Italy - Media Landscape

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Introduction

The Italian media landscape is characterised by the dominant role of television in comparison to other media platforms. In a 2011 article published in *Political Communication*, Shehata and Strömbäck define Italy as a good example of a "television centred" country, in which citizens spend a large amount of time watching television while press circulation remains low. Mass circulation has never been a feature of the Italian print press; instead, it appeals to an elite readership that is already familiar with politics and public affairs. *Millecinquecento lettori* (One thousand and five hundred readers), an article written in

1959 by the well-known Italian journalist Enzo Forcella, provides a good illustration of this situation: One thousand and five hundred is the number of readers a political journalist could count on when Forcella wrote his article. Since then, the situation has naturally changed, but the number readers nonetheless remains low.

The low levels of press circulation is driven by the print press's elitist focus and the absence of the so called "tabloid press" that exists in many other countries. This elite circulation produces a major consequence: Newspapers are not profitable and therefore need external support to survive. Most press enterprises either receive press subsidies or are backed by corporations and entrepreneurs that use the press to pursue their own economic interests. Some examples of print enterprises that are the property of companies include: the Caltagirone Editore, property of a real estate company; Itedi group, property of Fiat Chrysler Automobiles (FCA); and, the business paper *Il Sole 24 Ore,* property of Confindustria (Federation of Industrial Entrepreneurs).

While Italy's press circulation is limited, television consumption is very high. Television audiences are higher than those in many other countries and television is a major agenda setter within the Italian public sphere. Due to its large audience share, television boasts a substantially higher share of advertising spend than print and online media – a factor that further limits the profitability of print journalism. New media are also affected by television's large consumption. Indeed, the number of Internet consumers is lower than in other countries and digital infrastructures are much less developed, with online advertising expenditures suffering as a result.

Although partisanship has decreased over the years, it still represents a major distinguishing feature of the entire Italian mass media system. For many years, the print press was influenced by the presence of important party newspapers which, albeit no longer in circulation, established an interventionist tradition within the broader media landscape. This partisan tendency is exacerbated by the economic interests of enterprise owners, who are often inclined to promote self-serving policies and support close political friends.

In spite of the party press's disappearance, a tradition of political parallelism still persists. Both the print press and television reflect competing ideologies and political opinions even if they do not have any direct structural and ownership connections to political entities. One exception here is the Berlusconi media corporation, which is well rooted in Italy's tradition of political parallelism.

These historical ties between the news media and politics have limited the capacity for journalists to develop genuinely autonomous professional identities, separate from politics. There has always been a sort of osmosis between politics and journalism, with journalists entering the field of politics and politicians becoming journalists. This crossover has taken place in spite of the *Ordine dei Giornalisti* (Order of Journalists), a journalism guild that is supposed to be responsible for entry into the profession and its ethics. However, longstanding political differences among journalists have undermined any attempt to build a unifying vision of the profession and its standards.

The increased commercialization of the entire mass media system over last three decades has partially changed these aspects of the Italian media landscape. Nevertheless, the legacy of this past, and the established relationship between news media and politics, still survives – as the entry of mass media tycoon Silvio Berlusconi into politics clearly demonstrates.

The role of the state in shaping the face of Italy's media system has always been important, even if it has diminished over the years. The state plays a role as owner, regulator, and funder. In the past, several news outlets, both wire services and newspapers, have been property of corporations depending on the state. Today, just the *RAI – Radiotelevisione Italiana* (Italian Public Service Broadcasting - RAI) is property of Treasury Ministry.

Since effective self-regulation has been difficult for the journalism profession to achieve, both the Italian government and the

Parliament have taken on an active regulatory role. Media regulations during election campaigns provide a clear example. The so called "par condicio" laws attempt to prevent partisanship by providing a strict indication of air time that can be devoted to competing parties and candidates, guidelines on the publication of survey results, a restriction on televised political advertisements, as well as limitations for print press political advertisements. Government interventions have also tried to establish ethical standards and practices in a number of other areas, like the use of wiretapping.

In addition to its regulatory role, the government provides funding and support for the media system. Until recently, press subsidies represented the main source of income for many news outlets, particularly political newspapers that were unable to attract much market investment. Reliance on press subsidies has shrunk over the past few years, and is now limited to a small number of newspapers run by political groups.

1. Media

1.1 Print

Over the last decade, the Italian publishing industry has experienced a sharp slowdown in sales volume. Between 2007 and 2015, revenue dropped by more than 30%, from 41.4 to 30.6 billion euros. According to the latest report by the *Federazione Italiana Editori Giornali* (Italian Federation Newspapers Publishers - FIEG), total revenues for Italian dailies have decreased from €3.9 billion in 2007 to less than €2 billion in 2015. The average daily circulation has also dropped by around 2.5 million copies per day (without considering the "free press") from 5.4 to 2.9 million copies over the same period. These data confirm the long-term weaknesses of the Italian daily press industry, which, despite their budding digital editions, do not seem to be able to compensate for losses in the print press sector. Indeed, over the course of 2014, the total circulation of printed newspapers lost an average of 800,000 copies per day against an average growth of 100,000 digital copies per day. Advertising revenues have also suffered. Between 2009 and 2015, the publishing industry lost about 50% of its total advertising revenues, falling from €2.3 to €1.2 million. Of this loss, €755,000 belonged to dailies and €475,000 to weeklies and monthlies.

Data on the number of readers tells a similar story. According to the 2015/III Audipress survey, the percentage of customary readers ("readers on the average day") dropped by 22% between 2010 and 2015. By the end of 2015, only 18.7 million people, approximately one out of three Italians, read newspapers regularly, with 14 million Italians declaring they never read them at all. On the other hand, 39 million Italians stated that they had read at least one newspaper in the past 30 days.

The Italian newspaper market is divided among 84 publishing companies, of which 68, or 81%, published just one newspaper. In terms of economic power, the most important companies are: Gruppo Editoriale L'Espresso, with 20.5% market share; RCS MediaGroup, with 18.9%; Caltagirone Editore, with 7.2%; Monrif, with 7%; Il Sole 24 Ore, with 6.2%; and, Itedi, with 6%. It should be noted that, at the time of writing, a merger between Itedi and L'Espresso was in progress. Should this merger be successful, it will give birth to one of the largest publishing companies in Europe and reinforce L'Espresso's leadership position in Italy.

The news outlets run by each of these publishing companies are outlined below:

- Gruppo Editoriale L'Espresso: *la Repubblica*, *Messaggero Veneto* (local), *Alto Adige* (local), *La Nuova Sardegna* (local), *Il Tirreno* (local), *l'Espresso*, *National Geographic Italia, Micromega*, and *Limes*.
- RCS MediaGroup: *Corriere della Sera*, *La Gazzetta dello Sport* (sport news), *Abitare*, *Amica*, *Oggi*, *Dolce Attesa* and *Dove*.
- Caltagirone Editore: *Il Messaggero*, *Il Mattino* (local), *Il Gazzettino* (local), *Nuovo Quotidiano di Puglia* (local) and *Corriere Adriatico*

(local).
- Monrif: *Quotidiano Nazionale* together with *il Resto del Carlino* (local), *La Nazione* (local), *Il Giorno* (local), *Quotidiano Sportivo* (sport news), and *Cavallo Magazine*.
- Il Sole 24 Ore S.p.A.: *Il Sole 24 Ore* (economic news), *Fisco e Contabilità*, *La Settimana Fiscale*, *Guida al Lavoro* and several other periodicals devoted to professional training.
- Itedi: *La Stampa*, *L'Avvisatore Marittimo* (nautical news) and *Il Secolo XIX* (local).

The Mondadori group, owned by the Berlusconi family, deserves separate treatment. Although it is primarily involved in book publishing, it also publishes *Il Giornale* and several weeklies, which have a very high circulation. The right-oriented weekly, *Panorama*, is just one example.

In total, 123 subscription newspapers are published every day. As per 2015 data from *Accertamento Diffusione Stampa* (Press Circulation Verification – ADS), *Corriere della Sera* is the most diffused newspaper, with an average daily circulation of more than 307,500 copies. This paper has no clear political leaning and is generally oriented towards the centre of the political spectrum. It is followed by *la Repubblica*, a centre-left oriented paper, with 275,200 copies; *La Stampa*, the other centre-oriented paper, with 183,600 copies; and, *Il Sole 24 Ore*, a business paper, with 157,100 copies. *Il Giornale*, the main centre-right-oriented paper has a circulation of 82,900 copies, followed by *Libero* with 50,600 copies. Finally, *L'Avvenire*, the catholic paper, has a circulation of 109,100 copies.

Compared with other countries, local newspapers have a minor circulation and play a limited role in agenda setting. Nevertheless, some local papers do reach circulation levels as high as their national brothers. For example, in 2015, *il Resto del Carlino*, *La Nazione* and *Il Mattino,* achieved average circulations of 112,000, 87,400, and 45,500 copies per day respectively. Again, freesheets are not as common in Italy and their circulation is further on the decline. However, Italy does boast two successful freesheets: *Metro*, founded in 2000 and today distributed in Rome, Milan, Turin, Genoa, Florence and Bologna; and, *Leggo*, established in 2001 by Caltagirone Editore and today distributed in Rome and Milan. According to the 2015/III Audipress survey, *Metro* has an average of 812,000 readers per day, while *Leggo* has an average of 709,000 readers per day. No data on their circulation are available, since they are not included in the ADS monitoring.

As for Italy's weeklies, the most widely diffused publications are typically devoted to television programmes and gossip. *DiPiù* boasts the largest circulation, with 592,000 copies a week, followed by *Tv Sorrisi e Canzoni*'s 567,000 copies, *Tele7*'s 380,000 copies, and *DiPiù Tv*'s circulation of 327,000 copies. *Il Venerdì*, a weekly associated with the daily *la Repubblica,* is the most popular publication that is not related to television, with 333,000 copies, followed by *Famiglia Cristiana*, with its circulation of 328,000 copies.

1.2 Radio

Unlike the print media, over the course of 2014, radio and television increased their global revenues by 0.8%, reaching a total amount of €8.5 million (disaggregated data is not available). According to the latest report published by *Autorità per le Garanzie nelle Comunicazioni* (Authority for Communication Guarantees – AGCOM), radio is the second most frequently used media after television. AGCOM's survey showed that about 68% of the Italian population listened to the radio for an average of 149 minutes per day (data based on the seven days preceding the survey).

Global consumption trends, shifting away from television and towards the internet, have provoked the Italian radio sector to undergo a number of transformations, both in terms of distribution and content. There has been a significant shift towards web broadcasting in podcast and on-demand modes, simulcasting on televisual platforms, and broadcasting through specific apps and streaming services. At the same time, editorial decisions have begun to favour light entertainment content over more traditional news stories. It is very likely that these trends are an outcome of increased competition, the personalisation and fragmentation of audience demands, and a need to attract advertising investments. In 2013, only 25.5% of the Italian population declared that they use the radio to access news, against 74.4% who used television, 62.2% who used the Internet and 56.2% who used newspapers (data related to a general use of the means, not to a specific period of time).

In terms of market share, the public broadcaster RAI operates three networks and leads the market with 21.9% of total sector revenues. Unlike the private broadcasters, RAI is funded through license fees, and therefore it operates with a competitive advantage. Following RAI, Finelco group holds 12.9% of total sector revenues, Gruppo Editoriale L'Espresso holds 9.7%, *RTL* holds 9.3%, and *RDS* accounts for 6.6%. Other plays with lower levels of market shares include Fininvest group, with 3%; Il Sole 24 Ore, with 3%; and, Radio Italia, with 3%.

Private networks hold the largest share of audience. *RTL 102.500* stands out with 19.5% of "listeners on the average day", followed by *RDS*'s 13.5% share, *Radio Deejay*'s 13.2% share, *Radio Italia*'s 13% share, and *Radio 105 Network*'s 12.9% share. RAI, instead, occupies the sixth and the seventh positions, with *RAI Radio 1* holding 12% of audience share and *RAI Radio 2*'s holding an 8.6% share. RAI Radio 3 comes in fourteenth position with a 4% share.

1.3 Television

In the context of a media system characterised by deep changes, the Italian television sector has been able to strengthen its leadership, both in economic terms and the volume of consumers. Confirming this Italian preference for television, a 2015 study by SWG for AGCOM found that 96% of the population accessed television in the week before the survey. Traditional television (with a digital decoder) was the most frequently used with 90% of viewers, followed by satellite television's 32% share. A growing percentage of viewers also indicated that they enjoy digital delivery through personal computers, 29% of respondents; smartphones, 16% of respondents; and, tablets, 12% of respondents.

In terms of content, Italian viewers can choose from more than 230 national free and subscription channels, as well as an average of 100 local channels for each provincial district. Online audiovisual offerings are gradually gaining ground, mainly due to the supply of subscription streaming and on-demand services. For the time being, however, online television is still too small to challenge the dominant market position of more traditional television services.

Advertisements provide the main revenue source for television service providers. In 2015, advertising accounted for 41% of total revenues, followed by paid-for content at 38%, and public funding at 21%. Almost 90% of these revenues - equal to €7.8 billion - fell into the hands of the three main players: Rupert Murdoch's Sky group accounted for 33%; the Berlusconi family's Fininvest/Mediaset group held 28.4%; and, RAI controlled 27.8%. As for the remaining 10%, it was divided among Discovery group, with 2.3; Cairo Communication, with 1.5%; and other minor players. Breaking these figures down further, advertising expenditure made up for the majority of free-to-air revenues, at 64%, followed by license fees, which contributed to 36% of revenues. Conversely, the business model used by paid-for television outlets is mainly focused on selling services to the end user, with this accounting for 90% of total revenues. RAI occupies a special position since it can benefit from a public support through its licence fees that are equal to 70% of its total revenues, as well as revenues derived from selling advertising time.

Revenue share for services in each of these business model categories is highly concentrated among a few major players. RAI and Mediaset held 48% and 35% of the total revenues for the free-to-air market in 2015, followed by Discovery's 3.7%, Cairo Communication's 2.6%, and Sky group 's 0.9%. Conversely, Sky and Mediaset dominate the subscription market with shares of 75.8% and 19.4% respectively.

Finally, in 2015, Italy's television audience reached a level of 10.4 million "viewers in the average day". Of these, 37% watch RAI and 32% watch Fininvest/Mediaset. Discovery and Sky groups held a share of 6% and 5% respectively, followed by

Cairo Communication with less than 4% of the market. In the last five years however, Sky and Discovery are the two players which have gained the largest percentage of audience at 2.2% and 5.3% of total viewers, whereas RAI and Mediaset have lost 4.1% and 5.2% each.

1.4 Digital Media

By the end of 2014, 85% of Italian newspapers had both a digital and a print version. These digital offerings typically consist of two different product types: a digital version of the printed newspaper in pdf format or in the form of app for mobile devices; or, a website, mostly free, where the newspaper contents are enriched with pieces specifically written for the web and embedded with videos and pictures. Articles for the web are organised to optimise their visibility on search engines, such as Google, Bing and Yahoo; and social networks, which are beginning to represent a significant channel for incoming traffic flows.

However, for the time being, revenues arising from these digital offerings are generally not enough to cover losses accrued by the press side of the business. In 2014, only 10% of the newspaper industry's total revenues could be attributed to digital products (although this percentage still represented twofold growth from revenue five years earlier). Yet, within these revenues, 69% was derived from the sale advertising spaces, exposing publishers to the demands of advertisers. Local publishers, with their more limited audience capacity, therefore tend to be less involved in the digital process than the national ones.

As to digital circulation in 2015, first place belonged to Il Sole 24 Ore, with about 220,500 digital copies per day; followed by *Corriere della Sera,* with 81,700 digital copies; *la Repubblica,* with 60,100 digital copies; *la Stampa,* with 30,400 digital copies; and, finally *Italia Oggi,* with 17,600 digital copies.

Among local newspapers, *Il Gazzettino* was the most popular, with a daily circulation around 6,400 digital copies, followed by *il Resto del Carlino*'s 3,500 digital copies, and *il Mattino* and *La Nazione* with 2,800 and 2,100 digital copies each.

Despite the limited capacity for online channels to attract revenue, most of the main television players are beginning to integrate digital offerings – most commonly through websites and apps. One prominent example is *RayPlay*, launched in September 2016 by RAI, which allows viewers to watch a number of live programmes and catch up on those they might have missed for free. In-programme social media interactions, as well as social media discussions about television, are also growing. According to 2016 *Nielsen* data, more than 1 billion tweets from Italians referenced at least one of the 10,600 programmes that aired in 2015. Of these tweets, around 44 million were mainly devoted to talent shows, sport, and reality shows.

1.5 Social Networks

In recent years, the Internet has grown in importance - in terms of connected users, volume of connections, and connection speed - despite Italy's comparatively slow penetration and adoption rates. According to Internet World Stats, Italy's internet penetration currently sits at 62%, compared to 73.9% for the rest of Europe. In spite of lower penetration levels, there is evidence that online media companies are keen to consolidate on personal data generated by these online activities for their *platform envelopment strategies*, which exploit user data to improve their services and to enter other digital platform markets. The European authorities have long highlighted some critical points resulting from market concentration, particularly in the online advertising market which, for now, represents the main funding source for every web service.

According to the aforementioned AGCOM report, internet advertising revenues have increased continuously from 2010 to 2015, with only a slight decline in 2013, reaching a total amount of about €1.7 billion by the end of 2015. This growth in online advertising is in line with international trends, and can be attributed to the emergence of “display and video” advertising models - the images or videos displayed on websites - which have grown by 50% since 2013. Other types of online advertising such as the “search advertising” model, those that appear in search engines, and the “classified/directory” model, short texts derived from traditional press classified advertisements, are becoming less prominent. Newsletter and email marketing models are still popular, holding a global share of 45% in 2015. In terms of platform, Italy’s 2015 online advertising investment was led by spending on Google, followed by Facebook, and, much more distant, Seat Pagine Gialle The remaining expenditure went to offerings from traditional media outlets, such as Fininvest, RCS and GELE, and smaller digital natives, such as Italiaonline, Veesible and Leonardo.

Search engines and websites are the two main gateways that Italians use to access content. The social networks, for their part, come in third, although they are first in terms of average web surfing time. According to Audiweb report’s February 2016 survey, around 28.5 million people over the age of two, or 51% of the Italian population, logged onto the Internet at least once for more than two hours “in the average day”. This data includes logons from both fixed devices and mobile ones. Among the most used services, search engines enjoyed 26.4 million individual users, compared to 25.7 million users of generalist web platforms, and about 25 million users browsed social communities (a macro-category that includes social networking). On average, each person surfed the web for 13 hours per month.

Facebook is the most used social network in Italy. Even with a slightly decreasing user base, Facebook accounts for 22.8 million of Italian social media users. Instagram is the second most popular social network, with 8.3 million users, followed by Google+’s 7.5 million users, Twitter’s 6.6 million users, Linkedin’s 5.1 million users, and Pinterest’s 3 million users.

Finally, according to the already quoted survey realized by SWG for AGCOM, 62% of the Italian population sources their news from the web. Social networks are particularly popular gateways for news media, with 65% of habitual readers using them to access content, followed by online newspapers and magazines.

1.6 Opinion Makers

According to the website *BlogItalia*, which ranks blogs using Google PageRank and the Google Links algorithms, the top ten Italian blogs at the beginning of 2016 were: *Beppegrillo.it* (created by Beppe Grillo, the founder and charismatic leader of the Five Star Movement), *Blog.debiase.com* (Luca De Biase), *FiNeX*, *BlogItalia*, *Nazione Indiana*, *Nothing2Hide*, *Mantelblog*, *ItaliaSW*, *Quinta Weblog*, and *Il Cavoletto di Bruxelles*. Three of these are personal blogs, five are devoted to the computer and internet world, one is a generalist blog, and one is focused on food. No official data are available on the average number of visits per blog.

Facebook and Twitter are readily employed by journalists; indeed, studies have shown that journalists are among the most frequent users of Twitter. On these platforms, journalists constitute a sort of a self-referential community, which is able to influence the editorial choices of the legacy media thorough a diffused framework of e – interactions (Bentivegna - ,Marchetti, forthcoming).

1.7 Sources

Newspapers

- **Corriere Della Sera**
- **Il Giornale**
- **il Manifesto**
- **Il Messaggero**

- il Resto del Carlino
- Il Sole 24 Ore
- Italia Oggi
- La Gazzetta dello sport
- La Nazione
- la Repubblica
- la Stampa
- L'Avvenire
- Leggo
- L'Espresso
- Libero
- L'Unità
- Panorama

Publishers

- ADS-Accertamenti Diffusione Stampa
- Caltagirone Editore
- Gruppo Editoriale L'Espresso
- Mondadori
- Monrif
- RCS MediaGroup
- UPA-Utenti Pubblicità Associati

Radio

- Radio 1
- Radio 2
- Radio 3
- Radio 24
- Radio Capital
- Radio Deejay
- Radio Incontro
- Radio Italia
- Radio Radicale
- Radio 105
- RDS-Radio Dimensione Suono
- RTL

Televisions

- Canale 5
- Cairo Communication
- Disney Channel
- Discovery Italia
- Fox Crime/HD

- FOX/HD
- Italia 1
- La 7
- Mediaset
- MTV Italia
- RAI
- RaiPlay
- Rai 1
- Rai 2
- Rai 3
- Rete 4
- Sky Italia

Opinion makers

- BlogItalia
- Blog di Beppe Grillo
- Luca De Biase
- FiNex
- Nazione Indiana

2. Organisations

2.1 Trade Unions

Journalists have their own union, *Federazione Nazionale Stampa Italiana* (National Federation of Italian Print Press – FNSI) that, unlike the workings of other industrial and service sectors, gathers together journalists from all political affiliations. RAI journalists as well have their own union, *Unione Sindacale Giornalisti RAI* (Trade Union of RAI Journalists – USIGRAI), which also encourages participation from all political affiliations. Publishers, on the other hand, are represented via the FIEG. For their part, each of these organisations play a powerful role within the Italian public sphere, and often wield significant influence over the decision making process.

2.2 Journalist Associations

All Italian journalists are required to become members of the *Ordine dei Giornalisti* by passing a professional exam. This requirement, established by law in 1963, is unique to the Italian media landscape, and only exists in a small number of other countries. In principle, the *Ordine dei Giornalisti* is in charge of maintaining professional recruitment and ethical standards, but deep seeded political affiliations among journalists have limited its effectiveness in this latter regard. Instead, the *Ordine dei Giornalisti* has mainly focused on defending specific workplace privileges, like healthcare and pensions.

The *Ordine dei Giornalisti* classifies Italian journalists into three main categories: *Professionisti* (professional journalists), those who are regularly hired by a news outlet and who have passed the professional exam; *Pubblicisti* (freelance journalists), those who do not have a regular position within a news organisation; *Praticanti* (trainees), those who have a temporary position within a news outlet or are attending journalism school and yet to take the professional exam.

In addition to the *Ordine dei Giornalisti*, there are a number of other professional organisations for specific specialisations. For example, *Associazione della Stampa Parlamentare* (Association of Parliamentary Press) gathers political journalists covering parliamentary proceedings. This association regulates access to the seats of both Houses in the Italian Parliament, and therefore it has a direct impact on the relationship between news media and politicians.

2.3 News Agencies

The main Italian news agency is *ANSA*, a cooperative owned by Italy's major national newspapers and economically supported by public funds. It was established in 1946, at the end of the Second World War, after transitioning away from its position as the official news agency of the Fascist regime. Today, *ANSA* is renowned for its neutral approach to news and is even considered the most legitimate source of Italian news internationally. Several other agencies exist as well, such as *AdnKronos*, *AGA*, *AGI*, *Radiocor*, and *Askanews*, and each supply news in a plurality of formats.

On the web, there are many sites providing services to news organizations. Several of these news agencies have a mixed character; on one hand, they can be very politically oriented services, while on the other, they often mix together entertainment, gossip and news. *Dagospia* is a clear example of this overlap between factual news and gossip.

2.4 Audience measurement organisations

Auditel is the primary organisation in charge of television audience measurement. It was established in 1984. *Auditel*'s shareholders include RAI, *Mediaset* (the Berlusconi media corporation), and *Utenti Pubblicità Associati* (*Association of Advertising Users* – UPA), an association of companies with investments in advertisement. A small number of shares are also owned by FIEG. Auditel measures the number of televiewers and their choices through a devise (the Meter) placed on the television screen of 15,000 Italian families. It is important to note that Auditel data often provokes very harsh public debates about its reliability.

The diffusion of Italian print press is measured by the ADS, while the actual readership numbers are measured through a biannual survey conducted by Audipress, another company owned by FIEG and UPA. Finally, Audiweb detects and distributes Italian internet audience data.

2.5 Sources

Newspapers

- **Corriere Della Sera**
- **Il Giornale**
- **il Manifesto**
- **Il Messaggero**
- **il Resto del Carlino**
- **Il Sole 24 Ore**
- **Italia Oggi**
- **La Gazzetta dello sport**
- **La Nazione**
- **la Repubblica**
- **la Stampa**
- **L'Avvenire**

- Leggo
- L'Espresso
- Libero
- L'Unità
- Panorama

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- Radio Capital
- Radio Deejay
- Radio Incontro
- Radio Italia
- Radio Radicale
- Radio 105
- RDS-Radio Dimensione Suono
- RTL

Televisions

- Canale 5
- Cairo Communication
- Disney Channel
- Discovery Italia
- Fox Crime/HD
- FOX/HD
- Italia 1
- La 7
- Mediaset
- MTV Italia
- RAI
- RaiPlay
- Rai 1

- [Rai 2]
- [Rai 3]
- [Rete 4]
- [Sky Italia]

Opinion makers

- [BlogItalia]
- [Blog di Beppe Grillo]
- [Luca De Biase]
- [FiNex]
- [Nazione Indiana]

3. Policies

3.1 Media legislation

As already stated, both the structure of the Italian mass media system and the performance of professional journalist are deeply shaped by the interventions of both the Italian Parliament and the Government. Through the years, the decisions of the judiciary, specifically of *Corte Costituzionale* (*Constitutional Court*) have been important as well. For example, a 1979 decision opened the market for commercial television entrants, and paved the way for the large and influential operations, like Berlusconi's Mediaset, that we see today.

Over the last three decades, Parliament and Government interventions have lacked a coherent approach, often influenced by the partisan considerations of the day. Tight links between politicians and media organisations, for their part, have also limited the ability for opposing entities to agree on a shared regulatory approach. The history of Silvio Berlusconi and his television investments is an important example of this longstanding overlap between the media and politics. Indeed, this particular conflict of interest has dramatically influenced Italian political history.

Despite these difficulties, there has been movement to enact communications legislation. Law No. 249/1997, for instance, reformed the audiovisual and telecommunications system, creating a new framework of broadcasting frequencies. It divided broadcasting frequencies between three public channels (*RAI1*, *RAI2*, *RAI3*) and eight national commercial networks, including the most important existing ones: *Canale 5*, *Italia 1*, *Rete 4* (all owned by Mediaset). About 800 small to medium-size independent private local television stations were also allocated spectrum.

Today, Law No.112/2004, also known as "Legge Gasparri", is the main regulatory instrument for television, print press and new media. This law was widely debated and sparked substantial public outcry, prompting the Italian President, Azeglio Ciampi, to intervene in the legislative process and send it back to the Chamber of Deputies and Senate for revision. The European Commission also activated a procedura di infrazione (infringement case No. 2005/2006) against Italy because the distribution of spectrum frequencies was argued to favour existing operators of analogue television services and limit the formation of a pluralistic market.

This law reflects the principal assumption: Digitalisation has allowed for a plurality of competitors, beyond the legacy media. Under what the law defines as *Integrated Communication System* (SIC), the emergence of new entrants in the print press, television, online newspaper, radio, cinema, and advertising industries, among others, are considered. Under this law, limits to property concentration are diluted among a large number of entities and, in this way, the entire Berlusconi media conglomerate is safeguarded.

There is also a part of the “Gasparri” law that relates to RAI. It establishes a new procedure for the appointment of board members through the Treasury Minister. The Minister is provided with suggestions from *Commissione Parlamentare di Vigilanza* and, as such, political parties may be able exert some control over RAI, which had been limited by previous rules.

3.2 Accountability systems

Italian media accountability systems are weak. Oversight and accountability systems can only work if there is a shared framework of values and of respected procedures and routines - but this is not the case in in Italy. Each news outlet has its own niche audience, with their own expectations for the quality and substance of content. The inability of *Ordine dei Giornalisti* to establish a shared regime of ethics reinforces the system’s weaknesses. A good example of these limitations is demonstrated by the Betulla case. Betulla was the nickname of a journalist who was employed by a newspaper whilst working undercover for the Italian secret service. Once this conflict of interest was brought to light, Betulla was expelled by the *Ordine dei Giornalisti*. However, following opposition to this decision, he was reinstated as an external collaborator by another newspaper.

3.3 Regulatory authorities

Law No. 249/1997 created an independent authority, AGCOM, to oversee the entire communications sector - print press, television, radio and new media. AGCOM is a collegial body of eight members, including a president (appointed by the both Presidents of Parliament), a council of eight members (elected by parliament), and two committees (one for networks and infrastructures, another for services and products). Again, Italy’s partisan media system is reflected in the composition of AGCOM members, which usually reflect the political make-up of Parliament.

The composition of another regulatory body, the *Commissione Parlamentare per l’Indirizzo e la Vigilanza sui Servizi Radiotelevisivi* (Parliamentary Committee for the Orientation and the Control over Broadcasting), follows similar patterns. This body is in charge of issuing orientations for RAI activities, as well as overseeing its control. The *Commissione Parlamentare di Vigilanza* proves to be particularly important during election campaigns, as it has the power to provide strict directions on how to cover the campaign, limiting the autonomous, editorial choices of journalists.

3.4 Sources

Laws, regulations and institutions

- **AGCOM**
- **Constitutional Court**
- **Ministry of Communications**

4. Education

4.1 Universities and schools

Since *Ordine dei Giornalisti* oversees professional certification, it also provides directions to journalism education institutions. The *Ordine dei Giornalisti* requires that students undergo two years of journalism school before taking the profession exam. At the time of writing, 12 institutions have been officially accredited to provide this education:

- Master Biennale di Giornalismo Università di Bari
- Master Biennale in Giornalismo dell'Università di Bologna
- Master Biennale di I livello in Giornalismo a Stampa, Radiotelevisivo e Multimediale Università Cattolica Sacro Cuore
- Master Biennale di I livello in Giornalismo Libera Università di Lingue e Comunicazione "IULM"
- Master Biennale della Scuola di Giornalismo Walter Tobagi dell'Università degli Studi di Milano
- Master Biennale di I livello in Giornalismo dell'Università Suor Orsola Benincasa di Napoli
- Centro Italiano di Studi Superiori per la Formazione e l'Aggiornamento in Giornalismo Radiotelevisivo
- Master Biennale in Giornalismo Università LUMSA
- Scuola Superiore di Giornalismo "Massimo Baldini" - Università LUISS
- Scuola di Giornalismo Post Laurea dell'Università di Salerno
- Master Biennale di Giornalismo Università di Torino
- Istituto per la Formazione al Giornalismo, Urbino

4.2 Professional development

Every year, professional journalists are supposed to attend a certain number of professional training classes. This norm was only established in 2013, and requires that each journalist achieve 60 credits in a three year period, with a minimum of 15 credits per year. At least 20 of these credits must be accrued from training on professional ethics issues.

A 2015 report from AGCOM found that in 2014 there were 28,972 professional journalists, 75,498 freelance journalists, and 1,291 trainees operating in Italy. Of the professional journalists, 58.9% were men, 41.1% women, and 61.7% were older than 40. The majority of professional journalists, at 34.4%, worked for print press dailies, while 15.5% worked for weeklies, 11.9% for local radio and television, 10.5% for RAI, 8.4% for private companies, 7.6% for public institutions, 5.8% for press agencies, and 5.7% for national radio and television services.

4.3 Sources

- **LUISS Guido Carli**
- **Università Cattolica del Sacro Cuore**
- **Università degli Studi di Bari**
- **Università degli Studi di Bologna**
- **Università degli Studi di Salerno**
- **Università degli Studi di Torino**
- **Università degli Studi di Urbino Carlo Bo**
- **Università di Comunicazione e Lingue**
- **Università di Roma LUMSA**

5. Conclusions

5.1 Conclusion

The Italian media landscape is distinguished by two main features. Firstly, print and television media have always overlapped with politics. Even today, in spite of the commercialisation process that took place in the 1980s, the level of political parallelism in the Italian media is notably high.

Secondly, the Italian system is dominated by television. Due to the print press's elitist nature, audiences tend to turn to television for mainstream reporting. Throughout the years, the dominant position of television has been further consolidated by its large share of advertising revenue, which limits the ability of the print press to invest in content. Similar trends can also be identified in the emergence of new media, which has been slowed by a reluctance to invest outside of traditional televisual media.

In spite of its limitations, the Italian media landscape appears very alive and able to feed a public sphere focused on problems of general interest, which it treats through the eyes of external pluralism.

5.2 References

- AGCOM (2015), *Indagine conoscitiva su informazione e internet in Italia. Modelli di* business*, consume e professioni*, Allegato A alla delibera n.146/15/CONS.
- AGCOM (2016), *Il consumo di informazione e la comunicazione politica in campagna elettorale*.
- AGCOM (2016), *Relazione annuale sull'attività svolta e sui programmemi di Lavoro*.
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