Regulatory Situation[19]

2.5.1. Need for Transparent and Accountable Regulation

Next to the lack of specific laws, there is also a lack of underlying regulations regarding CM in many EU Member States. The existence of transparent processes and evaluation criteria to award and manage CM's access to radio spectrum, for example, varies throughout the EU. While some Member State's take CM into account in their regulatory framework (e.g. UK, France, Germany, etc.), most media regulators have not implemented processes and, for example, criteria to distinguish a CM service. They can therefore not adequately engage with the sector. As will be seen in the case study on CM policies in section 3.5, the British regulator Ofcom has established such processes and can be considered as a case of best practice in this regard.

One reason for the overall neglect of the sector may be that policy makers do not feel that CM contribute enough to the public interest as outlined in an earlier section of this study. An alternative explanation would be that that they are not aware of the sector's potential societal contributions. For instance, only a few regulatory authorities employ people with expert knowledge regarding CM. Additionally, the issue of CM is not well embedded in national parliamentary circles. The well-being of the sector is therefore as dependent on CM's profile among policy makers as on the availability of funding or advertising revenue.

2.5.2. The Challenge of Digital Switch-Over

In order to enable the sector to benefit from digital switch-over, national regulatory measures need to take account of the specificities of CM. Digital switch-over is the point in time when analogue television and/or radio transmission is changed from analogue to digital. This transition will take place in many Member States over the coming years. In its 2005 Communication on accelerating the transition from analogue to digital broadcasting, the Commission proposed that the beginning of 2012 be agreed upon for analogue TV switch-off in all Member States. National TV switch-over plans were therefore to be completed by 2012[20]. Switch-over to digital radio is still only planned at a national level. Initially, most Member

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[18] The Client brief specifically asked whether there is a direct link between legal status of Community Media and funding.

[19] Next to examining the legal status of the entire sector the brief specifically asks consultants to examine the underlying regulatory situation of Community Broadcasters.

[20] Communication on Accelerating the Transition from Analogue to Digital Broadcasting COM(2005) 204 Final, p.9.

States had anticipated analogue radio switch-off to occur by 2010 but stakeholders now expect switch-over to occur between 2015 and 2020[21].

Digital switch-over is a unique opportunity for the European television and radio sectors. Benefits include more television and radio channels, better sound and improved picture quality, better reception, enhanced information services and interactive applications. The transition towards digital broadcasting will also free significant portions of radio spectrum. For CM, digital switch-over could also be an opportunity, as Community Broadcasters could gain licences for spectrum that have become available. However, consultations with stakeholders of the sector show wide-spread concerns regarding:

- The ability to gain a broadcasting licence in this new environment on fair grounds: many consulted stakeholders fear they will miss out on regulations that seek to facilitate the transition to an all-digital broadcasting environment. Although some stakeholders acknowledge that digital broadcasting frees spectrum for further audiovisual services, most are concerned that CM will not benefit from newly available spectrum.

- The ability to gain access to digital transmission equipment, platforms and infrastructure (e.g. Multiplexes, Electronic Programming Guides, etc.): with digital switch-over, new potential bottlenecks are created. Operators of Programming Guides, for example, can favour services over others in their listing. Therefore, Must-Carry obligations need to be extended to cover this intermediary infrastructure. The sector is concerned that it will be left out at this crucial moment of defining how digital broadcasting will be regulated in the future.

- High transition costs: CM initiatives are furthermore concerned about high initial purchase costs in order to facilitate the transition to digital. For instance, according to the Community Media Association in the UK, accessing a future digital broadcasting frequency could entail a tenfold cost for CM operators in relevant infrastructure, compared to the costs of setting up on current analogue infrastructure.

In order to ensure that the sector and their audiences benefit from digital switchover, CM need to be taken into account by regulations that seek to govern the transition to digital. The Commission itself recognises that the switch-over process is most successful when Member States do not solely rely "on a market led approach but also on clear public policy action to coordinate broadcasters".[22] Member States either need to implement processes which enable the sector to gain a broadcasting licence (full and/or temporary) or ensure that CM services are catered for by Must-Carry obligations.

2.5.3. Must Carry and other European Union Regulations

According to EU directive 2002/22/EC on universal service and users' rights relating to electronic communications networks and services, "Member States may impose reasonable 'Must Carry' obligations for the transmission of specific radio and television broadcast channels and services…" (Article 31). Therefore, the European legal basis for implementing Must Carry

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[21] Screen Digest LTD, CMS Hasche Sigle, Goldmedia Gmbh, Rightscom Ltd, *Interactive content and convergence: Implications for the Information Society*, A study for the European Commission (DG Information Society and Media), 2007.

[22] Communication on Accelerating the Transition from Analogue to Digital Broadcasting COM(2005) 204 Final, p. 5.

rules for CM at national level exists. However, the Directive does not mandate that Member States implement such Must Carry obligations (Greece, Cyprus, Latvia, Luxembourg and the United Kingdom have not developed any Must Carry rules). The Directive only demands that Member States which impose Must Carry obligations provide "clearly defined general interest objectives".

In the related framework directive (2002/21/EC) the Commission suggests some general interest objectives that could be applied to CM: "Audiovisual policy and content regulation are undertaken in pursuit of general interest objectives, such as freedom of expression, media pluralism impartiality, cultural and linguistic diversity, social inclusion, consumer protection and protection of minors".[23] Research shows that four Member States (Germany, France, Ireland and the Netherlands) have implemented Must Carry regulations that may apply to CM. Some of these explicitly refer to the sector:

- The French broadcasting regulator CSA, for example, may request that a cable operator has to allocate a channel to non-profit organisations with the aim of transmitting programmes related to "social life".

- In North Rhine Westphalia in Germany, analogue operators must carry "Open Channels". The digital operators must carry the capacity of one analogue channel for regional televisions and "Open Channels".

Furthermore, according to a working document annexed to the Commission's communication on accelerating the transition from analogue to digital Broadcasting, public interest objectives do not change due to the transition from analogue to digital transmissions. Thus, Must Carry rules for CM can be justified by clearly identified public interest objectives in national regulations.[24] However, it is important to note that it is up to Member States whether to include the sector in its definition of public interest or not. CM sectors that do not benefit from such clauses can use the above mentioned examples of Germany, the Netherlands and France to make the case for inclusion.

2.6. Financial Context

2.6.1. Introduction

Throughout the EU, CM operate in a mixed economy. This means that CM organisations rely on different financial resources that are long-term as well as project-based - from private as well as public sources. In most countries where the sector is recognised by law, it benefits in some form from public support. This is justified by the sector's contribution to the public interest as outlined in Section 3 of this report.

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[23] Directive 2002/21/EC on a Common Regulatory Framework for Electronic Communications Networks abd Services (Framework Directive).

[24] (COM(2005)204 final). See: http://ec.europa.eu/information_society/policy/ecomm/info_centre/documentation/communic_reports/index_en.htm (accessed: 20/05/2007).

2.6.2. Financial Resources

The following lists different financial revenues that were identified by the consultants during the Assignment and briefly highlights the main characteristics of each of them:

Advertisement revenue: In at least 15 EU Member States, CM are allowed to use advertisements as a source of revenue. In some of these countries CM must adhere to stricter advertisement regulations than private media. In five cases a revenue cap which made sure to only allow for a certain amount of revenue to be based on advertisements (e.g. UK: 50%) could be identified. However, advertising revenues tend to remain below this threshold. The reason for this is twofold: Either, it is because the CM do not want to operate on the basis of advertising due to ethical reasons – many organisations perceive themselves as operating outside the media market. In addition, many advertisers find the reach and quality of programming not attractive enough. In some cases, Community Broadcasters have therefore broadened their programme to attract more advertisement.

Membership fees, sponsorship and support in kind: Many CM organisations rely on local financial support from listeners and local institutions. CM often organise local fundraising rallies to raise awareness among the community and win support. Furthermore, consultations showed that some initiatives benefit from special purpose foundations that collect sponsorship for CM[25].

Split of public service broadcasting licence fee: This is one of the most common mechanisms to support Community Broadcasting in a continuous and predictable fashion. Different models exist throughout Europe. In Germany, for example, most regional media regulators receive a share of the collected licence fee and are obliged to support media literacy and CM with part of this money.

Split of private broadcasters' advertising revenue: As will be outlined in the following chapter, the French Community Radio fund is financed by a share of a levy on private broadcasters' advertising revenues.
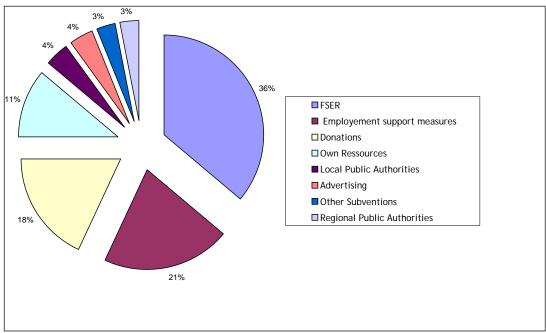
Indirect public funding: Many CM organisations manage to benefit from support schemes that do not primarily target the sector, such as employment support schemes or social inclusion programmes. These indirect sources of funding tend to be mostly used by organisations that receive low levels of ongoing operational support.

European project funding: Several CM initiatives benefit from a range of European funding opportunities. These will be further outlined in a subsequent section on EU policy.

To exemplify the mix of resources of a CM initiative, the following pie chart illustrates the revenue stream of a French "Radio Associative", which – compared to organisations in most other countries – benefits from above average public support.

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[25] Radio Corax in Germany is an example for such practice. It receives support from other local institutions such as the local municipal theatre via: http://cms.radiocorax.de/

Source: "La radio associative: état des lieux et enjeux", Les repères de l'AVISE, n°4 jan. 2005 France.

CM organisations operate on the basis of very different budgets and it is impossible to estimate an average turnover for a European CM organisation. During consultations, annual budgets ranging between € 50.000 and € 250.000 were quoted by radio initiatives in Germany, France and the UK. It should be noted, however, that these figures cannot be considered as representative for the sector. In general, budgets of open television stations tend to be significant while internet-based initiatives are often realised with fewer resources.

As the French report shows, French CM initiatives tend to be managed on a voluntary basis, with an average maximum of three paid employees. Staff costs generally make up the highest part of the budget, with a 54% average. Overheads (including copyrights) rank second, with rent or building costs accounting for another large part. Transmission and technical costs form the third largest part of a budget.

2.6.3. Different Financial Realities from Country to Country

As already indicated, the financial circumstances of the sector differ from country to country:

- In Sweden, the sector operates at local level and is primarily financed through civil society organisations and local interest groups.
- Advertising plays a different role in each country: While it is an accepted source of revenue in some countries (e.g. UK, Ireland, Italy), other countries' laws do not allow CM to broadcast advertisements.
- Community Radios in France benefit from continuous and high-level public support compared to most other countries
- Project funding linked to social objectives is most common in the UK and Ireland.
- Other countries have support mechanisms in place that operate at local level, where local bodies administer grants for local initiatives (the Netherlands).

The situation in the new Member States is heterogeneous. While some countries have support schemes in place that ease the financial burden of CM to some extent (Hungary, Slovenia), initiatives in other countries primarily rely on advertising, project funding or support through

civil society organisations.[26] As will be seen in the subsequent chapter on EU-level policy, many CM initiatives in the new Member States also rely on EU-funding.

2.6.4.   Policy Choices Regarding the Financing of Community Media

Policy makers can design rules and regulations that will in the long term influence whether the above mentioned mixed economy enables CM to thrive. In doing so, the positive and negative effects of different financial revenues should be weighed against each other.

Relying on market forces may redirect some initiatives from seeking to fulfil specific objectives that are in the public interest, to appealing to a broader audience by broadcasting more mainstream programming. On the other hand, a wider audience also implies that remaining public interest programming reaches more listeners and potentially has more of an impact. Moreover, operating in a commercial environment may equip activists with skills that can also be used in fundraising or station management and therefore add to the sustainability of CM.

While some consultees specifically asked for the establishment of public funding mechanisms such as the French system, consultations also showed that some perceive a trade-off between continuity of support and the willingness of the sector to meet public interest requirements. In some countries with well established support mechanisms, consultees promoted the establishment of project-based funding mechanisms linked to periodic reviews. There appeared to be a shared feeling among these consultees that the performance of CM can best be measured and promoted through project-funding. At the same time, regulators and governments should take into account that policy choices on whether to support the sector on a project-by-project basis or by means of a continuous model may have an effect on the longevity of CM initiatives.

In the context of the sector's strong diversity and a disparity of public resources across the Community, there is no single solution that would enable CM organisations to thrive in the EU. At best, transparent and accountable mechanisms – be they with regards to attracting private finance or public resources - should be implemented to target the financial needs of the sector as well as support the development of capacities.

2.7. Examples of Public Policies that Support Community Media
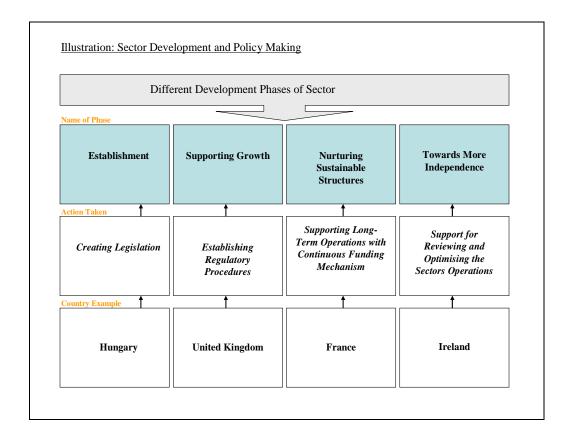
2.7.1. Introduction

Progressive public policy can contribute to developing the CM sector across Europe. As shown in the previous section, the sector delivers a range of public interest contributions that cannot be achieved solely by relying on market forces. Therefore, policy makers sometimes implement supportive measures for the sector. According to section two in the Client brief, the following identifies "Member States where policies have most helped Community Media to flourish" [27]. The illustration below shows that such policies are not only related to public funding but to a variety of measures that influence the sector throughout its development.

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[26]   The Soros Foundation in Latvia, for example, supports the Centre for Public Policy PROVIDUS, which in turn supports the website Politica.lv, a portal that gives the policy community the chance to comment on Latvian public policy issues.

[27]   As requested in section 2 of the Client brief, these countries include France, the UK, Ireland and Hungary.

Illustration: Sector Development and Policy Making

Different Development Phases of Sector			

Name of Phase

Establishment	Supporting Growth	Nurturing Sustainable Structures	Towards More Independence

Action Taken

Creating Legislation	Establishing Regulatory Procedures	Supporting Long-Term Operations with Continuous Funding Mechanism	Support for Reviewing and Optimising the Sectors Operations

Country Example

Hungary	United Kingdom	France	Ireland

2.7.2. Hungary: Establishment

Legal recognition is an important requirement to many CM sectors in the new EU Member States. It provides certainty and protection to the sector and is generally accompanied by the necessary licensing procedures and occasionally by financial support. So far most Central and Eastern European CM organisations do not benefit from any definition by law. The Hungarian legislation shows how to adopt a legal status regarding CM.

CM were legally recognised as such in **Act I of the 1996 Law on Radio and Television Broadcasting**. Two main factors positively influenced that recognition: In 1991 a moratorium was imposed on reviewing the media act until fair procedures regarding the passing of new media regulation were guaranteed. During these 6 years, some pirate radio initiatives joined forces with parliamentary members to lobby for the recognition of the sector. Additionally, the transition to democratic governance resulted in general awareness regarding the importance of having a healthy civil society sector. This helped the regulators to acknowledge the importance of having a "third media" sector next to private media and public service broadcasting.

Act I of the 1996 Law on Radio and Television Broadcasting recognises the specificities of a "non profit broadcasting company", defined as a "broadcaster who/which agrees to serve national, ethnic or other minority goals, cultural aims or an underprivileged group, or intends to serve as the public forum of a community". Non-profit broadcasting companies do not have to pay the broadcasting fees required by private operators. The broadcasting authorities are required to issue them an eight hour licence for minority of interest programs without inviting for tender. Overall, non-profit broadcasting companies are also given priority in licensing whenever 80% of the population of a given area or region already have access to two commercial local broadcasting services.

The Hungarian model is a good case study on how to use momentum and join political forces to create awareness of CM in a Central European Member State. The regulation in itself gives priority to the non-profit broadcaster and encourages CM to address specific regional minority issues. As regional minorities in many European countries suffer from under-representation in the mass media, such a requirement can also be perceived as a case of good-practice.

2.7.3. UK: Supporting Growth

The lack of political awareness regarding CM and subsequent missing regulatory procedures and policies across the EU is highlighted throughout this study. An up-to-date regulatory framework that increases the understanding among policy makers regarding CM and thus helps the sector to develop is vital for the sector. The UK is a prime example for how a Member State can introduce new legislation and regulations pertaining to CM and engage with the sector in a transparent and accountable fashion.

Ofcom has established "social gain" criteria which help to establish the special role of CM in the overall media landscape in the UK. These criteria help the regulator to award and extend licences to Community Radio initiatives.[28] By means of a public consultation, the regulator currently examines whether the criteria should be expanded and turned into guidelines. This would give more regulatory leeway to Ofcom while making it easier for CM operators to apply for licences. The important lesson learned for other national regulators is that Ofcom interacts with the sector before making this decision.

Furthermore, in the UK there appears to be greater awareness regarding the sector than in most other EU Member States. For example, Ofcom employs one senior associate who is responsible for CM and adds to the regulator's understanding of the sector. On a different level, the All-Party Parliamentary Community Media Group adds to the legislature's understanding of the sector[29]. Finally, the sector is well organised and represented by the Community Media Association.

While the British model of supporting CM may not be an ideal role model for all Member States, a procedural perspective on how the regulator Ofcom interacts with the sector is worth while and can help governments and the sector in other countries to better engage with each other.

2.7.4. France: Nurturing Sustainable Structures

As illustrated in the Sector Mapping, the availability of public resources can play a role regarding the development of a healthy CM sector. France's fond de soutien à l'expression radiophonique (FSER), a public fund for Community Radio, illustrates this. In 2005, the FSER made available approximately €24.2 Million of funding, contributing to app. one third of the revenues of each licenced Community Radio in France.

Support is made available in three categories: start-up support, support for equipment costs as well as support for running costs. Furthermore, aid can be increased on an individual basis depending on whether an initiative meets certain criteria regarding professional training as well

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[28] Section 8 of Ofcom's Application Form for CR Licensing list these 'social gain' criteria: http://www.ofcom.org.uk/radio/ifi/rbl/commun_radio/tlproc/application_form0607.rtf (accessed 05/07/2007).

[29] The members and objectives of the group can be obtained on the following website: http://www.publications.parliament.uk/pa/cm/cmallparty/register/memi208.htm (accessed 15/06/2007).

as cultural and educational content requirements. With a mix between continuous funding and performance based funding, the FSER ensures that beneficiaries can operate in a sustainable fashion while promoting quality performance.

The French model shows how a country with a distinct understanding of the societal importance of CM can support the sector's development with significant amounts of continuous public support while still rewarding flexibility and performance.

2.7.5. Ireland: Towards Independence

The future well-being of the CM sector in any of the EU's Member States is not only dependent on the availability of public aid or on legal recognition. The skills of people working in the sector as well as the implementation of appropriate organisational procedures are as vital to its sustainability.

The Broadcasting Commission of Ireland (BCI) has introduced several support schemes that seek to develop soft skills and overall performance of the Irish CM sector. The Community Radio Support Scheme provides funding to CM initiatives that seek to undertake internal as well as external evaluations of their organisations. The objective of the scheme is to improve the beneficiary's quality of services, operations, its development potential as well as its attractiveness to potential staff, volunteers and audiences. The scheme requires beneficiary organisations to also take external experts into account in the review. Beneficiaries further have to finish the relatively short review procedure by preparing a short final report. Overall funding for this scheme in 2007 is app. €53.000. This scheme illustrates how a regulator can contribute to capacity building in the sector with comparably little resources.[30]

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[30] To find out more about this scheme visit: http://www.bci.ie/news_information/press125.html (accessed 15/05/2007).

3. EU POLICIES AND COMMUNITY MEDIA

3.1. Introduction

Many EU policies have a direct or indirect impact on the CM sector. At the same time, CM can help to meet a range of EU policy objectives. Thus there exists opportunities for the sector, as well as EU policy makers, to interact with each other in order to promote the cause of CM. The following looks into:

- Whether and where EU policy objectives and CM goals coincide
- The relevance of EU-funding programmes for CM activities
- How the Sector engages with EU-institutions and policy makers

3.2. Relation between EU Policies and Community Media

3.2.1. Background

There is a general perception among the sector that EU policy making is important to CM. Consultations showed that CM organisations look increasingly towards EU institutions for further recognition. The sector primarily justifies this with the argument that CM help to meet overarching EU policy objectives, such as those of the Lisbon agenda. The following section examines in detail several EU policies and maps their objectives against the societal role of CM. The goal is to develop a comprehensive understanding of whether sector activity and policy objectives coincide.

3.2.2. Telecommunications Policy

No binding regulations regarding CM could be identified in the EU package of telecommunications regulation. However, the sector falls under the remit of a range of regulations including, for example, those governing universal service and digital broadcasting. While these regulations do not specifically mention the sector, many pave the way for implementing laws supporting CM at national level.

- Directive 2002/21/EC on a common regulatory framework for electronic communications networks and services (Framework Directive) notes that " audiovisual policy and content regulation are undertaken in pursuit of general interest objectives, such as freedom of expression, media pluralism, impartiality, cultural and linguistic diversity, social inclusion…"[31]. CM help to achieve all of these objectives.

- The directive 2002/22/EC on universal service and users' rights relating to electronic communications networks and services enables the implementation of Must Carry rules for nationally defined general interest objectives in Member States' regulations. In some countries, CM initiatives benefit from Must Carry rules. Countries such as France and Germany include the sector (or parts of it) in their national Must Carry regulations[32].

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[31] See Directive at:
http://ec.europa.eu/information_society/policy/ecomm/info_centre/documentation/legislation/index_en.htm#dir_2002_21_ec (accessed on 10/06/2007).

[32] See Directive at:
http://ec.europa.eu/information_society/policy/ecomm/info_centre/documentation/legislation/index_en.htm#dir_2002_22_ec (accessed: 10/06/2007).

- The authorisation directive (2002/20/EC) ensures non-discrimination with regards to the allocation of spectrum and related licences. This is important for inclusion of the sector in the transition to digital[33].

The Commission is currently reviewing this regulatory framework and should soon be adopting a communication outlining the guidelines for future reform of the telecoms package. This may be a good opportunity for the CM sector to raise their profile and bring the issues promoted by the sector to the public's attention, with a view to obtaining favourable regulatory conditions at EU level.

3.2.3. Audiovisual and Media Policy

According to Article 11 of the Charter of Fundamental Rights of the European Union "freedom and pluralism of the media should be respected". CM, which promote alternative perspectives in the overall media landscape, directly relate to this article.[34] The importance of media pluralism and diversity is furthermore recognised in several policy documents. However, none of these directly refer to the role of CM.

- The draft version of the Audiovisual Media Services Directive recalls that "*Cultural diversity, freedom of expression and media pluralism of means of communication are some important aspects of the European audiovisual sector and are therefore preconditions for democracy and diversity*"[35].

The Commission has furthermore adopted a Communication on the future of European audiovisual policy, in which it stresses that policy has to safeguard certain public interests, such as cultural diversity, the right to information and the importance of media pluralism[36].

- The Commission will in 2008 publish a Communication on Indicators for Media Pluralism reflecting wide-spread concern among EU-institutions that media pluralism and diversity are hampered by media concentration. [37] As CM are an alternative, bottom-up solution to increasing pluralism, this Communication may be somewhat relevant for the sector.

- *"Today, media literacy is as central to active and full citizenship as literacy was at the beginning of 19th century"*[38]. The Commission's interest in media literacy is growing. The Commission has undertaken a large consultation on the subject, open to all relevant parties. This survey will lead to a communication on media literacy in the second part of 2007.

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[33] Directive 2002/20/EC of the European Parliament and of the Council of 7 march 2002 on the authorisation of electronic communications networks and services (Authorisation Directive). http://eur-lex.europa.eu/pri/en/oj/dat/2002/l_108/l_10820020424en00210032.pdf (accessed the 21/05/07).

[34] Charter of Fundamental Rights in the European Union, Art. 11. http://www.europarl.europa.eu/charter/pdf/text_en.pdf (accessed the 20/03/2007).

[35] Draft Audiovisual Media Service Directive Consolidated Text, including EP first Reading Amendementsaccepted in full and the amended Commission proposal, March 2007, http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=CELEX:52007PC0170:EN:NOT, (accessed 18/07/2007).

[36] Communication on the Future of the European Regulatory Audiovisual Policy, COM(2003) 784 final, Brussel 15.12.2003, www.europa.eu.int/eur-lex/en/com/cnc/2003/com2003_0784en01.pdf (accessed 14/04/2007).

[37] http://ec.europa.eu/information_society/media_taskforce/pluralism/index_en.htm, (accessed thr 17/05/2007).

[38] Vivianne Reeding quoted in "Making sense of today's media content: Commission begins public media literacy consultation"; Press Release by the European Commission, 06/10/2006.

PE 408.943

- The Parliament resolution on the risks of violation, in the EU and especially in Italy, of freedom of expression and information stresses that national media ownership authorities should enable "equal access to the media for the various social, cultural and political players". As CM enable different societal groups to make themselves heard, the resolution is also indirectly related to the sector.[39]

Despite the fact that CM fall within many of the above mentioned policies, it has to be noted that regulatory measures and policies affecting media pluralism remain a responsibility of national authorities, and that the room for the EU to manoeuvre in this field is quite limited.

3.2.4. Freedom of Expression and Communications Policy

Freedom of expression and the right to access information constitute to the basis of democracy. CM help to put these rights into practice by enabling citizens to engage in a wider public discourse based on modern communication technology. They also facilitate access to information for disadvantaged minorities. CM are therefore directly related to promoting communications rights in the EU. While the sector is not specifically mentioned in any of the following policies, its activities coincide with their objectives:

- The draft European Charter or code of conduct on communication highlights the right to access information and recalls that "the European Commission believes that all European citizens have a right (…) to access information in their own language, to express their views and to be heard". As shown in this report many CM initiatives give a voice to the social, cultural and ethnic European communities and minorities.[40]

- The white paper on a European communications policy is developing a new European strategy based on the principles of the right to information, freedom of expression, inclusiveness, diversity and participation. The CM sector can help to further implement these rights by fostering grass-roots civil participation in public discourse[41]. Collaborating more actively with the CM sector is an opportunity for the EU to enter into a closer dialogue with citizens – CM should be given a greater role in the way Europe delivers its message to the outside world.

- The Draft Reform Treaty amending the treaty on the European Union and the treaty establishing the European Community includes the right of the elderly to participate in social, cultural and political life. As found in the case studies of this report, some CM activities facilitate this right.

3.2.5. Cultural Policy

CM help to achieve a range of EU cultural policy objectives such as the promotion of cultural diversity and intercultural dialogue. CM also foster local creativity.

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[39] European Parliament resolution on the risks of violation, in the EU and especially in Italy, of freedom of expression and information (Article 11(2) of the Charter of Fundamental Rights) (2003/2237(INI)). http://www.europarl.europa.eu/sides/getDoc.do?type=REPORT&reference=A5-2004-0230&language=FR&mode=XML (accessed the 18/07/2007).

[40] European Charter or Code of Conduct on Communication , 2006, http://ec.europa.eu/communication_white_paper/charter_code/index_en.htm (accessed 18/07/07).

[41] White Paper on a European Communication Policy, 2006, http://ec.europa.eu/communication_white_paper/doc/white_paper_en.pdf (accessed 08/06/2007).

- The recently published Communication on Culture – a first in European cultural policy making - includes many forward looking suggestions and ideas regarding issues that also relate to CM. It recognises, for example, the importance of fostering creativity at local level. Moreover, it contains a large section on the role of culture in fostering international relations. In this context, it should be noted that CM are important catalysts of change in transition and developing countries where the media environment is often dominated by a few number of players. Furthermore, the Communication acknowledges the importance of culture in delivering on the Lisbon Agenda. CM can be used as a tool for achieving these goals, as demonstrated in the case study of Radio Region in the UK, for example.

- In 1987, the Parliament passed a resolution on the languages and cultures of regional and ethnic minorities in the EC. It sets out specific provisions related to Media policy that could strongly apply to CM as it recommends to the Member States that they take measures in respect of the mass media, including: granting and making possible access to local, regional and central public and commercial broadcasting systems in such a way as to guarantee the continuity and effectiveness of broadcasts in regional and minority languages, ensuring that minority groups obtain organizational and financial support for their programmes commensurate with that available to the majority[42]

3.2.6. Policies Relating to Equality and Non-Discrimination

CM activities often promote the involvement of minorities in public discourse and help to overcome social, ethnic and cultural discrimination. While only indirectly related, all of the following policy objectives may be applicable to the sector:

- The racial equality directive recalls the importance for Member States to "address the different forms of discrimination and to combat them", and to work with civil society in order to do so. It also requests Member States to adopt specific measures to compensate "disadvantages linked to racial or ethnic origin". CM initiatives working with disadvantaged ethnic minorities constitute such measures[43].

- In its Communication on racism, xenophobia and anti-Semitism, the Commission establishes a range of guiding principles governing its activities, which includes preventive measures. The Commission's actions in this domain could therefore apply to CM as many initiatives foster cross-cultural dialogue[44].

- The stability pact for South Eastern Europe[45] includes, amongst other objectives, "preserving the multinational and multiethnic diversity of countries in the region, and protecting minorities". Special attention is particularly given to the Roma community. Many of the CM initiatives in Eastern Europe specifically address minorities that are neglected by the mainstream media.

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[42] Resolution on the languages and cultures of regional and ethnic minorities in the European Community, Doc. A2-150/87,
http://www.minelres.lv/eu/epres/re871030.htm (accessed the 06/07/2007).

[43] Council Directive 2000/43/EC of 29 June 2000 implementing the principle of equal treatment between persons irrespective of racial or ethnic origin.
http://ec.europa.eu/employment_social/fundamental_rights/pdf/legisln/2000_43_en.pdf (accessed 29/05/07).

[44] COM (95) 653 final, 13 December 1995,
http://eurlex.europa.eu/smartapi/cgi/sga_doc?smartapi!celexplus!prod!DocNumber&lg=en&type_doc=COMfinal&an_doc=1995&nu_doc=653, (accessed the 25/04/2007).

[45] http://www.stabilitypact.org/, (accessed the 09/06/2007).

3.2.7. Options for Further Engagement

CM's goals coincide with a range of different EU policy objectives which – in return – often have an influence on the sector. Yet, there is no binding regulation at EU level that specifically refers to or makes the case for CM.

CM, so far, have only been directly recognised by the Committee of Ministers of the Council of Europe in several recommendations related to media concentration and pluralism.

"Member states should encourage the development of other media capable of making a contribution to pluralism and diversity and providing a space for dialogue. These media could, for example, take the form of community, local, minority or social media." [46]

Furthermore, the Council of Europe acknowledged that CM constitute a "third sector, supplementing the national public service and the private broadcasting sector". [47]

Despite not being referred to in binding EU regulation, the sector has helped to achieve many of the core objectives of the EU. It helps, for example, to combat social exclusion as set out in article 137 of the EC treaty and contributes to the "flowering of the cultures in the Member States" as presented in article 151. Moreover, CM initiatives contribute to meeting goals set out by the Lisbon Agenda, as they favour the creation of a knowledge-based society and help to increase social and regional cohesion.

While telecommunications and media policies especially influence whether the sector can thrive or will stagnate, it is up to the Member States to decide how the sector should be recognised by national regulation. However, EU regulations give enough scope for implementing supportive regulations at national level. At national level, sector bodies may therefore be best advised to point towards countries where CM is recognised by regulations and further refer to the fact that such recognition is in line with EU legislation.

Consultations further showed that the widest scope to support the sector at EU level may exist in areas such as minority rights, cross-cultural dialogue or the fight against xenophobia and racism, as these are areas which the EU can address without impeding on Member States' rights to regulate the mainstream media.

3.2.8. Community Media as an Opportunity to Connect Europe to Local Constituencies

It should be noted that CM's localness corresponds well with the wish of the European institutions to connect EU themes to local and regional constituencies. This strategy was reflected in a recent policy white paper where it was recognised that "Europe needs to find its

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[46] *See:* 1)Recommendation of the Committee of Ministers to Member States on media pluralism and diversity of media content {Rec(2007)2} (Adopted by the Committee of Ministers on 31 January 2007); 2)The Declaration of the Committee of Ministers on protecting the role of the media in democracy in the context of media concentration (Adopted by the Committee of Ministers on 31 January 2007) "Stresses that policies designed to encourage the development of **not-for-profit media** can be another way to promote a diversity of autonomous channels for the dissemination of information and expression of opinion, especially for and by social groups on which mainstream media rarely concentrate."

[47] Recommendation 173 (2005) on regional media and trans-frontier co-operation by the congress of regional and local authorities in the Council of Europe.

place in the existing national, regional and local 'public sphere'"[48]. Regional Policy Commissioner Huebner's summary of this issue further highlights this opportunity:

"During my many visits to the regions which I mentioned a moment ago, I have had first hand experience of the importance of this local approach to the provision of information on Europe. It is through local media for example – regional newspapers, radio stations and television programmes – that people most readily identify and it is often to these media that they turn for information."[49]

In the medium to long term, CM may therefore play a role in communicating European issues at local level. It may be an opportunity for the sector to consider how it could engage in such activity.

3.3. EU-Funding and its Relevance to the Sector

3.3.1. Introduction

The EU has established a variety of funding schemes to meet many of the policy objectives set out in the previous sections. Several CM organisations benefit from such schemes. However, there is an opportunity to integrate the sector even further into EU-funding activity in order to achieve various policy objectives. The following looks into a selection of funding programmes which could help CM to further develop and identifies some previous EU projects in the sector.

3.3.2. Underutilised Opportunity of Structural Funds

In a nutshell, European funding works in two ways: The majority of funding is managed in a decentralised fashion by Member States and regions, while some funding is administered centrally by different European institutions. Decentralised Structural Funds may be the best opportunity for CM initiatives to access European support. To do so, the sector needs to develop entrepreneurial spirit and recognise how CM can meet Structural Funding objectives.

There are two structural funds that may be of interest to CM: The European Regional Development Fund and the European Social Fund. While the Commission oversees the overall strategies of these funds, national and regional authorities agree on funding initiatives and launch in addition to selecting candidates for calls for proposals. CM organisations are well positioned to benefit from these decentralised funds if they learn how to articulate their goals in a way that meets the objectives of the funds. It is also easier for CM organisations to establish contact with local and regional funding officers and to discuss possible proposals as they often lack the time and the resources to prepare for European calls for proposals that are managed centrally.

3.3.3. The European Regional Development Fund

The ERDF is currently the largest European fund. Its aim is social and regional cohesion. The fund has three objectives: Objective 1 is to promote the development and structural adjustments in regions lagging behind. Objective 2 supports the reconversion of areas experiencing structural difficulties. Objective 3 is to modernise education and employment policies in the regions not

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[48] White paper on Communications Policy, Part 1 Chapter 2.
[49] Speech: Going Local on European Issues Opening of the Europe Direct Centre Leeds Civic Hall, 17 November 2006.

eligible under Objective 1. CM initiatives must check which objective their region falls under in order to determine what kind of projects can be funded. [50]

In the past funding period from 2000 – 2006, several CM projects have benefited from the ERDF. In Scotland, the ERDF supported the Bradford BCB Community Radio to move into new premises. [51] 7 WAVES Community Radio in the UK obtained ERDF support to create a new media centre to increase training opportunities for its participants.[52] In North Karelia (Finland) Learning Central Karelia - "Outokumpu and Polvijarvi Project" established 35 IT kiosks that people could use free of charge. [53] This turned into a CM initiative when the project created a community network, in which the locals could chat, exchange or listen to local news. ERDF funds tend to sponsor structural development. Interested initiatives need to contact their national ERDF agencies for more details on eligibility criteria and funds available.

3.3.4. The European Social Fund

The ESF specifically targets social exclusion, worker's adaptability and access to employment. Similarly to the ERDF, the ESF is subdivided into different objectives. The 2007-2013 programmes include support to lifelong learning schemes and the integration of disadvantaged communities. CM's societal contributions therefore complement the objectives of ESF funding.

Several CM initiatives have accessed ESF funding in the past: The fund has helped to launch Radio Regen[54], one of the UK's leading CM organisations, and supported its work in training individuals for future employment. Furthermore, Radio Akropolis in the Czech Republic has also benefited from ESF support. [55]

The ESF additionally funds trans-national projects: The Irish Roscommon Partnership Company developed a project with Italian, Dutch and Swedish partners to empower people with disabilities[56]. The main objective was the creation of local Community Radios that would provide a bridge into commercial employment and foster a positive image of the disabled community. The project was supported under the EQUAL (equal opportunities) scheme of the 2000 -2006 ESF programme.

3.3.5. European Calls for Proposals

CM organisations can also benefit from Calls for Proposals launched by one of the Commission's Directorates General. These funding programmes follow specific goals and often require a consortium of partners from different Member States to apply for funding. Although this requires a significant amount of preparation, several CM organisations have received support through some of these schemes in the past.

The following presents selected centralised funding opportunities for CM and lists project examples.

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[50] For national contacts, please check http://ec.europa.eu/regional_policy/country/gateway/index_en.cfm,
[51] Bradford Community Radio Station, http://www.bcbradio.co.uk, (accessed the 16/06/2007).
[52] 7 Waves Community Radio, http://www.7waves.co.uk/live-across-the-wirral/news-newcentre.html, (accessed the 15/06/2007).
[53] http://ec.europa.eu/regional_policy/projects/stories/details.cfm?sto=1063&lan=5&pay=FI&the=7, (accessed the 21/04/2007) .
[54] www.radioregen.org, (accessed the 12/05/2007).
[55] www.radioakropolis.cz, (accessed the 15/05/2007).
[56] http://www.equal-ci.ie/2000/proj/rosc.html, (accessed the 15/06/2007).

A. Communication Directorate General

The Communication Directorate General promotes local communication activities to involve more citizens in a general discourse about European issues. CM can help to achieve this as they are local media that promote citizenship and participation. The following shows how calls for proposal from this DG can be suitable for the sector: A recent Call for Proposals, "Plan D for Democracy, Dialogue and Debate", provided financial assistance to civil society initiatives that promote public participation among young people and women in the debates regarding the EU. The fund financed around 70% of a project set up by a consortium of European partners. The resulting project was a CM project called "Radio Web for Europe". Today Radio Web for Europe organises workshops on European issues and created a European internet-based radio in which participants can upload their own contributions.

"Plan D for Democracy, Dialogue and Debate":
http://ec.europa.eu/dgs/communication/grants/index_en.htm

B. Directorate General for Education and Culture

"Europe for Citizens" is a support programme administered by the Education, Audiovisual and Cultural Executive Agency under the DG for Education and Culture. The program aims to promote active European Citizenship and to improve individual citizens' participation in the construction of Europe. As part of the programme's last call for proposals, CM initiatives were eligible to apply under Action 2: "Active Civil Society for Europe" which offered support to finance trans-national projects. The beneficiaries have to foster action, debate and reflection on European citizenship and democracy. Café Babel – a beneficiary of this fund - is an internet-based CM website, as well as a print magazine, that benefited from this fund. It is published in 7 languages by students from 20 European cities.

"Europe for Citizens": http://eacea.ec.europa.eu/citizenship/guide/index_en.htm

C. Directorate General for Education and Culture

"Youth in Action Program" - administered by the Education, Audiovisual and Cultural Executive Agency under the DG for Education and Culture.

The aims of this programme are to inspire a sense of European citizenship among the youth of Europe and to involve them in the construction of the future of the Community. It also fosters social cohesion and promotes non-formal and informal learning. It will be implemented from 2007 until 2013. The programme is divided into 5 sections, two of which are of relevance to the CM sector:

Action 1 ("Youth for Europe") aims to develop citizenship and mutual understanding by supporting youth initiatives that promote participation in democratic life. One planned activity under this Action could be of interest for the CM sector: An annual call of proposal aims to support a network of 10 different non-profit associations from across the EU. The network will be awarded € 1 Million to establish links between projects tackling the same themes and to increase knowledge exchange regarding the stimulation of youth participation in democracy.

Action 3 ("Youth in the World") promotes cooperation in the field of youth and non-formal education with other regions of the world, notably neighbouring countries. Student CM initiatives have already created connections with other European and non-European countries through the IASTAR movement and could therefore participate in this action.

"Youth in Action Program": http://ec.europa.eu/youth/yia/index_en.html#guide

D. Directorate General for Education and Culture

"Education and Training 2010" is also managed by the DG for Education and Culture. This work programme developed a lifelong learning strand subdivided into the Gruntving, Comenius, Socrates and Leonardo da Vinci schemes. The **Gruntving programme** funds various CM initiatives. It supports informal teachers and learning institutions. In particular, it aims to respond to the challenge of an ageing population and to provide pathways for adults to improve their knowledge and competences. It provides second chance education to adult learners and supports community-learning centres.

One program is of particular interest to CM: the Learning Partnerships help small-scale cooperation projects involving education centres from at least three EU countries. Each project receives an average €10.000. They must tackle themes such as active citizenship, languages, life long learning, inter-generational dialogue, computer skills and intercultural dialogue. The national agencies responsible for Gruntving manage the application procedures and award the grants.

Many community projects have already benefited from these partnerships deals. For example, the Cotolode network[57], 4 organisations from France, Sweden, Turkey and Portugal. Together they have created a community development toolkit for which they have received Grundtving support. Meta Europe[58] is another big project that was supported by the Gruntving programme. The project consists of a media training course designed and delivered by Community Radio activist and academics. 10 countries (mainly central and Eastern Europe) were involved with the project.

Gruntving Programme: http://ec.europa.eu/education/programmes/llp/grundtvig/index_en.html

E. DG Employment, Social Affairs and Equal Opportunities

The 2007-2013 Progress Programme (Programme for Employment and Social Solidarity) managed by DG employment, Social Affairs and Equal Opportunities: PROGRESS was created to help Member States deliver social policy goals. One of the objectives is promoting equal opportunities for all citizens. Under EU rules, Member States have the main responsibility for the development and implementation of the Progress programme. CM should therefore address their request to national representatives.

The programme is subdivided into 5 themes, 2 of which are of interest for CM initiatives:

The Social Protection and Social Inclusion category fights against all forms of discrimination leading to social exclusion. In their national action plans for the 2006-2008 time frames, Member States are stepping up efforts to promote 'active inclusion' of the most disadvantaged in society with the support of Progress. Civil Society organisations are one of the main beneficiaries since the states have intervened to help them reach the Union's policy objectives.

Diversity and combating discrimination: One of the main objectives of this action is to raise awareness and to promote the debate on discrimination issues. One of its focuses is the support of NGO's that are tackling these issues. The year 2007 programme concentrates on the Roma and handicapped issues. Many CM initiatives that deal with these issues should look out for relevant calls for proposals.

Progresse Programme: http://ec.europa.eu/employment_social/progress/index_en.htm

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[57] http://cotolode.mmz.nu/index.php?option=com_content&task=view&id=14&Itemid=88888891, (accessed the 16/06/2007).
[58] http://www.meta-europe.de, (accessed the 17/05/2007).

3.3.6. Further Involvement of the Sector in EU-Funding Activities

Although several European CM initiatives benefit from EU support, there is a clear opportunity to further involve the sector in EU support activities. The challenge may be to increase awareness among and communication between EU policy makers and the CM sector to achieve this.

Consultations showed that the awareness of and the ability to benefit from European funding varies greatly among the sector. While some organisations run several EU-funded projects in parallel, others believe there is no EU-funding available to CM at all. Moreover, so far national and international CM associations and networks have done little to assist their sector in understanding the myriad of support schemes available. Consultations showed that up to now, sector representatives have primarily looked towards the Commission's MEDIA Programme for support. However, the MEDIA Programme is a funding programme which pursues the development of the European audiovisual industry. CM should rather turn towards funding programmes that have a social or civil society component, as illustrated by many of the above examples.

The disorientation of the sector regarding EU funding could stem from the fact that it lacks the resources and the continuity to engage with and learn about the complex structure of EU funding schemes over a longer period of time. This is partly the result of the voluntary nature of the sector. As will be shown in the next section, the sector's demands address some of these challenges.

On the side of the EU institutions, there appears to be a lack of awareness regarding the breadth of CM's societal contributions. However, in order to achieve even further inclusion of the sector in EU funding activities, such awareness needs to be raised. So far, the sector has not succeeded in developing a clear profile in Brussels. If the sector managed to demonstrate how it meets EU policy objectives, support programmes could play an even greater role in its future.

3.4.   The Sector at EU-Level and its Demands

3.4.1.   The Sector's Representation at European Level

The CM sectors engagement with EU-institutions and policy makers has varied over the past decade. Though, there appears to be a current momentum regarding CM's endeavour to act collectively.

As is the case with representation at national level, multiple factors exist that influence the sector's ability to articulate common objectives at EU level:

- The voluntary nature of the sector makes it difficult for people contributing to CM to develop the policy skills and knowledge required to engage with EU-institutions.
- The division between radio, television, internet and press translates into the sector's endeavours to represent different political interests before policy makers (however, some notable exceptions exist as indicated in the description on how the sector is organised at national level – e.g. in the Netherlands and the UK).
- There is a general lack of financial resources to enable the sector to establish a spokesperson in Brussels.

The largest association representing parts of the sector is AMARC, the World Association of Community Radio Broadcasters[59]. In the past years the association has not focussed on engaging in the political process at EU-level. Although, consultations show that the association intends to become more active in the future.

Several networking events and workshops to discuss interaction between the sector and EU policy have been organised over the past few years to bring together national interest groups, academic researchers, practitioners and – sometimes – EU representatives from the Commission and Parliament[60]. These events have helped the sector to debate and formulate some common interests and goals.

Furthermore, a group of national CM representatives and practitioners have established an expert group to engage with and advise the sector as well as European institutions on CM related policy. While still at the infant stage, the Community Media Forum Europe (CMFE) comprises app. 25 CM experts and publishes statements to public consultations and policy issues that potentially have an effect on the sector.

3.4.2. Summary of the Sector's Policy Recommendations and Demands at EU-Level

Official policy demands of the sector are general and do not cover all policy areas that may be of importance to CM. During consultations, however, the sector's demands were expressed quite clearly by some representatives. These are threefold and comprise the following:

- Recognition.
- Access to radio spectrum.
- Access to public funding.

The following lists a selection of official demands of the sector with regards to EU policy:

- In its position paper on the White paper on Communication Policy, the CMFE proposes "the establishment of a European multilingual Community Media correspondent group which could deliver the European topics directly to the local communities"[61].

- In its position paper for the EC consultation on the revision of the Television Without Frontier Directive, the CMFE recommends that the revised TVWF directive should "consider that the question of media pluralism has to involve the role of commercial, public-service and community broadcasters"[62].

- The European manifesto to support and to underline the importance of minority CM calls upon the European Parliament, the European Commission and the Governments of the Member States "to see the minority media being recognised as a public community service and that, as such, they will be contained in all European and national media legislation and will obtain a "Must Carry" status on all relevant broadcast platforms"[63].

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[59] Amarc: www.amarc.org (accessed 25/04/2007)
[60] Fm@dia gathering in 2004, Community Media Workshop in Brussels in 2006, Community Media Policies Workshop in Budapest 2007.
[61] See: www.communitymedia.se/europe/cmfe06.pdf (accessed 12/06/2007).
[62] See: http://ec.europa.eu/avpolicy/docs/reg/modernisation/issue_papers/contributions/ip2-cmfe.pdf (accessed 12/06/2007).
[63] See: www.multicultural.net/manifesto/ (accessed 12/06/2007).

- The CMFE Contribution to the public consultation on the EC digital divide report asks for new public policy actions at the European level to stimulate the provision of broadband in remote, rural or sparsely populated areas of the EU and recalls its significant role in bridging the digital divide in remote, rural or sparsely populated areas[64].

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[64] See:
www.ec.europa.eu/information_society/eeurope/i2010/docs/digital_divide/community_media_forum_europe_c mfe.doc (accessed 12/06/2007).

4. CONCLUSION AND RECOMMENDATIONS

4.1. Conclusions

4.1.1. The General Situation of the Sector in the European Union

This study paints a picture of the current state of CM in the EU. The Client brief asked consultants to highlight the positive aspects of the sector and to illustrate how these are in line with EU policy objectives. While the overall aim of the Assignment was to cover the entire sector, many elements of the brief focussed on the situation of Community Broadcasting and specifically Community Radio. The report reflects these requests and subsequently touches upon the Internet and the press only to a limited extent. However, the overall challenges for and societal contributions of CM can be deemed similar for all these types of media.

The CM sector is a diverse sector that operates differently across the EU. While the sector shows significant activity in some Member States, it barely exists in others. Though in general, there appears to be momentum regarding its development in Europe as the sector tries to organise itself at national and international levels.

Digital technology is a threat as well as an opportunity for the sector. On the one hand, the Internet as well as digital broadcasting promises CM new ways to connect to their audiences. On the other, the sector lacks the skills, resources and notably the regulatory support to benefit from the future transition to an all-digital media environment.

The various degrees of CM activity across the EU, to some extent, depend on different national and regional regulations as well as on the historical circumstances of each Member State. As far as availability of data permits, comparably high CM activity could be identified in countries where the sector is enshrined in national media laws and thus becomes tangible for national policy makers and/or business partners. However, legal recognition of the sector does not automatically translate into public support for CM. It rather provides the basis for sustainable development of the sector.

CM projects often meet public interest objectives (as outlined in the next section). The sector therefore operates in a mixed economy and depends on various public support mechanisms as well as on advertising revenues and the aid of volunteers.

4.1.2. The Sector's Needs and its Interface with EU Policy

The study highlights that the sector makes a range of contributions that are in the public interest as well as in line with several European policy objectives. CM are, for example, a fresh, bottom-up solution to increase media pluralism and diversity across the Union. Their contributions to social cohesion, media literacy, local creativity, cross-cultural dialogue and local regeneration illustrate how the sector's activities coincide with EU policy goals. Furthermore, the localness of many CM presents an opportunity to Europe. At a time where EU institutions and policy makers wish to connect to Europe's regions and its local communities, CM organisations that wish to do so can help to achieve this. It naturally depends on each CM organisation whether or not it really delivers on these promises.

In this context, increased engagement between EU institutions and the sector is desirable. There are several areas in which public policy can help CM to address key issues which can either promote or impede their future development.

- The need for legal recognition of CM in media law.
- The need for regulations pertaining to radio spectrum licensing and digital switch-over that take account of CM.
- The need for public support to enable the sector to develop the capacities needed to operate in a more continuous and sustainable fashion.
- The need for increased networking and knowledge exchange between CM organisations and associations.
- The need for more continuous representation at EU level in order to develop a public profile of the sector.

It has to be acknowledged that many of these challenges and opportunities can only be addressed at Member State level. The need for national legal frameworks to facilitate the transition of CM to an all-digital media environment exemplifies this. The sector's wish for European policy to make up for the shortcomings of national governments may – to a certain extent - be a lost cause.

Nevertheless, several opportunities for stronger involvement of CM in European policy initiatives exist, and both the sector as well as Europe would benefit from a closer alliance in the future. Stronger involvement of the sector can be achieved by raising its profile among European institutions and policy makers and by articulating CM's societal contributions.

In the past, the sector has experienced difficulty in advocating for its various causes in a consistent and continuous fashion at EU level. For example, the sector has missed the opportunity to highlight CM's role in fostering media literacy in the recently finished Commission consultation pertaining to the topic. However, as this study shows, the sector is committed to make up for past shortcomings. The Parliament can support it in this endeavour, as illustrated below.

4.2. Recommendations to the European Parliament

4.2.1. Support Networking and Presence of the Sector at European Level

Stronger visibility of CM among European institutions and policy makers primarily has to result from the sector's own initiative. Members of the CULT Committee should support the sector in this endeavour through future engagements with its experts and representatives such as the CMFE, AMARC and with their continued presence at CM related policy events. The sector should furthermore be encouraged to have more presence in Brussels. The Committee could therefore support CM delegations that seek Parliament's support for travel reimbursements regarding meetings with the European Parliament.

The Committee should furthermore issue an Own Initiative Report regarding the potential of CM to implement EU policy objectives. Such initiative could be supported by a parliamentary hearing on CM where representatives of the sector and experts get to present their case before the Parliament. Furthermore, CM should be put on the agenda of the audiovisual intergroup as a future topic for discussion.

Finally, The Committee should encourage the sector to create a pan-European Community Media association that represents the sector before EU institutions and policy makers. It should be sounded out whether EC support for European Cultural Bodies could be applied to assist such a body's operations.

4.2.2. Support Establishment of a European Community Media Portal

In order to facilitate networking and the exchange of good practices among the sector, the development of an internet-based European Community Media portal should be supported. While this would allow CM organisations to learn from each other across borders, sector representatives could also use the portal to share, develop and articulate common objectives and statements. The portal would act as the "flagship" of the sector and help CM to gain profile among regional, national and European stakeholders. It could furthermore be used to collect more reliable data on the sector and contain a directory listing freely available CM programmes for download.

4.2.3. Highlight the Sector's Potential to Connect Europe with Local Communities

CM operate primarily at local level. The CULT committee could raise awareness among European institutions and policy makers regarding the opportunity to promote public dialogue on European issues via CM. It could, for example, sound out whether CM could play a greater role in Europe's communications strategy with DG Communications. If the role of CM in Europe's media landscape were to significantly increase in the mid to long-term future, the sector could be an important vehicle to bring Europe closer to its people.

4.2.4. Highlight Community Media's Role in Achieving Policy Objectives

There are currently a number of policy initiatives under way that may be of relevance to the CM sector in the future. Among these are the recently published Communication on Culture, the planned Communications on Indicators for Media Pluralism and on Media Literacy as well as the review of the telecommunications regulatory package. Should the CULT Committee initiate a Parliament Recommendation on the future development of these initiatives, the role of CM in achieving various policy goals should be highlighted[65].

4.2.5. Promote best Practice Exchange between Local, National and Regional Authorities

CM can benefit from increased awareness of local, regional and national authorities regarding policy options to foster CM. There are several European support programmes that facilitate the exchange of best-practice among such public or semi-public authorities, such as the former Interreg schemes (now Regions for Economic Change initiative). The CULT committee could highlight the opportunity of launching a CM related project to the sector.

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[65] It should also be noted that the European Commission has expressed interest in receiving the sector's viewpoints regarding its contributions to media literacy despite the expiry of the consultation on the topic.

4.2.6. Foster further Understanding of the Sector

The study showed that there is little reliable data that exists on CM activity in the EU. It is unlikely that Eurostat (which merely collects data on citizens' voluntary activity) will work with Member States to collect hard data regarding such a small sector. However, the Parliament could support further understanding of the sector by promoting research regarding CM as part of future calls for proposals under the 7th Framework Programme. Furthermore, it should be determined whether the European Audiovisual Observatory can include the sector in some of its future research activities.

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Resolution on the languages and cultures of regional and ethnic minorities in the European Community Doc. A2-150/87.

Communication COM(2003) 784, on the Future of the European Regulatory Audiovisual Policy, final, Brussel 15.12.2003.

White Paper on a European Communication Policy, COM(2006)35 final, Brussels, 1.2.2006.

The Amsterdam Protocol on Public Service Broadcasting, 1997.

Council of Europe:

Recommendation Rec(2007)2 of the Committee of Ministers to Member States on media pluralism and diversity of Media content.

Recommendation 173 (2005)1 on Regional Media and Transfrontier Co-operation by the Congress of Regional and Local Authorities in the Council of Europe.

Declaration of the Committee of Ministers on protecting the role of the Media in Democracy in the Context of Media Concentration, adopted by the Committee of Ministers on 31 Jan. 2007.

Selected Websites

AMARC, World Association of Community Radio Broadcastors
www.amarc.org

Budapest Community Media Workshop 2007, Community Broadcasting Workshop (Hungary)
http://www.personal.ceu.hu/departs/personal/Erich_Schwarz/index.html

CMA, UK Community Media Association
www.commedia.org.uk/

CMFE, Community Media Forum Europe- European Expert association on Community Media
http://www.cmfe.eu

Community Radio Toolkit- UK founded toolkit for Community Media (
www.communityradiotoolkit.net/

Europa, the European Union general website, with a link to grants and funding programmes
http://ec.europa.eu/grants/index_fr.htm

Fm@dia 2004, Community Media forum focusing on Central and Eastern Europe
www.fmedia.ecn.cz

Meta Europe, European Media Training Program by Community Media activists
http://www.meta-europe.de/

Global Village CAT, community television around the world:
http://www.communitymedia.se/cat

Community Media Research @ London Metropolitan University
http://www.communitymedia.eu/

ANNEX 1: List of consultations

Community Media Initiatives

Alternativ Radio, Mirela Scaunasu – Radio Producer (Romania)

Amisnet Francesco Diasio - President (Italy)

Citizen's Media Center, Michal Wojcik - Head of Projects (Poland)

Community Television Trust, Christopher Haydon - Director (UK)

Indymedia Belgium, Nele Mardaga - Editor (Belgium)

Radio Mars, Mojca Plansak (Slovenia)

Radio Regen, Phil Korbel - Director and Co-founder (United Kingdom)

Radio Robin Hood, Riitta Haapakoski - Managing Director (Finland)

Community Media Associations and Networks

Amarc, World Association of Community Radio Broadcastor**s,** Steve Buckley – President (UK)

Community Media Association, Phil Shepherd - Chairman (UK)

Commmunity Media Forum Europe, Thomas Kupfer – Board Member (Germany)

Community Media Network, Margaret Gillian - Project Manager (Ireland)

Community Radio Forum of Ireland, Niamh Farren (Ireland)

Fm@dia, Thomas Kreiseder - Project Manager of the 2004 Edition (Germany)

Fédération Nationale des Vidéos et Pays de Quartiers, Guy Pineault -Consultant to the Board (France)

Free Radio Association Austria, Helmut Peissl – Managing Director (Austria)

Iastar, Guillaume Leroyer – Artistic and Development Manager (France)

Meta Europe, Dr. Traudel Guennel - Project Coordinator (Germany)

Ofcom, Office of Communications – Lawrie Hallett – Senior Associate Licensing Division (UK)

OLON, Organisation of Local Media in the Netherlands - Pieter de Wit - Director of Olon (Netherlands)

Open Channel for Europe, Juergen Linke - Head of the association (Germany)

UCRM, Union de Radio Communitarias de Madrid - Luis Mariano Sanchez - President of the association (Spain)

Public Authorities

BCI, Broacasting Commission of Ireland, Shane Downer – Training and Development Officer (Ireland-

European Commission - DG INFSO, P-Y. Andrau - Audiovisual and Media Policy - Policy officer (Brussels)

European Commission - DG INFSO, M. Zacchetti - Media Program and Media Literacy-Policy –officer (Brussels)

Medien + Bildung Gmbh, Hans Uwe Daumann **–** Co-Managing Director (Germany)

Ministry of Culture, Peeter Sookruus - Head of Media and Copyright Department (Estonia)

Consultants and Researchers

Bart Cammaerts, London School of Economics - Researcher specialised in participatory media (UK)

Kate Coyer, Annenberg School of Communication at the University of Pennsylvania and the Center for Media and Communication Studies at the Central European University – Post Doctoral Research Fellow (US)

Christer Hederstörm, Ideosphere – System and Strategy Consultant in Information Technology and Media (Sweden)

Arne Hintz, University of Hamburg - Researcher (Germany)

Peter Lewis, London School of Economics - Researcher (UK)

Peter Molnar, Central European University, Researcher and Legislative Adviser to the Hungarian Informatics and Telecommunication Minister (Hungary)

Nan Rubin, Community Media Services - Managing Director (US)

Sean O' Siochru, Integra - Researcher - (Ireland)

Agnes Uhereczky, Association of Voluntary Service Organisations – Director (Brussels)

ANNEX 2: List of selected national organisations and networks

Country	Name and Website	Media
Austria	Austrian Community Radio Association www.freie-radio.at	Radio
Germany	Bundesverband Offene Kanaele www.bok.de	TV
	Bundesverband Freier Radio www.freie-radio.de	Radio
Denmark	Sammenslutningen af Medier i Lokalsamfundet www.slrtc.dk	All
France	CNRA, Conseil National des Radios Associatives www.cnra.asso.fr	Radio
	Iastar, Réseau International des Radios Campus www.radiocampus.org	Radio
	SNRL, Syndicat National des Radios Libres www.snrl.org	Radio
	Ferarock, Fédération des Radios Associatives Rock www.ferarock.com	Radio
	VDPQ, Fédération des Vidéos de Pays et de Quartiers www.vdpq.free.fr	TV
Hungary	Szabad Rádiok Magyarországi Szervezete www.szabadradio.hu	Radio
Ireland	CMN, Community Media Network www.cmn.ie	TV
	CRAOL, Community Radio Forum of Ireland www.craol.ie	Radio
	CTA, Community Television Association	TV
Netherlands	OLON, Organisatie van Lokale Omroepen in Nederland www.olon.nl	All
Portugal	Associação Portuguesa de Radiodifusão www.apradiodifusao.pt	Radio
Slovakia	Lotos www.lotos.sk	TV
Sweden	Närradions Riksorganisation www.nro.se	Radio
	Riksförbundet Öppna Kanaler www.oppnakanalen.se	TV
UK	CMA, Community Media Association www.commedia.org.uk	All
	Acto, Association of Community Television Operators www.maccess.org.uk/members/ilt.html	TV

ANNEX 3: Sample questionnaire

Please Return to

> According to the study brief, the term Community Media ("CM") is defined as "media that are non-profit and owned by or accountable to the community that they seek to serve. Community Media are open to participation in programme making and management by members of the community". Thus, in the context of this broad definition, the sector may also include activities sometimes labelled with different terms in different countries, such as "Free Media", "Civil Media", "Associative Media", "Open Media", etc. Furthermore, Community Media comprises radio, television, Internet as well as press activities in the context of this study.

General Information

Name	Organisation
Country	E-Mail address and phone number

Note: further general comments can be submitted in section 5.

2.   *The Situation of Community Media in your Member State*

Is there an official institution/association that represents the interests of Community Media – or parts of the sector - in your home country?

☐ Yes ☐ No

If yes, please list this organisation below (Listing more than one organisation is possible):

Name of the organisation	Web address and contact person if available

3.   *The Regulatory Situation regarding Community Media in your Member State*

Is the Community Media sector - or parts of it – recognised by law in your home country?

TV: Yes☐ No☐ Radio: Yes☐ No☐   Press: Yes☐ No☐   Internet: Yes☐ No☐

If your last answer was yes, please list references to the relevant laws below. If possible, please also kindly provide an English translation of the relevant paragraph of the legal text.

Media	Text reference	English translation of section on Community Media

What kind of licences do Community Radio and/or Community Television initiatives apply for? Please also outline the licensing terms for each media:

	Licence category (i.e. community/local/ student/commercial, other)	Main requirements	Main benefits	Part or full time licence?
TV				
Radio				

Name of licensing authority	

Do "Must Carry" regulations exist for private and public service broadcasters (radio and TV) with regards to Community Media programmes?

☐ Yes ☐ No

If yes, could you please outline what the regulations require from the broadcasters?

4. Funding for Community Media in your Country

How is Community Media primarily financed in your country (you can tick more than one box)?

☐ No support available
☐ National public funding ☐ Regional public funding ☐ Local public funding
☐ Private funding (NGOs, private foundations, etc.) ☐ Local sponsorship
☐ Advertisement revenue
☐ Other (please specify below):

If possible please also provide a list of funds available for Community Media in your country and explain how they are financed (i.e. tax money, split of licence fee, etc.):

Name of fund	How does it work?	Eligibility Criteria

5.   Additional Information about the Sector

How many individual community media initiatives exist in your home country (your estimation)?

Radio	TV	Internet	Press

If possible, please also attach a list of these organisations including name, media, contact details to your response E-Mail. In case you are aware that such information exists in your country, please kindly point us towards the correct website/contact where we can obtain the list.

Website URL or contact details	

Any further comments you would like us to take into account or texts and references you would like to point out to us:

ANNEX 4: Summary sheet of results of questionnaire

Country	N° of CM Iinitiatives		Recognition by Law		Must Carry Regulation	Funding Mechanism		Advertising Restriction***	National Representation			Broadband Connections at Home**
	Radio	TV	Radio	TV		Radio	TV		Radio	TV	Tech.Neutral	
At	15	2	x	x	x	R	x	NA	v	NA	x	20
Be	NA	NA	v	x	x	x	x	NA	NA	NA	NA	38
Bg	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	5
Cy	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	7
Cz	3	0	x	x	x	NA	NA	x	x	x	x	10
De	75	60	v	v	v	R	R	x	v	v	to come in aut.20007	19
Dk	159	110	v	v	x	N	N	v	v	v	NA	49
Ee	2	0	x	x	x	x	x	x	x	x	x	32
Es	100	6	x	x	x	x	x	x	NA	NA	v	16
El	0	0	x	x	x	x	x	x	x	x	x	2
Fi	5	NA	x	x	x	x	x	x	to come in 2008	x	x	41
Fr	683	NA	v	v	v	N	x	v 20%	v	v	x	36
Hu	100	NA	v	x	NA	N	NA	v	v	NA	NA	11
Ie	21	3	v	v	v	N	N	v 50%	v	v	x	7
It	NA	NA	v	v	NA	R	NA	v	v	NA	NA	12
Lt	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	9
Lu	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	29
Lv	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	13
Mt	38	NA	v	x	x	x	x	x	x	x	x	31
Nl	264	123	v	v	v	N	N	NA	NA	NA	v	62
Pl	100	10	x	x	NA	NA	NA	NA	NA	NA	x	13
Pt	100	NA	v	x	NA	NA	x	x	v	NA	x	13
Ro	2	0	x	x	x	x	x	x	x	x	x	6
Si	3	NA	v	NA	N?	N	NA	v	NA	NA	NA	20
Sk	0	2	x	x	x	NA	x	x	NA	v	NA	5
Sw	865	30	v	v	x	x	x	v for TV	NA	v	v	45
Uk	633	3	v	x	x	N	x	v 50%	NA	v	v	32

NA= Not Available   V= Yes   X= No   N= National   R= Regional.
*: level of internet access per household, source: Eurostat. 2006.
**: Percentage of households using a broadband connection, Eurostat 2006.
*** When available, cap on advertising revenue in relation to turnover is given.