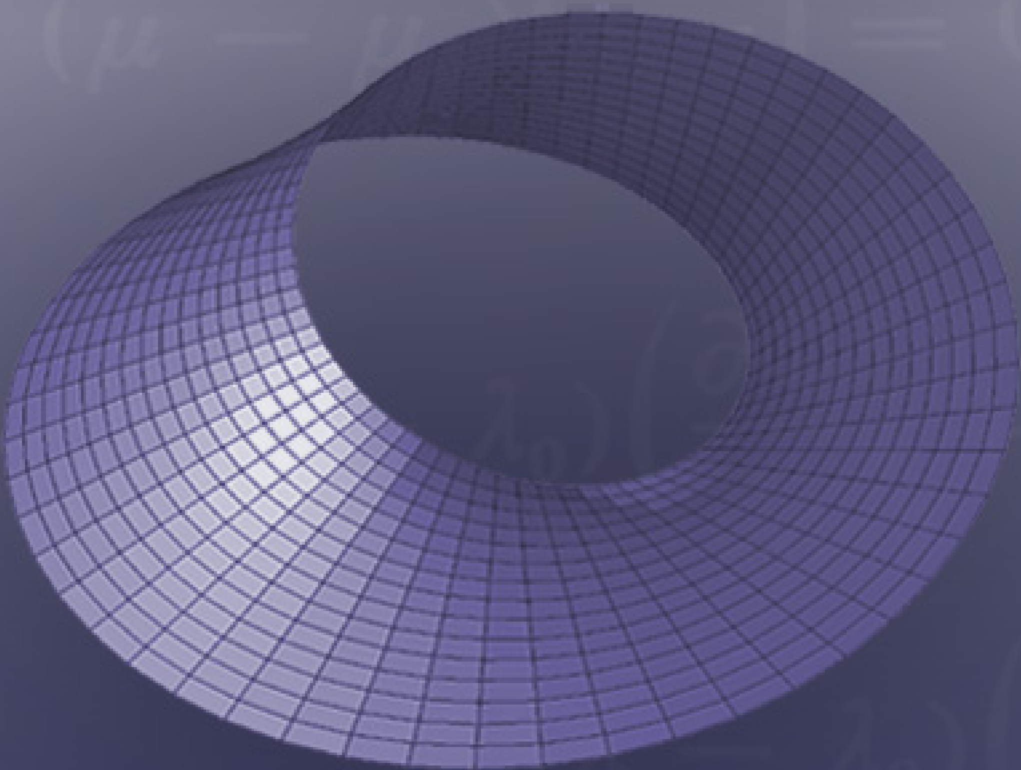
# Greece: status of media, in



# Greece: Status of Media, in

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# OUTLINE

**ABSTRACT**

The Greek media are mostly characterised by their decisive role in the context of political developments. Since the late 18th century, when Greek newspapers first circulated, both publishers and government have used the media in different ways: the former, to criticise political life; the latter, to control information –and, in the case of totalitarian regimes- as an effective propaganda tool.

Deregulation, in 1989, has marked a new era for the Greek media. For the Press, this new era brought the end of its dominion as an independent information provider. For public service broadcasters, it marked the formulation of an intensely competitive environment and the loss of a well-founded monopoly.

The operation of private television and radio stations influenced immensely the Greek media marketplace and regulative context. Advertising agencies discovered a new, profitable field in order to expand their businesses and, as a result, private broadcasters followed a course of intense commercialisation.

In addition, Greek media regulation was of a rather retrospective character (as in the case of most European countries). Its lack of flexibility and long-term planning led to a highly unregulated media environment, both in terms of ethics as well as in airwave frequencies. During the last four years, the need for legislative revision has become imperative in order to ameliorate present conditions.

At the moment, a considerable number of mainly private, public and municipal television and radio stations are operating throughout the country. The majority of the above-mentioned broadcasters are based in the capital (operating in a more

systematic-professional context), while there is a considerable level of geographical dispersal as far as local and peripheral stations are concerned.

In addition, newspapers have re-organised their journalistic output in the form of numerous special interest sections, in order to face competition from electronic media. Magazine publishers, through the publication of titles targeting niche markets, follow an identical entrepreneurial philosophy.

The “new media” sector in Greece (on-line and off-line products) is one of the most rapidly developing markets. A number of multimedia companies are dealing with CD-ROM production and distribution, while the number of Internet users is following a continuously increasing trend.

At the moment, the future prospects of the Greek media seem to depend, up to a great extent, on legislative revision. The need for legislation becomes imperative given that the advent of new technologies had as a result the creation of considerable entrepreneurial opportunities. While still unexplored, these opportunities could constitute the cause for further legislative implications.

Moreover, public broadcasters should face competition through re-organisation of their management and not through the continuous revision of their output. As far as the operative philosophy of the private electronic media is concerned, it should be re-oriented toward a long-term qualitative perspective.

The Press seems to have temporarily lost its authority as a liable source of information. Although newspaper and magazine publishers have embarked to aggressive marketing strategies, the continuous decrease of circulation numbers is a fact that should be examined through a qualitative, rather than quantitative, perspective.

## I. Introduction

The case of the Greek media is probably one of the most interesting in Europe, as it involves a number of special characteristics: intense governmental intervention, lack of flexible regulative bodies and anarchistic structure of the electronic media landscape due to ineffective deregulation procedures.

Through the analysis of both qualitative and quantitative data, the present paper will discuss the factors that defined the contemporary status of the media in Greece. It will also contemplate on the deregulation of the Greek media and its consequences in terms of legislation, competition and finance.

Data concerning the present status of radio, television, newspapers, magazines, cinema and new media will be provided in order to outline a clear image of viewership percentages, circulation numbers, Internet and CD-ROM use, advertising revenues and geographical dispersal.

Finally, the present paper will discuss the future prospects of the Greek media and the main factors that will determine their course in the new millenium.

## II. Brief historical overview of the Greek media

### A. The Greek Press

The history of the Greek Press can be traced back to the late $18^{th}$ century, although the need for the dissemination and exchange of ideas in a published form was not generated in Greece. Still under Turkish occupation, Greeks had been deprived of their rights to freedom of speech and education. Their only vivid link with their culture and religion were the "Secret Schools", which operated with the help and devotion of the Greek Orthodox Church. Although valuable, the work of these unique, "outlaw" educational units, could not, *de facto*, provide more than an elementary knowledge of the Greek language, in both its written and oral form.

The first Greek periodical publications, as pointed out in the research conducted by Balta and Papadimitriou, were the result of the efforts of the Greek diaspora in Vienna, Austria. Through these publications one can realise the ideological awakening of a nation feeling the need to resist to suppression and censoring. This need was mainly initiated by the international impact of the French Revolution and was expressed in its written form with the help of the financially strong Greeks abroad.

Publisher George Ventotis was the first to publish a Greek newspaper in May, 1784. His effort came to its end in July, the same year, after intense Turkish diplomatic pressure towards the Austrian government. Nevertheless, the first step had been made.

In the following years –especially, during the decade 1811-1821- and in spite of any sort of political turbulence or pressure- a considerable number of Greek newspapers and magazines are being published both in Vienna and in Paris, France. Amongst them, the bimonthly magazine *"ERMIS O LOGIOS"* ("Hermes, the Scholar") constitutes the first "arena" for the exchange of scientific knowledge concerning Greek language and its use in its ancient or popular form.

During the Greek Revolution against the Turks (1821-1828), the Press is "returning" to its homeland. Its role is mainly to inform about the results of the battles taking place throughout Greece, to cover all aspects of political and social news and to defend Freedom of the Press. The first three newspapers covering the Revolution between the years 1821-1822 are all hand-written, providing mostly fictional news in order to enhance the moral of those fighting and to incite others to join the struggle against Turkish Occupation. From August 1821 until May 1828 a number of newspapers in print form are circulating in Greece, mainly concentrating their theme areas in the conflict characterising political life during this period. What came as a result from this conflict was the first decree regulating Greek Press in April, 1831. The impact of the decree was such that affected not only the publications favouring opposition but also a number of newspapers supporting the Greek government.

During the ruling of the German King Othon (1832-1862), the Press is characterised by its purely political orientation, initiated by the demand for constitutional change. In 1864, two major rights (Freedom of Speech and Freedom of the Press) are restored, as, according to article 14 of the Constitution, all Greek citizens are entitled to express their views in written or oral form and any form of censorship or seizure of publications is prohibited.

The period following the above-mentioned constitutional change is characterised by the improvement of both content and appearance, the circulation of socialist newspapers and publications openly supporting political parties and the co-operation of the Greek Press with foreign news agencies. During the same period the dissemination of information is radically improved through the establishment of Press distribution agencies, while in 1895 the foundation of the Greek news agency “Telegraph Agency Stefanopolis”, bought by state in 1906 and renamed as “Athens News Agency”, marks the beginning of a new era for the Greek Press.

The first decade of the 20$^{th}$ century can be characterised as the “golden era” of the Press: radical improvement of production methods, notable augmentation of circulation numbers, entrepreneurial orientation in terms of operation –all these are factors which enhance its role and importance in the context of both the political and social arena. During the First World War and immediately afterwards, a considerable number of new titles are published. It is notable that many of these titles continue their operation till this day.

Nevertheless, the Freedom of the Press, established by the Constitutions of 1864 and 1927, is abolished in 1936 with the establishment of the new regime led by Dictator John Metaxas. During German Occupation (1941-1944) and the Greek Civil War (1946-1949) a considerable number of newspapers suspend their publication.

As Zaousis and Stratos are pointing out, it is only after 1954 that one can trace a steady rising of circulation numbers. This was mainly due to the noticeable development of the Greek economy and education, the moving of large population segments to urban centres and the rising of interest for athletic and social news. In

1966 circulation numbers literally doubled (approx. 700,000), in relation to those of the middle '50s (300-400,000).

In 1967 the ascending course of the Press, in terms of both circulation and quality, was abruptly stopped by the military *coup d' état*. During the seven years of the dictatorship (until 1974), a large number of newspapers were forced or chose to suspend, once more, their publication. Due to censorship, imposed before and after publication, the thematic areas of the titles left were dramatically limited. In correlation with the fear and apathy characterising that period, this fact led to a noticeable lack of interest by the readers.

During the years 1972-1973 the instability of the totalitarian regime was the main cause of the rising of circulation numbers. Naturally, after the year 1974, during which democracy was restored and until 1977, circulation numbers rose to more than a million. New titles proliferated and the ones which had suspended their publication begun operating again.

However, the thirst for information after seven years of censorship gave its place to saturation. In 1977, and in spite of the fact that national elections took place, circulation numbers dropped to 800,000 and remained in the same level until the year 1981, when the Panhellenic Socialist Party (PASOK) won the elections. A government that promised to change all aspects of political, financial and social life naturally triggered the interest of both the Press and its readers. During the same period, the publication of tabloid[1] newspapers and the use of offset techniques contributed to the creation of a new market segment, in correlation with the intense political bias and the fact that Greece became an EC member. In is notable that in the

[1] The term "tabloid" refers to the shape of these publications and not to their content, as in the case of British newspapers.

year 1989, circulation numbers reached 1,100,000 million, the biggest number ever in the brief history of the Greek Press.

As it will be discussed later in this paper, the deregulation of the electronic media the same year seriously damaged the powerful, “exclusive” role of the Press as a news provider.

**B. Radio and Television**

The official history of radio and television in Greece begins in November 1935, during the dictatorship led by J. Metaxas. According to the relevant law it was decided to create the “Service of Radio Broadcasting” which during German Occupation was under the direct control of the German army forces. During the same period and, although all radio units were “sealed” by German authorities, many Greeks used them “illegally” in order to get information, mainly from BBC, about the state of the war throughout Europe.

As mentioned in the significant relevant study by Papathanassopoulos, in 1945 the “National Radio Foundation” (EIR) is founded and six years later, in 1951, relevant legislation provides for the creation and operation of radio and television stations of the Greek Army Forces. Nineteen years later, in 1970[2], the aforementioned provision is abolished and replaced by a similar decision for the foundation of the “Service for the Information of the Army Forces” (YENED), which would be responsible for the establishment and operation of radio and TV stations. In addition, EIR is renamed to

[2] The first experimental television transmission took place in September, 1965 while regular broadcasting began in February, 1966.

"National Radio and Television Foundation" (EIRT) and, according to legislation, enjoys monopoly in terms of broadcasting.

For the militia totalitarian regime, television was the most effective tool for propaganda. Although this proposition is logical and has been more than once confirmed by similar cases of dictatorships throughout the world, it is quite unique.

As Papathanassopoulos stresses, YENED was the only military radio and TV station in Europe created first and foremost for the information of the Army Forces and, secondly, for citizens. In addition, reality openly contradicted legislation: although EIRT enjoyed monopoly according to law, YENED "legally" operated.

In 1975 EIRT is renamed, for the second time, to "Greek Radio Television" (ERT) and its cause is to "…inform, educate and entertain Greek people". Its sole stockholder is the state and its main source of financing is a sort of indirect taxation -a percentage of the total amount due in electricity bills, in spite if one possesses or not a radio and/or a television receiver. This form of financing (a peculiar, one might say, license fee) together with a small proportion of advertising, is another unique characteristic of the Greek radio and television. Greek public service broadcasting institutions (PSBs) are the only in Europe financed through the above-mentioned method and not exclusively through taxation –according to Barendt, in the form of an annual license fee, as in the case of BBC, or, as stressed in the study conducted by Humphreys, through a license fee combined with a limited proportion of advertising – as in the case of German PSB institutions.

One of the most important studies concerning Greek legislation, as far as media are concerned, was conducted by Dagtoglou. In it, the author points out one of the landmarks in Greece's media history: in 1982, YENED was renamed to ERT 2, but after only five years, in 1987, the merger of ERT and ERT 2, according to law 1730/1987, led to the creation of ERT S.A and its re-organisation in the following form:

1) Greek Television 1 (ET1)
2) Greek Television 2 (ET2)
3) Greek Radio (ERA, that is five different radio programmes and peripheral stations).
4) North Greece Television (ET3) and
5) Management.

The aforementioned re-organisation also provided for the foundation of a) *a Hellenic Audiovisual Institute* (IOM), which would operate as a research unit (at the present, IOM operates under the supervision of the Ministry of Press and Mass Media) and b) a *Company for Production and Commercial Distribution of Radio and Television Programmes*.

During the last two years the *status quo* of ERT S.A. has changed in order to face competition by private broadcasting institutions. ET 2 was renamed to *New Hellenic Television* (NET) and its programme mainly concentrates to entertainment and information (foreign programmes, educational TV, documentaries and films, together with in-house productions, news bulletins, TV-series and talk-shows), while ET 1's programme solely concentrates to entertainment.

This change had as a result a small rise of viewership percentages that had dramatically dropped since 1989, with the deregulation of the Greek radio and television landscape. However, as it will be discussed in the following chapters, the main cause of the problems characterising the operation of public service broadcasting institutions lies mainly to management –and not to the quality of their programmes.

Print and electronic media in Greece begun to operate in historic periods mainly characterised by political instability. Thus, they mainly (and, in many cases, solely) expressed opinions -and are still expressing to a smaller extent- either for or against political regimes. The Greek PSBs are still perceived as a "property" and the main propaganda tool of each elected government. It is also a fact that one of the main characteristics of the Greek political culture, as stressed by Tsagarousianou, is the intense interest of the Greek people for politics. However, during the last three years one can realise a definite turn of the audience (readers, viewers and listeners) to programmes and articles mainly of social and/or specialised interest.

## III. Deregulation and Regulative Context

The deregulation of the Greek electronic media was not the result of a careful planning procedure, characterised by long-term perspectives. As Papathanassopoulos argues, deregulation was the result of political circumstances and interests. State monopoly kept investors and entrepreneurs away from a new, financially promising and unexplored field such as the electronic media market.

In 1986 the results of the municipal elections in the biggest Greek urban centres (Athens, Piraeus and Thessalonica) favoured opposition –at that period, the "New Democracy" party. Under the pretext of the need for *pluralism*, all three newly elected mayors proceeded to the foundation of municipal radio stations –the first being "Athens 9,84". In a few months time, about a thousand municipal and private radio stations were broadcasting throughout Greece. In addition, the mayor of Thessalonica founded the city's first private television station, "TV-100", which broadcasted programmes from European satellite channels.

Governmental reaction was rather spasmodic as it concerned the creation of a national network for the re-transmission of satellite programmes in ten cities throughout Greece. The legislation gap created by the operation of municipal broadcasters and the above-mentioned network was covered by law 1730/1987, which constituted the first step toward deregulation. The same law provided for the foundation of the "Special Media Service", controlled by the Ministry of Premiership and the creation of the "Representative Assembly of Viewers and Listeners for Social Control".

The socialist government was then facing the outbreak of financial scandals and the increasing instability of the country's political *status quo*. Media entrepreneurs had the opportunity to carefully plan and proceed to the expansion of their activities, during successive election periods that finally led to an alliance governmental scheme. In 1989, the legal framework providing for the operation of private radio and television stations became a reality, by law 1866/89. In addition, the above-mentioned legal framework provided for the foundation of the "National Radio Television Council", which constitutes the first and only independent media regulative body in Greece.

The Council's mission, as an independent regulative body, was to ensure the objectivity and quality of broadcasted programmes. However, as Papathanassopoulos stresses, during the first three years of its operation (which were the most crucial given the continuous proliferation of radio and TV stations), the Council remained inactive. It was only during the fourth year that its members began examining licence candidacies for both radio and TV private stations, in order to ensure the existence of the standards set for national and local penetration.

The independent character of the Council remains a rather controversial matter. It is notable that, according to law 1866/89, the three major political parties were responsible for indicating the majority of its members (eleven out of nineteen)[3]. In addition the Council had the authority to *propose* stations meeting necessary standards, rather than to *decide* on which of them was eligible for legal operation –the final decision remained a governmental prerogative. The Council was also authorised to indicate higher management executives for the Greek public broadcaster, ERT.

Consequently, Greek electronic media were still regulated, although indirectly, by the state, in accordance with a "tradition" initiated by totalitarian regimes. Naturally, this "tradition" restricted the flexible character that a regulative body such as the Council should and must have. Lack of regulation and immediate control led to anarchy in the electronic media field, mainly because of the overcrowding in the airwaves – specifically as far as television stations were concerned.

Toward the end of the year 1989, two private TV channels, Mega Channel and Antenna TV, marked the end of public and municipal television and the beginning of a new era for Greek media. This era is characterised by intense commercialisation and fierce competition. The above-mentioned private TV stations constituted a powerful "duopoly", in spite of the fact that the number of private TV stations increased rapidly. Advertising agencies and media shops discovered an effective, powerful

[3] According to law 1866/89, candidates for Council membership must be journalists who are members of recognised professional unions, prominent scientists in the field of mass media and personalities with significant work in the areas of art, culture, news, education, Local Administration and syndicalism.

gateway in order to expand their businesses. Both Mega Channel and Antenna TV invested on the import of foreign productions (films and TV series) and in-house production (mainly Greek series complying with the “sitcom” format and political talk shows).

Private television stations also introduced sensualism and violence in their news bulletins and programmes, in order to increase viewership and, consequently, to maintain advertising revenue. As a result, the proportion of advertising and programme content became uncontrollable.

In addition, the above-mentioned strategy led to the extensive commercialisation of the broadcasted output. Television stations concentrated on the production and import of programmes that could attract their audience’s attention, regardless of their quality. As Meimaris and Metallinos stress in their relevant study, it is notable that in 1996 the percentage of *locally* produced documentaries, arts and culture programmes, travelogues, children’s programmes and instructional shows was restricted to 1% for both Mega Channel and Antenna TV, whereas the percentage of *imported* educational television programmes for the above-mentioned private broadcasters was 8% and 2%, respectively[4].

The National Radio Television Council seemed incapable of dealing with the above-mentioned phenomena. It is notable that only after governmental intervention, in 1993, the Council imposed small fines on Mega and Antenna for the large proportion of advertisements characterising their programmes.

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[4] The equivalent percentages of *locally* produced educational programmes for public broadcasters were 2% (ET-1) and 9% (ET-2) whereas the percentages of *imported* educational programmes were 7% (ET-1) and 65% (ET-2).

Moreover, although, according to its mission, the Council was responsible for the publication of three different Codes of Ethics[5] (concerning journalistic profession, programme content and advertising), it did not apply them in any case of infringement.

The need for effective media regulation was finally expressed through a new legal context in 1995 (law 2328/95). According to Hairetakis, this context improved the above-mentioned situation as it provided for three different thematic areas: private television, local radio and advertising market.

Firstly, this new context defined the standards for the provision and renewal of private TV and local radio licenses. Moreover, according to relevant EU guidelines, it set a number of principles concerning advertising and programme proportion, privacy, children and the correct use of the Greek language.

In addition, the above-mentioned legal context provided for the necessary transparency rules that should dominate transactions between media and advertising agencies. It also examined matters concerning the newly founded Ministry of Press and Mass Media and the National Radio Television Council.

But what was the most important element of law 2328/95, was that it constituted the first legal context providing for concentration of ownership. Relevant provisions concerned both horizontal and vertical restrictions: broadcasting entities could hold only one licence for the foundation and operation of a television or radio station. Companies of another nature were entitled only to 25% shareholding in broadcasting companies. In addition, any form of entrepreneurial participation in media companies belonging to more than two categories (television, radio, newspapers) was prohibited.

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[5] It is notable that, in 1999, the National Radio Television Council announced the elaboration of a new, more restrictive Code of Ethics.

Nevertheless, this new legal context solved only *few* of the serious problems characterising the Greek media landscape. During the last four years a number of ministerial decisions and EU guidelines were applied, in order to ameliorate the present chaotic situation. As Demertzis and Skamnakis point out in their relevant study, during 1996 and 1997, relevant decisions led to the constitution of two "airwave maps" for the prefectures of Attica and Thessalonica, respectively.

Naturally, the majority of the media regulative contexts in Europe are rather retrospective, due to non-systematic deregulation that took place in many European countries. However, the Greek case is characterised by lack of effective planning and flexibility, which, in conjunction with continuous governmental control, diminish the chances for a "healthy", regulated media environment.

## IV. Media in Greece

### 1. Television

The deregulation of the Greek media landscape in 1989 affected immensely the viewership percentages of public broadcasters. It is notable that in 1993 average viewership percentages for ET 1 had decreased to 7.9% and for ET 2 to 5,3% (in relation to 37,7 and 24,3, respectively, in 1989)[6].

**Public and main private television stations currently broadcasting in Greece**

| Television station | Ownership | Geographical Penetration | Transmission mode | Programme | Source of Income |
|---|---|---|---|---|---|

[6] These percentages concern the period *before* deregulation.

| | | | | | |
|---|---|---|---|---|---|
| **ET 1** | Public | 98% | Terrestrial | Entertainment | Licence fee And Advertising |
| **NET** | Public | 98% | Terrestrial | Information & Entertainment | Licence fee And Advertising |
| **ET 3** | Public | Strong in Northern Greece | Terrestrial | General | Licence fee And Advertising |
| **Mega Channel** | Private | 96% | Terrestrial | General | Advertising |
| **Antenna TV** | Private | 96% | Terrestrial | General | Advertising |
| **Star Channel** | Private | - | Terrestrial | General | Advertising |
| **Alpha TV** | Private | - | Terrestrial | General | Advertising |
| **New Channel** | Private | - | Terrestrial | General | Advertising |
| **Alter** | Private | - | Terrestrial | General | Advertising |
| **Filmnet** | Private | - | Terrestrial (encoded) | Sports & Movies | Monthly Subscription |
| **Supersport** | Private | - | Terrestrial (encoded) | Sports | Monthly Subscription |
| **Kids TV** | Private | - | Terrestrial (encoded) | Children | Monthly Subscription |

Source: Hellenic Audiovisual Institute, 1999.

Public broadcasters were unable to face competition from private channels, mainly because of the lack of strategic management and long-term perspective. In addition, managers are still entirely depending on the state, which means that their professional position relies on political stability and governmental interests. It is notable that most of ERT's managers were replaced after the appointment of a new minister responsible for the public broadcasters' operation.

The number of public and private television stations broadcasting on national and local level is estimated at approximately 160. As far as local and peripheral television stations are concerned, their number is estimated at about 150. They are characterised by the limited number of in-house productions and their programme consists mainly of foreign films, in order to gain viewership. In addition, it is characterised by lack of political and cultural content. Due to their limited financial resources, local and peripheral channels broadcast foreign films without complying with copyright legislation; this fact led to the imposition of fines by the National Radio Television Council.

At this point it must be stressed that the face of Greek TV landscape has changed significantly since December 1999, with the advent of the first digital "bouquet", NOVA. This change has to do more with the choices offered to Greek TV viewers, than with TV usage, in itself. NOVA offers a variety of Greek terrestrial, cable and foreign satellite TV stations. Although the fact that digital television is now an element of Greek media reality, two factors must be taken in mind, when considering whatever has to do with "digital magic".

The first is that the Greek market is *de facto* small, in terms of both geography and population, which means that potential for further digital TV growth, is quite limited. Terrestrial TV stations are already showing signs of market saturation and the viewers' fatigue by repeated content patterns is quite notable.

In addition, the high cost of the equipment needed for access to digital television is a considerable barrier to the financial viability and further growth of digital TV stations. Nevertheless, it seems that the Greek TV market is at the beginning of a new era, especially in the light of the Greek-Cypriot satellite consortium. The consortium consists of Avacom Net Services (43,4%) (Cyprus), the Hellenic Telecommunications Organisation (25%), Cyprus Development Bank (19,6%), the Greek Aeronautics Industry (10%) and Telesat (Canada) (2%). The above mentioned companies founded

Hellas Sat Consortium Ltd in Cyprus, which will be responsible for sending to space two (2) satellites, until the 31st of March 2004.

The first satellite, which will satisfy purely commercial – telecommunications needs, will provide services such as:

- Digital television in Greece and the Balkans
- Satellite Internet
- Specialised satellite connections services (VSAT) for the Balkans
- Telephony
- Occasional television links, like the ones that will take place during the Athens Olympic Games.

The satellite system Hellas Sat will consist of two (2) satellites, that will be sent to space on 31st August 2002 and 31st March 2004 the latest, respectively.

Coming back to terrestrial TV, and as far as TV set ownership in Greece is concerned, it follows a continuously increasing trend: from 2.4 million TV sets (1987), to 3.7 million TV sets (1999). The total number of TV sets is greater, since the above estimates do not include the various kinds of portable TV sets.

In 1987, one out of every four TV households also possessed a video set; it is estimated that two out of every five TV households in 1999 also possess a video set. These numbers confirm previous estimations that, although video usage was greatly affected by the advent of private television channels, there could be a possibility of small, but steady turn of the audience to video. This was due to the fact that, as discussed previously, private television stations interrupted their programme too frequently for advertisements.

In addition, the average daily TV viewing time exhibits an increasing trend (by 47 minutes from March 1993 to March 1998).

The quantitative data concerning television use derives from the operation of relevant companies dealing with TV viewership research. Viewership measurement in Greece begun systematically in 1972, by ICAP company. The research methods used by ICAP –until the completion of the research, in 1991- were the choice of a random sample and the completion of relevant questionnaires. NIELSEN company used the same method in 1986, when it embarked on a second effort of viewership research, that lasted until 1989. The most recent and technologically superior effort, that is still in operation, is the one initiated by AGB Hellas in 1988 and concerns the use of the "peoplemeters" method.

The existence of the necessary technical infrastructure in correlation with the variety of programmes offered led to a considerable increase of advertising time. The number of television advertisements follows a continuously increasing pattern throughout 1988-1997: from 39.9 thousand ads in 1988 to 217.9 thousand ads in 1992, and to 575 thousand ads in 1997. Since 1991, private television stations occupy a dominant position in terms of the average daily number of television advertisements.

Consequently, advertising expenditure in television increased to 317 billion GRD for the year 1995, in relation to 14,8 billion GRD for the year 1987. It is also notable that advertising expenditure in public broadcasting media accounted for the greatest part of advertising expenditure in radio and television until 1989 (100%). In 1990, an explicitly declining trend is exhibited and it is transformed, since 1992, into a path of rapid decrease of advertising expenditure in public broadcasting media, resulting in a 4.2-5.5% share of total advertising media between 1995-1997. Respectively, advertising expenditure in the private broadcasting media exhibited a rapid increase already since 1990 and ended up in absorbing a 95.8% share of total advertising expenditure in the broadcasting media in 1997.

## 2. Radio

The total number of public, municipal and private radio stations operating throughout the country is estimated at more than 1,700, the majority of which are private and local-peripheral. Only 33 of these stations operate in the area of Athens and their content consists of music (54.5%), a combination of news and music (39.3%), sports (3%) and religious matters (3%).

Total advertising expenditure in radio stations grew to 21.9 billion GRD in 1996, in relation to 3 billion GRD in 1988. It is notable that 94.9% of total advertising expenditure concerns private radio stations, while municipal stations follow with 4.4% and pubic stations with only 0.7%.

## 3. Newspapers

In June 1992 the Union of Owners of Daily Athenian Newspapers (EIHEA) sent to its members a document that pointed out the decline of the Greek Press, both in circulation numbers as well as in advertising revenue. According to that document, the decline was caused by the inability of the newspapers to effectively compete electronic media and by the inadequate distribution infrastructure. It was also stressed that the percentage of advertising expenditure in Greek television stations was by far larger than in most European countries (61% in comparison with 8% and 30% in other countries).

Another important factor contributing to the continuous decline of daily newspapers, according to the above-mentioned document, was the notable change of the form and content of Sunday newspapers. According to Papathanassopoulos, Greek Sunday newspapers demonstrated the flexibility necessary in order to face competition from television stations, with a wide range of thematic areas, specialised sections, extensive articles, research and exclusive themes. These characteristics transformed them to attractive advertising vehicles –it is notable that their total percentage in terms of advertising expenditure equals that of daily newspapers, although with significantly smaller number of publications.

Daily newspapers also face competition from “Press Preview” television and radio programmes, in the context of which newspaper headlines and main articles are read and analysed, constituting a base for further journalistic research.

In order to face fierce competition, daily newspapers used a marketing strategy of “added value details” in the form of coupons. The goods offered ranged from houses and boats to books and CD’s. As a result, daily newspapers were transformed to purely consumer goods; their journalistic output did not constitute the incentive for their purchase.

At the present, daily newspapers have significantly limited the range of their offers to “cultural” goods, such as books, CD’s and dictionaries. However, the authority and liability of the Press have definitely been diminished because of its turn to consumerism.

As far as local newspapers are concerned, it is notable that their role and the impact of their journalistic output are quite limited. This is due to the fact that 50% (in relation to total circulation numbers) of the Athenian daily newspapers is absorbed in the periphery, a fact that constitutes a strategic goal for the majority of press entities. Most of the Greek local newspapers operate in the form of “family business” and are characterised by concentration of ownership. The estimated average daily total circulation numbers reach 300,000-350,000 copies which is quite satisfactory, taking in mind that, for 1997, the same numbers for Athenian newspapers reached approximately 565,500 copies.

Nevertheless, circulation numbers of individual titles are quite disappointing. According to Demertzis and Skamnakis, there are very few local titles that exceed 5,000 copies per day.

In general, newspaper sales follow a decreasing pattern from 1989 (426.8 million copies) up to 1993 (301.5 million copies). A fluctuation of sales figures is observed from 1994 (314.7 million copies) to 1997 (274.4 million copies).

Political newspapers have the largest percentage of total sales, although their share is continuously decreasing since 1991: from 86.5% in 1989, to 77.1% in 1995. It is notable that the share of athletic, financial and other titles has increased to 20.6% in 1995 from 11.6% in 1989. In addition, advertising expenditure in newspapers was limited to just 14.6% (1996) whereas the electronic media (radio and television) absorbed 59.9% of total advertising expenditure.

## 4. Magazines

The Greek magazine market is quite rich in titles with more than 500 publications of both general and specialised interest. Sales numbers of general interest magazines decreased from 60.2% of total sales numbers in 1987 to 52.5 in 1991.

Since 1991 a number of special interest titles targeting niche markets have proliferated, marking a new trend in readership. It is notable that sales numbers of special interest magazines have increased to 63.6% in 1995 from 7% in 1987. These specialised publications can be divided in three different categories: a) Men's, women's, children's, adolescents' and parents' magazines, as well as magazines of social interest b) TV and radio guides, financial and entrepreneurial magazines, new technologies and c) decoration, fitness and lifestyle, cooking, leisure, music, sports, cars and motorbikes.

The percentage of total advertising expenditure for Greek magazines in 1996 exceeded that of newspapers by 5.7% (newspapers: 14.6% - magazines: 20.3%).

**Newspaper and magazine issues, cinema tickets per person in total population and per year. Radio and TV sets per 1,000 persons in total population and per year**

| Year | Daily Newsp. | Total number of newsp. | Total number of magazines | Radio sets | TV sets | Cinema tickets |
|---|---|---|---|---|---|---|
| 1960 | 14.7 (m) | 19.5 (m) | 3.5 (m) | 67 (m) | - | 10,1 |
| 1961 | 17,4 | 22.0 | 3,9 | 70 | - | 10,3 |
| 1962 | 19.0 | 20,7 | 3,7 | 75 | - | 11,4 |
| 1963 | 22,7 | 24,5 | 3,8 | 78 | - | 11,8 |
| 1964 | 25,8 | 27,5 | 4,2 | 83 | - | 12,8 |
| 1965 | 28.0 | 29,8 | 4,5 | 87 | - | 14,2 |
| 1966 | 28,3 | 30,3 | 4,8 | 92 | 1.5 (m) | 15,3 |
| 1967 | 24,4 | 26,2 | 5,2 | 96 | 2,9 | 15.7 (M) |
| 1968 | 24,4 | 26,6 | 6,1 | 101 | 5,6 | 15.7 (M) |
| 1969 | 26,6 | 28,6 | 6,8 | 107 | 11 | 15,4 |
| 1970 | 22,7 | 24,7 | 7,1 | 113 | 21 | 14,6 |
| 1971 | 22,4 | 25,8 | 7,9 | 135 | 31 | 13,3 |
| 1972 | 24,5 | 28,9 | 8,4 | 161 | 44 | 10,3 |
| 1973 | 26,6 | 31,2 | 8,6 | 193 | 63 | 6,9 |
| 1974 | 30.2 (m) | 33.5 (M) | 8.7 (m) | 231 (M) | 89 (M) | 6.4 (m) |

M: Maximum m: minimum Source: Hairetakis, 1997a: 95

## 5. Cinema

The "golden era" of Greek cinema production can be traced back in the 1950's and lasted until the 1970's. During that period ticket sales reached 300,000 and a small, but distinctive domestic star system was created. The extravert culture of Greek people together with favourable weather conditions led to the unique constitution of "summer cinemas" –film projection in open air spaces.

However, during the last decade, the number of cinema houses (including summer cinemas) has considerably decreased. It is notable that in 1985, 600 cinema houses operated throughout the country, whereas in 1994 only 320 were left.

In addition, 33 Greek films were produced in 1985 –this number was reduced to only 21 in 1994. Nevertheless, during the last five years, Greek productions have managed to attract large audiences, both on domestic and international level. In addition, cinema house owners have invested to high technology infrastructure and the majority of houses have undergone extensive remodeling. A considerable number of firms have also invested to sponsorship, by creating cinema house "chains" with their brand name.

**6. New Media[7]**

**a) CD-ROMs**

The multimedia production sector in Greece is a rapidly developing market. It is notable that in 1997 title production grew at a rate of almost 100% in relation to 1996. Both publishing and informatics entities are following a strategy of long-term planning and specialisation in different thematic areas. Distribution channels have been improved with the addition of the fourth, in the whole, company entering that specific sector, although none of the four ("E-Motion", "Multirama-Germanos", "One Way Technostores" and "Pouliadis and Associates") concentrates exclusively on multimedia distribution. Moreover, multimedia production is strongly supported by professional unions and research centres and during 1998 a considerable number of

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[7] For the purposes of the present paper the term "new media" concerns on-line (Internet) and off-line (CD-ROMs) products.

trained professionals has been employed by multimedia entities and specialised publications. As Kyriakoulakos stresses in his relevant study, most of the latter have developed in-house production departments in the context of an added-value products strategy.

The thematic areas of production mostly developed in Greece are "education", "arts and culture", "tourism", "music", "encyclopaedias" and "children's". Due to the complex organisation and considerable cost of the production of games in CD-ROM format, only seven (7) titles of that specific thematic area have been produced by Greek multimedia companies.

The total turnaround of the multimedia production sector in Greece is estimated, for the year 1996 at approximately 2,6 billion GRD (8,6 million EURO), with twenty-seven (27) firms concentrating exclusively or partially on multimedia production. Three (3) of these firms are sited in Thessalonica. They employ from two to five specialists and are using freelancers in periods of intense production. Most of these firms originate from the informatics sector (43%), while the audiovisual and publishing sectors have not yet acquired a satisfactory percentage (18% each). It is notable that only 18% of these firms concentrate exclusively on CD-ROM production.

As far as production cost is concerned, corporate presentations in the form of CD-ROM usually cost from two to four million GRD (maximum: six million) and are published in a limited number of copies.

The cost for productions concerning arts and culture amounts to twenty million GRD although it can reach eighty-five million depending on the quality of the title under production or in the case of multilingual versions and copyrights.

The average production cost for research titles amounts to eighty million GRD due to the need for original software. Most of these titles are financed by European or Greek research programmes.

The following comparative table can contribute to the understanding of the size of the Greek market and the production costs:

**Financial comparative data for "arts and culture" productions**

| **Country of Origin** | **Production Cost** | **Average no. of sold copies** | **Average sale price** |
|---|---|---|---|
| Greece | 20,000,000 GRD | 2,000 | 10,000-15,000 GRD |
| France | 96,000,000 GRD | 20,000 | 14,000-28,000 GRD |

Source: Kyriakoulakos, 2000

As it can be derived from the above data, the multimedia market in Greece is relatively small. Potential buyers amount to 2,500 and are expected to purchase each Greek title within six months of its introduction. In addition there is a number of multimedia production sponsors such as the following: five museums, six publishing houses, twenty-five state organisations, as well as University and European research projects. The latter have financed a significant number of specialised productions that target niche markets.

Although the prospects of the Greek multimedia market seem rather promising, there are a number of serious issues, which must be faced.

Firstly, Greek productions face intense competition from foreign titles. It is notable that in May 1997, in a total of 19,000 titles published internationally, 2,800 were available in the Greek market and amongst them, only 35 were Greek productions. Although there is a steady augmentation of the titles published, it is still very difficult to compete with the variety and quality of foreign productions and to attract potential customers.

In addition, some of the Greek productions are published solely in English as they are financed by European research projects. This fact is another setback for the creation of a strong, purely Greek profile amongst potential customers.

Another problem is piracy. As a writable CD-ROM costs only 1,500 GRD, the creation and sale of illegal copies is rather easy. The only method to solve this problem and to expand the market would be to lower prices. However, there is always the question of the viability of multimedia entities in a market as small as the one in Greece.

Moreover, the lack of exclusive multimedia distribution channels affects all marketing strategies applied in the multimedia sector, as its products are inadequately promoted.

**b) Internet**

In Greece it is estimated that, at the present, the number of Internet users exceeds 1 million, where 80% of them are connected via a local area network (LAN) and only 20% have established an Internet connection through an Internet service provider (ISP).

The average age of Greek Internet users (36 years) is quite young in comparison with the one of users in other countries, with the exception of the United States, where 40% of the users age between 12 to 17 years. This is due to two main reasons: a) that young people are easily familiarised with technological innovation and b) that almost 120,000 users in Greece are students and members of research centres. At the moment, there are 18 Universities, 14 Polytechnics and 13 research centres registered in the National Network of Research and Technology (which is the official Internet provider for academic institutions). These institutions had also the opportunity to upgrade their equipment (hardware and software) through EU financing programmes, which made access easier and faster.

The vast majority of the Greek users have a university degree. Specifically, 81% are students, or have studied, at Universities, Polytechnics, or hold a postgraduate degree, 18% are high school graduates and only 1% holds a lower degree. In addition, 60% and 25% of the users reside in large or smaller urban centres, respectively, and only 15% in the country. These percentages, when examined in correlation, can be easily interpreted given that the Greek rural population consists, in general, of aged citizens who are alienated with technology and that there is a significant percentage of illiteracy.

Nevertheless, one of the major setbacks for the extended use of the Internet in Greece, is its cost. According to data published in Forbes magazine, Greece is the fourth most expensive country in terms of Internet connection. It is notable that, since January 1999 there was an increase of connection cost per minute of more than 100%. At the moment, the Single Panhellenic Call Number (EPAK) constitutes the only feasible solution to this problem. The license for the use of this number is provided by the Greek Telecommunications Organisation (OTE) to the Internet providers complying with specific technical standards. As a result, a number of smaller Internet providers that do not comply with OTE's standards are not in a position to effectively face competition. The users that are able to use the EPAK are charged 240 GRD per minute (during "traffic" hours), instead of 360 GRD, while after 10 p.m. the standard charge of 180 GRD is reduced to 60 GRD for the users of the EPAK.

The considerable connection cost explains the fact that the income of the majority of Greek users (60%) can be considered as high (more than 300,000 GRD per month).

Moreover, 36% are freelancers and 25% company executives. The Internet is used mostly for professional reasons (53%), for entertainment (30%) and education (17%). In addition, 65% of the Greek users are men, although, during the last three years, the number of women using the Internet rapidly increases.

As far as media on the Internet are concerned, there are at the moment approximately 200 newspapers, magazines, television and radio stations throughout Greece that have a Web version[8]. The Press (magazines and newspapers) maintains a most active presence on the Internet with a percentage of 33% and 28%, respectively. Radio stations follow with 30% while TV stations have the smallest percentage of Internet sites with only 8.5%.

Moreover, it is notable that the majority of Internet sites concerning media are concentrated in the area of Athens and Saronic Gulf (42%). This is due to the fact that the vast majority of the Greek media operate in urban centres and mostly in Athens, in which resides almost half of the country's population.

As far as electronic commerce is concerned, Greek firms are just beginning to realise the value of the World Wide Web as an entrepreneurial tool. According to Athanassopoulos, in 1997 there were approximately 450 Greek firms with Internet presence. The results of relevant research showed that their presence mainly concerns "…information provision and distribution activities", while their communicative parameters are still at an experimental stage.

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[8] There are also four electronic magazines (Your Personal Success e-zine, NetLife Ezine, bubbl magnazine on the Net and Woman Today On Line Magazine) as well as one electronic fanzine (Tombstone Fanzine).

Another interesting parameter concerning the Internet in Greece, is the intense investment in portals, mainly by "traditional" media entities (newspapers and magazines publishing groups).

Alexa Research (www.alexaresearch.com) published the following data, concerning a general overview of the Greek portals:

| INTERNET SITES | PAGEVIEWS PER MONTH |
|---|---|
| ***PORTALS*** | |
| in.gr | 26.701.000 |
| pathfinder.gr | 1.705.000 |
| thea.gr | 972.000 |
| pan.gr | 701.000 |
| ibomm.gr | 209.000 |
| ***CONTENT PROVIDERS*** | |
| naftemporiki.gr | 11.458.000 |
| hellasyellow.gr | 2.670.000 |
| dolnet.gr | 2.076.000 |
| sportnews.gr | 1.851.000 |
| enet.gr | 1.741.000 |
| ***INTERNET SERVICE PROVIDERS (ISP)*** | |
| hol.gr | 3.930.000 |
| forthnet.gr | 3.018.000 |
| otenet.gr | 2.951.000 |
| x-treme.gr.gr | 833.000 |

*Pageviews per month for the time period March-July 2000 (www.alexaresearch.com)*

In more detail, **in.gr**, officially on-line since 25/10/1999, offers a search engine, a very well organized directory of the greek internet sites, news (always updated), free on-line access to Athens Stock Exchange, free e-mail account, personal calendar, chat room, many useful categories (i.e. weather report, dictionary, entertainment guide concerning Athens and Thessalonica e.t.c.) as well as separate categories for special events or news for instance the Olympic Games of Sidney 2000 or the results of the university entrance exams in Greece. In addition, **In.gr** offers -in collaboration with the mobile telephony company Telestet- various portal services that support the wireless application protocol (WAP).

**Pathfinder.gr** offers a search engine, Greek internet sites' directory, news, free on-line access to Athens Stock Exchange, free e-mail account, personal agenda, chat room, some useful categories like weather reports, favorite sites etc. We should point out the fact that in many categories pathfinder.gr redirects the users to in.gr. Also the user is able to adjust the home page in order to create his/her own home page according to his/her preferences.

**Thea.gr** offers a search engine, directory of the Greek sites, news, free access to Athens Stock Exchange, bookmarks, chat room and categories concerning some of the hottest news or events.

**Pan.gr** offers a search engine, directory of the Greek internet sites, free e-mail account, free on-line access to Athens Stock Exchange, news, entertainment and travel guide. Also there is a special category about WAP services; **pan.gr** offers these services with the collaboration of the mobile telephony company Panafon. Through **pan.gr** Panafon offers cellular phone and ISP services. **Pan.gr**, also, hosts an electronic shop in collaboration with other companies that support e-commerce and offer their products, also, through **pan.gr**. "*My Pan*" is the service that gives the ability to the user to adjust the home page according to his/her preferences.

**Iboom.gr** offers a search engine, a directory of the greek internet sites, news, free access to Athens Stock Exchange and also the latest news from other Stock Markets, WAP services, free e-mail account, chat room and "*my boom*" service, that offers the possibility of tailoring the home page according to each user's preferences.

Recently, another portal was launched, **flash.gr,** that is specialized in information services. There is of course a search engine but it's only for the portal's content. Apart from news and, generally speaking, information services, **flash.gr** offers interviews and detailed opinion articles and reports concerning the latest news, something very similar to a newspaper's first page layout. **Flash.gr** also offers free access to Athens Stock Exchange, free e-mail account, chat room and some other useful categories. The user is able to set the home page according to his/her preferences (that is "my flash" service). Of course, we should mention that **flash.gr** is now in a trial period and thus changes and improvements are expected to occur.

Mobile telephony company Cosmote recently announced "**My Cosmos**" service in collaboration with Microsoft. **My Cosmos** is a 'package' of services available for every mobile telephony device and not only for mobile telephony devices supporting WAP. That is because these services are available via WAP, short written messages service (SMS) and also via the 'smart' Sim Card, provided by Cosmote. The services offered are:

1. *Information Services*: news, weather reports e.t.c.
2. *E-mail service*: Cosmote offers a free e-mail account. Every user is able to access his/her account, send and receive e-mails through a computer, connected to Internet, or through his/her mobile phone through the above mentioned procedures.
3. *Financial Services*: Mobile Banking in collaboration with Piraeus Bank (for the time being) and on-line information about Athens Stock Exchange and user's portfolio.
4. *Entertainment Services*: a guide to cinemas, theaters and restaurants
5. *Search Engine through specified directories*.
6. *Customer Service*.
7. *Free access to every WAP page* (available only for devices that support WAP)

Also we should mention that Cosmote recently announced an agreement among Cosmote, OTEnet (an ISP company in Greece owned like Cosmote by OTE, the Greek Telecommunications Organization) and Yahoo!Europe (member of Yahoo!Inc). The agreement, among other things, provides Cosmote the right to offer Yahoo! services through WAP or Internet Protocol to all company customers. Consequently, this agreement is expected to strengthen Cosmote's position in the mobile communication field, especially in relation to portal services via WAP.

## V. The Future of Greek Media

The operative conditions of the Greek electronic media are expected to become more complicated after the advent of digital and subscription television. It is notable that, on the $20^{th}$ of May 1999, the National Radio Television Council has positively decided on granting permission to the first digital subscription channel.

In addition, law 2644/98 provides for radio and television subscription services, although the implementation of a relevant Code of Ethics lies to the initiative of broadcasters.

As a result, the media regulative context should become stricter in terms of setting adequate operation standards for potential broadcasters and of defining media ownership restrictions, given that technological convergence will become inevitable.

As far as conventional broadcasters are concerned, the advent of subscription radio and TV will mark a new era of intense competition. However, the cost of subscription services will probably stall the formulation of such competitive conditions. Nevertheless, both public and private broadcasters should embark on a strategic revisional procedure concerning the nature and quality of their content.

The advent of digital radio and television will also enhance the increasing tendency of the media to target niche markets. As a result, the number of special interest magazines will increase, including titles dealing with presenting and commenting on digital satellite and subscription TV programmes.

In the context of these dramatic changes, newspapers will probably face another big challenge: that of continuing to attract readers, given that these readers will have access to a considerable amount of information and entertainment through electronic providers. In the light of that specific perspective, the number of Internet and CD-ROM users will continue to rapidly increase.

Advertising agencies will probably adopt a more selective philosophy in terms of dispersing their output. The existence of numerous specialised media could lead to the re-apportionment of advertising expenditure; and that would certainly mark the beginning of a major financial crisis for private broadcasters, newspapers and general interest magazines.

Consequently, media in Greece are expected to enter a most critical phase that will certainly determine “winners” and “losers”. Apart from legislative gaps and financial issues, the Greek media will also have to deal with fierce competition. A feasible solution to that problem would be the employment of specialised executives who would be in a position to address and analyse expected challenges in the light of a scientific approach.

The preparation of these executives has already begun through the foundation of three University departments dealing with communication, journalism and mass media in Athens and Thessalonica.[9] Their graduates possess the dynamic to play a decisive role in the aforementioned context, in terms of strategy definition and, most important, quality preservation.

[9] The Departments of Communication and Media Studies of the National and Kapodistrian University of Athens and of Panteion University, respectively, were founded in 1990. The foundation of the Department of Journalism and Mass Media of the Aristoteleion University of Thessalonica took place in 1991. All three departments offer a Bachelor’s Degree, while the Department of Communication and Mass Media of the National and Kapodistrian University of Athens also offers a postgraduate programme in Communication and Mass Media.

## VI. Conclusions

The present paper attempted to provide a rather complete image of the Greek media landscape and the problems that will determine any future developments on that specific field.

The two major problems characterising the operation of electronic media in Greece could be summarized in the following oxymoron: intense governmental control (in the case of public service institutions) and lack of that form of control (as far as private broadcasters are concerned).

In the case of public television and radio stations, governmental control is expressed through continuous interventions concerning both content and management. The objectivity of the information provided by the PSBs remains a rather controversial matter; the biggest challenge for public broadcasters would be to adopt a different philosophy in terms of content and to *convince* their audience about the objectivity of their output.

However, a long-term communicative strategy of that sort should be deriving from management. In the case of Greek PSBs long-term planning appears quite impossible as high management positions depend on governmental will and interests. Successive resignations and dismissals of general managers have led to a vicious circle of dramatic changes concerning the public broadcasters' policy.

As far as the operation of private TV and radio stations is concerned, the lack of an effective regulative context has led to a rather chaotic situation, both in terms of airwave distribution as well as in terms of output. The adoption of relevant EU guidelines (concerning both advertisements and content) and the implementation of stricter and clearer laws have ameliorated the situation.

However, the role of the National Radio Television Council remains rather ambiguous. Although, according to law 1866/89 the NRTC is an independent regulative body, its composition, as discussed in previous chapters, deprives it of the objectivity and flexibility necessary to regulate the Greek media landscape.

In spite of the fact that their operational conditions were, from the beginning, problematic, private broadcasters have managed to introduce new, attractive trends in terms of "packaging" any form of journalistic output: fast, overwhelming rhythm, sensualism, and limited level of news analysis. These new trends, have, up to a large extent, alienated audiences with the journalistic format used by newspapers. In addition, the proliferation of private television and radio stations was accepted as a new "toy", a magic source of information that surpassed all others.

The Greek Press faced competition by implementing offensive marketing strategies that did nothing but transformed newspapers to consumer goods. The strategies used seemed to be rather effective and boosted circulation figures –but only for a short period. Any increase was plasmatic, depending on each title's coupon offers. In addition, newspapers were not in a position to estimate the number of "loyal" readers, as they bought titles depending on criteria other than their journalistic output.

At the present, newspapers seem to have realised that the most effective method to face competition from the electronic media is to provide alternative content: that is, extensive articles, research and specialised sections.

Magazine publishers have also re-oriented their entrepreneurial strategies by targeting niche markets. During the last eight years a number of specialised titles have successfully satisfied the readers' need for individuality.

This need could also constitute the main reason for the audiences' turn to new media. As discussed in the present paper, the number of users of on-line and off-line products rapidly increases. These products possess the dynamic to provide specialised information in an interactive context that, naturally, is more attractive in comparison with the one provided by mass media.

In addition, Greek firms, institutions and organisations are beginning to realise the communicative value of interactive environments. However, the number of entities using these environments for communicative or commercial reasons is still quite limited.

# GLOSSARY

**deregulation:** the process of applying free-market conditions in terms of TV and radio station ownership, which means that these are "released" from the exclusive control of the state and can be owned and operated by entrepreneurs.

**new media:** any form of Internet publication (such as web page, portal, vortal, search engine, etc.), as well as CD-ROM publications, of any kind (educative, entertaining, etc.)

**PSB –public service broadcasters:** TV and radio stations that operate under the control of the state and are solely or partially financed by it.

**viewership:** a percentage of the total number of active viewers, that are watching or have watched a specific TV station during a specific time period –for example, "BBC got 24,2% viewership, during the week 08/15/01-08/22/01".

**tabloid newspapers:** the term originally refers to newspapers of smaller shape than the usual, that concentrate on sensual content, gossip and use less "official" language (a characteristic example is the British "SUN"). As far as Greek newspapers are concerned, the term "tabloid" refers exclusively to their shape and not their content.

**readership:** a percentage of the total number of active newspaper readers, that are reading or have read a specific newspaper during a specific time period –for example, "The Times got 24,2% readerrship, during the week 08/15/01-08/22/01".

**summer cinemas:** film projection in open air spaces –usually, viewers can also enjoy a drink or even food, during the projection.

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