

Monitoring Media Pluralism in the Digital Era: Application of the Media Pluralism Monitor in the European Union, Albania and Turkey in the years 2018-2019

Country report: Czech Republic

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Annexe 1. Country Team

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Monitoring Media Pluralism in the Digital Era: Application of the Media Pluralism Monitor in the European Union, Albania and Turkey in the years 2018-2019

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1. About the project

1.1. Overview of the Project

The Media Pluralism Monitor (MPM) is a research tool designed to identify potential risks to media pluralism in the Member States and Candidate Countries of the European Union, and considering both online and offline news environments. This narrative report has been produced within the framework of the implementation of the MPM carried out in 2019, under a project financed by a preparatory action of the European Parliament. The implementation was conducted in 28 EU Member States, Albania and Turkey with the support of a grant awarded by the European Union to the Centre for Media Pluralism and Media Freedom (CMPF) at the European University Institute.

1.2. Methodological note

The CMPF partners with experienced, independent national researchers to carry out the data collection and to author the narrative reports, except in the case of Italy where data collection was carried out centrally by the CMPF team. The research is based on a standardised questionnaire and apposite guidelines that were developed by the CMPF.

In Czech Republic the CMPF partnered with Vaclav Stetka (Loughborough University), Roman Hajek (AnFas s.r.o.), who conducted the data collection, scored and commented the variables in the questionnaire and interviewed relevant experts. The report was reviewed by CMPF staff. Moreover, to ensure accurate and reliable findings, a group of national experts in each country reviewed the answers to particularly evaluative questions (see Annexe II for the list of experts).

Risks to media pluralism are examined in four main thematic areas, which are considered to capture the main areas of risk for media pluralism and media freedom: Basic Protection, Market Plurality, Political Independence and Social Inclusiveness. The results are based on the assessment of a number of indicators for each thematic area (see Table 1 below).

Basic Protection	Market Plurality	Political Independence	Social Inclusiveness
Protection of freedom of expression	Transparency of media ownership	Political independence of media	Access to media for minorities
Protection of right to information	News media concentration	Editorial autonomy	Access to media for local/regional communities and for community media
Journalistic profession, standards and protection	Online platforms concentration and competition enforcement	Audiovisual media, online platforms and elections	Access to media for people with disabilities
Independence and effectiveness of the media authority	Media viability	State regulation of resources and support to media sector	Access to media for women
Universal reach of traditional media and access to the Internet	Commercial & owner influence over editorial content	Independence of PSM governance and funding	Media literacy

Table 1: Areas and Indicators of the Media Pluralism Monitor

The Monitor does not consider the digital dimension to be an isolated area but rather as intertwined with traditional media and existing principles of media pluralism and freedom of expression. Nevertheless, the Monitor allows for an extraction of a digital-specific risk score and the report contains a specific analysis of risks related to the digital news environment. The results for each domain and indicator are presented on a scale from 0 to 100%. Scores between 0 and 33% are

considered low risk, 34 to 66% are medium risk, while those between 67 and 100% are high risk.

On the level of indicators, scores of 0 were rated 3% and scores of 100 were rated 97% by default, to avoid an assessment of total absence or certainty of risk.

Disclaimer: The content of the report does not necessarily reflect the views of the CMPF or the EC, but represents the views of the national country team that carried out the data collection and authored the report. Due to updates and refinements in the questionnaire, the MPM2020 scores may not be fully comparable with MPM2017 ones. For more details, see the CMPF report on MPM2020, soon available on: <http://cmpf.eui.eu/media-pluralism-monitor/>.

2. Introduction

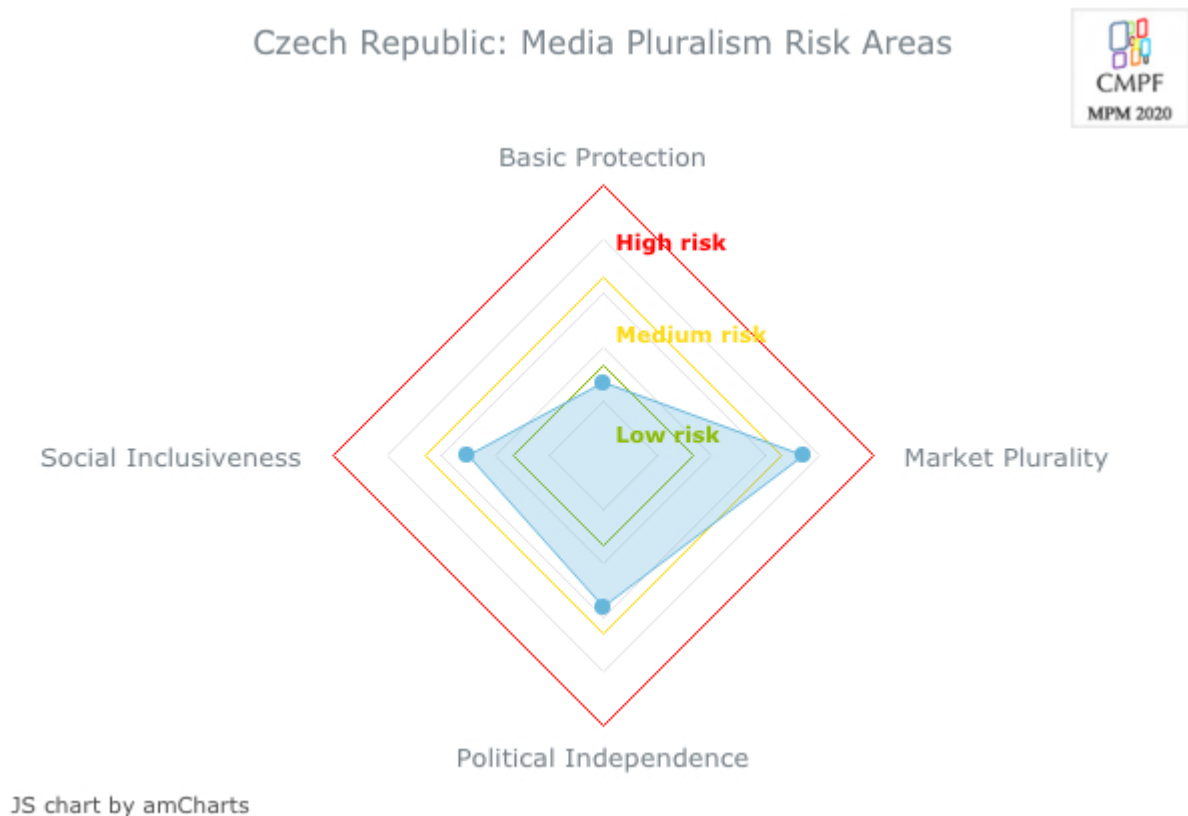
The Czech Republic is a Central European country with an area of 78 866 km² and a population of nearly 10.6 million inhabitants. The country is ethnically very homogeneous, with a relatively marginal presence of ethnic minorities (estimated 1.5-3% of Roma people, 1.6% of Ukrainians, 1.5% of Slovaks). The official (and dominant) language is Czech.

The GDP has recorded 3% growth in 2018 (CZSO 2019), and about the same number estimated has been estimated for 2019. The unemployment rate is one of the lowest in the EU (2.6% in November 2019), which in some sectors has been causing a lack of workforce. The average inflation rate in 2019 was about 2.8% (CTK 2020), the highest since 2012 and exceeding the Czech National Bank's inflation target (2.0%). Despite growing public support for the adoption of the Euro, the government does not have any plans for the country to join the Eurozone, and the majority of political representation opposes such step as well.

The current Czech political landscape has been to a significant degree shaped by the results of the 2017 Parliamentary Election which secured half of the seats for two populist parties - centrist, technocratic-populist party ANO led by the billionaire Andrej Babiš, which won 30% of the votes; and far-right anti-immigration party Freedom and Direct Democracy, which claimed the fourth spot (BBC 2017) - as well as by the 2018 Presidential Election that resulted in re-election of the incumbent President Miloš Zeman, a vocal critic of liberal media who has been systematically advocating for Russia- and China-friendly foreign policies (McLaughlin 2019). Partly as a result of intensifying criticism of Andrej Babiš's unprecedented conflict of his political, media and business interests, an informal power alliance has been emerging between Prime Minister Babiš and President Zeman, supported by the Freedom and Direct Democracy as well as by the Communist Party, despite officially being part of the opposition. The attempts to halt the growing political influence of this block have been largely unsuccessful so far also due to the notorious fragmentation of the parties under the umbrella label "democratic opposition"; on the other hand, new anti-government movements and initiatives have recently been launched within the civil society, the most successful of which being "Million moments for Democracy" that repeatedly managed to bring hundreds of thousands of people into the streets in 2019 (BBC 2019).

Despite increasing prominence of online media, the advertising market is still dominated by commercial television, attracting about 46% of the total advertising expenditures in the country in 2019 (SPIR 2019). Compared to most other Central and Eastern European countries, public service broadcasting still maintains a stable position on the market and manages to successfully compete with its commercial competitors in terms of audience shares, while surpassing them in terms of brands trust - Czech Television and Czech Radio have repeatedly occupied the first two spots among the most trusted news brands (Reuters Institute 2019). The newspaper market is highly concentrated and almost entirely controlled by local business tycoons; like in most other EU countries, it is also affected by continuing decline in print circulation. The drift of the news consumers towards the Internet, mirrored by the launch of several online news projects in recent years, is complemented by rising popularity of social media for accessing information; at the same time, there have been a growing concerns about the spreading of disinformation, both by domestic actors as well as part of foreign (mostly Russian) online propaganda campaigns (Győri and Syrovátka 2019).

3. Results from the data collection: assessment of the risks to media pluralism



According to the results of the MPM2020 for the Czech Republic, only one out of the four key areas displays low level of risk for media pluralism, namely Basic Protection. Two areas – Social Inclusiveness and Political Independence – scored in the upper half of the medium risk category, whereas the Market Plurality has exceeded the threshold for high risk.

In the **Basic Protection** domain, three out of five indicators scored low risk. The two indicators that display medium risk include universal reach of traditional media and access to the internet (40% risk, mostly due to low broadband connectivity in rural areas) and protection of right to information (38% risk, caused mainly by the lack of legal protection of whistleblowing).

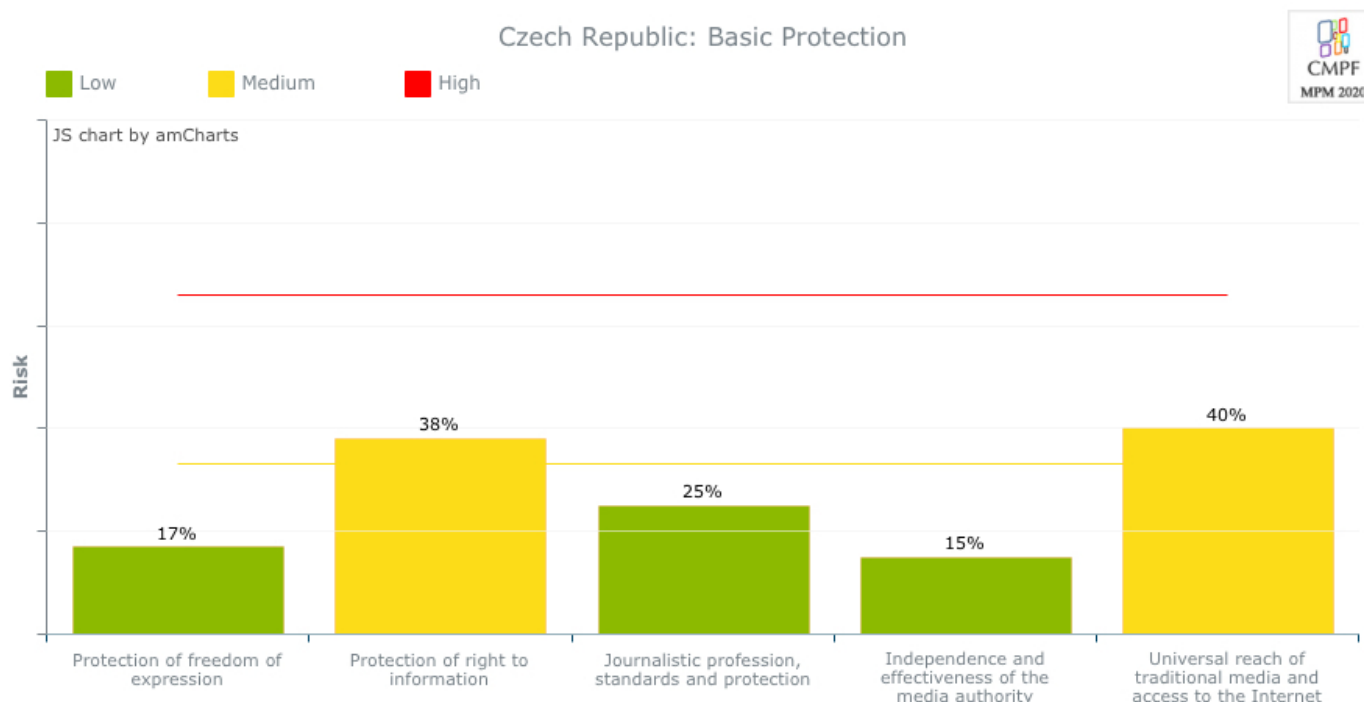
The **Market Plurality** domain exhibits substantial amount of risk, with four out of five indicators being in the high risk category. The biggest risk for media plurality is associated with commercial and ownership influence over the media content (90%), closely followed by news media concentration (87%) and transparency of media ownership (81%). All of these indicators reflect the specific situation on the contemporary Czech media market, which is, for the most part, divided among a handful of local oligarchs and business tycoons.

The scores for the indicators in the **Political Independence** area are spread across all three categories. The biggest risks (63% for political independence, 79% editorial autonomy) are related to instrumentalization of news media by political actors - some of whom being also their owners, such as Prime Minister Andrej Babiš, others being linked with them informally - as well as to the lack of sufficient regulatory mechanisms to protect journalists from undue editorial interferences. The indicator for the independence of PSM governance and funding is at medium risk (58%), with evidence of increasing pressures on public service media from leading political actors, including the Prime Minister as well as President Miloš Zeman.

The **Social Inclusiveness** area displays medium risk overall, although two indicators – Access to media for local communities and for community media, and Access to media for women – score in the high risk category. This reflects the troublesome situation of local media in the country, as well as the absence of media-specific gender equality policy.

3.1. Basic Protection (27% - low risk)

The Basic Protection indicators represent the regulatory backbone of the media sector in every contemporary democracy. They measure a number of potential areas of risk, including the existence and effectiveness of the implementation of regulatory safeguards for freedom of expression and the right to information; the status of journalists in each country, including their protection and ability to work; the independence and effectiveness of the national regulatory bodies that have competence to regulate the media sector, and the reach of traditional media and access to the Internet.



The results in the Basic Protection area reflect the fact that the law related to freedom of expression and right to information, mostly formed in the 1990s, is based upon international standards and protects the basic citizen rights necessary for a functional democratic society. In both cases, the law clearly defines reasonable restrictions and legal remedies in case of violation. Nevertheless, the law still bears the mark of the era of its creation, which means that it does not fully reflect the recent developments within the contemporary high-choice communication environment and potential threats related to it, leaving thereby more space to courts' interpretations. While only few cases related specifically to online activities have been brought to a close so far (mainly due to the length of the judicial process), it seems that freedom of expression and right to information are fairly well protected in the online environment as well.

This is reflected in the low-risk score for the **Freedom of expression** indicator (17%). The Czech media landscape is generally free from any kind of censorship, which applies both to offline and online media. There has been no evidence of systemic filtering, blocking or removing of online content, neither by the state nor by the ISP providers (vpnMentor 2017). Yet, there are no legal requirements on the filtering policies and no legal obligation for ISPs to inform about filtering or blocking content. Potential risk is also stemming from the fact that despite recent political efforts, defamation still can be sued under the Criminal Code.

Protection of right to information indicates medium risk (38%), partially due to non-existent legal framework for the protection of whistleblowing (a bill has been prepared to this effect in 2019 but has not been passed yet). As a result of this “vacuum” and vulnerability of those who provide inside information on allegedly criminal behaviour of their superiors, whistleblowing is almost absent in the society. Another potential risk is the way some public institutions treat the right to information. Despite heavy criticism a few years ago, and despite the Constitutional Court case-law, there are still situations in which institutions do not provide claimable information, and instead proceed to litigation, knowing the claimed information loses its value over time.

There is a low risk in the indicator **Journalistic profession, standards and protection** (25%), which however does not

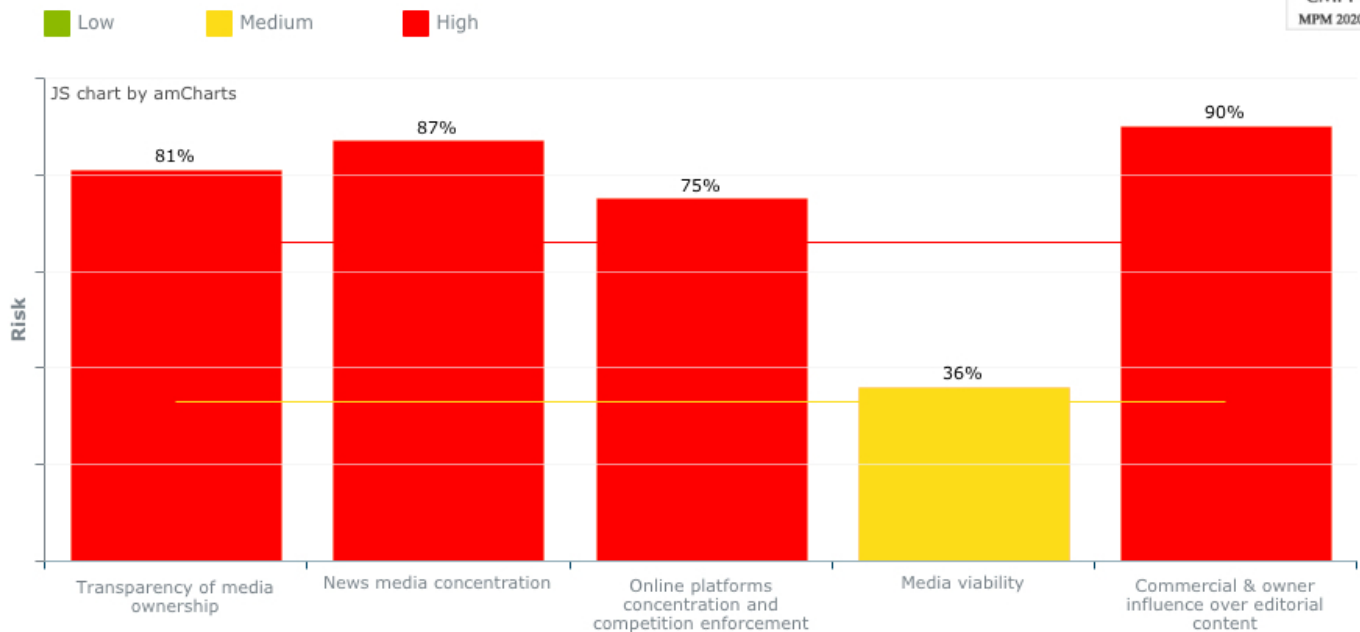
mean there are no issues regarding the state of journalistic profession and the status of journalists in the Czech society. Despite the attempts of some politicians to muzzle journalists by references to GDPR, the law that guarantees particular rights to journalists (e.g. to protect their sources, to publish information without permission if it is in the public interest etc.) remains unchanged. What is continuously worsening is the journalists' editorial independence (with regards to both political and economic pressures), their working conditions as well as their social prestige (CVVM 2019). The explanation behind this development is complex, including the relative weakness of the leading professional association (The Czech Syndicate of Journalists), the disregard of measures recommended by the Council of Europe, the decreasing number of journalists in newsrooms (which paralyses local journalism particularly - Boček 2019), and low level of job security. Moreover, verbal insults, defamations of and threats towards journalists have become a common part of political discourse for both populist and right-wing parties, but also for the president Miloš Zeman and the prime minister Andrej Babiš.

The **Independence and effectiveness of the media authority** scores low (15%) risk since the competences of the Czech Broadcasting Council (the main media authority with regulatory competences) are well defined in the law and effectively applied in practice. Yet the Council's political and economic independence is not well safeguarded by the law, and there have been growing concerns about the increasing politicization of the recent decisions concerning media coverage of the company Agrofert, which is currently placed in a trust fund of the Czech Prime Minister Andrej Babiš (Rožánek 2019).

Finally, the indicator **Universal reach of traditional media and access to the Internet** scores medium risk (40%). This is mostly caused by the continuing gaps in broadband coverage (89.8% of the state covered), which concerns mostly rural areas, and it is also linked to relatively lower rate of broadband subscription (86%).

3.2. Market Plurality (74% - high risk)

The Market Plurality indicators examine the existence and effectiveness of provisions on transparency of media ownership and the existence and effectiveness of regulation or self-regulation against commercial & owner influence on editorial content. In addition, they assess the risks related to market concentration in the production as well as in distribution of news: as for production, considering separately horizontal concentration in each sector and cross-media concentration; as for distribution, assessing the role of online platforms as gateways to news, the concentration of online advertising market, and the role of competition enforcement and regulatory safeguards in protecting information pluralism. Moreover, they seek to evaluate the viability of the news media market.



Four out of five indicators within this area score high risk, documenting that market plurality continues to be the most problematic domain of media pluralism in the Czech Republic at the moment. The highest risk score (90%) is displayed by the indicator **Commercial & owner influence over editorial content**, reflecting the troublesome ownership situation on the news media market, where the vast majority of publishers and broadcasters are now in the hands of local billionaires whose core business interests lie outside of the media sector (Ehl & Stetka 2018). While the evidence about practices of instrumentalization of news media outlets by their proprietors has been mostly indirect - manifested by frequent self-censorship as well as by regular alignments of the news agenda and editorial line with the owners' business and/or political interests - most observers of the Czech media scene agree that it points to systemic influence of editorial content within specific media groups and outlets, including those controlled by the Prime Minister Andrej Babiš, who has been in 2017 caught on leaked tape discussing the publication of articles attacking his political opponents in the newspaper Mladá fronta DNES with one of its journalists (Musil 2017). The Union of Publishers disagrees with such assessment, arguing that the overall risk is exaggerated and the publicised cases of alleged editorial interference are not representative of the behavior of Czech media proprietors in general (Václav Mach - expert opinion for MPM2020). Regardless of the opinions on the owners' actual influence, the risk is further exacerbated by the lack of specific mechanisms (legal or self-regulatory) granting social protection to journalists in case of the changes of ownership or editorial line.

The indicator **Transparency of media ownership** scored 81% risk, mainly because media companies are not obliged to publish their ownership structures or its changes on their website; the law only demands certain facts to be recorded in the public registers (especially in the Business Register). There is also no duty to reveal the “beneficial ultimate owner” of the company, and the lack of such information with regards to some prominent Czech media companies has been recently criticised and considered as a risk to democracy by the NGO Transparency International (2019a). The rules for broadcasting sector are a little bit stricter than for print (or online) media; broadcasting companies are obliged to regularly report ownership structures to public authorities.

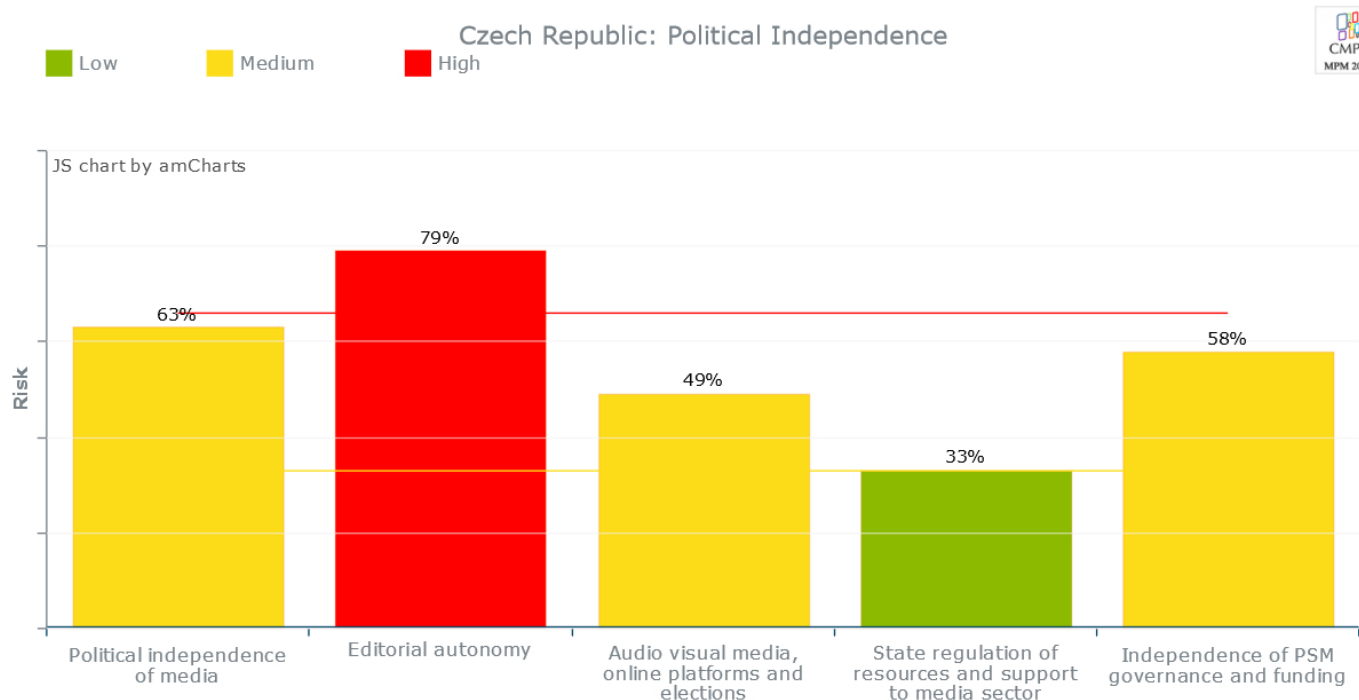
The media market displays high level of ownership concentration (the indicator on **News media concentration** is at 87%). There are no specific limitations regarding horizontal concentration for online or print media which are only subject to general restrictions by the Competition Law, which is however interpreted rather leniently by the Office for the Protection of Competition which rarely interferes with media mergers. Broadcasters are subject to limitation of the number of licences a single legal/natural person can hold (no more than two for nation-wide digital broadcasting), however the law does not prevent from cross-media ownership which is increasingly prevalent on the Czech media market, with some of the key media proprietors being involved in print, broadcasting as well as online sectors.

Digital platforms concentration exhibits significant level of risk as well, reflected in the indicator on **Online concentration and competition enforcement** (75%). While the segment of online media is sufficiently diverse in terms of the number of outlets - websites as well as social media platforms - their market share is heavily skewed towards a handful of strongest players, including Google and Facebook; nevertheless, the position of these two global leaders on the Czech digital advertising market is still not as dominant as in many other countries, to a large extent due to the strong market share held by the local web portal and search engine Seznam.

There is a medium risk (36%) concerning **Media viability**, reflecting the fact that, on the one hand side, print media sector and local media in particular have been ailing over the last several years, however the advertising market has been steadily growing (SPIR 2020), benefiting other sectors apart from print (especially online and TV). Several online news brands and independent projects have been developing new and alternative ways of funding, including crowdsourcing.

3.3. Political Independence (56% - medium risk)

The Political Independence indicators assess the existence and effectiveness of regulatory and self-regulatory safeguards against political bias and political influences over news production, distribution and access. More specifically, the area seeks to evaluate the influence of the State and, more generally, of political power over the functioning of the media market and the independence of public service media. Furthermore, the area concerns with the existence and effectiveness of (self)regulation in ensuring editorial independence and availability of plural political information and viewpoints, in particular during electoral periods.



The indicators for political independence area range from low to high risk. Although many legislative regulations and practices serve to guarantee media independence from political pressures, in some areas such guarantees are missing. Also, the practice often does not match the word of the law.

Political independence of media scored 63%, bordering on high risk. While the 2017 amendment to the Conflict of Interest Act explicitly prohibits politicians (including local ones) from owning stakes in media (newspapers, radio and television, but - remarkably - not online), the efficiency of its implementation has been frequently questioned (Dolan 2018). The adoption of this amendment was a direct reaction to the unprecedented collusion of political and media power in the hands of Andrej Babiš, since November 2017 Prime Minister, whose company Agrofert has been controlling several national newspapers, online news portals, lifestyle magazines and the biggest commercial radio station.

As a consequence of this Act, Mr Babiš had to transfer Agrofert into a trust fund, however most observers have been convinced that he has de facto remained in the control chair; this appears to be also the preliminary conclusion of the European Commission's audit, the leaked version of which was published by several Czech media in December 2019 (Reuters 2019; France24 2019). The Conflict of Interest Act is therefore clearly not able to prevent politicians from controlling media, which also applies to the case of another billionaire and politician, Ivo Valenta, who continues to control several regional TV stations and online media. Political influence over commercial media is however also exercised via informal networks and power alliances between owners and political actors; in particular, the second and third-biggest private TV stations (Prima and Barrandov) have been displaying bias towards particular political parties and politicians (including President Miloš Zeman) which has resulted in being fined by the Broadcasting Council (Trnka 2018).

The high level of risk for the **Editorial autonomy** indicator (79%) stems mainly from the absence of regulatory safeguards ensuring editorial autonomy, including when appointing and dismissing editors-in-chief, which has been a contentious issue in the past, especially with regards to the media outlets controlled by the Prime Minister Andrej Babiš. According to the recent report from the ECMPF fact finding mission, the fact that most media owners are pursuing parallel business and/or political interests also leads to certain degree of self-censorship among Czech journalists (ECMPF 2019), which is a widespread opinion among the Czech media observers. The self-regulatory instruments (e.g. codes of ethics) are either publicly unavailable (including in case of several major news organizations), or - for the most part - not addressing the issue of editorial independence.

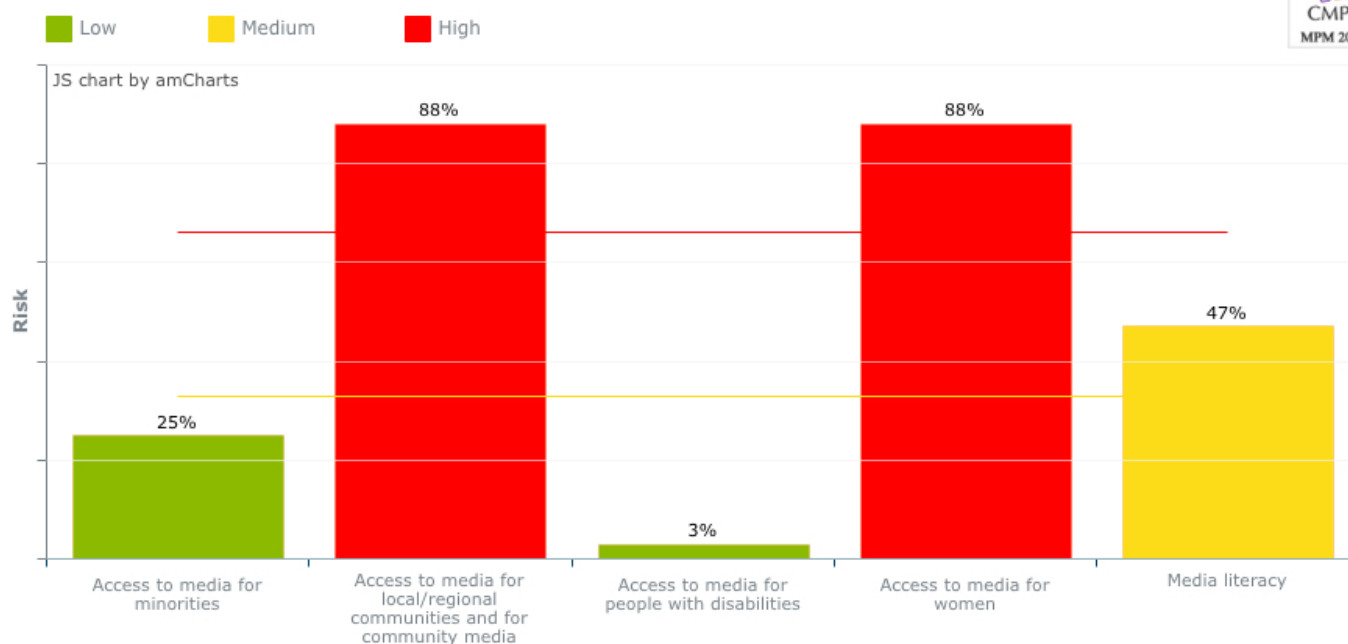
The indicator **Audiovisual media, online platforms and elections**, assessing the existence and implementation of a regulatory and self-regulatory framework for the fair representation of different political actors and viewpoints, scored medium risk (49%). While public service media have been having, overall, a good record of keeping a balanced representation of political viewpoints and actors, including during elections, some of the private audiovisual media have been found favouring certain political parties and actors.

The indicator **State regulation of resources and support to the media sector** scores 33%, bordering on medium risk. There is generally no issue with the broadcasting spectrum allocation, however there is problem concerning the lack of rules on distribution of state advertising to media outlets; also, there are no publicly available data for the amount of state advertising.

The **Independence of PSM governance and funding** scores medium risk (58%). The politicization of the appointment process of the members of broadcasting councils for both the public service TV and radio has been a notorious problem since the inception of both institutions, as the process ultimately lies in the hands of the Parliament. Recently there have been increasing concerns about alleged political influences over certain management and editorial decisions at the Czech Radio, including a controversial departure of one of the radio station's directors (Aust 2018). The license fee, the amount of which is arbitrarily decided by the Parliament, is potentially also a tool of political pressure, especially given it has not been increased in over 11 years.

3.4. Social Inclusiveness (50% - medium risk)

The Social Inclusiveness indicators are concerned with access to media by various groups in society. The indicators assess regulatory and policy safeguards for community media, and for access to media by minorities, local and regional communities, women and people with disabilities. In addition to access to media by specific groups, the media literacy context is important for the state of media pluralism. The Social Inclusiveness area therefore also examines the country's media literacy environment, as well as the digital skills of the overall population.



The scores for the indicators within this domain range from very low risk to extremely high risk, which suggests that in some aspects, and for certain groups of citizens, the Czech media system could serve as an exemplary good case for social inclusiveness, whereas in other aspects (and for other groups) it is not inclusive at all.

Comparatively worse result, yet still indicating low risk (25%), was recorded for the indicator **Access to media for minorities**. There remains a clear contrast between PSM channels and commercial stations regarding representation of minorities, which reflects the differences in legal requirements; whereas PSM channels are required to safeguard proportional access for minorities, private channels only have to 'reflect the plurality of society'. As a result, minorities are far from having proportional access to private channels.

The lowest risk (3%) is attributed to the **Access to media for people with disabilities**. Czech Republic has a well-developed policy that requires both PSM and commercial media (the latter to somewhat lower extent) to allow access to media content for people with both hearing as well as visual impairments. In practice, even the commercial media exceed the quotas set by the law.

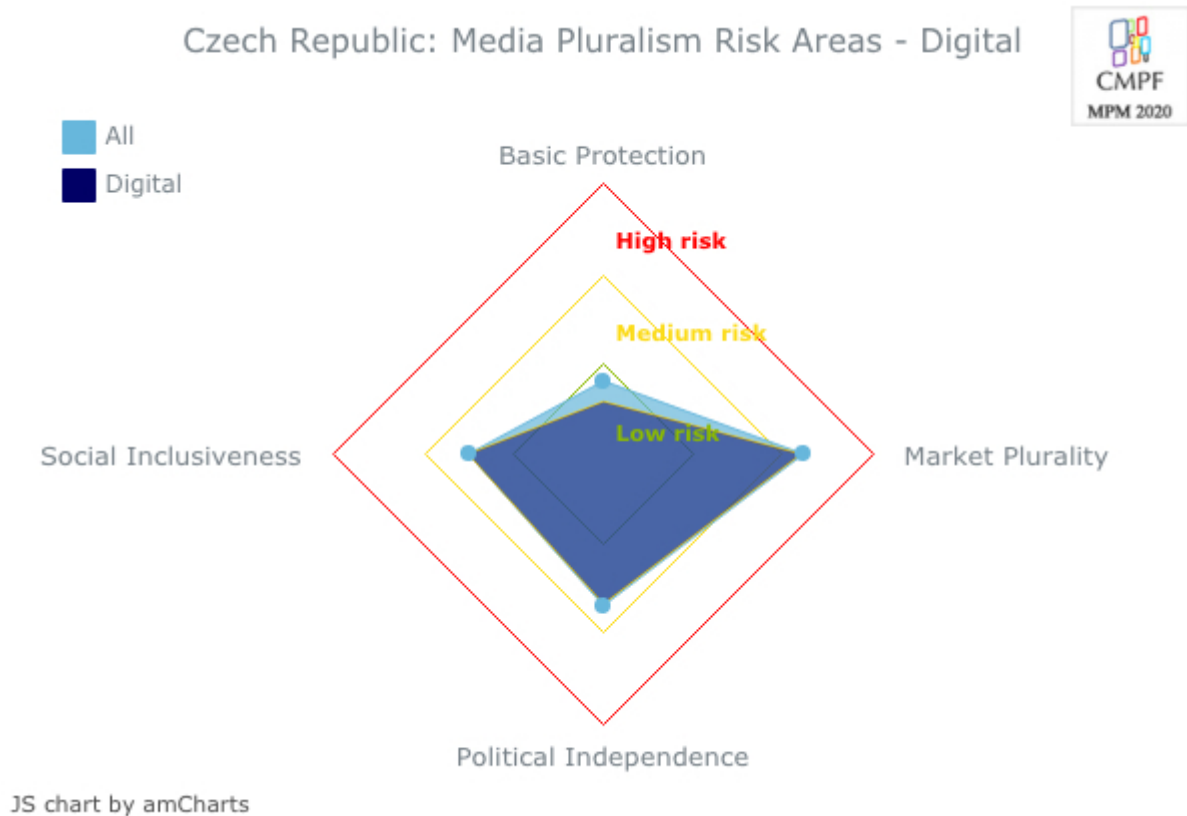
With regards to the **Access to media for local/regional communities and for community media** and the **Access to media for women**, the country scores very high risk (88% in both cases). The situation of regional/community media raises concerns by media scholars and political scientists. With the fast decline of local media, the country faces a rapid growth of the so called 'blind spots', places with no independent media coverage of current affairs. There is no special support for regional and local media, no frequencies reserved for regional/local broadcasting. Community media have been considered as a potential solution for this issue, yet nothing happened since 2013 when the Czech Broadcasting Council prepared several strategic documents that were supposed to serve as a basis for implementation of community media legislation.

The high score in the Access to media for women indicator reflects to a large extent the low representation of women in the executive positions and on management boards of the Czech media. This corresponds both with the overall situation within the Czech society, where women tend to hold rather lower-ranked jobs, as well as with the heavily unequal representation of women in high-profile positions on the media (e.g. as experts invited to comment current affairs). Despite the lack of systematic research in the subject, recent establishment of several public/NGO initiatives focusing on gender gap prove it is an important issue.

The **Media literacy** indicator scores medium risk (47%). Lack of media literacy of Czech population is often mentioned in relation to the phenomenon of disinformation. Despite the implementation of media education in the state educational plan in 2006, experts in this area currently stress that this formal implementation may not ensure better literacy (which resonates with poor performance of Czech children in 'reading literacy'). The lack of teachers' training

programs, teaching materials as well as of systemic support from the Ministry of Education are some of the reasons why media literacy is not well implemented in formal education, which is accompanied by limited offer of non-formal educational programs and activities (that often target the same group - children, without paying attention to other vulnerable groups). This also may contribute to lower digital skills of the population, with only 62% of Czechs having basic or above basic digital skills. Furthermore, the overall score of this indicator is also influenced by the ambiguous regulation of hate speech and the inability to protect particular social groups from hateful comments.

4. Pluralism in the online environment: assessment of the risks



Basic protection

The Basic protection indicators related to digital media score slightly lower risk compared to the overall result (19% vs 27%). In general, there is no difference in the way freedom of expression is safeguarded in offline and online communication, and the results confirm that. Due to the absence of specific regulation on freedom of expression online, the key law is the Charter of Fundamental Rights and Basic Freedoms that is part of the Constitution. As far as the case law suggests, freedom of expression online is well protected in the country. Also, there is no evidence of systemic interventions threatening freedom of expression online, either by the state or by the ISPs.

Compared to most other Central and Eastern European countries, the digital safety of Czech journalists is not that much of an issue. Although especially investigative journalists must take certain precautions (e.g. encrypted communication), and many journalists face intimidation, verbal abuse and threats on social media, there has not been an evidence of serious cases of digital surveillance, hacking or other forms of digital attacks towards journalists. There is no empirical data on the ratio of digital threats aimed at male versus female journalists; however, anecdotal evidence suggests that intimidation and online abuse of women working in Czech media is rampant, and often connected with threats of sexual violence.

The obligation to store data on Internet users is regulated by the Act No. 127/2005 Coll., on electronic communications. In line with European Convention on Human Rights, the law clearly states the conditions of storage of these data as well as of its provision. Despite some initial attempts of the government to (mis)use the GDPR adaptation law to ban the publishing of information about ongoing criminal proceedings and about the persons involved (under the pretext of personal data protection), the law does not significantly influence the working conditions of journalists. This adaptation law also determines an exception in data processing for scientific, journalistic and artistic purposes. For these purposes, data can be processed without an authorization of the Office for Personal Data Protection.

With 89.8% population coverage of broadband Internet and 86% of broadband subscription, the Czech Republic scores medium risk. Also the average Internet connection speed is lower than in most Western European countries (23 Mbps) and thus indicates medium risk as well. The ISPs market is on the one hand side concentrated in the segment of cable connection, yet highly fragmented in the sector of wireless connection which has more than 10.000 ISPs. There is no exact data on ISPs market shares, but there is no significant public concern about ownership concentration either.

The indicators related to net neutrality show low risk. The principles of net neutrality are not directly recognised in the law, but in the recommendations issued by the Czech Telecommunication Office (CTO) which is responsible for monitoring of net neutrality protection. According to the latest CTO's annual reports, there has been no complaint addressed to the Office on breaking the principles of impartiality and neutrality.

Market Plurality

The risk score for market plurality in the digital media sector is nearly identical (73%) as the overall score for this area (74%), somehow dampening the hopes that the online media market might serve as a remedy for the apparent lack of pluralism in the traditional media system in the Czech Republic. Many of the problems that have been detected in this area with regards to offline media seem to characterize the digital media as well. Transparency of ownership is particularly problematic in this respect, as the law does not enforce the disclosure of details about digital media ownership; and while the ownership structures of the majority of traditional media are generally well known (even if with important caveats), this is not necessarily the case in the domain of digital media which often escape the attention and scrutiny that is devoted to traditional media houses. Specifically, the lack of public information about ownership structures (as well as about sources of financing) has allowed various disinformation websites to flourish in the last couple of years, despite strong suspicions about some of them being linked to the Russian government.

In terms of horizontal concentration, the presence of numerous independent news websites, some of which have emerged in response to the process of oligarchization of print and broadcast media, has certainly contributed to greater market diversity. However, in terms of the audience and market share, among the most visited news websites there is a majority of those belonging to the biggest media houses (MAFRA, Czech News Centre, Vltava Labe Press, Economia), with only Seznam - the local tech company - being a significant challenger as a digital-born brand. This suggests that the digital revolution does not fully change the balance of power on the media market, and has a tendency to cement rather than weaken the position of the largest media conglomerates. Overall, the lack of reliable data on the Czech digital market, especially with regards to advertising revenues, does not enable for a comprehensive assessment of the viability and market strength of digital native media players and platforms - including Google and Facebook, whose impact on the market can only be estimated, as they do not disclose data about their revenues from the Czech market.

Political Independence

With an average score of 55%, the risk for political independence in the online domain seems to be very much the same as for political independence of Czech media overall (56%). There is a clear difference in the extent of political influence - unlike the brands that are associated with traditional media houses, there is no evidence of any substantial political control over the leading digital native media in the Czech Republic. The risks in this area are stemming mainly from the lack of regulation ensuring transparency of political advertising online, as well as their conduct on social media, especially during election campaigns. Only some political parties have been open and transparent about their online advertising spendings, as well as about their social media strategies, something that has been recently criticised by Transparency International; according to TI's report concerning the 2019 EP elections (Transparency International 2019b), many parties and candidates did not lead a transparent social media campaign, frequently using covert advertising techniques instead. With regards to the GDPR application in election context, there has been no sign of the Office for the Protection of Personal Data carrying out any systematic monitoring of how political parties have been using personal data during the 2019 EP elections.

The elevated risk is also applicable to public service media, with regards to the fact that there are currently no provisions in the law that cover the online public service mission, making it more challenging for public service broadcasters to adapt to the needs of the digital age - also in terms of their budget - without having an explicit backing for it in their legal remit.

Social Inclusiveness

Similarly to overall media literacy, the results show medium risk also in relation to digital competencies of Czech population. Some 64% acquire at least basic digital skills, while 24% of the population has low digital skills.

Despite a number of media literacy initiatives in the Czech Republic, most of which also counteract hate speech, the phenomenon of hate spread over the Internet is a serious issue. There is no legal (or self-regulatory) framework tackling

online hate speech specifically; however, it is possible to prosecute such act within the general framework of the Criminal Code, which is not often used by the police. Hate speech against ethnic minorities (especially Roma, as well as Arabs, Muslims and Jews) and against women is highly commonplace on the Czech Internet and social media; and while there are efforts to remove this type of content, they are far from being fully effective.

5. Conclusions

The MPM2020 results reveal that the biggest risks to media pluralism in the Czech Republic currently stem from the situation on the media market, particularly with regards to the influence of media owners over editorial content, high level of ownership concentration - both horizontal and cross-media one - or to the insufficient enforcement of ownership transparency. Other significant challenges to pluralism involve lack of institutional and regulatory safeguards for the independence of public service media as well as for editorial autonomy of private media, the increasingly dire situation of local and regional media, or the persisting gender imbalance in the news media, displaying disproportionately low representation of women in both executive and on-screen expert roles.

These risks are certainly not new; in fact all have been highlighted already in the previous edition of MPM in 2017. Many of them have since grown stronger, especially the risks related to ownership structures - the process of transferring of news media assets into the hands of powerful local billionaires, colloquially labelled as "oligarchization", has since then been virtually completed, and the leading Czech media owners have further consolidated their positions. The rise of digital platforms, while increasing diversity and enriching consumers' choices by adding a plethora of new online outlets, has not (yet) fundamentally changed the existing power relations on the media market, and has also brought new challenges, especially the spreading of disinformation and hate speech online (including abuse and intimidation of journalists).

Future media policy initiatives need to address these (and other) risks and challenges in each of the areas monitored by this instrument. Among the potential regulatory actions, the following are proposed as the most urgent, based on the risk scores recorded in the report:

- setting limits to cross-media ownership concentration, both in the offline and online domains;
- enforcing better transparency of media ownership, particularly with regards to the beneficial ultimate owner of media companies, and fixing the loopholes in the Conflict of Interests Act that de facto enable politicians to remain in charge of their media companies;
- introducing a system of monitoring of state advertising (direct and indirect), and ensuring fairness and openness of its distribution;
- reforming the system of appointment of the members of broadcasting councils that will ultimately decrease political party influence over the councils as well as broadcasters;
- implementing a programme to increase digital skills and media literacy of the population across different socio-demographic categories.

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** All the websites were last accessed on 30th January 2020*

ANNEXE I. COUNTRY TEAM

First name	Last name	Position	Institution	MPM2020 CT Leader
Vaclav	Stetka	Senior Lecturer in Communication and Media Studies	Loughborough University	X
Roman	Hajek		AnFas s.r.o.	

ANNEXE II. GROUP OF EXPERTS

The Group of Experts is composed of specialists with a substantial knowledge and experience in the field of media. The role of the Group of Experts was to review especially sensitive/subjective evaluations drafted by the Country Team in order to maximize the objectivity of the replies given, ensuring the accuracy of the final results.

First name	Last name	Position	Institution
Tomáš	Samek	Vice-Chair	Czech Television Council
Václav	Mach	Executive Director	Czech Union of Publishers
Eva	Hanáková	member	International Press Institute - Czech National Office
Lucie	Sýkorová	Chair of the Supervisory Board	European Centre for Press and Media Freedom
Karel	Strachota	Director of "One World at Schools" - educational programme about media literacy	Clovek v tísní / People in Need (NGO)

