

## MEDIA, POLITICS AND MARKET

### Swedish media between politics and market

#### Lars W. Nord

Professor and Chair of Political Communication  
Mid Sweden University, S-851 70 Sundsvall, Sweden  
Ph. +46 70 550 9333, Fax +46 60 14 89 34  
E-mail: lars.nord@miun.se

*The objective of this article is to describe and discuss the most important changes within the Swedish media system and their consequences on media performance and news journalism. Furthermore, the article compares media development in Sweden with the Baltic-Nordic region in general and discusses the possibility for small media markets to develop and combine national distinctive features with emerging global market trends. The main conclusion is that there remains no typical, single Nordic market, but rather different variations of mixtures of democratic corporatist national structures and more global liberal influences. Furthermore, this integration process is driven more by media institutional factors such as public service ideals and professional norms, than by proactive governmental policies.*

**Key words:** Media system, media policy, commercialization, media markets, globalization

#### Media system in transformation

The media system in Sweden has been characterized both by stability and change. Traditionally, there have been very stable and fixed relations between the political system and the media system. The party press system, with different newspapers representing different political views and diverging societal interests, guaranteed a foreseeable – but nevertheless effectively working – external pluralism in printed media during the 20th century (Nord 2001; Höyer, 2005). The public service broadcasting system in radio and TV contributed to this picture, when introduced in 1924 and 1956 respectively, by offering internal pluralism in programmes based upon the concepts of objective and non-partisan

reporting about political events (Hadenius, 1998).

Ideologically, the Swedish media system could generally be described as a mixture between classical liberal ideas on the press as an independent and monitoring ‘fourth estate’, and social responsibility ideas of necessary relationships between the political system and the media system in order to maintain diversity and public service in broadcast media. Historically, the prospects for independent journalism could not possibly be better. Sweden was the first country in the world to include a Freedom of Information Act in its constitution as early as 1766, and since then freedom of expression and freedom of information have been embedded in the Swedish constitution which give a

stronger protection than common law. However, in reality this liberal media approach has co-existed with numerous state regulations of the media sector and with an active media policy, most often conducted by the most often governing Social Democrats (in power for 65 of the past 75 years).

In all media, Swedish journalists nowadays are highly professionalized, and the country has a developed and institutionalized system for self-regulation as well as state regulations regarding, for example, the public service media, the ban on political advertising, impartial and neutral programming in the broadcast media, programming for children and press subsidies to second-ranking newspapers in a region (Petersson et al., 2005). Sweden has no law against limiting media ownership despite many political suggestions in this area. The problems with implementing such a law effectively have so far stopped the process. Beside of the legal system with its strong constitutional protection for freedom of information and freedom speech, Sweden is characterized by a system of institutionalized self-regulation on the printed market (cf. Hallin & Mancini, 2004). The Swedish Press Council is a part of this corporativistic structure. The Swedish Press Council is not affiliated with the government; the council makes decisions concerning media ethic issues in public and also publish regular reports with its considerations and explanations regarding their policy positions.

The party press system in printed media (including the press subsidy system) and the public service broadcast media were undoubtedly the core concepts of Swedish media policy during the period 1950-2000. However, they have gradually lost some of

their importance when established media policy positions have been challenged by the new media technology development, the deregulations of media markets and the increasing fragmentation of media audiences (Ewertsson, 2004; Nord, 2008). In recent decades, the Swedish media landscape has undergone considerable changes: more commercial radio stations and television channels and free tabloid metro newspapers have been introduced, and the Internet use has expanded rapidly offering the audience unlimited access to news and entertainment websites (cf. Carlsson & Facht, 2007). Still, traditional newspapers and public service broadcast companies in Sweden have been fairly successful in distancing themselves from their former political affiliations and in facing new commercial competitors, using their institutional strength and developed company brands.

The objective of this article is to describe and discuss the most important changes within the Swedish media system and their consequences on media performance and news journalism. Furthermore, the article compares media development in Sweden with the Baltic-Nordic region in general and discusses the possibility for small media markets to develop and combine national distinctive features with emerging global market trends.

### **Mass press in decline**

A mass press market, to a large extent based on subscriptions and reaching a considerable number of readers on a daily basis, has been one main characteristic of the Swedish media system. However, in a global perspective newspapers appear to

have lost readers in recent years and most developed nations report declining audiences for printed media throughout the last few decades (Norris 2000). Statistical data for Sweden for the last decade confirms the same development. The figures have not decreased dramatically, but the newspapers are reaching a slightly smaller audience than previously (tab. 1). Thus, it is reasonable to assume that newspapers now play a minor role in the present day Swedish society than during the 'golden years' of the 1970's and 1980's when circulation figures reached an all time high. In general agreement with the decline of the circulation figures, so the number of newspaper titles is also slowly falling. The reasons for this development may vary, but some general explanations include structural changes in newspaper markets, joint ventures and ownership concentration (Alström & Nord, 2003; Sundin, 2006).

Analyzing the Swedish press scene more in detail, it is necessary to stress the importance regional and local newspapers still have in Sweden. Even if the overall trend also here is a decline in subscriptions, local

papers still have a comparably large audience and play an important role in the local opinion formation processes as the leading producer of local news and opinion material. A majority of the Swedish households still subscribe to a local newspaper, while the biggest national dailies are becoming more and more of elite papers and the national tabloids have had substantial problems in keeping their audience (Carlsson & Facht, 2007). The most remarkable single change on the newspaper market in Sweden was the introduction of the tabloid Metro, a free newspaper in Stockholm distributed in the subway system and a commercial success story (Wadbring, 2003). Many other news media challengers have tried to copy the Metro concept, but they have so far not been as successful in the metropolitan media market.

Internationally, the most well known aspect of the press market of Sweden may still be the existence of selective and direct press subsidies, with governmental financial support given to newspapers with a second-ranked position within a particular market. The press subsidies were introduced in 1971

*Table 1. Some Key Figures of the Swedish Newspaper Market 1990-2005*

	1990	1995	2000	2005
Titles	90	95	84	84
Daily reading (%)	84	82	84	81
Total circulation (1.000 copies)	4916	4496	4109	3998
Press Subsidies (MSEK)	668	491	548	519
Newspapers without political affiliation (%)	44	41	46	45

The table shows the number daily newspapers produced five days a week or more, the share of the whole population reading a daily newspaper an average day, the total circulation figure of daily newspapers, the amount of press subsidies in fixed prices and the share of daily newspapers without any political or/and ideological reference or affiliation.

*Source: Nordicom Media Statistics.*

after a political deal in the parliament between the Social Democrats and the Centre Party, who both owned many regional and local newspapers with substantial economic problems. Nowadays, these selective press subsidies have been gradually reduced in Sweden (partly due to criticism from the European Commission) but they remain a controversial domestic policy issue with the left-centre political parties traditionally arguing in favour of the subsidies, and the now governing right-liberal political parties opposing them or arguing in favour of gradual reductions (Nord 2008). In practice, the press subsidies play a less important role in the Swedish press market than previously, and the existence of such subsidies has not prevented significant structural changes in regional press markets (Wadbring, Weibull & Bergström, 2002; Alström & Nord, 2003).

National dailies in Sweden, as in the other Nordic countries, have traditionally been affiliated with a particular political party. This party press system was originally based on three specific links between parties and newspapers: ownership, content and readership (Hadenius & Weibull, 1991). However, over the last few decades the political affiliation has only been attached to the editorial page where certain party position have traditionally been defined, especially during election campaigns, while news journalism has been characterized by professional, objective values (Nord, 2001). The party press model has been on the reversal since the 1970s, and today the leading national and local press is non-partisan and neutral on the news pages. Systematic content analyses of Swedish national media during election campaigns confirm that

most campaign coverage is partial in some aspects. However, different political parties and actors seem to be favoured over time with regard to their perceived newsworthiness (Asp, 2006). Thus, the structural bias in news seems to be a more distinctive feature of contemporary political journalism in Sweden than the ideological bias that dominated previously. Accordingly, the partisan press in Sweden has almost disappeared, even on opinion pages, and market-driven journalism has to a large extent replaced politicized reporting. The norm of journalistic objectivity is strong, and interpreted by a majority (58%) of Swedish journalists as "going beyond the statements of the contending sides to the hard facts of a political dispute" (Patterson, 1998, p. 22).

To conclude, mass-circulation press developed early in Sweden, and the newspapers used to have strong ties to the political parties, which was manifested on both the editorial and the news pages. Thus, historically speaking there was a high degree of political parallelism, and the media system – with regards to the newspapers – displayed a high degree of external pluralism (Hallin & Mancini, 2004; Nord, 2001; Hadenius & Weibull, 1999). However, recent global trends of journalistic professionalisation and deregulation have to a considerable extent changed the print news media in more market-oriented and non-partisan directions. Political news coverage has currently a more structural than ideological bias (Hallin & Mancini, 2004; Nord, 2006).

### **Public service under pressure**

The media system of Sweden has always been associated with strong public service broadcasting institutions. For a long time,

public service broadcast media operated in monopoly markets, with specific state regulations regarding programme content, non-partisanship and financing. No private or commercial radio and television stations were allowed to broadcast from Sweden or aimed at a Swedish public (Djerf-Pierre & Weibull, 2001). Gradually, political decisions about media expansions followed and the public service broadcast sector increased significantly as new regional and local channels were introduced in different parts of the country. A huge majority of politicians has defended public service media as a decisive instrument for free information and fair reporting within the Swedish society (Nord, 2008). The governmental Broadcasting Complaints Commission supervises laws and regulations. State regulations concerning the prevention of commercials in public service media are still very important and are also extended to commercials in new media formats such as public service text-TV and public service websites. However, sponsoring of public service programmes covering events or sport are allowed during special conditions (but heavily criticized by commercial competitors).

Deregulation and commercialisation of broadcast markets in recent decades all over the world, as well as the introduction of new media as Internet, satellite and cable television, have imposed huge challenges for public broadcasting everywhere (Katz, 2005). Sweden is no exemption to this rule. The system began to break down with the advent of cable television, and on New Years Eve 1987, the first private and commercial cable television station (TV3) started to broadcast in Swedish. Since the station was based in London, it was out of reach of

the Swedish authorities that unsuccessfully tried to enforce the Swedish law. This was celebrated as a victory for freedom by the parties to the right, who pressed for further deregulations (Borg, 1994). Thus, changes in media technology and a more liberal political climate created the preconditions for the deregulation of the broadcast media. Public service terrestrial monopoly disappeared in 1991 as the 'hybrid' commercial channel TV 4 (private, but operating under public service-conditions) was introduced. Two years later, the non-socialistic government allowed local private radio stations financed by advertisements.

Accordingly, the public service broadcast monopoly in Sweden was broken and the markets were now open for new commercial actors. Today Sweden has numerous cable- and digital commercial television channels, competing with the public service media for the attention of the audience (Jönsson & Strömbäck, 2004). The public service channels are prohibited to broadcast commercial advertising, and financed by mandatory license fees. The public service television channels have lost considerable audience market shares in recent years, while the public service radio still has a somewhat stronger market position. Thus, former monopoly companies in the public service sector are now faced with strong market competition. Sweden now has adapted to the European standard from the 1980's and developed a dualistic broadcasting system characterized by competing public channels (financed by license fees and/or state budget and commercials) and private channels (financed by commercials) (Siune & Truetzschler, 1992; Bardoel & d'Haenens, 2004). The table below illustrates the current market shares

*Table 2. Some Key Figures of the Swedish Broadcasting Markets 1995-2005*

	1995	2000	2005
Daily radio listening (%/min.)	82/193	79/174	80/163
Daily TV viewing (%/min.)	74/134	76/150	70/146
PSB Radio market share (%)	71	66	63
PSB TV market share (%)	51	44	39

The table shows the share of the whole population listening to domestic radio channels or viewing domestic television channels an average day and the market share of public service radio and television channels among the whole population.

*Source: Nordicom Media Statistics.*

of the public service broadcasting channels, measured as the share of total daily listening or viewing (tab. 2).

Generally, the market share for the public service broadcast media in Sweden has declined. However, public service radio with its four basic channels remains the biggest player in the market. Notwithstanding, new local commercial radio stations have been successful in reaching new audiences, especially among young people, and are now holding strong market positions in many major Swedish cities. The Swedish television market trends are about the same. Public service TV channels have lost a remarkable part of their daily audiences during this period. The national TV station TV4, a successful challenger of public service TV, is now having the greatest share of the national audience the average TV evening. TV 4 is financed by ads, while its programme policy is defined by a legal act with large similarities to the public service concept.

Faced with more different media formats than ever the Swedish audience also perceives media performances differently. National surveys confirm that public service television and radio and the commercial TV station TV 4 are the most trusted me-

dia in Sweden. Regional newspapers and daily papers maintain a middle-position in this aspect, while tabloid newspapers and private radio stations are not considered as especially trustworthy among Swedish citizens. However, the trend seems to be negative in this aspect for all kind of media in the Swedish society (Holmberg & Weibull, 2007).

To conclude, the increased competition in the Swedish broadcast media markets has affected the public service media to a considerable extent. New commercial players in the markets have attracted sections of the audience, particularly the young audience. However, public service channels have generally been rather successful in defending their market positions in the long run. After an initial drop, when new actors entered the scene, the public service radio and television channels appear to have been successful in recapturing their market positions. Public service is still alive, however under strong market pressure from commercial competitors. The digitalization of the television market was completed in the whole country in 2007, while the parliament decided in 2006 not to continue to develop digital radio broadcasting on a large scale.

Table 3. *Internet Access and Use in Sweden 1995-2005*

	1995	2000	2005
PC Access at home (%)	27	64	83
Weekly Internet Use (%)	4	32	42

The table shows the share of the household with computer access and the share of users of the Internet at least every week.

Source: *Nordicom Media Statistics*.

New digital media is also affecting old media structures. Sweden has a relatively long history of Internet penetration and computer use and ranks among the leading countries in the world in this respect (Norris, 2000). Public use of the Internet has increased steadily, and in 2005 a huge majority of the Swedish population reported that they had a personal computer with Internet access in their homes (tab. 3).

Public use of the Internet has increased steadily, and in 2006 80 % of the Swedish population reported that they had a computer with Internet access in their homes. The figures for 2006 showed that, on an average day, 52% of the population used the Internet and spent an average of 90 minutes online. Young people were over-represented among the users, as well as men and more highly educated persons. However, these differences seem to have diminished over the past years due to the higher penetration of the Internet (Harrie, 2006).

To conclude, the media system in Sweden is rapidly changing due to new technology and an increased market-orientation and deregulation. Thus, new commercial media companies appear on the market, and the competition for audience attraction and advertising money increases. However, the media market transformation process is so far mostly characterized by a mixture of old and new media structures and by traditional

distinctive media features co-existing with completely new media formats and settings. During these circumstances, it may be relevant to ask whether the Swedish system still could be said to represent a typically Swedish media model or not.

### **The Democratic Corporatist ‘Corner’**

In their classic work *Four Theories of the Press* (Siebert et al., 1956) the authors discussed four different normative media theories from around the world: liberal theory, social responsibility theory, authoritarian theory and Marxist theory. Their theoretical framework has influenced media scholars for decades, the main reason being that it was addressing multiple aspects of the media: the historical development of media and politics-relations, the degree of media freedom, and the different functions of media in contemporary societies.

Media scholars Daniel Hallin and Paolo Mancini (Hallin & Mancini, 2004) use *Four theories of the press* as an analytical point of departure. However, their approach is comparative and empirical in its nature. The authors compare the functions of national media systems in 18 developed countries in Western Europe and North America and identify three different models. In the figure

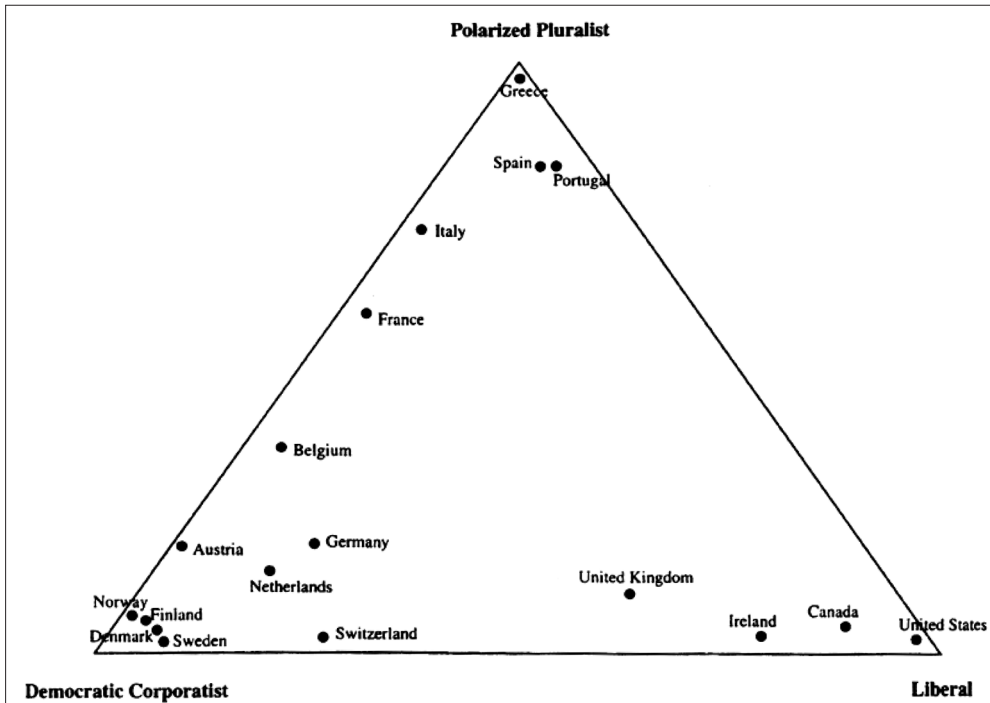


Figure. *Relation of Individual Cases of the Three Models*

below the name of the three models are located at the corners of the triangle (fig.1).

16 Western European countries plus the USA and Canada are located at different positions inside the triangle in accordance with the media characteristics of each country. The Nordic countries are those located in the *Democratic Corporatist* corner. In this general direction the Central European countries of Austria, Netherlands, Switzerland, Germany and Belgium can also be found. The Southern European countries of Greece, Spain, Portugal, Italy and France are located in the *Polarized Pluralist* corner. Finally the mainly English-speaking countries in this sample are all to be found in the *Liberal* corner. The countries mentioned are the United Kingdom, Ireland, Canada and the United States. The media systems of

Eastern European and Baltic countries are not included in the analysis.

Hallin and Mancini define the Nordic countries as the most similar countries of all and as the most typical examples of the Democratic Corporatist model. According to Hallin and Mancini's model the Democratic Corporatist media-system carries these common features (p. 67):

- Newspaper industry: Early development of a mass-circulation press and a high relative circulation of newspapers even today
- Political role: Historically a strong party-press thus providing external pluralism, a shift towards neutral commercial press and broadcasting relative autonomy in political issues
- Professionalism: Strong professionalism and institutionalized self-regulation



Table 4. *Pattern of Variation in Four Media Systems Dimensions*

	<b>Polarized Pluralist</b>	<b>Democratic Corporatist</b>	<b>Liberal</b>
Development of Mass Press	Low	High	High
Political Parallelism	High	High	Low
Professionalization	Low	High	High
State-Intervention	High	High	Low

(Hallin & Mancini 2004: 299).

- Role of the state: Strong state-intervention at a structural level, press-subsidies, strong public service broadcasting

This model differs from the Polarized Pluralist Model where newspapers are less frequently used and the degree of professionalisation is lower. The model also differs from the Liberal Model where state intervention is less common and the degree of political parallelism is lower (ibid. 299). The main distinctive features of the three models are illustrated in the table below (tab. 4).

In the concluding chapter Hallin and Mancini find that the 18 countries can be analyzed within their framework. However, at the same time, they acknowledge the existence of a continuous homogenization process regarding technology, political structure, economy and commercialization that appears to affect all media systems and which causes them to converge them in a more liberal direction. As with many other scholars, Hallin and Mancini reject the idea of a one-directional “Americanization” and argue in favour of an analytical exchange model where modernization and globalization are adjusted with distinctive national features such as existing laws and regulations and traditional political culture (cf. Nord, 2006; Plasser & Plasser, 2002; Blumler & Gurevitch, 2001; Negrine, 1996). Thus, there are constraints and national tendencies

in all countries which influence different media systems in a variety of ways (Hallin & Mancini, 2004, p. 301). This mixture of influences may be of decisive importance for systematic analyzes of changes within media systems.

### **Still a Swedish Media Model?**

Against this theoretical background of media-politics relations, the Swedish media system can broadly be described as a typical example of the democratic-corporatist model, with a partisan press system and a strong public service broadcast media system as distinctive features, at least until the deregulation and liberalization era of the 1990’s.

However, in the last decades the Swedish newspapers have definitely lost their party press character and the majority can be described as modern independent newspapers without any clear political party affiliation. At the same time, the previous central governmental press subsidies have been reduced and no longer play an important role in shaping the national newspaper markets. Governmental support has not been able to stop structural market changes or to prevent a concentration of ownership of printed media.

But still, daily newspapers in the Sweden are important players in the media market.

The number of newspapers and the daily reach still exceeds the figures for most other European countries (Norris 2000). Furthermore, the Swedish dailies seem to generate a strong position: they attract a large audience even in the age of the Internet, they have a bigger share of advertising income than their European counterparts and the majority of households in most regions and municipalities still subscribe to them (Swedish Newspaper Publishers' Association, 2006).

The Swedish broadcast media scene has generally experienced significant structural changes, as new competitors have been able to challenge public service companies during recent decades. Accordingly, public service audiences have shrunk and some private radio and television channels have been successful in gaining strong market positions. However, public service media in the Sweden is still a major player in the market in spite of heavy competition within the most attractive audience segments.

Furthermore, the professionalisation processes of the Swedish media markets have not turned all democratic corporativistic traditions into more liberal models. The Swedish Press Council remains central in interpreting and evaluating media ethics and there is no real debate to change the self-regulations systems into a more non-institutionalized direction. However, state intervention in the Swedish media markets has become less common and the system of selective press subsidies is a less distinctive feature of contemporary media system.

To conclude, the Swedish media system seems to have developed somewhat of a hybrid of the Democratic Corporatist and the Liberal Media Models. The relative strength

of the newspaper market and the strong position for public service media make the Swedish media markets special even in times of globalization and modernization. At the same time, state intervention has become much less important and political parallelism appears to be overplayed.

These observations may be summarized as key indicators of a process where the transformation of the Swedish media system can be described more as a simultaneous de-politization and institutionalization, than as an absolute market-orientation towards liberalization. State intervention, selective press subsidies and party press connections obviously belong to the past. Regulatory media policy has gradually been abandoned by Swedish governments regardless of their ideological orientation (Nord, 2008). If the de-politization process of the media was the only criterion involved in deciding the direction of the Swedish media system, it could definitely be described as becoming more liberal.

However, traditionally strong national media institutions in Sweden may have survived these political changes without becoming completely adapted to the market logic. Traditions and political culture seem to matter, and high public confidence in the historically most well-known media institutions may prevent a process where liberal market values turn the existing order upside down. Consequently, it is important to stress that the leading national media institutions such as daily newspapers and public service broadcast media no longer maintain their strong market positions through political support, governmental grants or tax favours. On the contrary, they maintain their contemporary positions by

utilizing their institutional reputations and company brands as reliable news content and entertainment features providers. One example is that media changes have not affected public confidence in public broadcasting significantly.

### **What about a Baltic-Nordic Media Model?**

Accordingly, there may be reasons to analyze the development of all Baltic-Nordic media systems within the framework of such a process of ‘hybridisation’. Even if there are significant similarities when comparing the different national media systems, they are to some extent all influenced by external factors and global trends. As a result, they may develop in different or similar directions in accordance with a dynamic interplay between international and national factors.

The results of this Swedish case study would definitely benefit from being further developed in comparative research settings, including systematic analyses of all the countries in the Baltic-Nordic region. Is the media in this region still somewhat of a democratic-corporatist ‘archetype’, or is it drifting away and becoming another copy of the western model?

Generally speaking, daily newspapers in the Nordic countries have been rather successful in defending their positions in the advertising market. They are losing market shares, but not to the same extent as in other parts of the continent. Generally in Europe, 30 % of advertising investments is in the newspaper market, but in the Nordic it account for almost 40 % of advertising money (IRM, 2005). Furthermore, the most

successful newspapers are also the most important news providers on the Internet in the Nordic countries. The public service broadcast media companies offer the most developed websites and are market leaders with reference to media convergence and digitalization. Thus, the oldest actors in the media markets appear to be the winners of the future; but more for institutional rather more than for political reasons. They do not need governmental support to remain in politicized media systems, but instead use renewed market strategies to keep up with public expectations. They may have many different and diverging interests, but their key to success in more hybrid media markets is to use the Nordic media traditions to their advantages in a more liberal environment.

The final conclusion – based on this Swedish case study and some brief observations of the Nordic countries in general – may be that there remains no typical, single Nordic market, but rather four different variations of a mixture of democratic corporatist national structures and more external liberal influences. Furthermore, this integration process is driven more by media institutional factors such as public service ideals and professional norms than by proactive governmental policies. Media policies may be more or less ineffective in the new media markets, while media institutions may survive or even strengthen their positions. Consequently, media governance perspectives may prove more useful than media policy approaches when analysing media market developments.

The Baltic countries differ from the Nordic countries in some aspects as political

traditions and culture of journalism. However, it is reasonable to believe that they face the same media system challenges as their neighbours in the North. All Baltic-Nordic countries are small countries with small national media markets. The ways these national markets are affected by con-

vergence, globalisation and commercialisation – and the extent to which traditional features prevail – should be highlighted in further comparative media research in order to ‘make the invisible visible’ and help explain decisive conditions in media market developments in this region.

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## ŠVEDIJOS ŽINIASKLAIDA TARP POLITIKOS IR RINKOS

**Lars W. Nord**

### S a n t r a u k a

Šio straipsnio tikslas – aptarti svarbiausius Švedijos žiniasklaidos sistemos pokyčius ir jų poveikį žiniasklaidos turiniui ir naujienų žurnalistikai. Švedijos žiniasklaidos raida straipsnyje lyginama su Baltijos ir Šiaurės regionu, aptariamos mažų šalių žiniasklaidos rinkos galimybės plėtoti ir apjungti nacionalinius bruožus kartu su stiprėjančiomis globalios rinkos tendencijomis. Pagrindinė straipsnio

išvada – nebėra charakteringos, atskiros Šiaurės šalių rinkos, tačiau atsiranda įvairūs junginiai tarp demokratinių-korporatyvinių, nacionalinių struktūrų ir globalinių, liberalių įtakų. Pagaliau, ši integralų procesą labiau veikia tokie instituciniai veiskniai, kaip: visuomeninės žiniasklaidos idealai ir profesinės normos, negu veiksnios vyriausybės priemonės.