



TV news channels in Europe: Offer, establishment and ownership

MAVISE

A publication
of the European Audiovisual Observatory



TV news channels in Europe: Offer, establishment and ownership

European Audiovisual Observatory (Council of Europe), Strasbourg, 2018

Director of publication

Susanne Nikoltchev, Executive Director

Editorial supervision

Gilles Fontaine, Head of Department for Market Information

Author

Laura Ene, Analyst European Television and On-demand Audiovisual Market
European Audiovisual Observatory

Proofreading

Anthony A. Mills

Translations

Sonja Schmidt, Marco Polo Sarl

Press and Public Relations – Alison Hindhaugh, Alison.hindhaugh@coe.int

European Audiovisual Observatory

Publisher

European Audiovisual Observatory
76 Allée de la Robertsau, 67000 Strasbourg, France
Tel.: +33 (0)3 90 21 60 00
Fax. : +33 (0)3 90 21 60 19
info.obs@coe.int
<http://www.obs.coe.int>

Cover layout – ALTRAN, Neuilly-sur-Seine, France

Please quote this publication as

Ene L., *TV news channels in Europe: Offer, establishment and ownership*, European Audiovisual Observatory, Strasbourg, 2018

© European Audiovisual Observatory (Council of Europe), Strasbourg, July 2018

If you wish to reproduce tables or graphs contained in this publication please contact the European Audiovisual Observatory for prior approval.

Opinions expressed in this publication are personal and do not necessarily represent the view of the European Audiovisual Observatory, its members or the Council of Europe.

TV news channels in Europe: Offer, establishment and ownership

Laura Ene



Table of contents

1. Key findings	1
2. Principales conclusions.....	5
3. Wichtigste Erkenntnisse	9
4. The Supply of TV news channels in Europe	13
4.1. How many TV news channels are available in Europe?.....	14
4.2. What are the main categories of TV news channels available in Europe?	15
4.3. What is the offer structure of TV news channels at national level in Europe?	20
4.4. Where are the TV news channels established?	23
<hr/>	
5. The Ownership landscape of TV news channels available and established in Europe 25	
5.1. What is the dominant ownership statute of TV news groups in Europe?	25
5.2. How pluralistic is the landscape of media groups controlling TV news channels in Europe?	27
5.3. How specialised are the market players controlling TV news channel portfolios in Europe?	30
5.3.1.Generalist single-market groups.....	31
5.3.2.Generalist multi-market groups	32
5.3.3.Specialised single-market groups	32
5.3.4.Specialised multi-market groups.....	33

Figures

Figure 1. Availability of TV news channels.....	15
Figure 2. The typology of available TV news channels in Europe by editorial focus and core audience.....	16
Figure 3. Transnational networks offering multi-edition TV news channels.....	17
Figure 4. Example of TV news networks and standalone channels available in Europe mapped by editorial and audience focus.....	19
Figure 5. Availability of TV news channels at market level in Europe	20
Figure 6. Typology of TV news channels available in a country's official language at market level.....	21
Figure 7. Establishment of TV news channels available in Europe	23
Figure 8. Structure of national news channels which broadcast in the official language(s) of the country where they are available, by establishment	24
Figure 9. Breakdown of TV news channels by ownership statute	26
Figure 10. Breakdown of media groups by number of news TV channels controlled in Europe	27
Figure 11. Media groups controlling multiple TV news channels available and established in Europe.....	28
Figure 12. Breakdown of media groups controlling news channels by specialisation and scope.....	30
Figure 13. Example of media groups controlling news channels mapped by specialisation and scope.....	34



1. Key findings

About the report

This report provides an overview of the TV news channel landscape in Europe. On the one hand it aims to portray the supply by sizing the offer, studying the TV news channels' typology, assessing the relevance of their availability and identifying where they are established. On the other, the report attempts to capture the plurality of suppliers by analysing the statute of the channels' controlling entities, their concentration and the specialisation level of their extended media portfolio.

The scope of the analysis includes all TV news channels with an international or national technical coverage available on the main TV line-ups in at least one of the 39 single European markets covered by MAVISE¹, as well as free-to-air channels available across Europe on satellite.

A market driven by national players serving national audiences

Since the world's first 24-hour TV news channel was launched in 1980, the genre has undergone a series of significant developments which have contributed to the making of an eclectic category. In a quest to globalise the news agenda while staying relevant for regional and sometimes national audiences, international networks have developed tailored multi-language and multi-cultural editions for their news channels. This, together with the continuous proliferation of standalone national and international news channels, results in competition in both transnational and national markets simultaneously.

With very few exceptions, the news channels adapt their editorial focus to their specific national, regional or global audience. This is a specificity of the genre that explains the absence of common linguistic video feeds as a means used by broadcasters in order to access untapped territories.

Because content relevance is key, a multi-market approach in this field must encompass both linguistic and cultural adaptation of the content to the core audience in order to offer competitive editions of the news channel. Since the level of localisation and distinctiveness of a news channel is driven by the broadcaster's resources, this challenges

¹ The database on TV and on-demand audiovisual services and companies in Europe managed by the European Audiovisual Observatory.



the development of multi-channel TV news portfolios, and explains their lack of popularity in the industry.

The majority of all-news channels available in Europe are therefore standalone channels usually with a national agenda aimed at national audiences. In most cases these channels constitute a single TV news asset owned by a generalist group as part of a diverse media portfolio addressing the same national market. The popularity of this model confirms that synergies between media assets of the same group are paramount in supporting the TV news business.

The supply of TV news channels in Europe

- Around 140 all-news channels are available in Europe regardless of their establishment location.
- A total of 43% of the TV news channels are national, meaning that their agenda is focused on one specific European territory and aimed primarily at the respective national audience.
- A full 57% of the TV news channels are international, meaning that either their agenda doesn't have a national focus or their core audience is not European.
- Euronews, DW, France 24, RT, Al Jazeera and i24News are global networks offering multiple international news channels aimed at transnational markets or global linguistic communities usually through a multi-edition portfolio strategy.
- BBC, CNN and Sky are global brands proposing a mixed portfolio of national and single-edition international news channels, be they regional or global. RT and Al Jazeera can also be included in this category due to their more localised channels such as RT UK, RT France and Al Jazeera Balkans.
- As a rule, the TV news channels adapt their editorial focus to their core audience, whether national, regional or global. Exceptions are NDTV 24x7, A News, UA TV, Channels 24, CNC World English and CGTN English, that focus on a national agenda aimed at a global audience, with the intention to promote the country's image and stories abroad.
- On average, only one in four TV news channels available in a given European market broadcasts in that market's official language(s). The availability of such news channels drops to one in seven when only national channels are taken into account.
- For 70% of the markets, at least one out of every two TV news channels broadcasting in the official language of the country is a national channel
- Four out of five TV news channels available in Europe are also licensed there. The rest are international channels established outside Europe.
- In most of the markets all national TV news channels available in the official language of the country are domestic (established in the country).

The ownership of TV news channels established in Europe

- Although the landscape of TV news channels is dominated by private broadcasters, almost one in three TV news channels is supported by the public sector, a much higher share than for other TV channel genres.



- National TV news channels have been launched by public broadcasters in UK, France, Germany, Italy, Poland, Portugal, the Russian Federation, Hungary, Turkey, Denmark, Ireland, the Netherlands, Spain, Switzerland, Croatia and the Czech Republic .
- Within the international news channel category, the public sector is mainly represented by France 24, DW, RT, the BBC, MIR 24 and CGTN English. Euronews has a mixed statute due to the 15% of its shares distributed between public shareholders and local authorities across Europe.
- Almost 90% of the broadcasting groups opt for TV news channel portfolios made up of only a single channel which is in 75% of the cases national.
- With each of two thirds of all news channels controlled by a different market player, the ownership landscape appears rather pluralistic in Europe for the TV news genre.
- The media groups controlling at least two news channels in Europe are Media Globe Networks, TV-Novosti, 21st Century Fox, BBC Group, DW-Deutsche Welle, France Medias Monde, United Group, Al Jazeera Media Network, Turkuvaz Medya and New Delhi Television.
- Time Warner fully controls only one news channel in Europe but has a multi-presence through the CNN family of branded news channels established as joint ventures, partnerships or affiliations.
- Two out of three groups controlling TV news channels in Europe own a generalist media portfolio, while the rest hold a portfolio specialised in the TV news business.
- Over 90% of the generalist groups active in news channels operate only one news channel, which in most cases is aimed at a domestic market together with the other media assets controlled by the group.
- A total of 80% of the players specialised in TV news also operate single-channel portfolios which sometimes may include other news media assets addressing the same market. The news channels are almost evenly split between national and international within this category.





2. Principales conclusions

L'objet du rapport

Le présent rapport offre une analyse du paysage des chaînes télévisuelles d'information en Europe. Il présente tout d'abord l'offre des chaînes d'information disponibles en précisant l'importance de cette offre, en examinant la typologie de ces chaînes, en évaluant la pertinence de leur mise à disposition et en identifiant le pays où elles sont établies. Le rapport met ensuite en lumière la diversité des prestataires de cette offre, en analysant le statut des groupes qui ont le contrôle de ces chaînes, leur concentration et le degré de spécialisation de leur vaste portefeuille de médias.

Cette analyse englobe l'ensemble des chaînes d'informations de couverture internationale ou nationale qui sont proposées sur les principaux réseaux de télévision de l'un au moins des 39 marchés européens pris en compte par la base de données MAVISE², ainsi que les chaînes gratuites disponibles par satellite en Europe.

Un marché porté par des acteurs nationaux au service de téléspectateurs nationaux

Depuis le lancement en 1980 de la première chaîne d'information au monde diffusée en continu, ce type de chaîne a connu une série d'importantes évolutions, qui ont abouti au caractère éclectique actuel de ce type de chaînes. Afin de traiter l'actualité du monde et d'acquérir une dimension internationale, tout en continuant à s'adresser à un public régional et parfois national, les groupes internationaux de télévision ont conçu pour leurs chaînes d'information des éditions multilingues et pluriculturelles sur mesure. Cette tendance, conjuguée à la prolifération continue de chaînes d'information nationales et internationales distinctes, impose aux acteurs du marché de faire face à une concurrence aussi bien nationale qu'internationale.

A quelques rares exceptions près, les chaînes d'information adaptent leur traitement éditorial de l'actualité en fonction du caractère national, régional ou international de leur public. Il s'agit là d'une spécificité propre aux chaînes d'information, qui s'explique par leur volonté de ne pas proposer de flux vidéo linguistiques communs, de manière à pouvoir toucher les téléspectateurs de pays dans lesquels elles n'étaient pas encore présentes.

² La base de données sur la télévision et les services audiovisuels à la demande et les entreprises en Europe, élaborée par l'Observatoire européen de l'audiovisuel.



Comme la pertinence du contenu proposé aux téléspectateurs est essentielle, les chaînes qui souhaitent être présentes sur plusieurs marchés doivent procéder à une adaptation linguistique et culturelle des contenus qu'elles destinent à leur public, afin de proposer un traitement de l'information qui permette de concurrencer les autres chaînes d'information. Le degré de localisation et de spécificité d'une chaîne d'information dépend des ressources du radiodiffuseur ; cette situation entrave le développement de l'offre multi-éditions des chaînes d'information, qui reste par conséquent un modèle très peu prisé des radiodiffuseurs.

Les chaînes d'information disponibles en Europe sont donc majoritairement représentées par des chaînes distinctes qui proposent en règle générale des contenus nationaux destinés aux téléspectateurs nationaux.

Ces chaînes nationales sont toutes établies en Europe et, la plupart du temps, elles représentent la seule chaîne d'information détenue par un groupe généraliste dans le cadre d'un éventail médiatique diversifié destiné à un même marché. La popularité de ce modèle souligne à quel point les synergies entre les atouts médiatiques d'un même groupe jouent un rôle primordial dans le renforcement de l'activité commerciale des chaînes d'information.

L'offre de chaînes télévisuelles d'information en Europe

- Près de 140 chaînes d'information en continu sont disponibles en Europe, quel que soit le pays dans lequel elles sont établies.
- 43 % de ces chaînes d'information sont nationales : les actualités qu'elles diffusent portent par conséquent sur un territoire européen précis et sont essentiellement destinées aux téléspectateurs nationaux en question.
- 57% des chaînes d'information sont internationales, ce qui signifie qu'elles ne privilégient pas une actualité nationale ou que le public qu'elles ciblent n'est pas européen.
- Euronews, DW, France 24, RT, Al Jazeera et i24News sont des chaînes mondiales qui proposent de multiples chaînes d'information internationales destinées aux marchés transnationaux ou à des communautés linguistiques du monde entier, généralement au moyen d'une stratégie d'offre multi-éditions.
- BBC, CNN et Sky sont des marques mondialement connues qui proposent un mélange de chaînes d'informations nationales et internationales à édition unique, qu'elles soient régionales ou mondiales. RT et Al Jazeera peuvent également figurer dans cette catégorie en raison de leurs chaînes à caractère plus local, comme RT UK, RT France et Al Jazeera Balkans.
- En règle générale, les chaînes d'information adaptent leur traitement éditorial de l'actualité en fonction du caractère national, régional ou international de leur public. NDTV 24x7, A News, UA TV, Channels 24, CNC World English et CGTN English font toutefois exception à cette règle, puisque ces chaînes, qui privilégient un traitement éditorial national, visent un public international en vue de promouvoir à l'étranger l'image et les actualités du pays en question.
- En moyenne, seule une chaîne d'information sur quatre disponibles sur un marché européen donné diffuse ses contenus dans sa langue officielle. Cette proportion se



limite à une chaîne sur sept lorsqu'on prend uniquement en compte les chaînes nationales.

- Dans 70 % du marché, une chaîne d'information sur deux au moins qui diffuse ses programmes dans la langue officielle du pays est une chaîne nationale ; sur le plan linguistique, l'offre disponible sur un marché européen donné est principalement représentée par les chaînes nationales.
- 4 chaînes d'information sur 5 disponibles en Europe sont titulaires d'une licence de radiodiffusion dans un pays européen. Le reste des chaînes est représentées par des chaînes internationales établies hors d'Europe.
- Sur la plupart des marchés, toutes les chaînes d'information nationales disponibles dans la langue officielle du pays sont établies sur leur territoire national.

La propriété des chaînes télévisuelles d'information en Europe

- Bien que le paysage des chaînes d'information soit dominé par les radiodiffuseurs privés, près d'une chaîne d'information sur trois bénéficie du soutien du secteur public ; il s'agit là d'une proportion bien plus élevée que pour les autres types de chaînes de télévision.
- Des chaînes d'information nationales ont en effet été lancées par les radiodiffuseurs publics au Royaume-Uni, en France, en Allemagne, en Italie, en Pologne, au Portugal, en Fédération de Russie, en Hongrie, en Turquie, au Danemark, en Irlande, aux Pays-Bas, en Espagne, en Suisse, en Croatie et en République tchèque.
- Dans la catégorie des chaînes d'information internationales, le secteur public est principalement représenté par France 24, DW, RT, BBC, MIR 24 et CGTN English. Euronews dispose quant à elle d'un statut mixte en raison de la répartition de 15 % de son capital entre des actionnaires publics et les autorités locales de divers pays européens.
- Près de 90% des groupes de radiodiffusion optent pour des offres composées d'une seule chaîne d'information qui, dans 75 % des cas, est une chaîne nationale.
- Comme les 2/3 de l'ensemble des chaînes d'information sont à chaque fois contrôlées par un acteur différent du marché, le paysage de la propriété présente en Europe un pluralisme assez marqué pour ce type de chaînes d'information.
- Les groupes de médias Media Globe Networks, TV-Novosti, 21st Century Fox, BBC Group, DW-Deutsche Welle, Medias Monde France, United Group, Al Jazeera Media Network, Turkuvaz Medya et New Delhi Television contrôlent au moins deux chaînes d'information en Europe.
- Time Warner ne contrôle qu'une seule chaîne d'information en Europe, mais dispose toutefois d'une présence multiple par le biais de la famille de chaînes d'information de la marque CNN, établies sous la forme de coentreprises, de partenariats ou de filiales.
- Deux groupes sur trois qui contrôlent les chaînes d'information en Europe disposent de leurs propres offres généralistes, tandis que les autres se spécialisent dans l'actualité économique.
- Plus de 90% des groupes généralistes détenteurs de chaînes d'information exploitent une seule chaîne d'information qui est le plus souvent destinée au marché national, tout comme les autres médias détenus par le groupe en question.
- 80% des acteurs spécialisés dans les informations télévisées proposent également une seule chaîne d'information, à laquelle s'ajoutent parfois d'autres médias



d'information sur le même marché. Au sein de cette catégorie, les chaînes d'information se répartissent presque uniformément entre chaînes nationales et chaînes internationales.



3. Wichtigste Erkenntnisse

Über den Bericht

Dieser Bericht enthält eine Analyse der Nachrichtensender-Landschaft in Europa. Der Bericht verfolgt zwei Ziele: auf der einen Seite einen Überblick über das Angebot an Fernsehnachrichtensendern in Europa zu geben, indem er die Typologie der Nachrichtensender untersucht, die Relevanz ihrer Verfügbarkeit bewertet und feststellt, in welchem Land die einzelnen Sender ihren Sitz haben; auf der anderen Seite versucht er, den Pluralismus auf dem Markt der Nachrichtensender zu erfassen, indem er das Statut der Gesellschaften untersucht, unter deren Kontrolle sich die Sender befinden, ferner das Niveau der Konzentration und der Spezialisierung ihres Medienportfolios.

Die Analyse berücksichtigt alle Nachrichtenfernsehsender mit internationaler oder nationaler Berichterstattung, die in mindestens einem der 39 europäischen Märkte vertreten sind, die von der MAVISE-Datenbank³ abgedeckt werden, aber auch Sender, die in ganz Europa über Satellit frei empfangbar sind.

Ein Markt, auf dem nationale Player dominieren und nationale Zuschauer das Programm bestimmen

Seitdem 1980 der erste 24 Stunden-Fernsehnachrichtenkanal seinen Sendebetrieb aufnahm, hat es auf diesem Sektor eine Reihe signifikanter Veränderungen gegeben, die dazu geführt haben, dass eine eklektische Kategorie von Nachrichtensendern entstanden ist. In dem Bestreben um eine Globalisierung der Nachrichtenagenda, ohne auf der anderen Seite die regionalen und nationalen Zuschauer zu vernachlässigen, haben internationale Sendergruppen maßgeschneiderte multilinguale und multikulturelle Ausgaben für ihre Nachrichtenkanäle entwickelt. Zusammen mit der kontinuierlichen Zunahme eigenständiger nationaler und internationaler Nachrichtensender hat dies dazu geführt, dass der Wettbewerb in diesem Markt sowohl auf transnationaler als auch auf nationaler Ebene stattfindet.

Von wenigen Ausnahmen abgesehen passen die Nachrichtensender ihren redaktionellen Schwerpunkt an ihre nationalen, regionalen oder globalen Zuschauer an. Dies ist eine Besonderheit dieses Genres, das auch erklärt, warum es in diesem Bereich

³ Die Datenbank über Fernsehen und audiovisuelle Abrufdienste und Gesellschaften in Europa wird von der Europäischen Audiovisuellen Informationsstelle verwaltet.



keine gemeinsamen linguistischen Video-Feeds gibt, die von den Rundfunkgesellschaften genutzt werden, um bisher noch nicht erschlossene Gebiete zu erreichen.

Da die inhaltliche Relevanz von entscheidender Bedeutung ist, muss ein Multi-Market-Ansatz in diesem Bereich sowohl die sprachliche als auch die kulturelle Anpassung des Inhalts an die Zuschauer umfassen, um eine wettbewerbsfähige Ausgabe des Nachrichtensenders anzubieten. Das Niveau der Lokalisierung und der Unverwechselbarkeit eines Nachrichtensenders hängt im Wesentlichen von den Ressourcen ab, über die eine Rundfunkgesellschaft verfügt. Daher ist der Aufbau von Mehrkanal-Nachrichtenportfolios ein Problem. Dies ist auch der Grund, warum mehrsprachige Nachrichtensender nicht unbedingt zu den beliebtesten Modellen in der Branche gehören.

Bei den meisten reinen Nachrichtensendern in Europa handelt es sich daher um nationale Nachrichtensender, die für nationale Zuschauer konzipiert sind.

Diese nationalen Sender haben alle ihren Sitz in Europa. In der Regel handelt es sich dabei um einzelne Nachrichtensender, die sich im Besitz einer Vollprogramm-Sendergruppe befinden und Teil eines vielfältigen Medienportfolios sind, das für denselben Markt bestimmt ist. Die Beliebtheit dieses Modells bestätigt, dass Synergien zwischen den einzelnen Mediensegmenten derselben Gruppe ungeheuer wichtig sind für die Unterstützung des Fernsehnachrichtensektors.

Die Fernsehnachrichtensender in Europa

- In Europa gibt es rund 140 reine Fernsehnachrichtensender, unabhängig davon, wo sie ihren Sitz haben.
- Bei 43% der Nachrichtensender handelt es sich um nationale Sender, das heißt, ihre Agenda konzentriert sich auf ein spezielles europäisches Land und in erster Linie auf die heimischen Zuschauer.
- 57% der Nachrichtensender sind internationale Sender, das heißt, ihre Agenda konzentriert sich nicht auf nationale Zuschauer, oder ihre Hauptzielgruppe ist nicht europäisch.
- Euronews, DW, France 24, RT, Al Jazeera und i24News sind globale Netzwerke mit internationalen Nachrichtensendern, die sich auf transnationale Märkte oder globale Sprachgemeinschaften konzentrieren, in der Regel über eine Mehrkanal-Portfolio-Strategie.
- BBC, CNN und Sky sind internationale Sender mit einem gemischten Portfolio aus nationalen und internationalen einsprachigen Nachrichtenkanälen, ob regional oder global. RT und Al Jazeera können ebenfalls dieser Kategorie zugeordnet werden, da sie auch über stärker lokalisierte Kanäle wie RT UK, RT France und Al Jazeera Balkans verfügen.
- Grundsätzlich passen die Nachrichtensender ihren redaktionellen Schwerpunkt an ihre Zuschauer an, ob national, regional oder global. Ausnahmen sind NDTV 24x7, A News, UA TV, Channels 24, CNC World English und CGTN English. Diese Sender bieten Nachrichtensendungen für globale Zuschauer an mit der Absicht, das Image des Landes im Ausland zu fördern.



- Im Durchschnitt sendet nur 1 von 4 Nachrichtensendern in der Amtssprache des betreffenden Landes. Berücksichtigt man ausschließlich nationale Sender, ist es nur 1 von 7.
- In 70% der Märkte ist mindestens 1 von 2 Nachrichtensendern, die in der Amtssprache des Landes senden, ein nationaler Kanal. Dies zeigt, dass in Bezug auf die sprachliche Relevanz das Angebot für einen bestimmten europäischen Markt in erster Linie von nationalen Sendern repräsentiert wird.
- 4 von 5 Nachrichtensendern in Europa haben eine europäische Rundfunklizenz. Die übrigen sind internationale Sender mit Sitz außerhalb von Europa.
- Auf den meisten der Märkte sind nationale Nachrichtensender, die in der Amtssprache des betreffenden Landes senden, allesamt heimische Sender (das heißt, sie haben ihren Sitz in dem betreffenden Land).

Die Besitzverhältnisse bei Nachrichtensendern in Europa

- Die meisten reinen Nachrichtensender sind zwar private Sender, aber 1 von 3 Sendern ist ein öffentlich-rechtlicher Sender. Das ist ein sehr viel höherer Anteil als bei den anderen Fernsehgenres.
- Nationale Nachrichtensender, die von öffentlich-rechtlichen Rundfunkanstalten betrieben werden, gibt es in der Tat in einer Reihe von Ländern: im Vereinigten Königreich, in Frankreich, Deutschland, Italien, Polen, Polen, Portugal, der Russischen Föderation, Ungarn, der Türkei, Dänemark, Irland, den Niederlanden, Spanien, der Schweiz, Kroatien und der Tschechischen Republik.
- Internationale Nachrichtensender, die von öffentlich-rechtlichen Sendern betrieben werden, sind vor allem France 24, DW, RT, BBC, MIR 24 und CGTN English. Euronews hat ein gemischtes Statut, da 15% seiner Anteile von öffentlichen Anteilseignern und Gebietskörperschaften in Europa gehalten werden.
- Fast 90% der Sendergruppen entscheiden sich für Nachrichtenportfolios aus einem einzigen Sender, in 75% der Fälle handelt es sich dabei um einen nationalen Sender.
- 2/3 aller Nachrichtensender werden von einem anderen Marktplayer kontrolliert. Wir haben es daher bei diesem Genre mit einer relativ vielfältigen Eigentumslandschaft in Europa zu tun.
- Die Mediengruppen, die mindestens zwei Nachrichtensender in Europa kontrollieren, sind Media Globe Networks, TV-Novosti, 21st Century Fox, BBC Group, DW-Deutsche Welle, France Medias Monde, United Group, Al Jazeera Media Network, Turkuvaz Medya und New Delhi Television.
- Time Warner kontrolliert zwar nur einen einzigen Nachrichtensender in Europa, ist jedoch durch die CNN-Senderfamilie, die entweder als Joint Venture, Partnerschaften oder Tochtergesellschaften existiert, auf zahlreichen Märkten präsent.
- 2 von 3 Gruppen, die Nachrichtensender in Europa kontrollieren, haben ein Vollprogramm in ihrem Portfolio, der Rest hat ein Portfolio, das auf Fernsehnachrichten spezialisiert ist.
- Über 90% der Vollprogramm-Gruppen, die auf dem Markt der Nachrichtensender aktiv sind, haben nur einen einzigen Nachrichtenkanal, der in den meisten Fällen auf den heimischen Markt ausgerichtet ist, zusammen mit den anderen Mediensegmenten, die von der Gruppe kontrolliert werden.



- 80% der auf Fernsehnachrichten spezialisierten Player verfügen auch über Einzelkanal- Portfolios, zu denen manchmal auch andere Nachrichtensegmente gehören, die für denselben Markt bestimmt sind. Die Nachrichtenkanäle bestehen zumeist aus nationalen und internationalen Sendern.



4. The Supply of TV news channels in Europe

The profile of the 24-hour news channel has gone through a significant diversification process since the world's first channel of the genre was launched. Various declinations have emerged along the way.

In 1980, CNN identified demand for a dedicated TV news channel and promoted a new format delivering continuous coverage of breaking stories accompanied by substantial reported details as events unfolded. In other words, the channel opened a live window to the world.

The UK's Sky News emulated CNN in 1989 and became Europe's first 24-hour news channel. While other news channels entered the landscape during this period, it wasn't until the early 1990s that CNN's success truly registered and triggered the appearance of more channels pursuing similar goals. CNN's reputation, along with its reach growth and the launch of CNN International in 1985, sent a message to the industry that there were viable opportunities beyond national borders to exploit untapped territories by globalising the news agenda.

The growing availability and penetration of cable and satellite rounded out the context in which the players were driven to embark on a quest for supranational reach and influence. This was when today's multi-channel news networks such as Euronews, BBC World News, DW, Al Jazeera and later on RT and France 24 joined the landscape of all-news channels shaping more balanced news coverage for audiences by championing different perspectives of the global news agenda. The constant adaptation to the ever-changing environment, the competition and the audiences' expectations led in time to the development of more market-oriented formats, meaning that the channels started to narrow their scope by focusing on regional and national markets.

The development of multi-channel networks designed to offer tailored coverage to a dedicated region, together with the proliferation of standalone international, national and even local news channels, created a landscape comprising competition both in overlapping transnational markets, and within national borders⁴.

⁴ Source : Cushion S., Lewis J., *The Rise of 24-hour News Television: Global Perspectives*, 2010



Promoting the idea that pluralism of viewpoints ensured balanced coverage of the news agenda, in 2017 Euronews replaced its single video feed with 12 distinct multi-lingual and multi-cultural customised editions and became the world's first glocal⁵ news brand by adapting to the expectations of its multiple local audiences and tailoring its content accordingly.

The resources of a TV news channel together with its autonomy usually determine the level of localisation achieved by the channel and the uniqueness of its perspective. This type of differentiation, the promotion of alternative views, is becoming more and more difficult to attain in a cluttered market where international, regional and national news channels are addressing the same audiences.

However, one specificity of the news channels is that their resources are not necessarily conditioned by their economic sustainability. In many cases, their role is to contribute to corporate or national equity by endorsing a vision, an ideology, a reputation or a statute. This is to say that apart from the audiences' expectations and the political economy of a 24-hour TV news channel, the specific context of a country also determines the type, scope and programming strategy of a news channel.

4.1. How many TV news channels are available in Europe?

Today there are around 140 "news only" TV channels available in Europe regardless of their establishment. The analysis here is based on data provided by MAVISE, the database on TV and on-demand audiovisual services and companies in Europe managed by the European Audiovisual Observatory and it focuses on TV news channels with international or national technical coverage.

These 140 channels are available on the main TV line-ups in at least one of the 39 single European markets covered by MAVISE, as well as free-to-air channels available across Europe on satellite.

The categories are not mutually exclusive in the way that most public channels together with a significant share of private news channels are included in the commercial packages of the main distribution platforms in Europe along with an unencrypted version available for free on satellite.

However, channels established outside Europe (e.g. i24News, Press TV, STV Noticias, VTV 1, IRINN, Beladi Satellite TV, Palestinian Satellite Channel, Libya Al Ahrar TV and others) tend to privilege free circulation over satellite.

⁵ Source: <http://www.euronews.com/about>



The total number of available all-news channels analysed is made up of distinct TV channels. As different linguistic versions of the same video feed may not ensure relevance on a national market, the multi-channel approach of the international networks is often based on the development of distinctive editions which encompass both linguistic and cultural adaptation to the core audience, rather than the proliferation of common linguistic feeds.

Apart from the all-news TV channels, there are also around 25 business TV channels available in Europe focused on business news and markets (i.e. CNBC, Bloomberg, BFM Business, RTL Z). These, together with infotainment, parliamentary and uncut news types of channel, have not been included in the scope of this report in an effort to retain a fairly homogenous sample for the analysis of the 24-hour news genre⁶.

Figure 1. Availability of TV news channels



Source: European Audiovisual Observatory / MAVISE database

4.2. What are the main categories of TV news channels available in Europe?

The 24-hour news channels have undergone a series of developments during their recent history, resulting in an eclectic current landscape. Different sub-genres of the category are emerging and co-exist not only at the European level but at the national level as well.

The typology proposed in this study relies on analysis of editorial focus and core audience as the two main criteria used to describe a TV news channel. From the editorial point of view, the channels are defined as either having a national agenda focus or an international one. The analysis of the core audience addressed by a channel contributes to identifying the national channels mainly focused on one specific European territory, and the international channels addressing several European territories in general as well as the ones primarily addressing non-European markets.

⁶ This characteristic is used to describe the specificity of the genre in terms of coverage continuity. Apart from marginal exceptions (i.e. TA 3), the TV news channels analysed in this category run a 24-hour broadcast.



This remains a qualitative analysis based on the public official information that the TV news channels have been providing about their mission, scope, objectives, profile, target audience, current programming and other aspects, as well as their actual presence across Europe in the line-ups of different national operators, based on data in the MAVISE database.

In a quest to further streamline the typology and convey the big picture, these categories have been analysed from the European audience perspective. Two main types of 24-hour news channels available in Europe have been identified as a result of this mapping, namely national (43%) and international (57%).

On average, two out of five TV news channels available in Europe are national. This category includes all TV news channels with an agenda focused on topics tailored for one specific European territory and aimed primarily at the respective national audience. Usually, they were also established in the respective country. This is clearly the case for national public channels such as BBC News, France Info, HRT 4, ČT24 and tagesschau24, as well as for private channels like Sky News, TGRT Haber, TVN 24, n-TV, LCI, TGCOM 24, Realitatea TV, Nova24TV, to name but a few.

While this category would appear to cover a standalone genre, the international channel group encompasses several 24-hour TV news channel sub-genres that are not perceived as national by any one domestic audience in Europe.

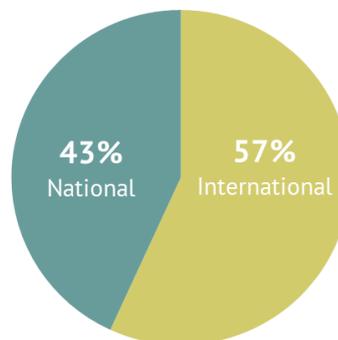
One international sub-genre is represented by the global multi-edition TV news networks which aim mainly at presenting the world agenda from a particular perspective while making it available globally through their transnational customised editions.

Euronews, DW, France 24, RT, Al Jazeera and i24News all offer international TV news portfolios with several multi-language and multi-cultural declinations usually aimed at supranational linguistic communities. Some of them also offer channels with a narrowed-down scope such as RT UK, RT France and Al Jazeera Balkans, as well as the more market-led editions of Euronews.

Euronews is the first glocal news network, covering world news 24/7 through 12 multi-language and multi-cultural editions. The brand aims to deliver a unique European perspective and promote pluralistic viewpoints by endorsing the delivery of tailored content. In Europe, this is achieved through the English, French, German, Greek, Hungarian, Italian, Portuguese, Russian, Spanish and Turkish distinct editions, all supported by dedicated online platforms. In 2016, Euronews launched Africanews, the first pan-African multilingual news channel dedicated to Sub-Saharan Africa.

DW is Germany's international broadcaster aiming to convey the state's image abroad and to promote understanding between cultures and people by integrating the German perspective with all other views on the global news agenda. DW English, the network's flagship TV news channel available almost everywhere around the world, is

Figure 2. The typology of available TV news channels in Europe by editorial focus and core audience



Source: European Audiovisual Observatory / MAVISE database



complemented by five additional editions in response to regional needs at a global level. Apart from the flagship channel, the German and Arabic editions are also available in Europe.

France 24 is represented by four separate TV news channels following the same editorial line and a common mission to provide a global public service meant to deliver a French approach to world affairs. The distinct channels target specific regional needs around the globe through language and content adaptation. The global 24-hour news channels in English, French and Arabic are all available in Europe while the recently launched Spanish version, which airs only six hours a day, is only available in 10 countries across Latin and South-America.

Figure 3. Transnational networks offering multi-edition TV news channels



Source: European Audiovisual Observatory / MAVISE database

RT is Russia's public international broadcaster aiming to provide an alternative perspective on global events while integrating the Russian viewpoint in the process and conveying the country's image abroad. RT offers three global and regional TV news channels in English, Arabic and Spanish broadcasting from Moscow. RT UK, a dedicated British news channel broadcasting from London and RT France, designed to address the French-speaking world broadcasting from Boulogne-Billancourt, are also available in Europe. The latter is the most-recently launched RT TV news channel and even though regional in scope, has the French agenda in focus from an editorial point of view.

Al Jazeera is a global network which started as the first independent TV news channel in the Arab world. Like other international networks included in this category, Al Jazeera aims to provide both a regional voice and a global alternative perspective to a world audience.

The global 24-hour Al Jazeera English, together with the two regional TV news channels Al Jazeera Arabic and Al Jazeera Balkans, are available in Europe. The network also has a documentary channel and another channel broadcasting uncut footage from world events, both accessible by European audiences.

Launched in 2013, i24News is a relatively young global news multi-channel network with major hubs in Israel, Europe and the U.S. offering international and localised news. The network claims it is the only broadcaster able to simultaneously analyse the Middle East, European and American points of view. The English, French and Arabic editions are available in Europe over cable and satellite.



A special group of TV news channels overlapping the national and international categories is represented by the BBC, CNN and Sky networks, all offering a mixed portfolio of national and international news channels. The globally recognisable networks offer several distinct TV news brands in their portfolio rather than declinations (customised editions) of the same channel. The other differentiator vis-à-vis the transnational networks is the fact that all of them have in their portfolio at least one national TV news channel (a channel created for, and aimed at a specific European market).

The BBC has BBC World News as its international news channel, BBC News for the UK market, and BBC Arabic as a regional response to Al Jazeera, Al Arabiya and Sky News Arabia.

Similarly to the BBC, Sky offers Sky News to the UK market and an international feed for Europe, Sky News Arabia as its Middle East alternative and Sky TG 24 on the Italian market.

Finally, for CNN there is CNN International available on the European market as well as regional and national incarnations of the brand through a system of joint ventures, partnerships and more than 1 000 affiliates around the world. CNN Türk is a joint venture with Demirören focusing on the Turkish market while CNN-News18 is a partnership with Network 18 aimed at the Indian market and available in Europe. N1 TV is one of the CNN affiliates in Europe, standing out as the first regional-local TV news network launched for the Adria region; due to its three localised editions, it is closer to the transnational deployment model. It differs from Al Jazeera Balkans, its main competitor, through its three dedicated production centres located in Belgrade, Zagreb, and Sarajevo, with separate editorial policies, reporters and TV studios, as well as Internet and mobile platforms. In cases where news overlaps, the information is presented jointly from a regional perspective.

A transversal look at these two categories of global networks reveals that RT through RT UK and RT France, Al Jazeera through Al Jazeera Balkans, and CNN through N1 TV offer a portfolio that is a hybrid between the two models.

Outside the global networks, there are several sub-categories of stand-alone international channels.

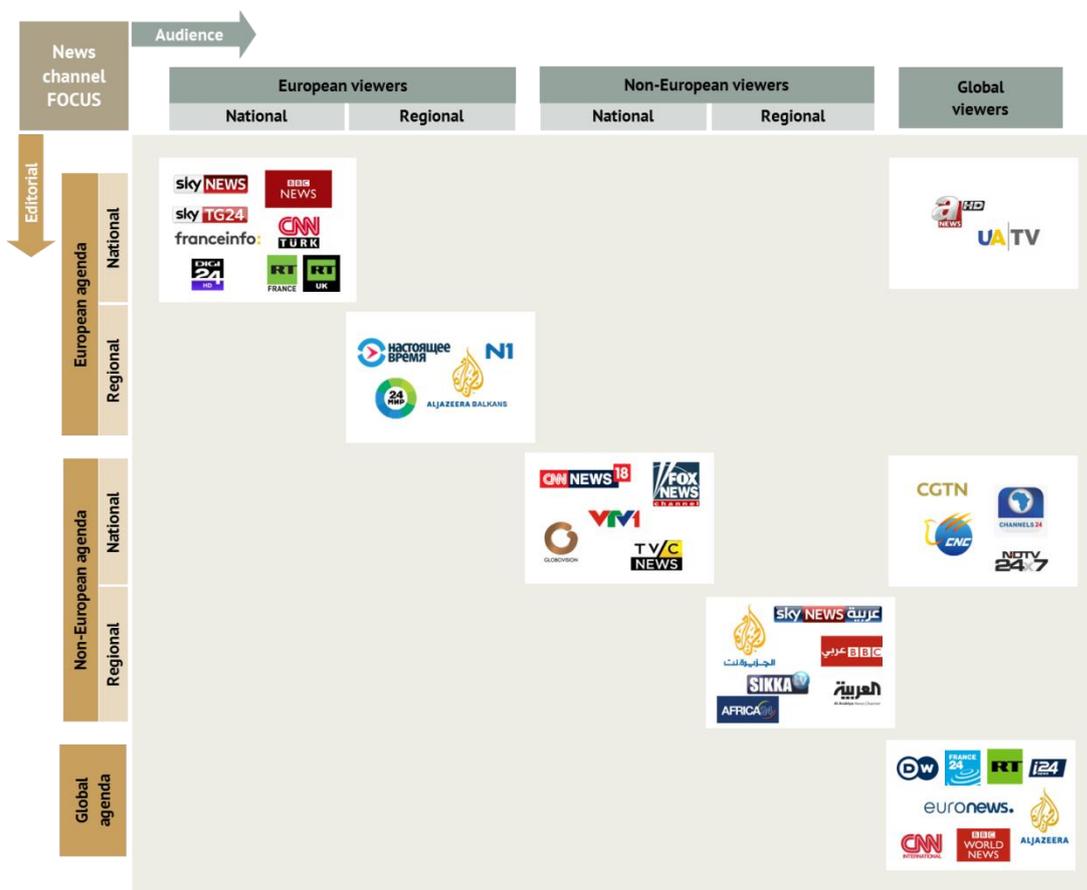
For example, there are standalone channels focused on regional European news and dedicated to a specific regional audience, such as MIR 24 and Current Time TV. Fox News, TVC News Nigeria, Future News, VTV1, Globovision and others, meanwhile, are TV news channels focused on a national agenda dedicated to a specific territory outside Europe while technically available to European audiences. Africa 24, Sikka TV, Al Arabiya and teleSur are TV news channels from the same sub-genre with the difference that their scope is larger in that they aim to address audiences at a regional level rather than at a country level.

In general, the TV news channels adapt their editorial focus to the specific core audience that they target, be it national, regional or global.



There are, however, exceptions such as A News, UA TV, Channels 24, CNC World English, CGTN English, NDTV 24X7 and other channels with an editorial focus on the national agenda dedicated thought to a global audience with the intention to promote the country's image and stories abroad.

Figure 4. Example of TV news networks and standalone channels available in Europe mapped by editorial and audience focus



Source: European Audiovisual Observatory / MAVISE database

The elevated 43% share of national TV news channels addressing European audiences shows the importance of this category in contributing to the total offer and how paramount the content and language relevance are in building demand for this genre.

There are still particularities that can be identified among TV news channels belonging to any of these sub-genres. It is safe to say that the landscape is highly heterogeneous and that constant diversification and customisation are key trends characterising the all-news channel market in Europe.



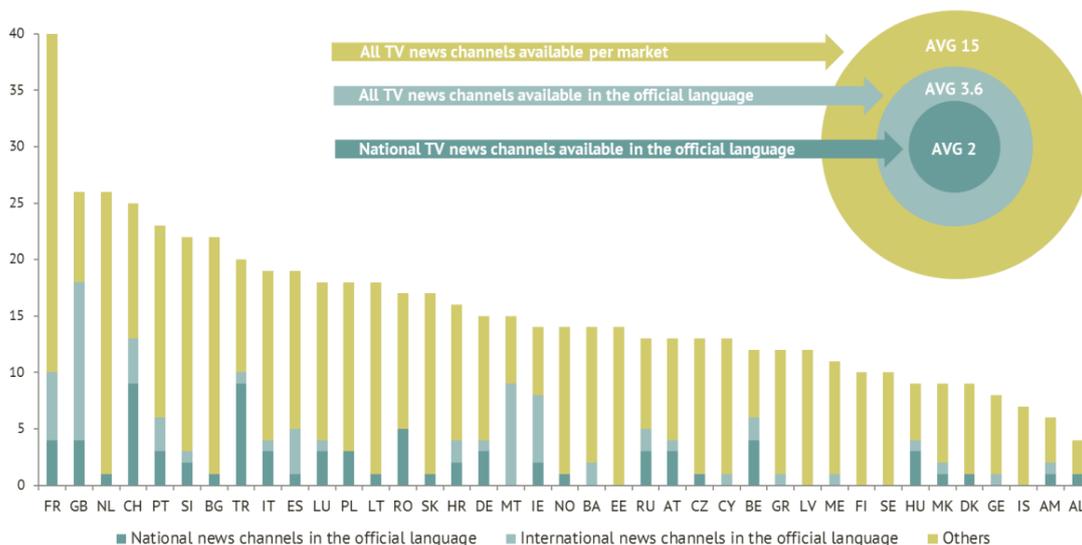
4.3. What is the offer structure of TV news channels at national level in Europe?

The global offer of TV news channels in Europe can be construed as an average generated by the diverse structures available at each European market level. The availability is elicited from data provided by the MAVISE database and comprises channels present in the line-ups of the main DTT, cable, IPTV and satellite platforms operating in any one specific country.

The study analyses the typology of news channels for 39 European markets with a keen eye on the channels' broadcasting language and its majority national audience. This is assessed through cross-analysis taking into account on one side the official languages of a specific country and on the other the selection of channels available in at least one of the official languages of the respective territory. The official language(s) criterion is restrictive but it was employed in order to simplify and promote consistency throughout this analysis.

On average, there are 15 TV news channels technically available in any given European market. In markets such as France, the UK, the Netherlands and Switzerland viewers can choose from over 25 TV news channels, while the offer in Albania, Armenia, Iceland, Georgia, Hungary, Macedonia and Denmark is fewer than 10 channels.

Figure 5. Availability of TV news channels at market level in Europe



Source: European Audiovisual Observatory / MAVISE database

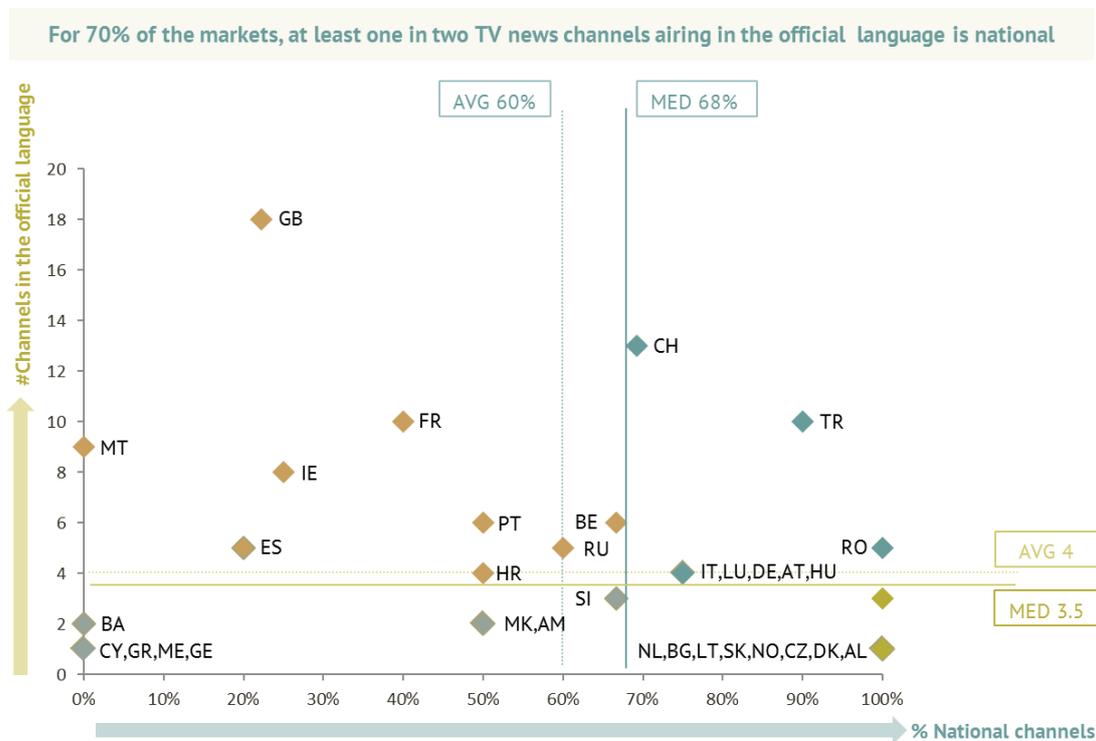
Only one in four news channels available in a single European market broadcasts in the official language(s). In other words, an average of 3.6 channels are actually linguistically accessible to a majority national audience.



This shows that while a relatively rich offer of news channels is available on average at market level, it is mostly made up of channels that travel well but are not specifically aimed at a majority national audience.

In the UK, Switzerland, France, Turkey and Malta, audiences can choose from up to 18 such TV news channels. While the UK and France have the advantage of a high language circulation at the global level, small countries such as Switzerland, Malta, Luxembourg and Belgium benefit from multiple official languages, rendering the offer overrepresented in these markets. At the other end of the spectrum, five Nordic and Baltic countries - Estonia, Latvia, Finland, Sweden and Iceland - have no TV news channels available in their official language.

Figure 6. Typology of TV news channels available in a country's official language at market level



Source: European Audiovisual Observatory / MAVISE database

The national TV news channels available in a market can be both domestic and foreign. For example, all national channels available in Austria are national German TV news channels. The low average of two national channels per market shows that only one in seven channels available is a national channel airing in the official language of the country.

On average, two national channels broadcast in the language of the market, where such channels are available. There are however exceptions such as markets where none of the TV news channels available in the official language of the country are national or



markets such as Turkey and Switzerland with a rich offering of nine national TV news channels. In Turkey this can be attributed to domestic pluralism, while the national offering in Switzerland can be traced to the existence of the country's multiple official languages, making foreign national channels in French, German and Italian all linguistically adapted to a majority national audience.

Taking a closer look at the typology of TV news channels available in the official language of the market, there are four categories of market, depending on the size of the offer and the proportional weight of national channels.

In half of the 34 markets with news channels that broadcast in the official language(s), the audience can choose from a maximum three TV news channels. At the same time, for half of these markets, national TV channels account for over 68% of the TV news channels available in the official language of the market. In both cases the median stays close to the average, showing that the landscape is relatively diverse without major outliers.

A slightly lower availability median indicates the presence of markets with a very high number of TV channels, such as the UK, while the slightly higher median regarding the offer structure suggests that there are markets where national channels are not represented, such as Bosnia-Herzegovina, Cyprus, Greece, Montenegro, Georgia and Malta.

For 70% of the markets, at least one out of two TV news channels available in the official language of the country is national. This shows that when it comes to channels broadcasting in the official language(s) of a specific country, the offer for a respective market is more likely to be national whereas in the absence of this criterion, international channels remain the ones circulating best across borders.

If we map the European markets based on their offering size and structure, four groups emerge at the intersection of the two medians, providing a more in-depth understanding of the TV news channels that are broadcasting in the official language(s) of one specific territory.

For example, Poland, the Netherlands, Bulgaria, Lithuania, Slovakia, Norway, the Czech Republic, Denmark and Albania are all part of a group with a relatively limited offering of TV news channels available in their official languages and entirely represented by national channels. Apart from Poland, for all these markets the offering consists of one single channel.

On the other hand, there are also countries with poor availability of news channels broadcasting in their official language(s), where the offering however comprises mostly international channels. Apart from Slovenia, Macedonia and Armenia, where at least one national channel is available, in countries such as Bosnia-Herzegovina, Cyprus, Greece, Montenegro and Georgia the offering consists entirely of international channels.

The significance of international TV news channels in the composition of the full offer is also apparent in countries with a high availability of TV news channels airing in the official language. In Spain, the UK, Ireland and Malta their weight ranges between 75%-100%, while in countries such as Portugal, Croatia and France they constitute around 50%-60% of the total.



While Belgium and Russia also belong to the group, they are more similar to countries in which the broad offering is driven by national channels. Just like Switzerland, Luxembourg and Austria, with a 70%-75% share of national channels in their portfolio, Belgium (67%) benefits from the availability of TV news channels addressing neighbouring countries while sharing the same official languages. Turkey, the most competitive market, has the highest number of national TV news channels and like in Romania they account for most, if not all, of the entire offering. The rest of the countries in this group - Italy, Germany and Hungary – display a 75% share of national channels in their line-up.

It appears that markets with broader availability are more diverse in terms of the offering structure, whereas markets with a narrow line-up tend to be represented entirely by either national or international channels.

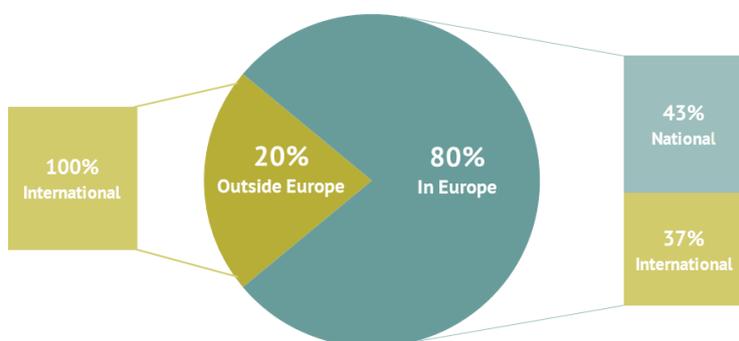
4.4. Where are the TV news channels established?

Out of all TV news channels available in Europe, four in five hold a European broadcasting licence. Only 20% of the news channels were established outside Europe and all of them are international. They are mostly represented by channels that don't have a centre of interest in the territory and are characterised by free circulation over satellite, as well as a cable presence limited to just a few European markets. One exception here is Qatar-based Al Jazeera Arabic with a very strong cable presence in Europe.

All national TV news channels were established in Europe and represent the majority of all news channels established in the territory.

Taking a closer look at the market level, in 22 markets all national TV news channels available in the official language are domestic. On average, two national news channels have been established per single European market and are available in its official language.

Figure 7. Establishment of TV news channels available in Europe



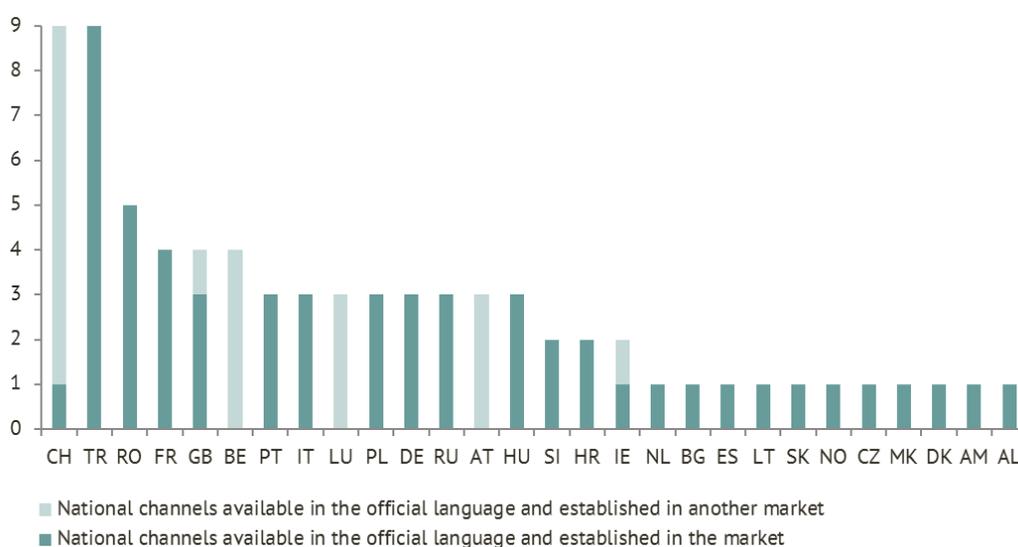
Source: European Audiovisual Observatory / MAVISE database



Markets such as Turkey, Romania, Portugal, Poland, Hungary, Slovenia and Croatia represent very competitive landscapes for domestic TV news channels relative to the population of the countries.

Belgium, Luxembourg and Austria have no TV news channels established in their territories, and Switzerland and Ireland have only one, while benefitting from the availability of national channels licensed in neighbouring countries sharing the same official language.

Figure 8. Structure of national news channels which broadcast in the official language(s) of the country where they are available, by establishment



Source: European Audiovisual Observatory / MAVISE database



5. The Ownership landscape of TV news channels available and established in Europe

The TV news channels' typology emerges from the different business models chosen by the market players. Legal structure, financial resources, type of internal organisation, industry know-how, portfolio strategy, autonomy status, level of specialisation, role and brand-equity also play a role in influencing the making of a TV news channel.

This chapter seeks to identify the different categories of media groups that control the line-up of TV news channels established in Europe. This is achieved through analysis of the broadcasters' statute, the relative level of external market pluralism and the controlling entities' typology in terms of media portfolio and scope.

5.1. What is the dominant ownership statute of TV news groups in Europe?

The resources of a news channel are not necessarily dependent on its economic sustainability. This is why in many cases the mission of a news channel plays a more important role in ensuring its viability and also tends to be connected with the channel's controlling entity. In Europe, around one in three TV news channels is supported by the public sector – indicative of the high affinity public broadcasting has for this genre when compared to the broader, whole universe of television channels⁷ established in Europe.

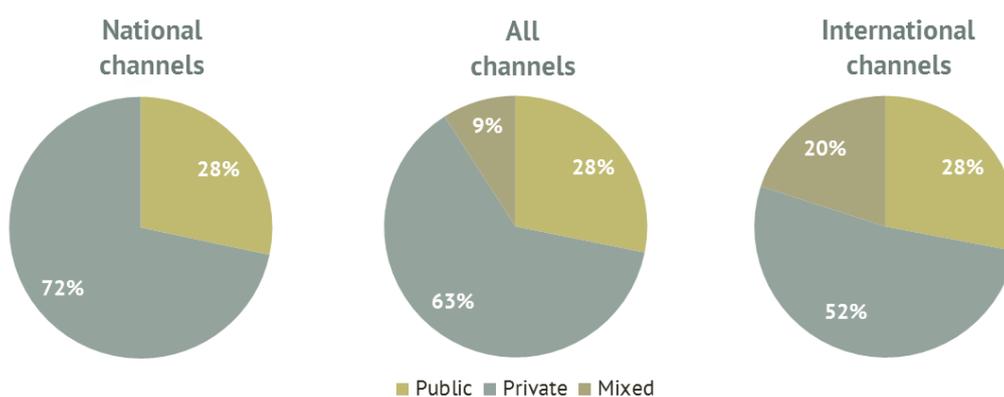
The national news channel landscapes of Denmark, Ireland, the Netherlands, Spain and Switzerland are dominated by the public service broadcasters, while in countries such as Croatia and the Czech Republic, the public and private sector are equally represented. Other countries where the public broadcaster has launched national news channels are the UK, France, Germany, Italy, Poland, Portugal, the Russian Federation, Hungary and Turkey.

⁷ Source: Schneeberger A., *Audiovisual services in Europe: Localised, targeting and language offers*, European Audiovisual Observatory, Strasbourg, 2018



Within the international news channel category, the public sector is mainly represented by France 24, DW and RT multi-channel networks, as well as by the BBC umbrella brand network, MIR 24 (the interstate regional channel aimed at the CIS countries) and China's CGTN English.

Figure 9. Breakdown of TV news channels by ownership statute



Source: European Audiovisual Observatory / MAVISE database

While the public ownership structure is a characteristic of both national and international channels, the mixed type of ownership is only a specificity of the latter and is entirely represented by Euronews. Taking into account the fact that the private participation in Euronews accounts for 85% of the shares, while the rest are held by public shareholders and local authorities across Europe, the network can be considered primarily private⁸.

Euronews shares the same objectivity principle with the international public networks in its promotion of the importance of pluralistic views, with the difference that its broader scope sees it seeking to convey a European, rather than national, perspective abroad.

Although the relative importance of public sector support is fairly significant for this genre, the landscape of TV news channels, whether national or international, remains dominated by the private broadcasters, with more than 70% of all news channels (including Euronews).

⁸ Euronews is also supported by the European Union through a framework partnership agreement.

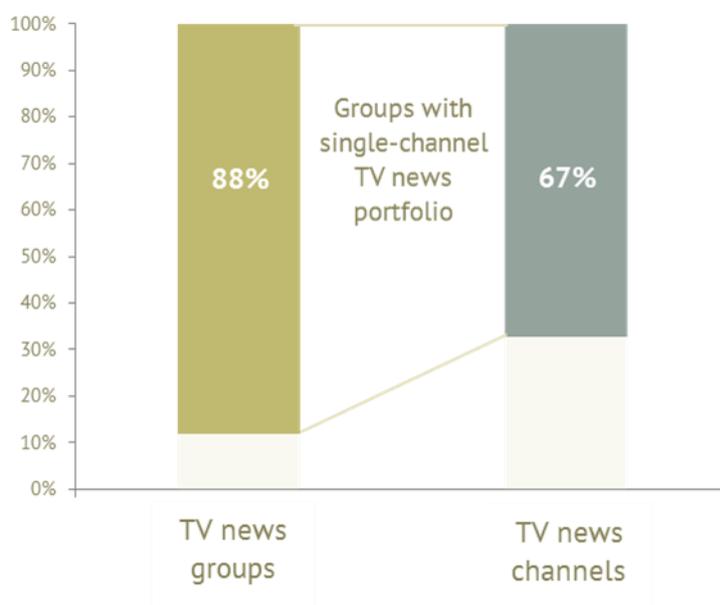


5.2. How pluralistic is the landscape of media groups controlling TV news channels in Europe?

There are around 80 media groups operating TV news channels in the European territory. Their portfolios show that the market is relatively competitive, characterised by a diversity of players. The following analysis takes into account the total number of TV news assets owned by the top entity controlling the channel.

Almost 90% of these broadcasting groups own a single TV news channel established and available in Europe.

Figure 10. Breakdown of media groups by number of news TV channels controlled in Europe



Source: European Audiovisual Observatory / MAVISE database

They are represented by public broadcasters such as RTÉ (RTE News Now), RAI (RAI News), CT Ceska Televize (CT24), France Televisions (France Info), NPO (NPO Nieuws), VGTRK (Russia 24), China Global Television Network (CGTN English), as well as private ones such as Cyfrowy Polsat (Polsat News), Altice (BFM TV), Televiza Evropa (TV Evropa), Bertelsmann (n-tv), Top Media Group (Top News), Ciner Group (Haber Turk), Global Media Circulating (Iran International), Channels Incorporated (Channels 24), Awraas TV (Al Magharibia) and others.

The single news channels, each owned by different market suppliers, account for two thirds of all TV news channels, portraying a relatively pluralistic media ownership landscape in Europe. Over 75% of these channels are national, as they address one single European territory with a national agenda.

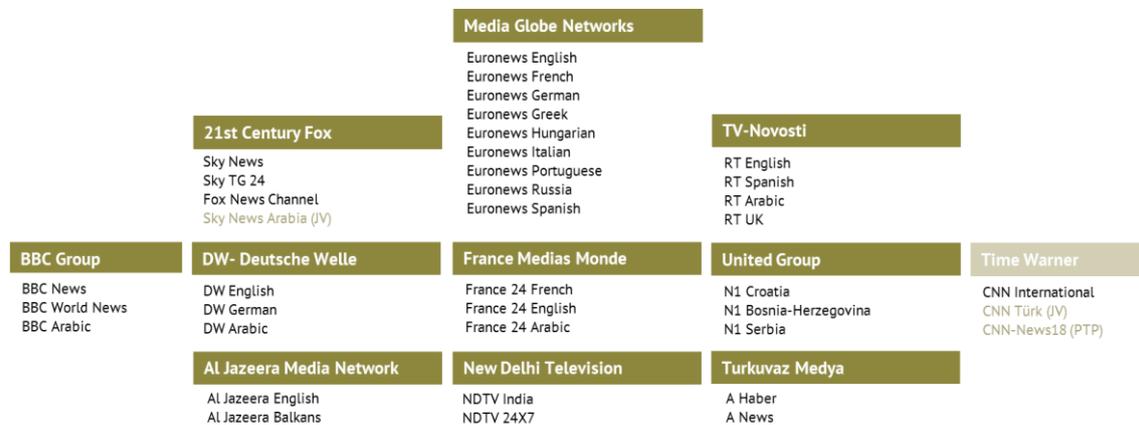


It appears that groups are more likely to opt for a business model based on a single-channel TV news portfolio rather than a multi-channel strategy.

As already seen in the TV news channel typology, due to the need to adapt content to a specific audience, one channel will always address one specific market, be it national, regional or global. In other words, single-channel and multi-channel groups target one single market and multiple markets, respectively. Nonetheless, this analysis suggests that the majority of broadcasters opt for a narrow scope in order to stay relevant and competitive.

Ten media groups, however, account for one third of the TV news channels operating in the European market. These are groups with at least two news channels in their portfolio.

Figure 11. Media groups controlling multiple TV news channels available and established in Europe



Source: European Audiovisual Observatory / MAVISE database

Media Globe Networks, the Egyptian company holding 60% of Euronews SA, controls 10 multi-language and multi-cultural editions of the international news network available in Europe. In June 2017, Comcast-owned NBC News bought 25% in the company with the intention to expand Euronews' content coverage and programming through a future co-branded EuronewsNBC service. The remaining 15% of the shares are distributed between public shareholders and local authorities across Europe.

TV-Novosti, the non-profit organisation financed from the budget of the Russian Federation is the sole owner of the five RT news channels established and distributed in Europe. These are represented by the three international RT editions in English, Spanish and Arabic together with the national RT UK and RT France channels.

The remaining groups have a maximum of three TV news channels in their portfolios. This is the case for France Medias Monde, DW-Deutsche Welle, BBC Group, United Group and 21st Century Fox.



France and Germany's international public broadcasters, France Medias Monde and DW-Deutsche Welle both operate three versions of their multi-channel global networks in Europe - France 24 (French, English, Arabic) and, respectively, DW (English, German, Arabic).

BBC Group, the UK's public broadcaster, also contributes to the category with its umbrella brand network of three channels available in Europe and addressing, separately, the UK market (BBC News), the Arabic-speaking world (BBC Arabic) and a global audience outside the national territory (BBC World News).

United Group, the leading telecom and media provider in South East Europe has full ownership of Adria News which runs the N1 regional news network with three localised versions. From the outset, the network was a member of the CNN family of over 1 100 worldwide affiliates, as its exclusive affiliate for the Adria region.

21st Century Fox, the majority shareholder (39%) of Sky and sole owner of Fox News Network runs the UK's Sky News channel, Sky TG 24 addressing Italy and Fox News Channel dedicated to the US audience and made available in Europe. Through BSkyB, the group also co-owns Sky News Arabia together with the Abu Dhabi Media Investment Corporation. However, for the market concentration analysis here, the 50/50 joint venture has been treated as a distinct entity owning a single news channel.

Time Warner does not actually own multiple news channels in Europe; its presence in this category derives from the CNN family of branded news channels. Through the Turner Broadcasting division, the group controls CNN International, the global news channel. Established in Europe are also CNN Turk and CNN-News18, both focusing on their respective national markets. The first is a 50/50 joint venture with Turkey's Demirören group, while the latter is a long-term partnership with India's TV18 controlled by Reliance Industries.

From the ownership point of view, Time Warner does not control the two channels, so their owners have been treated as distinct entities for the concentration analysis. As previously seen, in addition to the joint ventures and partnership, Time Warner is also present in Europe through CNN's affiliates network.

The groups with a two-channel news portfolio in Europe are Al Jazeera Media Network, News Delhi Television and Turkuvaz Medya. Qatar's privately owned Al Jazeera Media Network holds broadcasting licences in Europe for the global Al Jazeera channel and for Al Jazeera Balkans, the regional channel aimed at the Balkan countries. New Delhi Television, based in India, offers its two news channels in Europe, namely NDTV India and its English-speaking international edition, NDTV 24X7.

Similarly, the Turkish group Turkuvaz Medya owns A Haber, a national channel aimed at the domestic market and A News, designed to convey an 'accurate' image of what is happening in Turkey, for an international viewership.

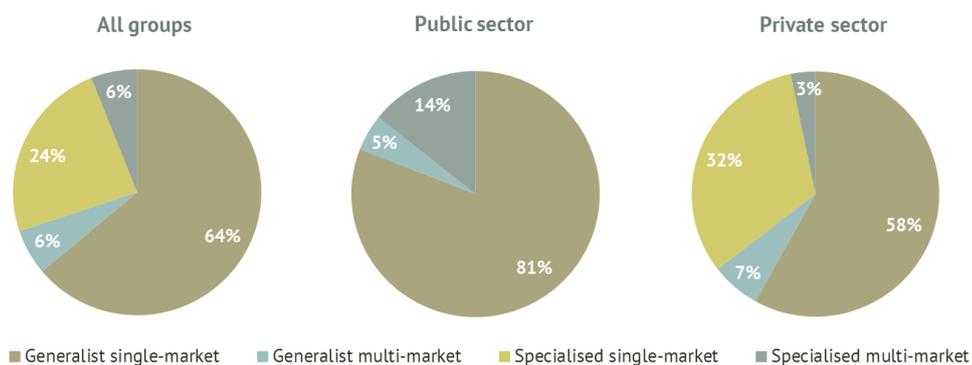


5.3. How specialised are the market players controlling TV news channel portfolios in Europe?

The portfolios of TV news channels tend to be streamlined; the majority consist of a single channel aimed at a specific market which in most cases is national in scope. A natural question is therefore: how specialised are the media asset portfolios owned by market players controlling TV news channels.

The analysis here is based on the crossing of two indicators to determine on one hand the level of specialisation of a media group and on the other the scope of its TV news channel portfolio. Given that the number of news channels owned by a player is in practice equivalent to the number of markets targeted (due to the channel's need to adapt to audience expectations in order to stay relevant), the media groups are categorised in single-market and multi-market groups based on their TV news focus. In this analysis the market is not limited to a geographical scope, but rather represents the intended core audience of the news channel which - even if in most cases domestic - can sometimes stand for transnational audiences (i.e. regional, continental, global).

Figure 12. Breakdown of media groups controlling news channels by specialisation and scope



Source: European Audiovisual Observatory / MAVISE database

From the media portfolio point of view, a group is defined as being generalist as long as the TV news business is not at the core of its operations and as long as it owns additional media assets such as non-TV news channels, radio stations, printed press, publishing and media houses in the same market as the news channel. A specialised group is one that focuses on the TV news business only, or where other media assets are marginal, remain situated in the realm of news and are designed to endorse the principle activity.



5.3.1. Generalist single-market groups

The mapping of the groups according to the two afore-mentioned criteria reveals that almost two thirds of the players own diverse media portfolios which include a single TV news channel. This type of generalist media groups aim their services at a single, usually domestic market.

The fact that a majority of generalist groups operate TV news channels appears to indicate that the TV news business may in itself not be a profitable⁹ one and that synergies between media assets of the same group are paramount in supporting the model. Within a generalist media group, the TV news channel can minimise the risk by spreading its fixed costs, re-purposing its resources and disseminating its content¹⁰ across the other media platforms. While this is a strategy employed by the specialised groups operating either multiple channels or single channels on multiple news platforms, at the end of the day their market is still limited to a niche audience, whereas the generalist groups benefit from a larger audience by cumulating demand for content that expands beyond news, and sometimes supporting it also through laterally integrated businesses.

One third of this generalist single-market groups category is accounted for by the domestic public service broadcasting groups, while the rest is represented by private generalist groups such as Vivendi (Cnews, FR), Discovery Inc. (TVN 24, PL), Egmont Fonden (TV 2 Nyhetskanalen, NO), Intact Media Group (Antena 3, RO), Top Media Group (Top News, AL), TurkMedya (24, TR), Mediaset (TGCom 24, IT), Promotora de Informaciones (TVI 24, PT) and Axel Springer (Welt, DE), just to name a few.

Efficiently expanding the audiences for a TV news channel implies costs that directly influence the level of localisation achieved and are geared towards rendering the channel relevant for a specific market.

As seen in the previous chapter, the multi-market strategy is not a common business model for TV news channels because in order to be truly competitive at a national audience level, the groups have to consider launching local incarnations, and manage dedicated teams. This is not only difficult in terms of the initial investment and future operating costs but also because the news channel will not be able to spread the risk if the generalist group that owns it is absent or has a reduced presence in the newly-accessed market.

⁹ Source: Kevin D., Pellicanò F., Schneeberger A., *Television News Channels in Europe*, European Audiovisual Observatory, Strasbourg, 2013

¹⁰ Source: Compton J., *News as Spectacle: The Political Economy and Aesthetics of 24/7 News*, 2004



5.3.2. Generalist multi-market groups

Since the majority of the generalist single-market groups have an integrated portfolio strategy where all their assets address the national territory, a strong presence in international markets is unusual. Conversion from generalist single-market to generalist multi-market, is not easily achieved in the TV news business.

This explains why the generalist multi-market category is very restricted (6%) and also very eclectic. While these groups own at least two TV news channels, each channel has a different scope. So although they may be characterised as multi-market, they are on the whole not akin to a multi-national model, due to the difficulty of implementing a consistent deployment strategy at the national level.

Other than its flagship Sky News channel, 21st Century Fox has only one other national incarnation, in the form of Sky TG 24 in Italy; Fox News is a standalone channel with a focus outside Europe and Sky News Arabia is a joint venture with a regional market scope. BBC Group is another particular case not only because it is the only public broadcaster included in this category but also due to the fact that each of its three news channels addresses markets that are different in scope, from global BBC World News, through national BBC News, to regional BBC Arabic.

Closer to a multi-national model is the recently launched N1 network owned by the United Group, due most probably to the fact that as it is concentrated on the relatively small Adria region, it enjoys proximity, language and news agenda advantages that benefit the bottom line of the business. However the network remains a regional one in focus, addressing the Adriatic countries with a common interest agenda infused with local content for Croatia, Serbia and Bosnia-Herzegovina.

Finally, Turkuvaz Medya and New Delhi Television go for a different strategy with two domestic news channels, one directed at the national audiences (A Haber and NDTV India) and one targeting the international market (A News, NDTV 24X7). What all these groups have in common in the markets where they are present with news channels is ultimately a generalist media portfolio which also includes multiple news channels.

5.3.3. Specialised single-market groups

The specialised single-market groups belong to a category that remains specific to the private sector and they account for a quarter of the media groups controlling news channels in Europe. These are generally groups holding one single news channel in their portfolio and, rarely, additional but marginal other news media assets in the same market.

As opposed to the generalist single-market category, the news channels in the specialised single-market groups are almost evenly split between national and international. The groups may own news channels with a national European editorial agenda in focus aimed at either national or international audiences, or news channels with a non-European content focus addressing either the global, or regional and national, audiences.



NovaTV24.si (Nova24TV, SI), Channels Media Group (Channels 24, UK), B1 TV Channel (B1, RO), UA TV (UA), Televizia Evropa (TV Evropa, BG), Rain TV-Channel (Dozhd, RU), Afrimedia International (Africa 24, FR), RFE/RL (Current Time TV) are all examples of this category.

5.3.4. Specialised multi-market groups

The specialised multi-market groups' business is also supported mainly, if not entirely, by TV news channels with the difference that they own multiple channels dedicated to several markets. Although this segment is also very limited (6%), the business model is more consistently represented here as opposed to the other multi-market category.

Five groups are identifiable, representing the main international multi-channel TV news networks in Europe. France Medias Monde (France 24, FR), DW-Deutsche Welle (DW, DE) and TV-Novosti (RT, RU) are all backed by the public sector, while Euronews is mainly a private entity controlled by Media Globe Networks, since only 15% is owned by public shareholders. In contrast to the customised editions addressing transnational linguistic communities offered by the first three specialised groups, Media Globe Networks delivers, through its editions, a more localised approach by infusing national content in its global agenda.

An advantage for this category is that the groups benefit from synergies between the channels and platforms by re-purposing and adapting existing content for their different editions. Still, a full-fledged national channel implies more significant financial and operational effort together with exposure to greater risk. Al Jazeera Media Networks made a step in the direction of a dedicated news channel with a smaller regional scope by launching Al Jazeera Balkans, while TV-Novosti has taken a step further with the launch of national channels (RT UK, RT France), also in a mission to complement its transnational editions.

As with the generalist multi-market groups, no emerging trend can be identified regarding their expansion, but rather a need for localised and thus highly relevant news content. Their customised editions remain international in scope by infusing regional and local content and adapting the perspective of an otherwise regionally or globally focused channel. To fully capitalise on this opportunity however, players must be ready to enter the competition at a national level through localisation achievable with the launch of full-fledged national channels specially designed for a given country.

In conclusion, the majority of media groups controlling TV news channels in Europe own one single TV news channel usually aimed at national audiences and which is more frequently part of a generalist portfolio of media assets targeted at the same market.



Figure 13. Example of media groups controlling news channels mapped by specialisation and scope



Source: European Audiovisual Observatory / MAVISE database

A publication
of the European Audiovisual Observatory

