

Media Markets in Scandinavia

Political Economy Aspects of Convergence and Divergence

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Abstract

It is commonly believed that the Nordic countries, in general, and the Scandinavian countries, in particular, are so much alike that they constitute a common media system – often termed democratic-corporatist. But a review of recent studies on power and democracy in Sweden, Norway and Denmark shows that there is most probably no such thing as one uniform Nordic media model. It may be argued, however, that political and commercial preconditions make the Scandinavian media markets extremely suitable for comparative research. In order to do such research, without risking reproduction of prejudices and unwarranted generalizations, media researchers must pay close attention not only to media convergence, but also to divergence in terms of the political economy that constitutes the national framework surrounding media corporations and media regulators.

Key Words: comparative research, media market, convergence, divergence, political economy

Introduction

Political economy approaches to media studies had their heyday in the 1970s (Miller & Gandy, 1991). By the end of the century, these applications were overshadowed by other research perspectives. Yet the current trend towards international comparisons invites a renewal of this kind of social studies, taking into consideration the institutional context surrounding media market competition, especially in order to balance excessive claims and exaggerated generalizations in relation to globalization and media convergence.

In their groundbreaking monograph *Comparing Media Systems* (2004), Daniel C. Hallin and Paolo Mancini propose a promising framework for this kind of research. A political economy model (including the Scandinavian media markets) termed "Democratic-Corporatist" is contrasted to two other models: the liberal and the polarized. Within this comparative framework, the relationship between state, business and media is discussed in an institutional context, primarily based on statistical comparisons, descriptions and formal regulatory regimes.

In the present article, it is my intent to inform and supplement the Hallin/Mancini-typology using empirical data from recent studies of democracy and power in Denmark, Norway and Sweden. I do so in order to illustrate how a regional market perspective may improve our understanding of convergence and divergence regarding media organizations as local players in global games (Kristensen & Zeitlin, 2005). In conclusion, I

suggest ways in which critical media research may be constructively applied to these competitive games.

The Democratic-Corporatist Tradition

Denmark, Norway and Sweden invite comparative research because the regional media markets of Scandinavia share a number of common features, with a long tradition of self-regulation of business terms, combined with politically negotiated and culturally legitimized subsidies. Research of this kind, however, is relatively scarce, and the little we have reveals significant institutional differences, e.g. the Norwegian study of democracy and power (Østerud et al., 2003) was considerably more pessimistic about the future of democratic governance than was a similar study in Denmark (Togebjerg et al., 2003). Comparing these findings to international research on political economy and media management (Picard, 2004; Roppen, 2004), we can highlight four conditions that are thought to be essential qualities of media performance in democratic-corporatist systems:

1. Relatively large readership of privately owned newspapers
2. Relatively high audience reach of public service radio and TV
3. Professional and competitive production of news and views
4. Regulated market conditions based on political compromises

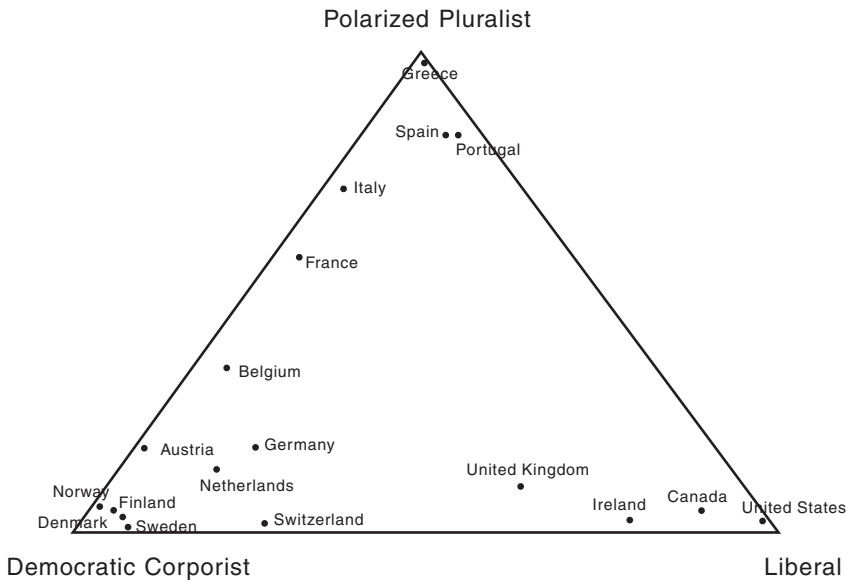
Scandinavian media research on the first two points generally confirms mutual trends towards a common Nordic model based on democratic ideals of press freedom and corporate public service autonomy (Hadenius & Weibull, 2005; Nissen, 2006). Recent research on the two latter points, however, evaluating professional news production and political media regulation, brings forth important nuances differentiating Denmark, Norway and Sweden that must be carefully addressed in order to demonstrate and understand the financial and political divergence of media markets in Scandinavia.

Hallin and Mancini (2004, p. 190) focus on the “partnership between social organizations and the state” as the central aspect of the democratic-corporatist media market model based upon ideals of freedom of expression, democracy, and the education of the general public, which characterize the Scandinavian notion of a political economy for news and views. Collective bargaining is an important component of this tradition. Consequently, newspapers, radio, and television in Scandinavia are expected to play a role not only as commercial marketers, but also as a public arena for a critical and consensus-seeking debate.

In contrast to the polarized media systems that characterize Southern Europe, party representatives and interest organizations do not control the media in Scandinavia. In the past, elected officials did have party-controlled newspapers at their disposal, and parliamentary representatives were in control of electronic media. Recent political deregulation and closure of weaker media players, however, bear witness to the increased dominance of major media conglomerates, which may potentially drive the Scandinavian systems in the direction of the liberal tradition. In this context, home market privileges, language barriers and regulatory regimes become important institutional conditions of competitiveness. On the other hand, there is no guarantee that state interventions of the past can secure the competitive vitality required under the international media convergence of the future.

In Scandinavia, political fears of commercial and market-driven news production resulting in bias and homogeneity in media content have fuelled heated discussions on how to proactively secure diversity in open access to public opinion forming. These concerns have resulted in revised market regulations, including more selective press subsidies and demands for special treatment of minority viewpoints.

At the same time, radio and television services have been de-regulated. Broadcasting in Scandinavia was initially limited to companies that were granted government concessions for use of the limited amount of available frequencies. Later, the argument for continued state regulation has rested upon political considerations of cultural orientation. In line with the liberal model of media business, these monopolistic conditions have been systematically changed since the late 1980s (Ewertsson & Hultkrantz, 2004). None the less, according to Hallin and Mancini (2004:70), Norway, Finland, Denmark and Sweden can still be placed in the extreme democratic-corporatist point of a typological triangle constituting “a common culture and a common public sphere”.



Source: Hallin & Mancini 2004, p. 70.

In a democratic-corporatist media system, Hallin and Mancini expect government regulations to be based on ideals of public opinion driven politics and collectively negotiated business considerations. The mass media are assigned a political role as proxy citizens, representing a diversity of voices and connecting the masses with competing elites. From an economy perspective, this may essentially be regarded as a regulated form of home market protection resulting in a hybrid media system based on license financing and revenue derived from the marketplace. It may also be regarded as a political construct aimed at avoiding concentration of power and a one-sided public debate.

Older studies of democracy and power in Scandinavia demonstrate that mass media in the Nordic nations do indeed live up to these democratic-corporatist functions while acting on competitive market terms (Østgaard et al., 1979). Lately, however, the mass media have also to some degree replaced political parties as public administrators of political agendas (Strömbäck, 2000). Research from a political economy perspective

demonstrates institutional developments facilitating concentration of media ownership (Østbye, 2000), but altered market conditions have also made the authoritative exercise of power more transparent (Hoff, 2004). All in all, the fact that public opinion is increasingly mediated through conglomerates of market-dependant enterprises is not necessarily a sign of decline or improvement of Scandinavian democracies:¹

The media of today play a greater role as the connective tissue between the public and the political leadership than they did previously. Media have a significant influence upon the public agenda, public opinions, political communication and political decisions. Yet their power can also be exaggerated. Presumably the media structure and news criteria in general are most important. There seems to be a mediation of politics in which politicians and organizations accommodate first and foremost the electronic news media's requirements for access and form (Togeby et al., 2003, p. 212; my translation).

This quote gives a balanced view of how the Danish study of democracy and power summarizes the current knowledge of power relations in the media, with particular emphasis on relations to the political system. These conclusions are based on a long series of studies: Albæk et al. 2002; Damgaard 2003; Hoff 2004; Kjær 2002; Laursen 2001; Loftager 2004; Lund 2002; Madsen 2000; Philips & Schrøder 2004. It is evident from this research that the democratic-corporatist media system of Denmark at the turn of this century is neither strictly controlled by politics nor by omnipotent market-driven enterprises. Media owners, editors and journalists do occupy privileged positions that are significant for the authoritative allocation of valid social values. But such market conditions are balanced by user-generated content, particularly communicated by web-based media.

Content analysis of journalistic coverage of the political arena does indeed document spectacular examples of distortion of proportion and agenda setting manipulations. These occurrences, however, are exceptions rather than the rule. The daily run of the mill is characterized by orderly editorial processes dominated by routine competition that taps authoritative news sources. The main result is not the spinning of public opinion, but rather processes of priming and framing that influence what issues elected officials of authority should (and need not) pay particular attention to. In this manner, the core power of the media is to define what situations require political action – as opposed to issues that are best left to the private sphere or silently accepted (Lund, 2002).

The market-driven competition among media outlets has, paradoxically, led to relatively uniform redaction of political news not only in Denmark, but also in the rest of Scandinavia. In their contribution to the Swedish study of democracy and power, Ekecrantz and Olsson (1994) conclude that this tendency must be ascribed to institutional conditions: The homogeneous perspective and weighting in the editorial process rests to a great extent upon the fact that the journalistic actors are dependant upon collective norms and mutual dependency in a mediated field of strategically conflicting sources that promote news and views.

This very important aspect of media management is not salient in Hallin and Mancini's typology. They focus mainly on state intervention, professionalization of journalism and political parallelism. But the Swedish and Danish studies of democracy and power clearly show that the media system is not only influenced by politics, but at least equally influenced by routine practices and business considerations within an institutionalized framework of self-regulated enterprises serving the public on competitive media markets.

Business Considerations

In all the Scandinavian countries, we find a complex combination of market-driven and budget-driven media. The legitimacy of this hybrid political economy rests upon professional standards of self-regulation, freedom of expression and licence to operate on market conditions. Scandinavian media systems are characterized by relatively open access to the press, radio, and television. This is a central tenet of public service traditions and democratic ideals of diversity of opinion. Despite the fact that media markets have suffered an epidemic of newspaper closures in the post-war era, journalistic competition on news and views still characterizes editorial practices (Lund, 2002).

One-sided party bias and singular business dominance no longer dominate the majority of Scandinavian news media. Instead, a homogenized institutional practice has emerged in which communicating actors negotiate the news agenda through a constant give-and-take. In practice, mediated political and news production enjoys a conditional autonomy. The individual mediums are deeply dependant upon each other as well as on authoritative sources (Allern, 2001), as the competing players balance their concern for the paying audience and their concern for commercial advertisers (Gustafsson, 2005).

Comparing media systems of this kind, it is hardly sufficient to focus only upon formal concentration of ownership. We must also examine the particulars of editorial preferences and professional homogeneity that occasionally lead to biased reporting and pack-journalism. Scandinavian media business act on a competitive market struggling to maximize share and reach, defending editorial autonomy and routines of self-regulation. Media uses and gratifications are closely monitored (Weibull, 1983; Bergström et al., 2005), but no individual editor or journalist exercises exclusive powers over his/her audience (Østbye, 2005). Editorial influence is primarily exercised through collective negotiations defining situational consensus. When considered from a political economy point of view, market-driven competition is neither perfect nor free in the liberal meaning of the terms. The authors of the Swedish study of democracy and power clearly demonstrate this, warning against reduced content diversity in mediated news and views:²

Given that mass media have an impact on the way democracy functions, how media are governed must be considered crucial. Control over media has strategic bearing upon the struggle for power. If one particular way of defining public opinion monopolizes the media, democracy is placed in jeopardy. Demands for diversity and freedom of access become essential (Pettersson & Carlberg 1990, p. 46; my translation).

In other words, in Sweden, the public – perceived as responsible and informed citizens – must be guaranteed the opportunity to independently shape their own opinions on media market terms. Within these limits of democratic ideals of freedom of expression, diversity, and media access, media businesses (private as well as publicly financed) have a licence to operate as mediators of public opinion.

Such a privilege calls for self-restraint and caution in democratic-corporatist media systems. Because significant aspects of democratic action are mediated by a privately owned press, media businesses are expected to act in a responsible and informed fashion. Despite the fact that Swedish (and other Scandinavian) editors and media owners may not legally be subject to formal, parliamentary or constitutional checks and balances, they voluntarily and collectively offer public service for more or less private money.

Under these circumstances no mass media can, in the long run, attain complete independence from the paying public or from political authorities. In a negotiated

economy, all parties involved in these exchanges may intervene if the informal rules of conduct are being systematically broken. Editorial power is delegated by the public and granted under institutionalized conditions. Media ownership and ideological bonds, for example past party affiliation, no longer serve as indisputable definers of editorial privilege. Consequently, the self-regulation of professional and socially responsible journalism becomes a crucial justification for the management of media businesses.

Scandinavian studies of democracy and power document how the influences of powerful elites function as informal adjusters of editorial practices. Research data, on the other hand, do not imply that Scandinavian editors and journalists systematically serve owners and business managers in ways known in pluralist-polarized media systems. Neither do they fully live up to liberal ideals of an objectivist journalism that acts as an independent watchdog of democracy (Valeur, 2002).

The political economy of media management may be understood as a never-ending negotiation in which journalists and sources, editors and owners reciprocally control and balance each other. While the individual editor is responsible for his or her own media content, no single actor controls the exercise of editorial power in the negotiated order as a whole. Everyday redaction rests upon journalistic decisions that prioritize events and initiatives prepared using professional tools and work routines. Media content is edited within a normative framework that is neither defined strictly by political nor by narrow financial considerations (Lund, 2002).

Radical media critics, however, consider the very exercise of editorial power as an attribute connected to capital and position, which hover high above the powerless masses (McManus, 1994). In its extreme, this cynical perception of dominance may lead to conspiracy theories claiming that undemocratic special interests, with the help of well-compensated operatives, systematically manipulate and work against the common interest. In order to counteract these accusations, institutional news sources use “victims of power” to illustrate political problems and their potential solutions. Paradoxically, this kind of editorial case-journalism places powerless citizens in positions of being influential for the promotion of conflicting elites. Media coverage of immigration and health care, for example, are two exemplary illustrations of how this form of editing takes place in routine journalism.

The net result is a political arena characterized by “scandal” in a continuous struggle for visibility between shifting alliances of actors on the political stage (Thompson, 1995). The balance of power can be shifted via editorial bias in the news institution; for example through a revealing story and the reaction it effects among competing elites. Parliamentary news coverage increasingly resembles horse race coverage. Journalists assume the roles of both commentator and referee. For professional media consultants, these confused roles become a tempting opportunity to nurse and spin special interests (Nielsen, 2000).

Consequently, media power is exerted not only through publication, but also by the information journalists more or less knowingly omit from their routine reporting. Professional decisions by editors not to cover complex issues or obtuse perspectives are of great practical significance. In the long run, these business considerations may have a stronger political significance than does manipulative spinning of mediated public opinion (Noelle-Neuman, 1984).

In short, Hallin and Mancini are right to emphasize journalistic professionalism and editorial independence as essential elements of the democratic-corporatist model of media management. Scandinavian studies of democracy and power confirm that mass

media in Denmark, Norway and Sweden enjoy a relatively high degree of autonomy. The net result is complex power relations and reciprocal influence of journalists, editors and news sources spun and nursed by elected officials and public administrators. Limitations in the form of ownership and political control are no more prevalent than are source-dependency and institutionalized norms.

Consequently, the ongoing battle for editorial control is less concerned with spin doctoring and more with niche nursing a negotiated order in which credibility depends less upon manipulation and more upon the ability to cloak special interests as a common good. Within this mutual framework, there are significant differences among the Scandinavian countries, for example in areas such as the education of journalists, media ownership, and statutes that regulate competition. More specifically, in terms of business models, a considerable amount of divergence can be observed across the Scandinavian media markets. In Denmark, for instance, local papers exclusively financed by advertising have existed for many years. In Norway, this type of publication has met active resistance from dominant players in the media market, and the Swedish invention of free traffic papers has provoked differing reactions in the Scandinavian context.

The impact of such differences in terms of business considerations has not been systematically researched. Therefore, Hallin and Mancini (2004) may be absolutely right in their claim that the shared traditions of the Scandinavian media system are in jeopardy. But the claim that current trends in the political economy should systematically be pushing the democratic-corporatist institutions in the direction of the liberal pole can neither be confirmed nor rejected in spite of the close readings of current media research in Denmark, Norway and Sweden.

Political Regulations

The Scandinavian nations have a long tradition of parliamentary control of the mass media as a cultural-political supplement to market-based self-regulation under free trade conditions. The government intervenes in media business with the intent of securing diversity and national identity. The official political goal has usually been to create and preserve the basis for free speech and fair competition on the media market. But tools and methods utilized for political regulations vary from nation to nation (Kelly et al., 2004).

Even fundamentals, e.g. the editorial and political limits to free speech, are interpreted quite differently within and between individual media market players of Scandinavia. This was clearly demonstrated during the heated debates on publication of the so-called Mohammed-cartoons initiated by the Danish newspaper *Jyllands-Posten* (Petersson et al., 2007). Also public service broadcasting (usually regarded as the central element of the Nordic media model), differs markedly when we compare frameworks of political regulations and their impact on editorial decision making (Roppen et al., 2006).

Differences of this kind cannot be accounted for by economical considerations alone. Political power struggles and compromises play important parts as was clearly demonstrated in the latest power and democracy studies in Norway. A number of empirical studies (Eide 2001; Slaatta 2003; Syvertsen 2001; Østbye 2000; Østerud m.fl. 2003) have thoroughly re-examined these issues, re-evaluating traditional dogma on politicized media regulation (Hernes 1978; Olsen 1980) and applying a field-perspective (Bourdieu 1996) with special attention paid to the order of symbolic power:³

The focus of this evaluation concerning the power of the media has been that specific media organizations (...) are positioned differently within an order of the media. Within this frame of reference, we discuss a structured division of labour between different technological fields in which certain relations exist between the fields, structuring the positions of the individual media in the order of the media (Slaatta 2003, p. 232; my translation).

Regarded from this point of view, media power is a structural order that can neither be reduced to a specific tradition of a party-political nature nor to a professional framing of news and views based on ideals of objectivist journalism. The distribution of symbolic power, both historically and currently, is sociologically perceived as a battlefield on which a variety of economic and cultural conditions have significant impact upon the diversity of media content. On the other hand, media market power is not a given attribute that chosen elites inherently possess, but rather something conflicting actors exercise in mutual interplay and within an institutional framework heavily influenced by political action. This may be described as symbolic power struggles to define the premises for public debate in which all citizens have the right to participate; but, it must be noted, without equal opportunity to exercise mediated influence.

In order to mitigate such inequalities, all the Scandinavian nations have some form of politically defined subsidies for the printed mass media, ranging from direct funding and tax relief to cheap rates for delivery by the postal services. Norway, however, is the only Scandinavian nation in which formal limits of ownership have been politically regulated. This may be an incentive for Norwegian media houses to expand regionally to a greater extent than other Scandinavian players.

While Norway and Sweden to varying degrees offer direct support to selected newspapers, the representatives of the press, supported by a political majority, have rejected similar proposals in Denmark. The consequences of these differences in press subsidies are disputed and invite future research. But no Scandinavian government has initiated comparisons of this kind.

As far as the electronic media are concerned, the approach to regulation on a national level has been more consistent throughout Scandinavia, and public service broadcasting is institutionally strong in all the Nordic nations both in terms of share and reach. Yet analyses of the creation of Denmark's TV2 (Bruun et al., 2000), Norway's TV2 (Dahl & Høyer, 2003) and Sweden's TV4 (Ewertsson, 2005) show that behind the apparently uniform goal of public service on de-regulated market terms lie significant variations in the political approach to the re-regulation of electronic media.

On the basis of Scandinavian studies of democracy and power, one could more generally argue that democratic-corporatist diversity in the Nordic media markets is only partly due to intended effects of government regulation. Other givens, e.g. language barriers, play a significant role as barriers of entry. The Nordic nations consist of relatively small niche markets that do not attract the multinational players to the same degree as larger mass markets do. The institutional frameworks are net results of competing and co-operating players negotiating conflicting interests on national and international markets. In sum, the Scandinavian media systems are not based on pure market economy, where business considerations call the score; they are also not products of a planned economy in which a political majority rules. They are in fact democratic-corporatist hybrids.

In this mixed and negotiated economy, commercial alliances are not allowed to become cartels that diminish market competition in a monopolistic fashion. Securing diversity within provincially defined niche markets, however, is not the only goal shaping media politics in Scandinavia. Another premise is international conventions. With organizations such as the EU and UNESCO in the lead, the norms of *free flow of information* are accepted conditions in the Nordic nations. The prohibition of restraint-of-trade regulations is an additional factor that may play a decisive role in the future of public service broadcasting (Mortensen, 2005).

The national approach to media regulation has traditionally prevented foreign dominance of media ownership, but in the future it may also impede Scandinavian players in the increasingly globalized competition for consolidation and media convergence. Media enterprises such as Schibsted, Bonnier, Aller and Egmont can be regarded as dominant media businesses in a regional context. But placed in the global perspective, they are relatively small players. National regulation to protect even smaller players may increase diversity in the short run, but risk obstructing trans-national expansion. In the long run, this may weaken Scandinavian media businesses in terms of their multinational competition.

In line with the corporate tradition for negotiation and compromise, Scandinavian media have a long tradition of collegial arrangements to prevent legal conflicts and political intervention. Such measures put voluntary restraints on mergers and buy-outs on national markets. How this is done, however, differs from niche market to niche market. In Sweden, social responsibility arrangements have been institutionalized in terms of a so-called *publicistiskt bokslut* (Wadbring, 2003). This arrangement of media audit is directed by researchers, who combine the media's own reports with opinion polls conducted within and outside editorial offices. These status reports prompt public discussion, while conclusions to be drawn are left to the editor-in-chief and media managers.

All in all, the recent studies of democracy and power demonstrate that the media markets in Denmark, Sweden and Norway are similar in terms of internal self-regulations and external state-regulations. But the regulatory regimes are by no means identical. Scandinavian comparisons do not support claims for one unified democratic-corporatist system with regard to political intervention. Significant differences persist, not only from nation to nation, but also among competing media corporations adapting to political rules of the symbolic power games.

Hallin and Mancini may be quite right in claiming an international mega-trend towards liberal convergence in terms of political de-regulations in national and regional media markets. But even under such conditions, institutional change is path dependant. Different kinds of press subsidies and other forms of unilateral intervention of the Scandinavian kind will probably be maintained. But of course, there is no guarantee that the institutional frameworks of the past will survive and suffice under changing market conditions for de-regulated media businesses and public service providers.

Local Players in Global Games

Hallin and Mancini (2004) claim that a process of convergence is currently taking place. Mega-trends are pushing all media markets around the world towards the so-called liberal system of market-driven and de-regulated commercialism. Similar claims are often heard in Scandinavian media debates. Warnings about Americanization and convergence are abundant. Leaving normative fear and loathing aside, an important

question for media research in this relation must be: How can the Scandinavian media businesses and political regulators learn from each other?

A, answer to this question based on political economy can only be found by carefully studying the ongoing battles for convergence and divergence in different media markets since the 1990s. Scandinavian skirmishes of this kind have ethnocentrically been labelled “the Great Nordic Media War”. Pessimists fear the present struggle will have the same results as the military confrontations of the 1700s, where neighbouring nations inflicted so much damage upon each other that outside powers dictated the terms of truce – thereby, by analogy, reducing all the Scandinavian media to inferior players on a converging world market.

While Scandinavian publicists and politicians fight among themselves on a mutual and regional market, multi-nationals such as Mecom, News Corporation, and RTL are ready to clean up the aftermath of local battles. In Scandinavia, the regional players and their political institutions have proven themselves able to create high barriers of entry. But Nordisk Råd and other trans-national agencies have had little success in coordinating regional media policies. Emphasizing the continuance of general subsidies for the printed media, and the preservation of government-financed public service radio and television, as the central counter-strategy to secure greater diversity. Hallin and Mancini conclude:

A strong tradition of rational-legal authority affects the media systems of Democratic Corporatist countries in several ways. First, (...) the expansion of the newspaper is connected with the development of rational-legal authority, as it is with the expansion of the market and parliamentary democracy. Second, the relative autonomy of public service broadcasting systems in Democratic Corporatist countries is consistent with the independent character of public institutions generally. Third, legal institutions often have an important influence on the media systems in Democratic Corporatist countries. (Hallin & Mancini, 2004:193-4)

A second crucial research question is whether this political tradition, based upon national regulation of the media derived from statutory powers and professional autonomy, can preserve content diversity and a negotiated economy under global convergence and increasing economies of scale. This question becomes crucial in light of the changing strategies of multinational players investing heavily in on-line media worldwide. One side effect of the Scandinavian practices of political media regulation, with emphasis on the national level, has been the creation niche markets of limited volume controlled by relatively small players. Scandinavian media enterprises enjoy tax abatements and political protection from external pressure, but few have succeeded in trans-national thinking and international consolidation.

The past 100 years of interaction among media businesses and political regulators has created institutional conditions that, to a great degree, have preserved provincial home markets in Denmark, Norway and Sweden as provincial and relatively closed systems in terms of worldwide media competition. It has been difficult and risky for foreign players to penetrate the Scandinavian market barriers, and the promise of success was limited, in part because well-run and well-financed public service channels in radio and television delayed and limited advertising to the electronic media. Advertising media buyers were shunted off to the printed media where regional publishers control a dominant share of the market.

Consequently, the political economy of the printed and electronic media in Denmark, Sweden and Norway has created institutional conditions that favour national services based upon hybrid combinations of private and public funding. Jan Stenbeck, who brought satellite-television to Scandinavia and founded Metro International, demonstrated this vividly by using an effective strategy of civil disobedience in Scandinavia in the late 1980s. In retrospect, Stenbeck illustrated the changing condition for national players in de-regulated games by referring to the popular pastime of "rock, paper, scissors" where paper engulfs the rock, the scissors cut the paper, and the stone destroys the scissors (Andersson 2002).

Individual media businesses (*rocks*) do act as independent agents of profit maximization in Scandinavian media markets. Business interests are regularly asphyxiated by political regulation (*paper*). Global, technological development (*scissors*), on the other hand, can cut through national "red tape" and make it ineffective, as Stenbeck himself proved by introducing satellite television. And – as history teaches us – no mass media technology can be implemented without capital. So in the last instance, it is private money for public services that frames the terms of politically de- and re-regulated media orders of Scandinavia.

International studies confirm that multinational business interests prime and spin the political regulators in regional markets across the globe (Curran & Gurevitch, 2005). But the extent and consequences of market-driven media convergence have only been marginally explored in a Scandinavian context. This invites grand generalizations. Increasingly, the procurement of democratic access and diversity in opinion forming will probably be left to market-based forces maximizing profits. Collective self-regulation of the democratic-corporatist kind may prevail, but it is somewhat like selling elastic by the yard: It is only workable as long as it rests upon mutual trust. Such element of prudent statesmanship and self-restraint cannot necessarily endure global market conditions. The perseverance of internal autonomy requires a careful balancing with external audit. In this respect, market-oriented media research from a political economy point of view could play a much more active role than has been the case in Scandinavia.

Conclusion

To sum up, there are many political and economic indications that Hallin and Mancini (2004, p. 143-197) are correct in attributing common traits to the Nordic media systems. But no single common regional media order dominates. No uniform Scandinavian media model exists in spite of the fact that Denmark, Norway and Sweden share many common traits, e.g. self-regulated journalism and politically regulated media markets based on political compromises.

For constructive media researchers, the primary goal should not only be to reveal the side-effects of such developments, but also proactively to investigate how local players in global games may administer traditional values, e.g. freedom of expression and public service, under changing institutional conditions. Media management must be viewed not strictly as an attribute associated with ownership or political affiliation. Research-based media-market analyses must be grounded in political economy based comparisons of media systems – locally, regionally and globally.

Scandinavian press, radio and television have emerged from a provincial tradition institutionalized by means of politically regulated market conditions. This makes Denmark, Norway and Sweden fundamentally different from most other European countries

and even more different from the American media market that usually dominates the research agenda. Interventions of the past did not encourage international expansion and competitive vigour. Consequently, the domesticated media industry can probably only preserve its relative autonomy under increasing world competition and EU-harmonization if systematic knowledge of the institutional impact on national competitiveness is available. Constructive media research may assist in this process by becoming more comparative in focus.

In line with this, Scandinavian media managers must be convinced that they have a shared interest in the creation of greater transparency in the regional market. Researchers do have access to relevant media data, primarily due to the work of Nordicom, but the base data from the different countries are not always fully compatible. We also lack specific comparisons of media management and unintended side effects of political regulation. These are necessary inputs if we are to solidify the political economy foundations of generalized ideal-types so as to consider not only systemic convergence, but also institutional diversity.

In short, political economy research questions the very existence of the democratic-corporate model of Scandinavia in order to understand the specific conditions of local players and their institutional competitiveness in global games. There is little doubt that many common commercial and political characteristics exist throughout the regional media market constituted by Denmark, Norway and Sweden. But these similarities cannot be properly understood without carefully calibrated comparative designs, considering not only global mega-trends, but also the diverging forces that constitute the national media markets in a Scandinavian context.

Notes

1. "Medierne spiller i dag en større rolle som forbindelsesled mellem befolkningen og den politiske ledelse, end de gjorde tidligere. Medierne har betydelig indflydelse på både befolkningens dagsorden, befolkningens holdninger, den politiske kommunikation og de politiske beslutninger. Men deres magt kan også overdrives. Ofte udgør de blot en arena for andre aktører. Det vigtigste er formodentlig mediestrukturen og de generelle nyhedskriterier. Der synes således at ske en medialisering af politikken, som indebærer, at politikere og organisationer indretter sig efter først og fremmest de elektroniske nyhedsmediers adgangs- og formkrav." (Togeby m.fl. 2003, s. 212)
2. "Givet att massmedia har sådan betydelse för demokratins funktionssätt bliver det avgörande hur media styrs. Kontrollen över media är av strategisk betydelse i maktkampen. Om en enda meningsriktning monopoliserade media skulle demokratin hotas. Kraven på mångfald och fritt tillträde bliver därmed centrala." (Pettersson & Carlberg 1990, s. 46)
3. "Sentralt i denne fremstillingen av mediernes makt har vært at de enkelte medierne (...) inntar ulike posisjoner innenfor en medieorden. Innenfor den kan vi snakke om en strukturert arbeidsdeling mellom ulike teknologiske felt, hvor bestemte relasjoner optrer mellom felterne, som virker strukurerende inn på de enkelte mediernes posisjoner i medieordenen." (Slaata 2003, s. 232)

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