

Policy Development in Danish Radio Broadcasting 1980-2002

Layers, Scenarios and the Public Service Remit

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In Denmark, the monopoly period of radio broadcasting ended in 1983 when local and community radio stations were launched. By the end of the 1980s commercial local radio was established and in 1988 got a market share of 20% – especially attracting the younger audiences. This new competitive environment forced the national public service broadcaster, Danmarks Radio [DR], to change its general policy and develop new programme strategies. The development of new formats, inspired by U.S. commercial radio, played an essential role in this process. From the mid-90s more radical changes were implemented in DR, involving a reformulation of the core values of the public service remit, a management-oriented restructuring of the organisation, and development of new production procedures and programme formats.

This chapter examines changes in the notion of DR public service radio broadcasting during this twenty-year period, focusing in particular on the development of new concepts of audience behaviour and programme preferences.¹ It describes the main components in the market situation and the influence of the converging media market at the turn of the century. What are the consequences of the approaching digitalisation for the general policy, and the strategic implications, for programme and channel format innovations in DR? And how will new production and distribution formats (DAB, webcasting, streaming, etc.), ‘narrowcasting’ and the more individualised audience behaviour influence the public service remit?

The overall policy changes in DR radio broadcasting have parallels in Nordic and other European countries, partly based on the strengthened co-operation (for instance in the strategic task force of EBU). In this sense, at least, the Danish case cannot be considered unique.

The modernisation process of radio broadcasting in Denmark

The modernisation of Denmark's Radio began in July 1959 when the traditional Danish Broadcasting Company (from 1964 simply DR, covering both radio and television) was challenged by a private commercial radio station. Radio Mercur broadcast its programmes from an old ship anchored in international water between Denmark and Sweden. The signal covered the eastern part of the country, including Copenhagen with a fourth of the total population. In a strict legal sense, Radio Mercur was not pirate radio. It did not violate any Danish law because it used a frequency not assigned to Denmark. But it was a challenge to dominate opinion among politicians and DR, based at that time on a strict, paternalistic interpretation of 'public service.' In practice, it questioned the view that radio broadcasting should not primarily be devoted to entertainment, and should therefore not allow popular music, rock and pop charts, fast talking DJs and commercials.

Scepticism and anxiety replaced widespread post-war fascination with American popular consumer culture, at least in the older generation and among the guardians of public service values. For them, radio was first and foremost a medium for enlightenment, the promotion of core values of high culture, and objective or neutral news programmes. Until 1964 news programmes were edited and controlled by the Association of Danish Newspapers, as agreed in the early days of radio on grounds that public radio should not compete with newspapers.

The Danish government struggled for four years before a new law was passed that made Radio Mercur illegal (Jensen, 1997, II: 182). But Danish radio audiences had already tasted the forbidden fruit and anxiety among the politicians grew when audience research proved that listeners preferred Radio Mercur to the DR channels (P1 & P2). A third channel (P3) was planned and launched in 1963 by DR, 'The Music Channel.' It had 14 hours of daily broadcasting and the programmes were mostly DJ presentations of popular music, including rock and pop charts, Top 20, etc., with special programmes in the afternoon for teenagers: "After school hours". Before P3 the only option for listening to that kind of programming was Radio Luxembourg. Despite the popularity of American English and lifestyles, done in a Danish context these programme types had a greater power of penetration.

But for many years to come, the Music Channel had to be considered an enclave among DR's radio channels. It was popular, but exactly how popular is difficult to say because audience research was rare, almost non-existent. Radio broadcasting was defined on the premises of the sender rather than the audience, and consequently a more comprehensive redefinition of the public service values and a reform of the channel system was only implemented at the end of the 1980s. But the seed of a slow process of reform was planted in 1963. During the sixties and early seventies the cracks in the walls supporting the traditional concept of public service broadcasting wid-

ened until they gave way in the 80s and 90s to cumulative changes in definitions of the public broadcasters' roles and concepts of the audience.

Archeological layers of public service

Recent media research in the Nordic countries has specified three "archaeological layers" in the notion of public service from 1925 until present days (cf. Syvertsen, 1992; Søndergaard, 1995; Hultén, 1996).

The first version defined the concept as a "*public utility*" that was technically/economically based, comparable to state provisions for mail, roads, railroads, etc. Here public service means a technical standard (as high as possible) in broadcasting for an efficient management and distribution system reaching all the citizens in the country. The first Director General of the BBC, John Reith, enjoined the phrase "*public service*" in his book *Broadcast over Britain* (1924). Reith developed his thoughts about radio as an instrument for enlightenment and as a distributor of cultural goods. But since these reflections were not related to the Danish notion of public service, the term at that time was primarily technical and economic in nature here.

The second version could be defined as "serving the public life, *the public sphere*". In the monopoly period (in the UK until 1955 and for Scandinavian countries until the 1980s), the term increasingly referred to content and cultural values. Here the public life and the public sphere are common denominators for the institutions and 'places' where individuals (as citizens) act in their capacities as citizens in relation to the public sphere, in contrast to their status as individual persons (bourgeois) when they are in the privacy of their homes. Broadcast media brought information and general knowledge to the public to enable citizens to act as such in the various processes of democracy. This definition emphasises distance from both the market and the state. This conception of public service was used by media financed by the licence-fee through the fifties up to the eighties, mainly to defend their monopoly situation and to avoid competition (as well as influence) from commercial media.

In the third archaeological layer, the concept of public service refers to "serving the public, *the public audience*". In this definition, the "public" is audience – citizens in their roles as *consumers* of media content in an individual or private sense. Here the function of public service media is to serve the needs of the audience as clients or customers (rather than as citizens). This definition became generally accepted in the late eighties and early nineties after the monopoly had ended and replaced by a duopoly, or even more competitive media environments, in line with the growth of commercial radio and television stations (Søndergaard, 1995: 24).

Based on the future-oriented policies of DR, now at the threshold of convergence and digitalisation, the question is whether public service broadcasting in these iterations is still a meaningful notion? One might argue that

the 'service' aspect seems to gain ground relative to the audience and also the introduction of more individualised programme formats. That is exemplified by digitised 'pull technology' features, i.e. in DAB: tune in and listen to your favourite programme when you want to, independent of programme schedules. The Internet offers similar options. But the 'pull technology' is not yet replacing the traditional push technology in broadcasting. One can, however, also advance the hypothesis that the segmentation and fragmentation of the Audience (into audiences) indicates the difficulty of maintaining the notion of the 'public arena' or a public sphere as a future core ingredient of the public service remit. An indication is the catch phrase in the DR radio strategic plan for 2003: "unique radio for everyone".

These three (or rather four) distinctions should not be considered as strictly separated over time but, rather, as elements in a slowly evolving process in which various aspects of the layers co-exist. One often finds this, for example, in diverse policies across different channels within the same public broadcasting institution.

The shift from the second to the third layer began in Denmark in the early eighties when public discussion about breaking DR's monopoly intensified. One of the major objections against the monopoly was based on the fear of political bias in programmes, especially in the news. The right-wing parties in parliament, especially the strong Liberal Party (Partiet Venstre), argued that an intellectual, left-wing elite in the capital dominated the news and was setting the agenda for political and cultural discussion in the country. The recommended solution was to break the monopoly. Decentralisation became the keyword in this political strategy.

But this decentralisation process factually began earlier when DR launched nine local stations (called Regional Radio) between 1972 and 1974. The programme output was rather limited during the first ten years, mainly concentrated on news and current affairs a few hours each day in the morning and late afternoon. The consequences for the general attitude towards DR were limited, however, and no major shifts in viewpoints and programme policy could be ascertained. Regional radio was a small-scale duplicate of the nation-wide DR. The liberal opposition nonetheless considered regional radio as a first step on the road to breaking the monopoly (Jauert, 1990: 102).

Similar developments took place in the other Nordic countries in the same period, so Denmark was by no means a special case (Hujanen & Jauert, 1998: 108). A Finnish research project indicated the background for deregulation was not only due to political pressures from liberal forces, but also highlighted internal inadequacies and contradictions in the monopolistic practices of public service companies. "Were this not the case private commercial broadcasting could not have successfully entered and subsequently unravelled the operational context of PSB" (Lowe, 1998: 114). The restructuring of Nordic PSB institutions during the late 1980s and early 1990's, especially changes in production planning and programme scheduling, should also be considered a vital part of a modernisation process. That was neces-

sary for legitimising the cultural values of the PSB institutions by taking a more reflective and responsive attitude to the needs and preferences of audiences (Hujanen, 1996; Kemppainen and Soramäki, 1996; Kemppainen, 2001; Lowe & Alm, 1997; Lowe, 1998).

The next step in the deregulation process of Danish radio broadcasting was taken in 1983 when an experimental period with private local and community radio (and television) began at the initiative of the government, led at that time by Social Democrats. The political intention was to strengthen local culture, local debate, local democracy and to extend the possibilities of public access. Commercials were still prohibited, but in spite of this limitation private media companies, including some newspapers, got involved in local and community radio mainly because of anticipated prospects for future income and, more immediately breaking the monopoly, eventually also on nation-wide radio broadcasting. The breakthrough for commercial radio came in 1987 when the experimental period was succeeded by a permanent law that allowed commercials in private local radio and introduced municipal and partial state funding for non-commercial community radio run by grassroots movements, local associations and minority groups.

As a result of the breaking of the radio monopoly, DR was transformed. After more than twenty years of only moderate changes in policy and programming, DR had to rapidly adjust several times to the new competitive situation during the nineties. Two major shifts in DR's overall policy took place – the first and a radical one during the period 1988-1992, and the second around the turn of the century.

Flow and formats – the development of new strategies 1988-1992

When local radio stations first made their entry in Denmark, they were not considered a serious threat to or by DR. They were not regarded as competitors but rather as a supplement provided by local, idealistic radio enthusiasts. This understanding changed within a few years. After commercials were permitted in 1988, and when about a dozen larger commercial local radio stations expanded to establish fully professional coverage in 'provincial' Western Denmark, the management in DR realised that the time had come for more radical changes in the former monopoly institution: in policy, organisation, production procedures, programming and approaches to the audience (Hujanen and Jauert, 1998: 114). This was accompanied in the same period by the breaking of the nation-wide public service television monopoly. A partly commercial, public service channel (TV 2) was launched in 1988.

At first the problematic could be considered a crisis of legitimacy. In earlier days DR could rely on claims for a unique position as the provider of culture, news, information and entertainment to the Danish public. Apart

from television broadcasts from neighbouring countries, there was no competition in the Danish broadcasting market before the end of the Eighties. But the context changes meant the legitimacy of DR could now be questioned. How much of the market share would it be acceptable to lose in relation, and to which part of the population, before it would be reasonable to argue for cut backs in the licence fee? The pressure from the liberal opposition was immediate and in the late eighties DR did in fact face minor reductions in its budgets. The licence fee for DR (both radio and television) was reduced to approximately 2 billion DKK per year (\$250 million in 2001 dollars); per household that was approximately 1,500 DKK per year (\$ 210 in 2001 dollars). DR had to initiate reductions in staff and redefine its organisation to manage on a smaller income. This resulted in periodically recurring internal crises and spells of paralysis (Sepstrup, 1994: 226).

The situation for radio was not as serious as for television, but the management was surprised to see the rapid growth and the popularity of the commercial local radio stations. The number of local radio stations has been fairly constant since 1987 at about 250, half of them commercial. Approximately 35 stations can be considered fully professional with a solid, economic base. The local radio turnover for commercials has not yet exceeded 2% of the total advertisement turnover, and at the beginning of the nineties it was around 120 million DKK (Jauert & Prehn, 1995: 122). This percentage has been quite stable since (Carlsson & Harrie, 2001: 214).

What explains the popularity of the commercial radio channels? First of all, they were formatted. The programme flow was aimed at the specific audience available at any given time of the day and ready to listen, although the style of music, DJ performance, and the 'pulse' or 'beat' of the channel soundscape could change over the day. In most cases it had to change because of the limited transmission area (max. 300,000 people) and also limitations in transmitter power (max. 160W to 3kW). Only in the two or three biggest cities could one establish local radio that was exclusively aimed at teenagers. Within a relatively broad music concept, European Hit Radio being the most common, one could vary the style of music over the day and create enclaves with 'oldies' or 'classic rock' or similar more specialised music formats. Within a few years some stations introduced music management – the music was no longer selected by the DJ. This was a familiar phenomenon in the USA, but was considered a revolution in the Nordic countries (around 1990). By now it is considered a normal routine (Kempainen, 1998; Kempainen, 2001). Although the resistance among DJs and journalists in DR was very strong, it was introduced in 1992 in P3 and has slowly spread to the other stations.

Secondly, the local atmosphere and community spirit in the programmes was a main factor contributing to their popularity. In contrast to the more 'official' language policy in Denmark's Radio, the language on local radio was in the dialect spoken in each respective area. The issues in the pro-

grammes were also rooted in locality and listeners were offered various services considered useful in daily life: traffic, weather, local events, etc.

Thirdly, the contact between local radio and listeners was more direct, varied and sometimes almost intimate. The number of phone-ins exceeded by far what was earlier the case in DR, and quizzes, debate programmes and 'night-hawk' talk radio became very popular and contributed to attaching listeners to the station. The local station became 'our radio' – in contrast to DR, which was identified with the atmosphere of the capital and high brow paternalism (Jauert & Prehn, 1995: 63). In all these respects, then, the commercial local radios represented a serious challenge to the old monopoly approach to public service radio and its programme policy and practice. The need for reform in DR was inescapable.

Thus, from 1988 an era of more radical changes, including a channel reform, was initiated in DR. From top to bottom the institution was involved in the development of the 'new radio'. In organisational and strategic terms it was a very deliberate action on the part of management because the operation was not just an adjustment of old routines. The aims and goals, as well as the general organisation of programme production and programme policy, were to be reformulated and restructured.

A new public service concept

The 'old radio' had mainly been organised as a production and broadcast institution. It considered itself primarily as a provider of cultural commodities, news and information, fulfilling the function of public service in the sense of "serving the public sphere, the public life". Although searching for a new attitude towards the audience, the aim and goal was to maintain key functions characterising the second era of public service principles.

After two years of internal discussions and restructuring, a 'constitution' for the new radio was formulated. Behind the official and formal wording of the new general policy paper for this modernised radio, it is obvious that the audience is more the focus of the institutional agenda: "... DR must show respect for the audience, be open towards it's criticism and engage it in the programs" (*DR Aims and Goals*, 1990). But it is one thing to change the general policy and formulate a new policy paper. It turned out to be more difficult to reorganise the production routines and to change and develop the programming.

New channel formats:

The general deregulation process and subsequent struggle for justification and legitimisation, prodded the managers of Nordic Broadcasting companies to seek inspiration from abroad, primarily in the North American radio markets (Kemppainen, 1998; Kemppainen, 2001). The term 'format radio'

was introduced to the Nordic broadcasting vocabulary, amongst other concepts inspired by the American radio producer and consultant, George Burns. In his capacity of Director of Burns Media Consultants, he visited Europe several times around 1990 and was, on one of these occasions, a keynote speaker for the European Radio Directors in the EBU [European Broadcasting Union] meeting in Heidelberg in 1990 (Leif Lønsmann 1990 – and interview March 8, 2001 with Leif Lønsmann, former Head of Radio Development in DR, since 1998 Director of Radio, DR). This reflects a general trend to seek inspiration and adopt influences ‘imported’ by consultants from abroad, and also via extensive programme staff visits to overseas commercial radio stations.

The evident inspiration from American/Canadian/Australian commercial format radio marked the transition from block radio to an adjusted version of flow radio and format principles. But format radio in the strictest sense was not yet introduced. Block radio is the essential programme structure of the old radio, representing mainly the sender perspective of broadcasting. Block programming in the monopoly period consisted of separated, single programs, each with its own title, form, subject and producer, often produced and presented without any relation to the previous program or to the one that followed (Lønsmann, 1990: 2).

The traditional block programming represents a concept of radio as a medium for listening in – a “lean-forward” listening approach to radio programmes. It presupposes the full attention of the listener. Flow radio instead underlines the function of radio as a companion to everyday activities of an audience. In the transition period, before the new format principles became dominant, flow principles were already introduced in 1963 when the Music Radio (P3) was launched. The original block radio principle continued on the two other channels, P1 and P2, until the reform period 1988-1992, but gradually opened possibilities for more flow elements in so called ‘streamlined blocks’, especially in daytime slots (e.g. ‘morning drive’).

In 1992 the channel reform was completed and DR had four radio channels on three frequencies (see Table 1.). With this arrangement DR wished to emphasise a protest against what was considered an obstruction towards its endeavour to meet the new demands of the competitive radio market. Since 1982 it had been possible to launch a fourth nation-wide FM station, but Danish politicians had not subsequently been able to decide whether to assign it to DR, to another public service provider (i.e. TV 2), or to a commercial company, similar to P4 in Norway.

The ideal situation for DR was to have two full service channels, aimed at large audiences and with different music formats meant for a younger (P3) and then (P2) for an older audience (DanmarksKanalene-The Denmark Channel). Supplementing those formatted channels was P1, a content-defined channel meant for smaller, specific and changing target groups. P2 Music was a content-defined channel as well, mainly devoted to classical music and new experimental, Danish music. But with four channels on three fre-

quencies, the Denmark Channel and P2 Music had to share one frequency, with the Denmark Channel broadcasting during the daytime and P2 Music during evening hours and weekends.

Table 1. DR Channel reform 1988-completed 1992

P1 – Channel 1 <i>Narrow Content defined</i>	The channel for culture and the spoken word. Focus on national culture, enlightenment, talk and radio documentary, features and fiction
P2 Music – Channel 2 <i>Narrow Content defined</i>	Classic radio. Focus on Danish music and orchestras, Danish presentation and co-operation with the national music scenes.
P2 The Denmark Channel- Channel 2 <i>Music and age format</i>	Nine regional radios, partly networking; a full service channel for the mature audience (40+) with a music format, according to that.
P3 – Channel 3 <i>Music and age format</i>	A 24 hour full service channel for the young audience , 12-40 with news, journalism, service – with a music profile aimed at the younger generation

The new channel structure cannot be considered a completed reform on the principles of format radio due to the specific market situation with limited audience groups, and also because of the political demand for only a modest redefinition of public service principles. But the DR objective was to present more programme diversity, attract larger audiences and serve smaller target groups with specific interests. The 1992 channel reform was an adjustment to the new competitive environment rather than a radical change.

Organisation and production:

One of the major obstacles to an immediate channel reform was the inadequacy of the bureaucratic organisation of programme production to meet the new demands from the new channel reform. In the old radio different departments were regarded as expert formations, i.e. current affairs, drama, music, documentary, news, etc. They were editorial units and did not have to serve specific programme or audience defined goals within a defined channel. Often they regarded themselves as competitors to other editorial units and one of the major aims was to defend the size of the annual budget and certain time slots once they had been appointed to the department (Jensen 1997, III: 190; Lowe, 2000).

In spite of the evident insufficiency of the old organisation, it took DR almost four years, from 1988 to 1992, to reorganise the production units. The former expert formations were replaced by four channel divisions, supplemented by a few expert departments (i.e. news, drama), each responsible for its own channel and organised in flexible and changing production teams.

Already in late eighties some of the regional stations experimented with so-called 'self-regulated groups' where journalists, producers and technicians deliberately crossed the borders between professions in order to be flexible and to better serve production and audience needs. These experiments turned out to be quite successful and by the turn of the century there was greater flexibility, although DR still had professional boundaries (Hujanen & Jauert, 1998: 122).

Increased competition and upcoming media integration: 1992 – 2002

After the channel reform in 1992, DR continued to maintain both a high share (78% of the market) and a high weekly reach (more than 90%). In these respects DR was the second strongest among the Nordic public service broadcasters. In the same year YLE had a share of 73%, NRK a share of 67% and SR a share of 96% – SR having no commercial competitors (Radio Research Department, DR 1997). But during the nineties the DR market share was slowly decreasing, reaching 67 % in 2001 (Radio Research Department, DR 2001).

Strategic planning within DR was intensified and in 1994 a new general policy document was published, called *Denmark's Radio 1995-2005: A report of DR's values, program policy and development*. It represented a further development of market-oriented strategies from the end of the eighties, now supplemented by reflections on the core values of public service. Which qualities in the program are essential for a public service, partly market independent, institution? The answer was not simply to "serve the audience" but instead it talked about "radio and television in service of the people", a reaction against tendencies to populism in the program policy. The report underlined the public service obligation to "strengthen the citizen's ability to act in a democratic society" and in this respect reformulated some of the core issues of the second layer in the public service concept (Søndergaard, 1995: 36).

Simultaneously, the extensive strategic report heralded a new era in the history of DR because its intention was obviously to clarify the core public service values of pivotal importance for the institution during the next decade. This was a first step in the 'branding' process, having a major impact on the media policy debate as well as substantial internal consequences for the organisation as a whole. The new strategic plan was in fact implemented as a guideline for the development of efficient (compared to previous attempts) internal planning instruments, for instance for the development of definitions of quality measures for specific genres and channel formats.

The notion of programme quality ascribed an increased importance in accentuating special "DR qualities" as a public service broadcaster. From 1998, the programme producing units have tried to encircle quality criteria for certain

Table 2. DR Core PSB Values.*DR core public service values 1995-2005*

In order to strengthen the citizen's ability to act in a democratic society DR must be a broadcasting institution dependant on the wishes and needs of the whole population, but independent from economical and political specific interests must increase the options in relation to the market oriented supply of radio and television broadcasting giving weight to Danish Culture

Source: Denmark's Radio 1995-2005: 30

genres, i.e. entertainment, sport, culture, children's programmes, drama etc.² This innovation process included the audience through focus groups, in depth interviews and informal discussion forums with rank and file programme producers. The involvement of the 'people on the floor' proved to be very important for relatively successful changes of the production processes and the re-structuring and rationalisation of production units as a result of the 1995 strategic plan. An increasing portion of programme production is put out for tender and several production units are in this way competing with each other across channel borders, and also with external companies, to deliver to certain slots (or roughly outlined concepts ready to be filled with content).

This process has sharpened the attention among the staff towards the quality aspects, but at the same time has caused fragmentation in the corporate culture. Many staff members consider the increased focus on the market and the internal competition as a threat against the core public service values, and for those it is hard to accept that the production units expand or shrink concurrently with the number of tenders they win or lose. The introduction and results of the increased management has led to a troubled corporate atmosphere and several internal crises, reaching its peak in September 2002 when a three week long strike among the journalist and the production teams broke out. This was caused by the introduction of performance-related pay as the principle for salaries. From a management point of view this trimming of the organisation obviously had a two-fold rationale. On the one hand it prepares the organisation to meet the reality of increased market competition. On the other hand it is to enable success without substantially increasing the licence fee. In other words, this is a classical way of legitimising the publicly funded organisation in this period of deregulation characteristic of a political climate dominated by neo-liberal thinking.

The focus on content development was supplemented by more concrete policy plans, shaped by the upcoming digitalisation and media integration. Other European countries, first and foremost UK and Sweden, have invested in the development of digital audio broadcasting. But DR has been more cautious and did not launch DAB until October 2002. For the time being on DR's DAB channels, one can find parallel broadcasting of the satellite and Internet Classic Music channel, a 24-hour News Channel (DNR 24), organ-

ised on a 1 hour wheel, four music channels, a compiled talk channel, and an open transmission channel from the Parliament (see Table 3). Excepting the Classic Music Channel, all other music channels are mere jukeboxes. The news channel is low-budget repetition, the talk radio channel is compiled from DR's FM radio channels and the DR Demokrati [The Democracy Channel, see table 3] is unedited transmission. This reluctant strategy is a result of a complicated pattern of technological based visions of new products, economic constraints and uncertainties related to the social and behavioural consequences of the implementation of new features in the social uses of traditional broadcasting, and, not least, to date extremely few DAB listeners.

One of the major problems is the lack of specifically new programme content for the digital platform, i.e. elements of interactivity and more pull applications (news, features, on demand, etc.), in turn related to the uncertainty of consumer acceptance and willingness to use or buy the new products. From the consumer's point of view, what would be the motivation to buy a DAB receiver for €800 or even €200 when the digital surplus is hard to find – and you cannot switch to your favorite DR FM station, but instead must turn on your older receiver for this option? Thinking about the social uses of the broadcast media, “the sociability” and for broadcast radio the “companionship” in daily life routines – one wonders if this could be replaced by active and selective consumers arranging their own media menu? Such doubts have been part of the general policy considerations in DR leading to the present reluctant position, influenced also by Swedish experiences with DAB when SR chose to close down nation-wide DAB activities in 2002 (Public Access, 2002: 1).

Thus, uncertainty about the dominating future scenario for the digital future of media convergence has resulted in a DR strategy that is concentrated on a refinement of channel and programme formatting. DR Radio has tried to increase the quality aspects of certain genres and, in these ways, prepare the programme units for a future where DR is not only a content provider but also a distributor of different, integrated media products on several technological platforms.

Scenarios for convergence

Three scenarios have dominated the policy debates and visions of the digital future at DR. They have been named “*The Sea of information*”, “*The Digital Lagoons*” and “*The Media Islands*”. The archipelago metaphor represents extreme positions in the visions of the near future as imagined by the media players. Like many other scenarios, they are not to be considered exclusive. One should think of them as realistic options within different time frames.³

“The Sea of Information” is based on the dominant position of the Internet as *the* technological platform for the digital era. It is individualistic, open

and anarchic. The computer wins because of its “lean forward” culture and its individual and interactive character. This contrasts with the “lean backward” culture of the traditional broadcast media where the same content is distributed simultaneously to many consumers at the same time. The future reception – or the interaction – takes place on the basis of technologically merged, flexible (independent of place) terminals and is made on the basis of individual, free choice among an indefinite number of content providers. The user is “fishing” his or her media products from the digital sea.

“The Digital Lagoons” is also called “the gatekeeper scenario”. Here consumer possibilities to choose are controlled by a few global and vertically integrated players, i.e. Murdoch, AOL/Time Warner, etc. The distribution takes place within defined standards and the consumer is tied to the gatekeeper’s digital packet solution, the domestic set top box. The television set is the dominating, interactive entertainment station. The computer is more dedicated to work functions. The gatekeepers hold the copyrights for dominating content formats as well as a de facto – through subscription – ownership in relation to the customer.

“The Media Islands” is a scenario of stagnancy. Lack of demand on interactivity, lack of bandwidth and insufficient investments in technological infrastructure keep the development on a ‘not converted’ track. This scenario is distinguished by emphasising traditional socially and culturally integrating functions. The idea is that as consumers and citizens we consider ourselves – also in our media consumption – as part of greater community and look askance at development that is dominated by devices based on technological possibilities rather than socially grounded needs. According to this scenario, the media landscape will not change radically compared to the present. The competition between public service broadcasters and the private players will still exist, but it will take place in discrete sectors. According to the report, this scenario is not to be considered a special Danish phenomenon⁴, but rather as an indication of universal constraints and mechanisms pointing in a direction other than convergence (*Konvergens i netværkssamfundet*: 95).

Based on the strategic decade plan from 1995, DR has navigated between those three scenarios in its policy and planning processes. For DR Radio, none of the three has been a dominant preference. The Director for Radio proclaimed a few years ago that DR Radio will broadcast “through all cracks and crevices in the Radio House of DR.” DR’s goal has been to strengthen its capacity as a media content provider rather than continue ‘just’ as public service radio through its declared intention to be present on *all* distribution platforms:

- analogue broadcast radio: where the content provider (DR) still composes the programme output
- digital audio broadcasting: where the EPG will develop a mixture of pull and push programme deliveries; the listener will be able to com-

pose his/her own programme menu during the day and combine radio output with written, supplementary information

- radio on the WWW: where the listener will be able to compose different media elements from the DR web site; parallel 'broadcasting' of the analogue DR channels, DR web-radio, DR streaming audio (music, jukebox function), supplementary written information, video clips, etc.

In early 2001, DR Radio finally got the licence for the fourth nation-wide FM channel in competition with a number of commercial companies, including MTG (Viasat) and also Clear Channel Communication (USA) in a joint venture application with the three biggest national morning papers. DR Radio kept its monopoly on national radio and a market share of 67%. The other 33% is claimed by the local commercial radios. But the new liberal-conservative government has now decided to approve the launch of two nation-wide commercial stations in 2003 plus a total deregulation of the local commercial radio market, allowing unlimited networking. This has put fresh pressure on DR and intensified the formatting and branding of existent analogue channel profiles and, furthermore, advanced the timetable for launching new digital services.

So far the effort expended on these new services has been rather modest, although DR Online (www.dr.dk) has expanded and three years ago was supplemented by streaming three of the analogue channels. The primary scheduled programmes have distinct web sites with additional information and the possibility to download recent programmes. In an attempt to win back the youngest part of the youth audience (12-20 years) from the commercial local music radios, DR Radio created three music web streams on DR Online aimed at this target group. They are a part of the growing youth communities on the site, organised around BOOGIE – a popular MTV inspired television show involving all three platforms and interactivity via chat rooms and SMS messages.

But that is the only example (so far) of such a media integrated initiative. It is remarkable that the total DR (radio, television and online activities) investments in integrated programme initiatives, including DAB activities, over the last three years has been less than 2% of the annual budget of 3 billion DKK (*DR Beretning og regnskab*, 1998-2001). Because the number of digital receivers has been minimal to date, and considering the recent launch of DAB broadcasting and the development plans for the next couple of years, it is far too early to predict a break through.

But one can detect some optimism because of the new digital, cheap DAB receiver being introduced for approximately €200, similar to the UK initiative in 2001. One of the obstacles seems to be out of the way, but leaves the most crucial to be addressed: will the audience find the digital programme 'surplus value' sufficiently attractive to invest?

In the course of 2003, when the DAB system is fully established, the plan is to launch 10 DAB channels with a number of interactive and on demand

Table 3. DR channel reform 2001: "Unique radio for everyone"

P1 – Channel 1 <i>Narrow Content defined</i> Brand: <i>Thought-provoking radio</i>	The channel for culture and the spoken word. Focus on national culture, enlightenment, talk, debate and radio documentary, features, fiction, drama.
P2 Music – Channel 2 <i>Narrow Content defined</i> Brand: <i>Music and Culture</i>	Classic radio and new musical genres. Focus on Danish music and orchestras, Danish presentation and co-operation with the national music scenes. Special programmes about books and literature.
P3 – Channel 3 <i>Music and age</i> <i>format 20-40,</i> <i>contemporary hits</i> Brand: <i>Tuned in radio</i>	A 24 hour full service channel for the younger audience, format news, journalism, service – with a music profile aimed at the younger generation. Focus on DJ's (hosts), satire, events – interaction with youth programmes on TV and the DR web communities, incl. web-radio.
P4 – Channel 4 <i>Music and age</i> <i>format 40+</i> <i>Classic hits</i> Brand: <i>Present radio</i>	Nine regional radios, partly networking; a full service channel for the mature audience (40+), with a corresponding music profile, news, debates (on local issues), live music, call-in programmes.
New DAB channels (8)	DR Classic (Music-parallel broadcasting, satellite and Internet Radio) DRN 24 (24 hours news radio, based on a 1 hour time wheel.) DR Rock (music) DR Soft (music) DR Jazz (music) DR Skum (music – Parallel broadcasting : Internet Channel "Boogie Skum") DR Plus (Talk Radio – compiled programmes from the four FM channels) DR Demokrati (Transmissions from The Parliament)

features – 50% news, current affairs and enlightenment programmes and 50% music, fiction, entertainment, sport and service. The activities on DR Online will expand, including streaming of all analogue channels and the launch of new music web streams for the upper part of the younger audience (20-35 years). Radio on Demand, Enhanced Radio and I-Radio (Interactive Radio) are all being developed on an internal, experimental lab basis, but as a part of the DR Radio Strategy Plan for 2003 (*Strategi 2003*).

On the cusp of the converted era one can conclude that DR Radio has met the digital challenges with a cautious but open mind. The investments and resources spent on new technological devices have been prioritised, targeting the most motivated groups. The most important strategic investment has been put into trimming and reorganising the company, preparing its structure and its programme production potentials for increased competitive market conditions. On the other hand, the focus on the audience as more individualised (or at least even more segmented) consumers has been sharpened by the more precise formatting of channels and programmes (see Table 3).

The notion of public service seems even more difficult to define or re-define in an era where traditional broadcasting is confronted with the digital challenge. But DR Radio has, in a very obvious manner, maintained the different archaeological layers of programme types and genres. In this way one can claim that DR Radio has tried to practice the public service remit in its historical context. Especially in P1, one can find reminiscences of programme phenomena originating from the early days of the radio pioneers. The cultural and social integrative strength of radio is thus still evident. With a minor change of the predicament noted by John Ellis concerning the future of broadcasting, one can agree that “broadcast radio [television] will continue as a distinctive form of radio...” (Ellis, 2000: 176, quoted in Søndergaard, 2000: 26).

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Notes

1. The notion 'public service' was not commonly used either in legislation or in public debate about broadcasting in Denmark until the early 1980s when the deregulation process was initiated. Previously the term "in service of the public" [I almenhedens tjeneste] was used. In the final report of the state Media Commission (1980 – 1985) published in 1985: In *Betænkning om dansk mediepolitik. Betænkning nr. 1029.1985* [Report on Danish Media Policy] the reader will find the notion 'public service' in common usage in relation to public broadcasting media.
2. The results of projects have been published (in Danish) in a book series from DR called *Programkvalitet* [Programme Quality]. The first on drama, entertainment and culture was published in 1998.
3. The three scenarios are described in the report titled *Konvergens i netværkssamfundet* [Convergence in the Network Society], published by the Ministry of Culture and the Ministry of Research, Technology and Development in 2001. The scenarios are shaped by statistics about media use, growth analyses in media, and from a number of qualitative interviews with key persons within the telecommunications sector in Denmark, conducted by KPMG Consulting.
4. In Denmark, the number of personal computers with Internet access and the number of mobile phones place the country among the Top 5 nations in global comparisons (*Media Trends*, 2001: 216).

