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Digitalisation of Polish TV – an opportunity for development or lost chances

Introduction

Even though it has been a quarter of a century since Poland undergone crucial socio-political changes, it is claimed that the process of reaching mature democracy is still unfinished. This is also one of the major causes of that the Polish media system is under ceaseless construction. The first period, called by R. Filas (1999, p. 37) as the phase of impetuous enthusiasm and forced changes, resulted in enacting basic bills and in establishing plethora of the new media ventures. The most common were local newspapers (hundreds), radio stations (dozens) and TV stations (dozen or so). Media reality very often was ahead of law regulations, especially at the early stages of transformation. Vital two acts for the press sector were introduced in March 1990 (8^{th} and 22^{nd}). First one concerned self-government authority and opened the new era of the local press in Poland. The second one began dismantlement of the press monopoly by demolishing Working-Class Publishing Cooperative (RSW). Although it proceeded quite fast a distributional part of this institution kept its favourable position for the next decade. Symbolic closure of the socialist model of the press was done when the Seym passed a revolution abolishing the office of censorship in April 1990.

Electronic part of the media system developed in due course and also appropriate legislation was introduced later on. The essential bill of radio and television broadcasting was passed in December 1992. As the article deals with the topic connected with television, important details about this law will be given in following paragraphs. Nevertheless, it is worth mentioning that regulations in audio-visual media sector were significantly late in comparison to real life of fast growing market and the audience demands. Suffice it to say that first commercial radio and TV stations started to operate at the beginning of 1990, which is more than three years before the abovementioned bill was put into practice.

Twenty five years of media system development is not a long history and hardly any could state that what may be observed now is a final shape of Polish media landscape. Moreover, its former construction, subdued to the socialist propaganda model, operated almost twice as long as the market-driven economy in Poland. Introduction of new legislative regulations did not cause that the old system has been instantly fully dismantled or completely replaced by the new one. What has really happened was coexistence and kind of a mixture of an old and a new system. Thus, this transformation might be called as a negotiated one (Jakubowicz, 2007).

Since the socialist regime collapse politicians chosen during free elections a couple of times has been trying to have control over Polish media, particularly public television. Their influence becomes more visible when the time of political campaigns is close. Nevertheless, this trend is rather a matter of elites: whether they have class or not, how strong are the pillars of democracy and how efficient is the watchdog role played by the fourth estate. The issue, however, has been discussed lately throughout Central-East European countries. On the other hand, when it comes to the private sector it is also a question of the ownership and transparency. This matter was took up by academics and practitioners clustered in European Journalism Observatory. Media researchers in their joint effort came to conclusion that the phenomenon of media barons who are thinking of using their influences to reach particular political goals is noticeable even in Western Europe (Kuś, Russ-Mohl, Szynol, 2013).[1] The wider research, namely “Media and Democracy in Central and Eastern Europe,” was carried out recently by the University of Oxford.[2]

Though the aim of this article is focused on the current situation in Polish television it is more than justified to give the essential background which shows the direction of the most significant changes connected with the process of digitalisation of terrestrial television. The character of this short study is mainly descriptive, nonetheless, as a former journalist author tries to combine theoretical approach based on documents and literature analyses with his own experience, observations and interviews with practitioners.

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[1] For a shorter version in German see: M. Kuś, S. Russ-Mohl, A. Szynol, *Die Rückkehr der Patrons*, “Neue Zürcher Zeitung” 13.08.2013, http://www.nzz.ch/aktuell/feuilleton/medien/die-rueckkehr-der-patrons-1.18131794.

[2] Final reports of the project are available at: http://mde.politics.ox.ac.uk/index.php/home/2-news/179-new-fianl-project-reports-published.

Towards dual, public and private television

As it was mentioned before, radio and television developed later than the press sector. Firstly, because it is a kind of regularity that more advanced technologies need more time to be introduced and assimilated. Secondly, investments in this segment are usually much higher. Thirdly, law regulations were launched almost three years later than those connected with the printed media. Nevertheless, even in the pre-licensed period (the first license process started in 1993 and finished next year) between 1990 and 1993 more than hundred local radio stations appeared and dozen or so private local TV stations. Additionally, transformation of the press was mainly based on privatisation of existing titles, whereas besides two governmental channels TV market had to be built almost from nothing.

The most important difference, however, was the share of foreign investors. Polish members of parliament did not set any limitations for foreigners. It is hard to judge, why it has happened but a couple of explanations are possible. First of all, the press market seemed to be neglected. Years of exploitation when it comes to printing machines/houses, offices and newsrooms resulted in their quite poor condition. Using old technology and lack of know-how was also very common. Foreign investments were to cure all these drawbacks. Last but not least, one of the intensions of de-monopolisation law was to free newsrooms from the communists, especially at the management and editor-in-chief levels.

As Bajka claims (1998, p. 21), “the Germans approached the issue methodically, trying to determine the press market segments which they could take in the future.” Their well-known groups, such us: Bauer, Springer, Burda, Grüner+Jahr flooded Polish market with cheap highly--circulated monthlies and weeklies for the youth and women. Surely, the Germans were not the only ones interested in running media business in Poland. There were also companies from Norway, Italy, France, Sweden, Denmark, Switzerland and the United States. Nonetheless, it was not the colour press and magazines takeover that triggered such critical attitude towards foreign investors’ presence but their acquisitions in daily press, particularly at the regional level, which is the core of the author’s interest. In the second half of nineties German company, Verlagsgruppe Passau, and Norwegian Orkla gained dominant position in regional daily press in Poland, which led to pluralised monopoly (Filas, 1991, p. 38). Soon after Orkla had been taken over by Mecom, the author suggested that: “the Brits will consider to withdraw from Poland completely due to the dissimilarity from other divisions. In the meantime, the Germans will try to take over Mecom's shares in the regional press sector, which is Passauer's core of interest. If they succeed, the readers will be the biggest loser without choice of other point of view" (Szynol, 2012, p. 361). In 2013 Mecom sold out its regional dailies to German group. Consequently, there are only a few titles left that are run by other companies. The problem of foreign companies' presence on the informational part of the media market is being taken up quite frequently by media researchers. Although there is no common agreement among Polish scientists in that matter, most of them recognize advantages and disadvantages. J. Flankowska (2002) tried to put these prose and cones together in a special issue of "Studia Medioznawcze" dedicated to the abovementioned subject.

Going back to the electronic media sector, it is essential to indicate that its further development differed from the printed one due to the limit of shares foreign investors could have in radio and television broadcasting companies. According to the previously mentioned radio and TV broadcasting act from 29. December 1992, "concession for the joint-venture company may be granted if foreign investor's part in seed capital or in share capital do not exceed 33 per cent" (Ustawa, 1993, art. 35, p. 2). This rule was valid up until first of May 2004 when Poland accessed European Union. Thus, one might say that Polish electronic media market was protected against aggressive expansion from abroad. It is highly probable that if it were not for these limitations, Polish radio and TV broadcasting would have been shaped otherwise.

In early nineties, as it was mentioned above, private radio and TV stations were launched. Some of them, due to lack of law regulations, broadcasted without any permissions. Others tried to obtain temporary permits and awaited the first license process. As a result of this process the National Broadcasting Council granted in radio sector three nationwide licenses (RMF FM, Radio Zet, Radio Maryja), two over-regional and 156 local ones. Naturally, that was a kind of revolution on the Polish radio broadcasting market and it framed conditions for further competition between public and private segments. The living proof of it is that nowadays the first two stations when it comes to audience rates are: RMF FM and Radio Zet.

For public television years after socio-political breakthrough were very tough. Firstly, two organisms, which for decades were gathered in one and governed by the Radio-Television Committee, had to divide. Secondly, two channels of Polish TV had been for years perceived as a tool of socialist propaganda and the main goal was to regain the audience trust. That is why 18th of November 1989 a TV announcer began with words: “I hope that the programme will step by step earn your trust. The news in our new programme will be good or bad, hopefully those later the least but always true.”

Whereas governmental television had to (be) transform/(transformed) towards public, competitive – private sector started from scratch. Firstly, at the end of 1989 and further on local terrestrial stations came into existence, such as: Sky-Orunia in Gdańsk, PTV Echo in Wrocław and TV Morze in Szczecin. Most of them were broadcasted illegally, nonetheless soon became very popular in their locations as the trust in public TV was still under construction. Moreover, in the circumstances of free economy, open boarders and lack of audiovisual content satellite television was conquering the market. Aerials sprang up as mushrooms and to some extent their presence on the balconies were perceived as an expression of social status. Simultaneously, also cable TV appeared, though due to necessity of infrastructure investments the pace of its spread was not so fast. It is worth emphasizing that from this time on Polish television market was divided in three operational modes: terrestrial, satellite and cable. The only change is that the terrestrial signal has been recently changed from analogue to digital. Another important thing is the percentage of people using different ways of audiovisual content consumption, which will be discussed in following paragraphs.

Fierce competition

Development of the private sector sharpened competition, absent during the communism era. Once Poland chose the path towards democracy, the government lost its monopolistic position and instrumental abilities in media. Naturally, it was not those dozen or so local terrestrial TV stations that might have become a threat to rulings’ power. Furthermore, this process of losing control was continuing in time. Establishing a new sector carried out in two directions. One mode was based on creating a network of local terrestrial stations, the second – to set up nationwide TV and try to gain the license.

Soon after dozen or so local broadcasters launched their media business, Nicola Grauso appeared. Most of the media market observers claim that it was nobody else than Silvio Berlusconi, Italian tycoon, who sent his

Sardinian friend to make business in Poland. Grauso had been taking over shares in mentioned local stations (up to the restricted limit of 33%) and started to build the network, namely Polonia1. As T. Mielczarek points out: "Grauso's activity aroused many controversies. Magnitude of his investments was questioned and the quality of Polonia1 programme criticised. It has been emphasized that the television operates against Polish law – Polonia1 did not receive a nationwide license and none of its stations concession to broadcast locally. In spite of that the programme was still broadcasted" (Mielczarek, p. 321).

It is worth stating that popularity of Polonia1 was quite big. For the first time Polish audience could watch maybe not very ambitious productions, nonetheless – gathering millions of viewers all over the world, e.g. "A-Team", "MacGyver" or Spanish and Argentinian soap operas. It is also reported that for the first time in Polish TV advertisements started to interrupt films and other programmes. In 1994 Grauso's stations were shut down as he had not been given the license. Even though he still tried to operate and broadcasted the signal via satellite. Finally, Grauso sold out his Polish assets to Italian group Fincast (after its bankruptcy – Polcast). Another thing is, how twisted and complicated were fates of local terrestrial stations, which will be mentioned later on.

The second modus operandi was taken by Polish businessman, Zygmunt Solorz-Żak. Fifth of December 1992 he managed to launch a brand new TV station – Polsat. At the beginning a signal was sent via satellite from the Netherlands, as there was still no law to spread terrestrial television in Poland. This was probably one of the arguments used against Grauso and in favour of Solorz during the first license process carried on between 1993 and 1994. Knowing that illegal broadcasting might be brought to the table, Polish entrepreneur did not take the risk to start his business within the country. Nevertheless, his profile and business background gave raise to controversy. Thanks to his connections with politicians, efficient lobbying and go-getting energy – it was him, not Nicola Grauso who had been given the first license to run nationwide terrestrial television.

Talking about making decision in the electronic media sector, it has to be said a little bit more about the most important act mentioned before. Twenty ninth of December 1992 the Seym passed a very expected radio and television broadcasting bill, which took effect on the 1st. of March next year. Besides setting the limit for foreign companies, this crucial act began a new era for both sectors: public and private. Due to this document national (or rather governmental) radio-television was going to transform into two independent media companies: Polish Radio (PR) and Polish Television (TVP), both of which as a stock company of the State Treasury. However, the key issue in the act was establishing the National Broadcasting Council (NBC).

As M. Głowacki rightly points out, “Poland represents the French model of appointment where both the legislative and the executive branch have the power to appoint the members of the regulatory authority. Members of the Council are appointed by state bodies which are related to political parties. Furthermore, in this case, they can directly represent the political party’s programme and main elements of that parties ideology. The French system is closely linked to the political structure and does not always guarantee a balance of power between the political forces” (Głowacki, 2008, p. 113). Similarly, the NBC is an institution which practically cannot be unbiased, as its members are nominated by three political bodies: the president (two members), the Seym (two members) and the Senat (one member). Even though that in the constitution, where the NBC is also mentioned, it is clearly stated that “A member of the NBC can neither be a member of any political party or trade union nor run any public activity which is impossible to reconcile with the dignity of fulfilled function” (Konstytucja, 1997, rozdz. IX, art. 214, p. 2). In T. Mielczarek’s opinion by establishing a regulator of audiovisual media in such way “Polish legislator recognised that this is the best solution for the issue of a public supervision of those media, which may best protect public interest, pluralism and national authorities following in succession” (Mielczarek, 2007, p. 42). Nevertheless, as the author of this article claims “the future would show how far practise failed to meet legislators’ expectations” (Szynol, 2011, p. 216).

During the first license process only one TV station was given a permit for nationwide terrestrial broadcasting (Polsat) and one for regional (TV Wisła). The latter played an important role in developing a second nationwide television, which came into existence in 1997, during the second license process, namely TVN. And that was a very significant impulse to sharpen competition on the countrywide level (even despite the fact that the license for TVN was not nationwide). As Z. Bajka summarizes “Since October 1993 up to the end of February 1998 the NBC granted altogether 212 concessions, including 194 for radio broadcasting and 18 for television” (Bajka, 2000, p. 96).

Unfortunately, the local level of terrestrial television in Poland neither became powerful nor developed to visibly influence the market. There are few reasonable explanations for that. Firstly, the number of established

TV stations probably never exceeded twenty. Consequently, it was barely possible to use a scale effect by creating a network that might be financially self-sufficient (Polonia1 may serve as a model). Furthermore, unsuccessful Grauso’s attempt resulted in falling the network apart. Some of local stations were just shut down, another tried to operate independently. Secondly, there was no support from the NBC and other regulators to run this kind of business, which is quite expensive. To cover all these expenses connected with infrastructure, equipment and trained staff without any subsidies or tax exemptions the advertisements market would have to be much more abundant, which is not the case of Poland, especially at the local level. Thirdly, short history of self-government authority and communes casts a shadow on local society’s activity, also connected with media. As a consequence local media are not very popular. In addition, when it comes to TV audience ratings show that the most desirable part of viewers (16–49 years old) are at this level almost marginal. There is no need to explain how this effects media businesses operations.

Setting Polish economy on the tracks of free market attracted attention of many foreign investors. At the beginning particularly in the press sector as there were no limits for them. They presented a very well-thought-out strategy. The most consistent were, as it was said previously, German companies. Their step-by step actions began around the time when the process of RSW de-monopolisation reached an advanced level. Obviously foreign investors kept an eye out for an opportunity to access a new and quite big market. At first they were sending translated versions of a few magazines well-known in their own country. Next phase was to increase the number of titles and copies produced still in Germany and to sell them in Poland. Once they were convinced that Polish economy is stable and Poles are willing to buy their products in large numbers they packed necessary stuff and send it along with some management staff to run a serious media business in Poland. Little by little the content was changing from fully translated into produced by media workers hired on the new market. Obviously, high concentration of foreign investments aroused plenty of discussions and controversies. The journalists and some media observers were even claiming that foreigners had made the press partition or that Poland became a German media colony.[3] There is no intention to describe the

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[3] See respectively: E. Wilk, *Hołd bawarski*, “Polityka”, nr 40(2109), 4.10.1997, p. 20; S. Sieradzki, *Niemiecka prasa*, “Wprost”, nr 43 (1091), October 2003, p. 22.

press market and share more opinions about what has happened on them,[4] though it is more than advisable to make a point that there were some important similarities and differences in shaping press and electronic media sectors.

To some extent electronic media were following development of the press, though with a delay. Surely, the limit of 33% caused that foreign companies were not so eager to invest their money without any prospects of expanding shares, as it was the case in the newspapers and magazines. Nevertheless, for international or even global broadcasters and producers also selling their media content only, which they normally generated in different countries, was something not to be despised. Thus, when Polish households had become more and more equipped with satellite aerials and connected to cable networks, those content suppliers instantly appeared on the market. They could use for example the first scrambled TV (Canal+), which had been given the concession during the first license process. In the beginning foreign broadcasters did not pay a special attention to Polish viewers as they even didn't bother to translate the content of their channels spread in networks and via satellite. Thus, as R Filas notices, "In the second half of 1993 proportions between using Polish satellite channels, accessible in plenty of cable TV networks (TV Polonia, Polsat), and foreign ones (mainly RTL, SAT1, MTV) became almost even, at the same time the number of watching foreign TV decreased" (Filas, 1999, p. 44). As a consequence, broadcasters from abroad were forced to translate the content and in the next stage of competition – quite similarly to what had happened in the press sector – to place a part of their production in Poland.

To sum it up, foreign companies did not conquer Polish terrestrial TV market on its opening, basically due to legal constraints. They have taken the safe strategy. Besides one mentioned competitor, the others preferred to sell only their ready-to-air products (or to franchise programmes), which became much easier when in 1998 two digital platforms started (Wizja TV and Cyfra+). Situation changed significantly in May 2004 when Poland joined European Union and limits for EU broadcasters were abolished. Nevertheless, up to this particular moment Polish investors divided the market between them and took convenient positions making the

[4] For further details see: A. Szynol, *Obcy kapitał w polskiej prasie ze szczególnym uwzględnieniem dzienników regionalnych w dwadzieścia lat po przełomie*, in: *Przestrzenie komunikowania*, eds. I. Borkowskiego, K. Stasiuk-Krajewskiej, Wrocław 2010, p. 81–100.

market even harder to enter. As T. Kowalski rightly discerns, “Newcomers normally arduously build up their reach and earn viewers’ acceptance, which causes that they are less attractive for advertisers interested in access to mass audience. The better TV market is developed, the higher programme offer is diversified, which raises entering barrier. Presenting the remarkable programme offer and making it interesting for the mass viewer usually demands extraordinary expensive and intensive marketing efforts” (Kowalski, 2006, p. 214). Lastly, Polish TV market is dozen or so times less attractive when it comes to advertising revenues than British, German or French not to mention American.

Public vs. private – means biased vs. unbiased?

Another important issue which came to light vividly on the audiovisual market was political influence. As it was said before, Polish regulatory framework was created on the grounds of former system remnants. Moreover, even the new institutions to some extent were bound up with executive power, thus – with politicians. The most important is the National Broadcasting Council which – according to the constitution – “stands on guard of freedom of speech, right to information and of public radio and television interest” (Konstytucja, 1997, rozdz. IX, art. 213, p. 1). Nevertheless, members of the NBC are nominated by political bodies and – what may be surprising – do not need to have any degree. The only condition taken directly from the act is “knowledge and experience in the scope of means of social communication” (Ustawa, 1993, rozdz. II, art. 7, p. 1). Many a times this knowledge has been checked by journalists with embarrassing results for politicians becoming members of the Council.

Since establishing the NBC politicians were trying to have an influence on its decisions, among which is granting concessions and filling places in supervisory boards of public radio and television. Probably the strongest attempts had been carried out during the sixth term of parliament (2005–2007), as it was quite stormy, highly polarised and shorten tenure. In December 2005 soon after parliamentary election three cooperating parties managed to make very fast amendment to the bill and changed the number of NBC members from 9 to 5. As a result also boards of Polish Radio and Polish Television were replaced. Personal changes have been done on different levels, from the newsroom staff up to the CEO of TVP.

There is hard evidence that during mentioned period, including pre-election time, public media, especially Polish Television was far from unbiased and credible. E. Nowak and R. Riedel proved in their research that in main news programme of TVP (“Wiadomości”) in years 2005 and 2007 public television was partial. Eleven out of 41 analysed news items were biased in favour of Law and Justice (PiS) and there was no negative coverage connected with this party. In the meantime, the strongest opposition, namely Civic Platform (PO), was mentioned 4 times in the negative context but never in the positive. Two years later the outcome of analyses was even worse. In favour of PiS researchers found 14 pieces and no negative, whereas for PO it was 7 negative and no positive. It is more than justified to state that personal changes which had been done between the two analyses did the trick.

Partiality, however, did not concern only public television. In the same research Nowak and Riedel discovered by comparison that also commercial station, namely TVN was not completely unbiased. In its main news programme (“Fakty”) in 2005 six items were in favour of PO and two negative, whereas for PiS none was positive and one negative. Two years later partiality increased significantly as PO earned 11 positive and nought negative coverage while PiS, on the contrary, had only 2 positive but 14 negative. Both measurements were taken shortly before two parliamentary campaigns when majority of news items were devoted to political activities.

Conclusions from the mentioned research were also shared by the Organization for the Security and Co-operation in Europe’s Office for Democratic Institutions and Human Rights (OSCE/ODHIR). In their final report written after pre-term parliamentary elections (21 October 2007) it is clearly said that “last two weeks of the campaign showed lack of qualitative balance by public television in the coverage of the three main contestants. The National Broadcasting Council was unable to properly discharge its constitutional responsibility due to deficiencies in its structure and disagreements flowing from its partisan composition, underlining the need for measures of reform to ensure appropriate independent oversight of the conduct of the public media” (OSCE/ODHIR, 2008, p. 1). The authors of the report did not have many critical remarks addressed to private TV stations. However, they noticed that both commercial broadcasters paid a little bit more attention to Civic Platform than to Law and Justice and that Polsat coverage was slightly more critical towards PiS. One of the most important conclusions from this report was that “Consideration should be given to minimizing governmental influence on the composition of the NBC, and to achieve greater balance, diversity and independence in managerial appointments in public media” (OSCE/ODHIR, 2008, p. 14). Under the ruling of quite exotic coalition (PiS–LPR–Samoobrona) sometimes it was not the most important what has been said in the news but was has been left unsaid. There was a couple of widely commented information in private stations that public television passed them over. Examples of such shameful behaviour and hand-controlled politics in public media also on a regional level the author gives in another publication.[5]

First of May 2004 Poland entered European Union and as a consequence the limit of 33 per cent shares in the electronic media sector for EU members has been abolished. It gave a chance for foreign companies to conquer Polish market. First steps have been taken in radio broadcasting segment. The second popular station in Poland, that is Radio Zet, sold its shares in autumn 2004 to French group – Lagardère. This, however, was not a surprise as – if truth be told – the French controlled the station before the act came into existence. Two years later, this time by surprise, the German group, namely Bauer, took over the biggest radio station – RMF FM. Most employees received this news without enthusiasm; however, there were not so many personal changes or lay-offs than someone would have expected. As the German group possesses also different media in Poland (mainly magazines for women and the youth) radio stations became an efficient tool for cross-media promotions.

Talking about impartiality in TV it has to be emphasized that for very long time public television had the dominant position on the market, which is obviously not the favourable factor. Appearance of the first private station did not change this immediately. Moreover, commercial station was at first very focused on gaining the widest reach and that was possible to accomplish by broadcasting ‘easy to consume’ content. This attitude was in due course a kind of a curse for Polsat, as the station was commonly called disco-polo channel. Launching the second competitor, TVN, started a new era on the television market in Poland. The target of the new station was set differently. Polish investors, namely Walter and Wejchert’s families, tried to address their TV to richer Poles living mainly in big cities. TVN, which was the most important part of ITI media group, from its beginning put emphasis on the news and commen-

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[5] A. Szynol, *Towards commercialistaion and politicisation – Polish media and Polish journalism20 years after socio-political change*, in: *Making democracy in 20 years. Media and politics in Central and Eastern Europe*, ed. by B. Dobek-Ostrowska, M. Głowacki, Wrocław 2011, p. 235–247.

tary programmes and thus became a stimulus for competition in the field of independent, credible and efficient journalism. Nonetheless, according to the AGB Polska data Polish Television in 2000 still had almost the half of the audience (TVP1 – 25,7%; TVP2 – 19,1%; TVP Regional – 2,9%), whereas Polsat one fourth (25,3%) and TVN only a bit more than one tenth (11,4%). It is easy to count that the great four (as it is used to name: TVP1, TVP2, Polsat, TVN) on the verge of the new millennium had 81,5% of the whole television market. What is more, the cable and satellite TV managed to capture only 5,3% of viewers even despite the fact that in the late nineties, as R. Filas claims (2010, p. 35) there were about 800 cable networks spread all over the country (or rather the number of networks than operators).

It is worth mentioning that there was one attempt to come into being on the terrestrial TV market. In March 2001 on the remnants of Franciscan TV Niepokalanów, which did not succeed, TV Puls was established. Due to religious character and limited technical reach the station was still barely visible in ratings. Lured by easy and fast investment on the quite cheap market, Rupert Murdoch took over 24,5% of TV Puls in June 2006. It may be assumed that Australian media tycoon was pretty sure of that he was going to become a big player on Polish TV market as it was the case of Bulgaria. Thanks to his political believes and connections he managed to change the license records from specialised to universal. Furthermore, being favoured by the biased NBC he was granted more frequencies, which gave TV Puls wider reach (from 15,9 to 29%). In the meantime he raised his shares up to 35%. Nevertheless, the station could not break 1% of shares of the audience and Rupert Murdoch withdrew from Poland in November 2008. Probably he underestimated the strength of competitors and was not ready to invest more money without quick return prospects. His investments in Puls have been estimated at 50 million dollars, which seems to be not enough to take up equal fight with competitors being present on the market for dozen or so years.

To summarise the issue of impartiality and political influences, it is worthwhile to quote last results of opinion polls, made by CBOS (łb, 2014). The most appreciated television in Poland is public TV with 82% positive marks (11% of increase in comparison March 2014 to March 2013). Second position was taken by TVN with 80% (6% rises) and the third belonged to Polsat – 79% (also 6% higher than the previous year). Only 11–12% of respondents were unsatisfied with their efficiency. It appears that Poles are quite forgiving when it comes to their attitude towards TV stations even if impartiality of some broadcasters was more than disputable.

Late digitalisation – last chances for cable and sat TV

The new millennium brought along many significant changes to the market. First of all – the Internet, however, in Poland majority did not have an access up until 2009. Nonetheless, electronic media were in the audience centre as 92% of people’s time devoted to media in 2001 was spent on: TV (60,7%), radio (30,2%) and the Internet (1,4%) (Makarenko, 2001). Surely, during the next decade these proportions were to change in favour of the Internet and the content available on mobile devices, though a large amount of it was still produced by TV broadcasters. Together with the audience expectations producers and broadcasters had to develop their offer and make it easy to reach. As a result digital platforms were launched. Wizja TV and Cyfra+, established in 1998, merged into Cyfra+ four years later. In the meantime (2000) Polsat started its own platform – Cyfrowy Polsat. This kind of strategy turned out efficient and in 2006 also the closest competitor, ITI group did the same and set up digital platform called television n. When the structure of ITI ownership changed Cyfra+ and television n were merged in March 2013 into nc+.

At the beginning the growth of new platforms was not so fast, as it is shown in table 1. In the first five years of their operations the change was minimal. Probably the main obstacle was a poor offer and the cost of subscription and other fees (satellite dish, decoder, installation). But as the number of available channels also translated and thematic ones steadily increased the satellite television became much more popular. Filas points out that in four years 2003–2007 the number of subscribers tripled from 950 thousand up to 3,4 million. It happened along with a crop of new Polish-language thematic channels, such as sports which doubled, women’s, children’s and music (Filas, 2010, p. 46–47).

Table 1

Number of digital platforms users [mil.]

Platform	2000	2002	2004	2005	2006	2007	2009	2011	2013
C. Polsat	0,8–1,0	0,2	0,3	0,5	1,0	>2,0	3,2	3,506	3,6
Cyfra+		0,7	0,7	0,7	0,9	>1,0	1,4	1,550	2,8
n	–		–	–	0,06	>0,2	0,7	1,275	
Σ	**0,8–1,0**	**0,9**	**1,0**	**1,2**	**1,96**	**3,3**	**5,3**	**6,331**	**6,4**

In some cases the figures given in different documents are slightly different. ‘Σ’ means total, ‘>’ a little bit more than the figure.

Source: *Own combination based on the NBC and broadcasters’ reports.*

Terrestrial broadcasters, especially commercial groups, were very active in setting up thematic channels for a couple of reasons. Firstly, they could more precisely reach different targets and audience group of interests (e.g. TVN24 – successfully introduced in August 2001 informational television). Secondly, having their own digital platform they could produce more content and sell it along with the air-time filled with advertisements. Thirdly, fierce competition did not give them any other option than to create as many channels and products as rivals. Lastly, prospect of digitalisation of terrestrial signal meant that instead of a couple of nationwide or over/regional stations it might be possible to have more than twenty of them. Consequently, it was necessary to show off and to prove that the company is suitable to be given the chance on the MUX – digital terrestrial TV platform.

Thus, strong competition between TV broadcasters was the essential factor for fast development of digital platforms, however, no less than the NBC announcement about switch off in July 2013. A huge leap may be observed in 2006 (and next year) when ITI launched its own platform and Polsat responded with a very attractive offer, especially when it comes to prices. In October 2008 the president of the Office of Electronic Communications (UKE) announced the contest for booking frequencies that were going to be used in DVB-T (Digital Video Broadcasting-Terrestrial) and DVB-H (-Handheald). Once the deadline for a switch off had been set for the end of July 2013 the broadcasters started to fight for digital platforms viewers. Consequently, last couple years were constant attempts to outrun rivals. The most visible manifestation of it was Christmas promotions. The increase was significant up to the year 2011 as from this point onward DVB-T has been successfully and gradually introducing. Slight decrease in the second half of 2013 (200–300 thousand less than shown in table 1) was a consequence of growing popularity and full access to DVB-T and clumsily carried out merger between television n and Cyfra+. In media observers’ opinion the debut of joined platforms may serve as a model for PR workers how they should not act in social media.

Simultaneously with digital platforms also cable TV has been developing. On opening the market, plethora of operators appeared. In their main focus were the big and medium sized cities as these were already equipped with basic telecommunication infrastructure. In due course they established necessary installations in every city above 40 thousand of citizens. As it was mentioned previously, at the end of XX century there were about 800 cable TV networks present on the Polish market and this was going to change in a couple of years ahead as well as the fact that at the turn of the centuries satellite and cable TV were able to capture only each twentieth viewer. In March 2001 the NBC stated in its report that cable TV in Poland is the third biggest in Europe and the fastest when it comes to its growth. However, process of consolidation has been started as dozen or so suppliers dominated the market and 30 the biggest firms supported two third of all users (KRRiT, 2001, p. 170). At the beginning of 2003 it was only 15 firms with the share of 78%. In 2006 the number of the biggest players dropped to ten firms that had 3 million subscribers (about two thirds). Finally, process of consolidation led to current situation when there are basically three major players: UPC (1,47 mil.), Vectra (834 th.) and Multimedia Polska (825 th.), which gives them about 68% of the market (data of Polish Chamber of Electronic Communication, PIKE – IV quarter of 2013).

Table 2

Number of cable TV operators and users [mil.]

Year	1995	1998	2000	2001–2008	2009	2010	2012	2013
Number of operators	300	461	600	600	450	>400	500	500
Number of subscribers	2–2,5	2,8	3,5	4,5	4,5	>4,0	4,2[a]	4,6–4,7

[a] There is a data inconsistency even inside the NBC reports. In the same document (KRRiT, 2013) on page 35 it is mentioned 4,2 million cable TV sockets, whereas on page 14 – 5,6 million of users. Next year in KRRiT information different data are given in the same document (KRRiT, 2014): on page 11 the number of cable TV users is 4,6 million and on 35 – 4,7 million.

Source: *Own combination based on the NBC and broadcasters’ reports*.

Moreover, as it is shown in table 2 the number of operators was not strictly connected with the most important thing – number of subscribers. It may be assumed that these figures do not cover a full picture. Number of users was for sure bigger than subscribers or sockets. For a couple of years operators probably did not count multiroom services as an additional consumer activity, which distorted the statistics. Another thing is that even without a significant increase of subscribers it was possible for the suppliers to earn more money. Within the last few years they enriched the offer essentially, thus also ARPU (average revenue per user) could vary. In the middle of previous decade cable TV operators spread about 400 channels among which there were 50 in Polish language. As the NBC reports show, in 2010 this number tripled up to 146 channels (worth emphasizing that

81 of which licensed abroad). Furthermore, operators added to their offer other services, such us the Internet and telephone or all of them in the triple play package.

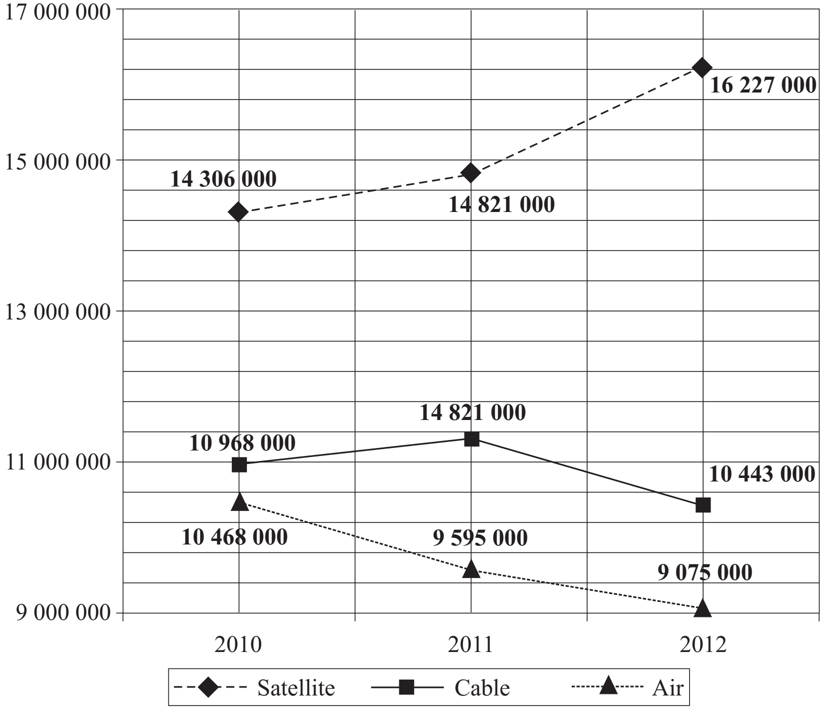
To sum it up, satellite and cable TV came long way from the margin of the market up to significant players making use of late digitalisation of Polish television. As the NBC information states, in 2010 most of West-European countries were far ahead of Poland when it comes to the type of dominant TV signal (digital vs. analogue). In Spain, Great Britain and France digitalisation exceeded 90 per cent (respectively: 98, 97 and 93%), whereas in Poland it was only 56% (KRRiT, 2012, p. 55). It explains why satellite and cable TV gained such a strong position before Digital Terrestrial Television (DTT) became accessible and popular. They managed to enrich their offer and make it useful for many viewers. Turning this process away will not be easy task to perform and will last another few years.

One-way ticket – digitalisation

It seems to be quite obvious that the change into digital is something irreversible. Moreover, it is not only the matter of terrestrial television. As it was said above, satellite and cable TV made good use of delaying switch off and in the last few years earned viewers’ attention, which was also profitable. As the graph 1 shows within three years 2010–2012 the number of viewers watching TV via satellite increased significantly. Cable TV won more customers in 2011 but next year the number dropped. Aggressive marketing strategy of operators and audiovisual content producers caused that number of free-to-air TV viewers decreased in the whole observed period.

On the graph 2 it is quite clearly shown that satellite TV highly likely soared at cable TV expense in 2012 and even more at terrestrial TV expense in years 2011–2012. When the latter was losing its shares on the market (2,2% in 2011 in comparison to 2010 and 1,3% in 2012 to 2011) satellite grew up sharply (respectively 1,3 and 3,6%). The only thing which might be surprising is the fact that in spite of almost the same percentage share of the satellite and cable TV audience (especially in 2011) the number of satellite viewers was much higher (by 3,5 million). The best explanation seems to be that for a long time sharing the signal taken from satellite dish was impossible whereas it was not the case of cable network,

Graph 1. Number of viewers accoridng to the way of reception

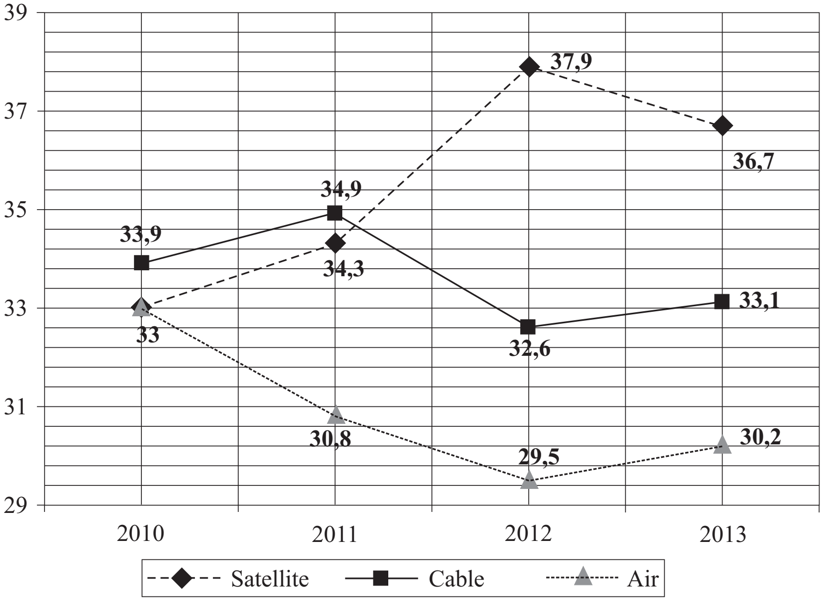


Source: Own combination based on the Nielsen Audience Measurement data taken from (Koziel-ski, Gluza, 2013).

easily spreadable. In a different survey (KRRiT, 2012, p. 11) the outcome for the satellite TV in 2011 was even higher – 43,9%, whereas cable TV reached 29,2% and terrestrial television 26,9% (18,7 – analogue and 8,2 – digital). This fluctuation and discrepancies are quite understandable, as these were only estimations and what is more, done in the period of fierce competition between broadcasters and mixture of possible way of signal reception.

In April 2010 the ministry of infrastructure and development announced the deadline for switching off the analogue signal – 31 July of 2013. Nevertheless, the process of digitalisation had already begun. Cable TV operators did not wait for this moment but had been enriching their offer in the meantime. The change of proportions between channels in analogue and digital version has been gradually but consistently made. The

Graph 2. The way of TV reception [%]



Source: Own combination based on the Nielsen Audience Measurement data taken from (KRRiT, 2014, p. 5).

same concerned satellite channels, however, in a slightly different mode. To improve the offer satellite platforms replaced the old equipment with the new one and thus were able to spread the content in high definition standard. Simultaneously, operators were encouraging producers to generate the content in HD version. Also the channels made by the owners of platforms have been transformed into this higher quality.

The project of Digital Terrestrial Television in Poland assumed setting up three multiplexes (MUX 1, MUX 2 and MUX 3), that are multifunctional platforms which can spread the package of digital radio and TV signal along with additional data (such as EPG – Electronic Programme Guide) in one frequency channel. It was presumed that each MUX could consist of seven or eight channels. There is no intention to describe step by step every change on the MUX-es content, though the process was quite complicated and included several in-between movements. Generally, MUX 1 was planned as a temporary platform for main public TV channels. As soon as the third platform was ready all Polish Television channels would go to MUX 3 and new broadcasters (and also latecomers) could replace TVP on MUX 1. The second platform was planned for private nationwide channels already existed on the terrestrial TV market (Polsat, TVN, Puls, TV 4). In Septmber 2010 MUX 2 was launched in a couple of regions and the same happened with MUX3 a month later. Next year also MUX1 began to partially operate. The process of spreading each platform’s technical reach was surprisingly smooth and even shutting down the analogue signals in particular regions where digitalisation had been carried out did not encounter serious difficulties. The final switch off was accomplished the 23rd of July 2013.

Kozielski and Gluza rightly noticed (2013, p. 6) that “Digitalisation phenomenon is done, though the fragmentation phenomenon is under its way – none of broadcasters will give up the fight on a viewer.” Thus, as it was mentioned previously, all of the competitors were trying to run their businesses effectively and moreover to create new channels. This way Polsat launched thematic channel – Polsat Sport News which in due course was placed on MUX 2. By the same token Polskie Media (the owner of TV 4) established TV 6, ITI group TTV and Polish Television made use of this historical opportunity and divided its informational channel into TVP Info and TVP Regionalna. It is worth emphasizing that enormous activity of broadcasters and multimedia companies influenced severely the position of so-called great four. Comparing their shares in May 2013 and 2012 they lost almost 9% (from 57,66 to 48,88 – NAM data). It may be said that their era of TV dictatorship has ended. However, paradoxically thanks to DTT technical reach of TVN increased up to 97,6% which had never happened before.

In the table 3 the latest composition of MUX-es has been compiled. The biggest share in DTT fell to Polish Television with eight channels. Furthermore, up to 27 of April TVP 1 will be kept on MUX 1 and then replaced by Fokus TV. Thus, public TV may be called as a big winner of digitalisation. However, time will show whether all thematic channels of TVP become as popular as competitors’ proposals. Other broadcasters being present on the terrestrial TV market also should not complaint. Polsat placed its sport channel and moreover as Polskie Media company belongs to Solorz-Żak the whole group managed to take additional two positions on MUX 2 (TV 4 and TV 6). Holding ITI has three channels on multiplexes. The main product, namely TVN, and secondary TVN 7 on MUX 2 and the third one, called TTV, on MUX 1, however in this television the group holds only majority shares. Dariusz Dąbski, the owner of

TV Puls, was granted a place for his second channel, which is Puls 2. Nevertheless, there are some doubts if Polish businessman is resourceful enough to compete with bigger players on the market. As Kozielski and Gluza point out “A viewer tempted with the novelty of multiplex will zap to a new channel. But once he finds more and more reruns he may go back to those watched previously” (Kozielski, Gluza, 2013, p. 9).

Table 3

Current composition of MUX-es

MUX 1	MUX 2	MUX 3
TVP 1 → Fokus TV	Polsat	TVP 1 HD
TVP ABC	TVN	TVP 2 HD
Eska TV	TVN 7	TVP Info
TTV	TV 4	TVP Kultura
Polo TV	TV Puls	TVP Polonia
ATM Rozrywka	Puls 2	TVP Historia
TV Trwam	TV 6	TVP Rozrywka
Stopklatka TV	Polsat Sport News	TVP Regionalna

Source: Own combination based on data taken from Emitel’s webpage (MUX-es technical operator), 25.05.2014.

On this stake there are also debutants, though some of them well-known from different segments of media landscape. The most successful seems to be Zbigniew Benbenek, founder of Zjednoczone Przedsiębiorstwa Rozrywkowe, and the co-owner or shareholder of: the biggest radio network (Eska), Eska TV, Polo TV, Fokus TV, daily tabloid “Super Express” and even the network of casinos. As he believes in being far from media hype sometimes is called the *éminence grise*. Enthusiastic reception of his TV channels, packed with popular entertainment and disco music ensures fast returns of investments. Another newcomer is ATM group – TV content producer. Its reality shows, sitcoms, serials and quiz shows are very well-known and it is highly likely that some of them will be broadcasted in ATM Rozrywka channel.

It is worth mentioning a few statements about latecomers. In December 2012 the NBC announced a contest for four left places on MUX 1. Conditions were quite strict as each channel had to fit to one of the categories: educational-cognitive, children’s, movies and socio-religious. The least might be said about the winner of the first category as Fokus TV will appear at the end of April 2014, however, in their application the main content consists of: documentary, educational and guidance programmes. Polish Television won in the children's channel and thus TVP ABC started. First ratings are quite promising as in March 2014 ABC was a leader of kids' channels. Furthermore, public TV has vast archives that can be useful also in the case of ABC and other thematic channels. Stopklatka is the winner in the field of movie channel, which was not surprising as the founders are Kino Polska and Agora. The latter is a very powerful concern and among other things publisher of "Gazeta Wyborcza". Majority shares belong to Kino Polska, a company which is over ten years on the media market in Poland and had during the contest support from famous directors, such us: Agnieszka Holland, Roman Polański and Andrzej Wajda. This kind of back up and two companies' cooperation was very convincing for the NBC and hopefully also for the viewers.

The history of granting TV Trwam a place on multiplex may serve as a case for separate study. Nevertheless, it has to be said a few words about this station. Its founder, father Tadeusz Rydzyk, is undoubtedly the most controversial priest in Poland. Although in the documents the license is given to Lux Veritatis Foundation, everyone easily associate Trwam (and also Radio Maryja) with the extrovert priest. It was him and his strong conservative views that endeared him hundreds of thousands Poles marching in supporting protests against the NBC decision after the first contest, when TV Trwam did not receive a place on MUX. Consequently, during the additional contest, under such pressure and conditions of this license distribution no one would dare to pass Rydzyk over.

Fragmentation of TV market in Poland is a fact and clearly shown in table 4. Only great four can still reach more than 10% of the whole audience (4+). Public broadcaster as the heir of old times is a little bit privileged when it comes to the general audience but in commercial group (16–49) both public TV programmes lose significantly with private competitors. The distance between great four and other rivals is shrinking and this may be observed as a constant trend. Moreover, during the last year besides TV Puls (+ 0,1%) all the rest stations decreased. In first 10 the most popular TV stations there is almost every channel that is present on one of the MUX-es. In the audience 4+ only news channel, namely TVN24, and Polsat2 are not placed on any MUX. In the target group there is one more channel absent on DTT – TVP Seriale.

Table 4

Viewership of the most popular channels in first quarter of 2014 [%]

	Channel	Shares 4+	Shares 16–49	Channel	
1	TVP1	14,07	13,20	Polsat	1
2	TVN	11,87	13,05	TVN	2
3	Polsat	11,66	10,46	TVP1	3
4	TVP2	10,39	8,92	TVP2	4
5	TVN7	3,35	3,36	TV PULS	5
6	TV PULS	3,01	3,26	TVN7	6
7	TVN24	2,90	2,54	TV4	7
8	TVP INFO	2,60	2,37	TVN24	8
9	TV4	2,58	1,57	TVP Seriale	9
10	Polsat2	1,61	1,56	Polsat2	10

Source: Own combination based on the Nielsen Audience Measurement data taken from (Kurdupski, 2014).

What has to be bear in mind, experienced players were kept fighting for as many places on DTT as it was possible. Moreover, their efforts began earlier on different submarkets, such as cable and satellite TV. Summarised ratings of the three most powerful TV groups prove that vividly. According to NAM data (pp, 2014) in January 2013 TVP group had 31,93% shares (31,32 in 2012). Polsat group reached 22,27% (22,48) and TVN group 20,13% (20,64). Thus, even though they lost the power in single products they managed to sustain their market positions in whole.

The process of digitalisation is only partially finished and completed as there is still a place for other multiplexes (up to 8). Three years ago the NBC was planning to establish two more MUX-es for following broadcasters and another one for mobile TV (DVB-H), however, already ended proceedings show that there is no certainty whether it will come into existence. Although one should pay more attention to the regional or local multiplexes. As it was emphasized, terrestrial television on the lowest level had never been a strong submarket. Nevertheless, it may be a chance to restore this important segment in the era of glocal media and fragmentation. On the verge of switch off some of the local stations were shut down, e.g. Telewizja Dolnośląska (part of Odra TV). On the other hand, in December 2013 two local multiplexes were launched (with local station TVT in Rybnik and the second one with NTL Radomsko). In both cases local broadcasters cooperate along with 4Fun Media. It is more than advisable that the NBC should take care of such initiatives.

Conclusions

Polish independent media history is relatively short and when it comes to electronic sector it goes back to early nineties. Breakthrough point for television was launching the second private station, which significantly speeded up the competition. Due to the foreign investors’ legal restrictions, Polish market has been protected for over decade. This period was fruitfully used by family-run companies which quite fast divided the market between them. Zygmunt Solorz-Żak, who is claimed to be one of the richest Pole (with over 10 bil. złotych), built up the solid foundations for his multimedia business with nationwide television, digital platform and telecom. European circumstances gave him a chance to make use of internationalisation of his assets, which is probably much more efficient than running all the enterprises in Poland. The second group (ITI) was founded by two families whose members had vision of very modern media holding. In Polish reality it appeared that some investments were too expensive and in the long-run it was impossible to cope without international financial support. Jan Wejchert’s death and Mariusz Walter’s withdrawal from active managing the holding along with debts caused gradual sell out of the company, lately co-owned by Swiss businessman Bruno Valsangiacomo. These changes probably resulted also in great merger of two satellite platforms.

Digitalisation has been carried out with a considerable delay and the market, especially satellite and cable TV operators, had plenty of time to prepare for it. It led to fierce competition between them, which seemed to be advantageous for viewers who have been given a lot of new possibilities: enriched offers, triple play services, visibly improved quality of the content etc. However, late digitalisation and former division of the TV market caused that none of foreign players appeared on DTT sector. Fragmentation of TV signal reception, brought along with digitalisation, seemingly weakened the main competitors’ channels, nevertheless, taking into account the new products – their market positions are rather unthreatened. Decisions made by the NBC during the MUX-es creation let that happen. Furthermore, newcomers on TV market are quite familiar to the audience and media researchers and neither of them expects revolution. It may happen that sharing multiplexes this way was a kind of lost chance for starting it.

Huge investments made by media companies (one year of broadcasting on MUX costs about 10 million złotych) resulted in advertisements brokers’ consolidation. One of them, namely Atmedia, almost disappeared from the market. Main players try to cope with adverts’ management by themselves to avoid additional costs. Another thing is how to share the content in new devices springing up like mushrooms. Asbis company estimates that in 2014 the number of tablets in Poland will double and broadcasters have to take it into consideration. As well as new phenomena, such as meshing and stacking. According to Millword Brown survey (km, 2014), watching TV is accompanied by using a second device with a screen. In Poland 18% of the time is devoted to the content related to what we are watching on TV (meshing), however, no less than 22% of the time we spend on the second screen displaying something non-related (stacking). For broadcasters this is something quite new and they will have to respond to this customers’ behaviour as they try to avoid zapping and zipping, nonetheless to little effect.

The future of de-fragmented viewers’ attention is hard to predict. It seems that media companies are making unceasing efforts to capture customers on every single tap/click on their electronic devices, no matter whether it is a TV screen, laptop, smartphone or tablet. And this is a real dimension of digitalisation. What we are living now is not the same analogue world where almost everything was put in order, in so to speak linear perspective. It is barely possible that we could and wish turn this way back. Digitalisation is a one-way ticket.

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Cyfryzacja polskiej telewizji – możliwość rozwoju czy stracone szanse

Streszczenie

Głównym tematem artykułu jest cyfryzacja i jej wpływ na telewizję w Polsce. Autor szeroko opisuje podstawy tego procesu, próbując dokonać porównania między drogą rozwoju mediów drukowanych i elektronicznych. Sięgając do przełomowego okresu, analizuje kluczowe wydarzenia i to, jakie piętno odcisnęły na elektronicznym segmencie systemu medialnego w Polsce. Najsilniejszy akcent w artykule jest położony na wyłączeniu analogowego sygnału nadawania telewizji naziemnej: jak do tego doszło i jakie były/są konsekwencje tego fenomenu. Autor wspiera omawiane zjawiska najważniejszymi danymi i niezbędnymi objaśnieniami tego, co wydarzyło się na rynku audiowizualnym.