



CS2. Country case studies on critical junctures in the media transformation process in Four Domains of Potential ROs (2000–2020)

The aim of the second case study is to provide analysis of risks and opportunities concerning the diachronic changes in four domains defined by the project in the 21st century.

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SWEDEN

Critical Junctures in the media transformation process

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Executive Summary

The purpose of this paper is to discuss Swedish media developments between 2000 and 2020 in terms of critical junctures. This includes examination of media developments in relation to four defined domains (Legal and Ethical Regulation: Journalism; Media Usage Patterns, and Media User-Related Competencies). In this paper we ask how the Swedish developments within the four domains can be understood in terms of opportunities and risks connected to deliberate communication. In the Swedish case, what seems to be significant is the relative absence of clearly defined country-specific junctures. Mostly, we observe many small, incremental changes and gradual developments of risks.

Keywords: media development, Sweden, politics, media, journalism

1. Introduction

Sweden has approximately 10 million inhabitants and belongs to the group of Western countries that has often been referred to as mature democracies (Ford & Jennings, 2020). Universal suffrage was established in 1921, and a parliamentary system has been in function since then. Swedish democracy has been characterized by comparably high levels of voter turnout in elections, high degrees of public trust in political institutions and high levels of satisfaction among citizens with the way democracy works in the country (Oscarsson & Holmberg, 2016). Sweden ranks high in international comparisons of democracy and freedom of expression:

- *Freedom in the World 2021*: status “free” (Score: 100/100, stable since 2017).
- *Liberal Democracy Index 2021*: Sweden scores highly in the Top 10% bracket – ranked 2 of 183 countries (Varieties of Democracy Institute, 2021).
- *Freedom of Expression Index 2018*: ranked 10 of 183 countries, down from 7 in 2016 (Varieties of Democracy Institute, 2017, 2019).

1.1. Political context

Politics in Sweden has historically been remarkably stable with the same political parties in the parliament for a very long time, and a dominant role played by The Social Democratic Party. During the last few decades however, electoral volatility has increased significantly, and the party landscape has changed dramatically (Oscarsson & Holmberg, 2016; Hagevi, 2019; Bolin et al., 2022). The electoral successes of the right-wing populist Sweden Democrats has challenged

traditional political alliances, existing conflict dimensions and power blocs and has complicated the process of government formation (tab. 1).

Table 1. National Election results and voter turnout in Sweden 2000-2020 (percent)

Election year/ Political party	2002	2006	2010	2014	2018
Centre Party	6.2	7.9	6.6	6.1	8.6
Christian Democrats	9.1	6.6	5.6	4.6	6.3
Liberals	13.4	7.5	7.0	5.4	5.5
Green Party	4.6	5.2	7.3	6.9	4.4
Moderates	15.3	26.2	30.1	23.1	19.8
Social Democrats	39.9	35.0	30.7	31.0	28.3
Sweden Democrats	1.4	2.9	5.7	12.9	17.5
Left Party	8.4	5.8	5.6	5.7	8.0
Voter turnout	80.1	82.0	84.6	85.8	87.2
Parties forming government after election	Social Democrats	Moderates Centre Party Liberals Christian Democrats	Moderates Centre Party Liberals Christian Democrats	Social Democrats Green Party	Social Democrats Green Party

Source: Valmyndigheten, www.val.se

1.2 Economic context

Sweden has been a member of the European Union since 1995 but decided not to join the monetary union after a referendum on this topic in 2003. Sweden was hit by the financial crisis of 2008-2009 but not to the same extent as many other countries. Key economic indicators such as unemployment rates and inflation figures have remained quite stable during the last few decades. Economic growth, in terms of GNP per capita, has developed positively between 2000 and 2010, but slightly declined or increased modestly over the last ten years. Inequality in society, as measured by the Gini index, has increased during the analyzed period, confirming the existence of resources gaps among segments of the population (tab. 2).

Table 2. Basic economic data in Sweden 2000-2020

	2000	2005	2010	2015	2020
GNP/capita (\$)	29.625	43.437	52.869	51.545	51.926
Unemployment (%)	6.1	7.8	8.6	7.4	8.3
Inflation (%)	1.0	0.5	1.3	0.0	0.5
Gini-index	23.0	23.4	25.5	26.7	26.9

Sources: World Bank, SCB, www.countryeconomy.com

1.3. Social context

From a broader societal perspective, the most important change between 2000 and 2020 is probably the increased number of people of non-Swedish origin living in the country. As a result of comparably liberal immigration laws – at least until 2015 – the number of migrants arriving to Sweden increased significantly. In 2019, over 25 % of people living in Sweden were of foreign origin, meaning they were either born outside Sweden or both their parents were born in another country. Integration of migrants has generally speaking not been particularly successful. Social segregation and law and order are topics that have become more important on the political agenda (Bolin et al., 2022).

The outbreak of the Covid-19 pandemic in Spring 2020 initially led to international attention for Sweden as a country with a deviating approach, having no hard restrictions or lockdowns and instead relying on citizens' behavior (Jerneck, 2021). The voluntary-based strategy was questioned in the beginning as being too laid back, but in the long run Sweden did not perform worse than other countries regarding death tolls and people in need of intensive care.

Developments in Sweden between the years 2000 and 2020 indicate important contextual changes. But at the same time, contextual changes should not be exaggerated. Through an international perspective and comparison, recent transformations could be perceived as less dramatic. Distinct country-specific contextual critical junctures are therefore not so easy to pinpoint. Digitalization, the financial crisis and the Covid pandemic affected the Swedish society in several ways but can hardly be described as critical junctures, rather more as factors mainly slowing down or speeding up relatively steady transformation processes. Against this background, it is not easy to identify specific risks and opportunities for deliberative communication based on the contextual factors.

1.4. Assessment of monitoring capabilities

Monitoring the capabilities of the Swedish media system provides a wealth of data, often of acceptable quality, which allows for a deepened and full-fledged understanding of the Swedish media developments and transformations (see case study 1 of Sweden). It enables different actors in the Swedish society to foresee the media developments and to conduct deeper inquiries into certain aspects, be they market monitoring or social inquiries into the working conditions. In all four domains, there is a variety of reliable data sources from different sectors of society.

2. Risks and opportunities of legal and ethical regulation domain

2.1. Development of agency and change

It is difficult to define single critical junctures regarding legal and ethical regulations of the media sector in Sweden. National political institutions and existing legal arrangements seem to be resilient. For example, the implementation of GDPR in Sweden in 2018 has not changed media and journalistic working conditions dramatically as constitutional acts such as the Freedom of the Press Act and the Fundamental Law on Freedom of Expression take precedence over the new regulation. The state is still the most important actor in the domain of legal and ethical regulation.

Fundamental rights of freedom of expression and freedom of information have remained strong during the last two decades, 2000–2020. At the same time, there are some indications of growing problems with journalist's easy access to public documents and decreasing respect for the protection of sources in public administration. Public authorities are generally aware of laws and regulations but also meet demands for increased efficiency that sometimes challenge principles of openness and transparency. Privatization and increased market competition in several areas of society have contributed to less transparency in the public sector.

State actions influence media activities mainly on the system level. Press subsidies and strong public service media have been cornerstones in Sweden's media policy during the last two decades (Nord & Ots, 2019). They are both regulated in media laws and charters and supported by a political majority. At the same time, the views on media policy principles have been influenced by media technology developments. Over time, press subsidies have become less

controversial, and more marginalized in media politics (Ohlsson 2014; Ots 2009), while public service media have become more controversial from ideological perspectives.

The possible implications for deliberative communication in the legal and ethical domain could be perceived from different perspectives. Existing regulatory frameworks have proved to be resilient and continue to provide good opportunities for true and genuine deliberation in the Swedish society. At the same time, the lack of regulation in some areas such as disinformation and media ownership transparency certainly entail risks for the future development of deliberative communication.

2.2. Freedom of expression

Sweden was the first country in the world to include a Freedom of the Press Act in its constitution, as early as 1766. Since then, freedom of expression and freedom of information have been embedded in the Swedish Constitution, which provides stronger protection than common law as the Act can only be changed by two separate parliamentary decisions with a general election in between.

The democratic rationale for free speech is central to the Swedish Constitution, which states that democratic conditions are based on freedom of expression and every citizen's right to express their messages, opinions and views in speech, text, or visual forms (Kenyon et al., 2017). The Constitution states that freedom of expression may be limited on explicit issues regarding national security, public order, privacy and individual integrity and prevention of criminal acts (RF 1974: 152). However, there are several exceptions to these rules, including slander and aggression against minorities. Defamation laws do not exist, and Sweden does not have any laws against blasphemy, for example.

Freedom of expression and free journalistic speech are not limited due to implementation of data protection laws. When it comes to the GDPR and regulations on net neutrality, GDPR has been implemented since May 25, 2018. In Sweden, it is directly applicable as a law with the explicit provision that the Freedom of The Press Act (SFS, No. 105/1949) and the Freedom of Expression Law (SFS, No. 1469/1991) take precedence over the GDPR. This means that both constitutionally protected and unprotected media will be able to use personal data in the same way as before the implementation of the new Data Protection Act.

Finally, it is worth to note that there is no law that regulates disinformation but Sweden together with other EU countries are currently discussing measures to combat disinformation. Newsrooms are generally aware of the risks of misinformation and information coming from social media platforms and regularly discuss these problems. However, voluminous, and continuous information flows, time pressure, and limited editorial resources, make efficient checking of doubtful information difficult. While daily fact-checking procedures are not always working well, leading news media have been successful with single fact-checking initiatives (Kalsnes et al., 2021; Nord & von Krogh, 2021).

2.3. Freedom of information

Freedom of information is guaranteed in The Freedom of Information Act, that was originally established as early as 1766 (TF 1949: 105). In the early 1990s the Act was supplemented by the Freedom of Speech Act that covered not only printed media but also broadcast and digital media (YGL 1991: 1469). In comparative terms, media speech in Sweden is relatively free of legal restrictions (Bull, 2006: 335–340).

The Swedish jurisdiction is more detailed than in many other countries and includes important aspects such as the degree to which the approach differentiates between media and non-media

speech, strong protection for media sources, and rights of access to information held by public authorities (Kenyon et al., 2017).

The overarching principle of general access to public documents is an important subsection of the Freedom of the Press Act (SFS, No. 105/1949 [1]). The principle is rigorously implemented in practice. Access can be restricted by law, but the principle is extensive. However, during the past decades, some journalists claim that secrecy clauses have become increasingly common in legislation. The reasons for this are said to be privacy concerns due to the openness of digital documentation, protection of personal integrity, and protection of commercial and state interests.

Source protection is an important subsection of the Freedom of Information Act and stipulates that a source that wants to remain anonymous cannot be revealed and it forbids authorities from searching for sources who have given secret material to media for publication purposes. The law also provides protection to whistle-blowers. Sweden follows the European Convention for the Protection of Human Rights and Fundamental Freedoms (SFS, No. 1219/1994[3]).

There are no specific regulations on transparency for media companies in Sweden. Competition law has never been applied to the media sector in Sweden, so the concept of "excessively high" ownership concentration has never been assessed. Swedish law does not contain specific provisions requiring the disclosure of ownership details in the Swedish news media sector. Foreign ownership of Swedish media is at a low level and largely limited to Norwegian owners – e.g. Schibsted, A-media and Polaris (Facht & Olsson, 2021).

Instead, all companies are included and constrained to follow the general regulations in the Swedish Law of Financial Relations, the so-called Transparency Act (SFS, No. 590/2005) [8] which requires companies to be transparent about ownership structures, and the Competition Act (SFS, No. 579/2008) [9], and which regulates ownership concentration. There is a risk of treating media companies in the same way as any other company, and it may have a negative impact on Swedish media plurality in the long term. The level of news media concentration in Sweden is regulated by the Radio and Television Act (SFS, No. 696/2010, Ch. 4, 11§, 15§ and Ch. 13, 27§-28§) and by the broadcasting licenses.

2.4. Accountability system

2.4.1. Development and agency of change

The state is an influential actor in an indirect way in the accountability domain, accepting traditionally established corporative principles of self-regulation if they seem to work well. EU legislation is implemented but the state level is more important. Media organizations and related non-statutory bodies are gradually adjusting to changing media developments and the structural transformation of the media system.

It is probably correct to claim that the dramatic media developments (digitalization, globalization, commercialization) in the period 2000–2020 have been the driving force behind new initiatives and policy proposals. The structural transformations of the media landscape have raised concerns about the robustness of existing legal and ethical frameworks. There is certainly a general awareness among policymakers about the need to revise and adopt regulations to meet new demands. So far, this awareness has not resulted in distinctive turning points in media and politics-relations but rather in step-by-step adjustments following recent media developments.

2.4.2. Existing media accountability instruments and evaluations of their effectiveness

Sweden is characterized by a media system with institutionalised self-regulation (Hallin & Mancini, 2004). Systems for non-statutory media councils have existed for a long time. The Swedish Press Council, founded in 1916, was part of this corporatist structure. The council makes decisions concerning media ethics issues in public and publishes regular reports with considerations and explanations regarding its policy positions (von Krogh, 2016).

In 1969 a national Press Ombudsman was added to support the system and protect the interests of the public. In 2020, both institutions were replaced by The Media Council and the Media Ombudsman. Simultaneously, broadcast media were included in the self-regulation system alongside print and digital publications. The system is well recognized by news media organizations and has a general impact on journalistic practices (Nord & von Krogh, 2021).

The self-regulation system in Sweden is frequently under debate but has hitherto shown its strength and is generally respected by media companies. The system can't be described as completely decisive for daily newsroom work, but it is occasionally used when principles for news selection and publishing criteria are discussed. The self-regulation system was critically tested in 2017 when the threshold for publishing rumours and allegations of sexual harassment was lowered during the #metoo movement. 38 complaints were handled by The Media Council and 24 of them were approved, all criticising newsrooms for lack of reporting and substantiation.

A code of ethics for leading national news media has existed for more than 100 years and has been regularly discussed and updated. The code of ethics is issued by the Media Administration Agency, which is an umbrella organization for the main publishers' associations and the journalists' union. Codes of ethics are well established in the newsrooms and often referred to in the debate on media performance. Sweden also has many specialised journalists' associations for different purposes, such as investigative journalism, environmental journalism, science reporting, and so forth, that discuss ethical issues within these sectors (Nord & von Krogh, 2021).

Many awards such as "Guldspaden", "Stora Journalistpriset" etc, celebrate investigative and "proper" journalism practice. These topics are also discussed at the Publishers' Club's public debates and on and other platforms such as in "The Media", a weekly radio show about journalism practice on public service radio. Online transparency tools exist to some extent but are not widely used. There are also a few other institutionalized media-critical initiatives such as Nordicom and The Institute for Media Studies but their impact on journalistic practices is difficult to assess. Web based media criticism by civil society is not very prominent.

3. Risks and opportunities of journalism domain

3.1. Development and agency of change

Changing structural conditions on Swedish media markets entails risks of decreased diversity, both in terms of media content and media ownership. The lack of news media presence in several rural and suburban areas remains a problem as it generates an unequal supply of information about what is going on in society (Nygren & Tenor, 2020). Other risks involve the funding of journalism. Willingness to pay for news is still comparably high in Sweden (Newman et al. 2021) but the increased supply of non-journalistic sources of information for free is certainly a risk. So is also the growing level of harassments and threats to journalists in their daily work, particularly from extreme right-wing activists (Wadbring & Mølster, 2015).

What could be understood as a critical juncture is the entrance of social media platforms, or rather the public breakthrough of such platforms in society (Facebook in particular, but also

Twitter), which could be dated to the period from 2010 and onwards. In a more general sense, these required new types of competencies to be implemented in the very identification and development of news, of how to lead traffic from social media sites to the media platforms in an environment with an ever-more metric and algorithmic rationale. Here, clickbait hunting has been assumed to generate the kind of competencies that primarily pave the way for what Lewis (2017) refer to as ‘quick and dirty news’ and thus an unsustainable media development (cf. Berglez et al. 2017).

From another perspective, professional values in journalism still stand strong and have unconditional support from important actors in society, as well as from a huge majority of politicians from different ideological camps. It is also interesting to note an increased interest in, and support for, investigative journalism in national news media. Despite structural market changes, the news media sector still can provide citizens with high-quality journalism. In fact, some media mergers in economically weak regional markets may have contributed to higher journalistic quality as they have replaced a previously ruinous competition in the market.

A general analysis of the journalism domain in Sweden confirms that it is difficult to define decisive critical junctures as the development of journalistic conditions seems to be more of a gradual transformation and adaption to the overall changing media ecology. A media market under increased economic pressure certainly entails potential risks for deliberative communication as the number of arenas available for public debate is reduced. Growing competition and commercialization of the media sector probably also encourages production of content that is less deliberative. The main actors behind these processes include global dominant digital players as well as commercial media-related business, which shape new media market conditions in which journalism is of minor importance.

Market-driven changes in journalistic production conditions may on the other hand also – at least in theory – provide new deliberative opportunities if more rational and efficient newsroom routines due to digitalization saves money for more costly forms of watchdog journalism necessary to have powerholders accountable to the public. Accordingly, media mergers and concentration of newsroom resources can – under specific circumstances – result in more efficient investigative journalism if overall better working conditions are at hand.

Considering political actors’ behavior, the imposed limitations on public service media operations and efforts to undermine their autonomy – proposed by a strengthened right-wing political alliance – can be perceived as a risk from the same perspective. Still, the overall legal support for strong news media from most actors throughout the analyzed period must be considered a basic democratic strength.

3.2. Market conditions

The supply of news journalism all over the country decreased during the analyzed period. The number of local municipalities in Sweden without a local media presence increased, as did media ownership concentration given that 57 % of all news departments belonged to one of the five biggest media owners in 2020 (Wallentin, 2021). Recent years have also seen unexpected media mergers, with the biggest private media player, Bonnier, re-entering the local newspaper market in 2019 after nine years of absence, buying 28 local newspaper titles. One of the biggest problems for commercial news media has been the decline of advertising revenues. During the period 2008–2020, advertising revenues to news media declined by almost 60 % with the biggest drop in the last year to levels not seen since the financial crisis of 2008/2009 (Lidbom, 2021).

Consequently, the economic situation has been increasingly strained for journalism in Sweden. The effects have not been abrupt but gradual (e.g. Lindberg, 2021). Largely due to new digital

habits, newspapers had difficulty recruiting new subscribers to their print editions, and advertising revenue was lost to new competitors. Willingness to pay for online content was low and digital advertising revenues remained insufficient to finance journalism (Ots, 2014).

As a result, newspapers were selling off properties and streamlining operations to cut costs. At the same time substantial investments were required from media organizations who wanted to adapt their operations to compete on digital platforms. As a result, various acquisitions took place whereby newspapers could, through joint ownership, collaboration, and coordination, create scale efficiencies and share functions like photos, sports news, web development and printing across several newspapers (Ots 2012; Alström & Nord, 2000; 2003). The process of ownership concentration has fundamentally transformed the power distribution on the newspaper market but has also been deemed necessary for the survival of a local provincial press. As a result, the market for journalism is today dominated by a handful of large chains, in which foreign (Norwegian) ownership has also emerged (Facht & Olsson, 2021).

The previously existing oligopoly situation on media markets remains in place. On the newspapers market, there are three dominant players: Bonnier (Dagens Nyheter, Expressen, Sydsvenskan, Bonnier News Local), Schibsted (Aftonbladet, Svenska Dagbladet), and Polaris (Göteborgs-Posten and regional newspapers). Bonnier is the biggest owner group, and its business interests have expanded significantly in other parts of the country outside Stockholm. The national radio market is traditionally dominated by public service radio, although a few national private radio stations have been established in recent years. The national television market has four dominant players: Sveriges Television, SVT (public service); Telia (TV4 AB); Nent (Nordic Entertainment Group); and Discovery. They control a major part of the television market. In the last few years, the downward economic trend for newspapers seems to have been broken (Lindberg, 2021). Willingness to pay for online journalism has gone up; digital user maturity, the fake-news debate, and decreased trust in digital platforms after the Cambridge Analytica scandal may have affected this development. Certainly, the Covid pandemic has led to a very strong boost in digital readership. Studies from 2020 also indicated that younger segments of the audience increased their use of legacy media platforms (Nygren, 2020). While the industry is still shrinking in terms of total revenue, the profitability is growing in the industry (Lindberg, 2021). This positive trend is particularly prominent among the large and digitalized corporations that were able to use the Covid crisis to their advantage. For Sweden's largest morning daily, Dagens Nyheter, 2020 was their most profitable year ever, and in 2021 the result improved further.

3.3. Public service media

Public service media have enjoyed a strong legal protection based on the arm's length-principle and clear distance between politics and media operations regarding financing model, organization, and company structure. However, recent decades of increased media digitalization have raised questions about public service media operations on the Internet and competition conditions in relation to commercial media (Nord & Truedson, 2021). Centre-right politicians and the private media lobby have strongly argued for stricter regulations for public service media content on digital platforms. In 2009, Sweden followed many other EU countries and introduced 'Public Value Tests', assessing public value and market implications of new PSM services (Wormbs, 2011). The Swedish model of public service value tests have generally been perceived as relatively 'soft' version and until today no announcements of new services have been made to the Swedish Press and Broadcasting Authority, MPRT.

In 2019, the previous license fee model was abolished and replaced by a taxation system making public service media slightly less independent and potentially more sensitive to political intentions (SOU 2017: 79). The license model gradually became more obsolete; increasing numbers

of people refused to pay the license, households paid the same amount regardless of income and the abundance of digital and mobile devices made it less rational to base the fee on holding a TV set in your home or not. The new financing model is not directly linked to the annual state budget but based on a percentage of people's income and administrated by the Tax Authority. Still, a political majority can change the model of financing from one year to another.

Finally, a public inquiry on revision of the Freedom of Information Act concluded that there was no broad political majority behind the proposal to guarantee conditions of autonomy for public service media in the Swedish constitution in order to avoid overly dramatic changes to public service media conditions (SOU 2020:45).

3.4. Production conditions

Digitalization processes affect working conditions. Robot journalism is commonplace today, with many newspapers using robots or sourcing robot-generated articles externally, for instance to create local content from public data (Clerwall, 2014). A more recent effect of digitalization is the new focus on content as the primary source of income, rather than advertising. Journalists see the opportunities of more digitally mature audiences that are willing to pay for very niched content. While this looks promising for future product innovation in the field of journalism, including for instance newsletters and journalism platforms like Substack, their real impact on the field remains to be seen.

3.5. Agency of journalists

In total there are 14 300 journalists (2021) who are members of the Swedish Journalist Union (www.sjf.se). The number has decreased gradually over the last few years, and although the union claims to organize around 90 % of all journalists, there are reasons to believe that the number of un-organized journalists has increased. This is particularly true of younger journalists and journalists working outside the legacy media sector. Roughly speaking, the number of journalists in relative terms in Sweden is thus around 1,5 journalists per 1000 inhabitants.

3.6. Journalist's working conditions

Sweden, like many other countries, also reports increasing cases of journalists being threatened or harassed (SJF/JMG, 2019). Leading politicians have declared that such actions should be perceived as threats to democracy and free media. Significant steps to protect journalists have also been taken by news media companies, who provide full and unlimited legal support for their journalists. Hatred and threats against media workers also existed before the era of the Internet, social media, and the expansion of the platformization of communication. However, society's digitalization brought this phenomenon to the next level. Much of the hatred and threats against journalists are thus linked to social media use, with lagging legislation and the rather passive approach of tech companies such as Facebook and Twitter an apparent problem.

3.7. Intra-organizational diversity of human resources; gender issues

The latest survey among Swedish journalists covering the period 2007–2011 showed an equal representation (50–50 %) of men and women working as journalists. A huge majority of journalists (83 %) had a university-level of education. Employment conditions were good as 75 % had a permanent position. 15 % said they were working on a freelance basis and the remaining share worked in temporary positions, except for 2 % who were unemployed for the moment (Asp, 2012).

3.8. Journalistic competences, education, and training

The first journalism school in Sweden was established in 1947 (Poppius) and the first formal journalism programs were launched in 1959 at universities. The first professor of journalism was appointed in 1990 at Stockholm University. In 2018, journalism programs were offered at 11 universities, 11 folk high schools, and two independent institutions. Quality of education is regularly assessed by the ministry of higher education using expert panel evaluations, and the standard of journalism training in the country is generally perceived to be good.

When it comes to competencies among journalists and media workers in general, what seems to have been a common thread throughout the two analysed decades (2000-2020) is increasing pressure to develop different kinds of skills in a work environment becoming embedded in the “high-speed society” (Rosa & Scheurerman, 2010). On the one hand, we can assume that journalists have been facing the pressure to increase their skills in different respects. Journalism has been a natural part of modern society, in which modernization has very much been characterized by constant development of knowledge (Giddens, 1990).

On the other hand, one could claim that the last two decades have indicated an intensification of this process, to a large extent due to the overall “internetization” and digitalization of society. In this respect, Sweden has been considered a global leader in multiple ways, although it could be critically debated whether the media sector has always been part of this Swedish process (i.e. as a leading actor) or if it has primarily been ‘reactive’, seeking to keep the same pace as other actors in Swedish society.

A crucial competence has thus been *digital/multi-media skills*, i.e. the ability to produce content that is integrated into digital society and intended for digital audiences. This has served as an opportunity, for example in developing and updating the media organization in a direction that is in line with the overall development of society (digitalization), but also entailing a of not being able to fulfil digitalization goals and thereby being associated with tomorrow’s society rather than the future. In terms of a risk, this is also connected to the issue of worsening working conditions and increasing pressure among journalists to cope with and develop multiple skills (Nygren 2012).

Other important aspects involve journalism’s epistemic competence to cover an ever-more complex society and world (i.e. globalization), associated with the new world order after 9/11 (Nohrstedt & Ottosen 2001, 2004); the anti-globalization movement/protests, the financial crisis in 2008; climate change, EU, etc. During this entire period of two decades, an increase in information involving transnational news (EU) or about local-global complexities has, despite its increasing importance due to Sweden’s integration in the world, not been clearly empirically visible in research (Berglez 2011).

The business crisis of the private media sector instead seems to have led to an emphasis on domestic news. The decline of traditional foreign correspondence might have been partly compensated by a gradual hybridisation of domestic and foreign news, in which ever-more international actors, events, and outlooks become embedded in domestic news instead (see Berglez 2013).

3.9. Professional culture and role perception

According to national surveys among Swedish journalists, a huge majority strongly endorse the professional goals of independent scrutiny of powerholders, gathering and distributing information to citizens to inform decisions in a democracy and giving a voice to the voiceless (Asp, 2012). These figures are high from a comparative perspective (Strömbäck et al., 2012). Leading national news media in Sweden can be considered highly professional and with sufficient and

sustainable resources to maintain basic democratic functions, including independent investigative journalism. Interviews with editors of leading media organisations in a study from 2019 led to the unanimous conclusion that investigative reporting is first on their list of priorities (Nord & von Krogh, 2021).

4. Risks and opportunities of media usage domain

4.1. Development and agency of change

As within the journalism domain, transformations in media usage patterns are mainly caused by global and transnational conglomerates providing media consumers with new platforms and devices for use. Media habits are also to a considerable extent dependent on the available output of media content offered. However, media usage is still also dependent on media consumers' rational choice of media diets, depending on individual preferences for information, entertainment etc.

4.2. Agency of media-users and analysts

Current developments in media usage patterns in Sweden indicate a process of fragmentation among audiences that is unfavourable for deliberative communication. Mutual understanding and equal conditions for participation for deliberative processes are more difficult to achieve if people's knowledge and experiences vary too much due to individual consumption patterns in the high-choice media environment (cf. Prior, 2007).

At the same time, it should be noted that increasing gaps in news consumption patterns are not always a democratic problem. All kinds of media available to citizens offer different mixtures of informative and non-informative content, as well as varying options for participation and deliberation. Traditional media are often understood in a democratic context but have no monopoly on democratic functions. As some studies have shown new media outlets may contribute to democracy by engaging citizens who were previously less interested in politics (Nord & Strömbäck, 2018). But if already well-informed and less well-informed groups in society continue to deviate in terms of news media consumption, there is a risk that increasing knowledge gaps and selective exposure trends will make democracies less sustainable and more vulnerable.

4.3. Access to news and other media content

Swedish people can be described as an increasingly digitized people. Virtually everyone uses the Internet, from the very young to retirees. This usage has been measured regularly since 1995, and online habits have been examined by both public research institutes (SOM, Nordicom and the World Internet Institute) and commercial research institutes (TNS-SIFO and Novus). What is apparent is that the use of social media has progressed in a short time span from being part of our private sphere to becoming a natural part of the public conversation (IIE, 2018). The use of broadband via fibre at home is increasing, and more than half of households nowadays are connected to the Internet via fibre. However, the most common way of using the Internet daily is via mobile phone: 100 % of young Swedish people, aged between 16 and 25, use smartphones.

The most significant media usage trends in Sweden 2000–2020 are related to this digital transformation and the introduction of a high-choice media environment. The migration from traditional to digital media is happening at a rapid pace. Digital media innovations are quickly adopted by large groups of media users when they have barely been introduced. Some important

milestones to be mentioned are the introduction of the iPhone in 2007 and the iPad in 2010 as well as the breakthrough of Facebook in 2006 and Netflix in 2012. These events could easily be referred to as ‘game changers’: global media trends influencing media usage patterns in single countries (Ohlsson, 2016).

In 2019, 92 % of Swedes had a smartphone and 70 % had a tablet (The Internet Foundation, 2019). Online and mobile platforms have, to a large extent, supplemented and replaced print and broadcast media in a country where broadband penetration is 97 % today and expected to be 100 % by 2025. 70 % of the Swedish population now access news via smartphones, and 30 % pay for online news (Newman et al., 2021). The digital media infrastructure encourages more fragmented media consumption patterns, with social media playing a more important role than ever, also as a news provider, and especially for younger generations. Although news media is available all over Sweden, it tends to reach people to a lesser extent than before.

4.4. Relevance of news media

At the end of the analyzed period, media usage patterns in Sweden had changed – especially when older and younger segments of the population were compared. In 2020, 80 % of the entire population consumed legacy media (both private and public) on any platform every day. 43 % consumed news by social media, and in the younger category – under 25 years old – social media dominated as a news source (Ohlsson, 2021).

Despite these changes displayed in consumer patterns, viewers tend to stay with traditional media — newspapers and the public broadcasters — when it comes to news. The battles over movies, sport and fiction seems largely to have been lost to commercial media, but public service radio and TV have maintained their position as trustworthy and reliable news providers. In the broadcast market, there are almost no other providers of news, except for commercial channel TV4 (Carlsson & Facht 2010).

There are great differences in generational media use, as young people (aged 16–29) have social media as their main news source. 69 % in this age category regularly consume news on social media platforms, compared with 16 % of social media users among senior citizens. Even if there have always been age-based differences in news consumption, the contemporary generational digital divide based on social media use is remarkable (Andersson, 2019).

The *Reuters Institute Digital News Report* also indicates that Swedish peoples’ general use of specific media as a news source is falling. Traditional media, such as print newspapers, saw a decline between 2016 and 2019, going from 43 % of the population saying they use newspapers as a news source to 30 %. During the same period, television figures have dropped from 72% to 67 % and the trend is the same on social media, where numbers declined from 56 % in 2016 to 46 per cent in 2019 (Newman et al., 2021).

News is consumed regularly by segments of the population, but overall news consumption figures are declining. As shown by data from *Reuters Institute Digital News Report*, 22% of Swedish media consumers consider themselves as ‘news avoiders’ and actively stay away from news either often or sometimes (Newman et al., 2021).

The larger gaps in news consumption have developed step by step, but the change is profound when comparing the years of 2000 and 2020. Gaps in news consumption have often been perceived as a fundamental challenge for democracy in terms of people’s political knowledge, participation and interest (Prior, 2007; Aalberg & Curran, 2012). The main democratic concern is that narrowing media use to mainly online and social media could have negative effects such as filtering crucial information by creating so called ‘echo chambers’ or ‘filter bubbles’, which have a severe impact on the quality of the public discourse and may contribute to fragmentation

by pushing communities apart or creating and increasing information disparities (Bonfadelli et al., 2022).

4.5. Trust in media

Faced with a wider range of different media formats than ever, the Swedish audience also perceives media performances differently. Trust in news media has been relatively unchanged during recent years. About half the population says that they trust news media in general and 56 % of the Swedish citizens declare that they trust the news media they consume. Over time, trust in news media has increased from 40 % in 2016 to 50 % four years later. The most trusted news media brands are the public service media companies Swedish Television, SVT (76 %) and Swedish Radio, SR (75 %) followed by local and regional newspapers (73 %) (Newman et al. 2022).

These results are in line with national surveys showing that public service television and radio and the commercial TV station TV 4 are the most trusted media in Sweden. Regional newspapers and daily papers maintain a middling position in this respect, while tabloid newspapers and private radio stations are not considered to be especially trustworthy among Swedish citizens.

5. Risks and opportunities of media related competencies domain

5.1. Development and agency of change

Most activities are concentrated on young people, children, and adolescents. In their rich database, consisting of recurrently produced reports (Statens Medieråd 2005; 2008; 2019a, 2019b), mainly involving surveys, we cannot observe any drastic critical junctures. Instead, one can observe several gradually developing opportunities and risks in relation to the values of deliverable communication and deliverable democracy.

5.2. Overview of media related competencies in policy documents

In Sweden, *Nordicom*, serves as an important producer of data and knowledge about the underlying structural, e.g. socio-economic or generational conditions for media usage (see above) and development of media competencies. This is done through the annual data collection of *MedieSverige* (www.nordicom.gu.se/sv/statistik-fakta/mediestatistik), which might include, for example, the extent of different kinds of media and/or devices per household. Nordicom as such has been rather active in highlighting the topic of media competencies through the various contributions of Prof. Ulla Carlsson.

Furthermore, The Swedish Media Council has a central role in monitoring and analyzing the development of Swedish citizens' media competencies (often in combination with a focus on their media use).

5.3. Information about the media literacy programs in formal and/or in non-formal education

Media literacy is obligatory in the civics curriculum. Since there are no media literacy programs *per se* in the Swedish context, the answer to this question is not straightforward. In addition,

since media literacy is only one of six core aspects in civics, it may be dealt with differently by individual teachers and/or schools, but there are books examining teacher's perspectives.³²¹

5.4. Actors and agents of media related competencies: risks and opportunities

During these 20 years, the media ecology surrounding individuals has developed tremendously. To begin with, this has generated opportunities such as the capacity to interact through many different channels and devices (Madianou & Miller 2013), and often to find the kind of communication that suits one's preferences and needs, thus enabling different kinds of competencies to develop. Risks are instead associated with a digital divide in terms of different groups' contrasting media literacy, but also a certain vulnerability in relation to the massive amount of information and communication to which people becoming exposed in everyday life. They have to treat, interpret, share, etc. different kinds of media information, often with blurring lines between professional media/journalism and other types of media content. Source criticism has therefore become an ever-more important competence, both among citizens in general and among children. In the latter case, media literacy education has become integrated into the Swedish school system.

5.5. Assessment of media related competencies among citizens

The *Swedish Media Council (Statens Medieråd)*, coordinates the national effort for greater media and information literacy in the general population³²². The Council annually produces reports about these issues, available on its website (www.statensmedierad.se), where the focus is on the younger population. The idea is there is to contribute with knowledge about how to prepare children and adolescents for citizenship and thus contribute to deliberative communication and ultimately deliberative democracy.

6. Analytical conclusions

The overall impression of developments in the four domains analysed in this paper suggest that *gradual transformations have been more prevalent than critical junctures*. Consequently, the distinctive role of different actors in terms of changing processes is not particularly easy to detect as these processes have commonly been embedded in negotiations, bargaining and compromises between single actors, which is typical for a democratic corporatist media system. Furthermore, actors' potential influence in these processes needs to be related to overarching structural conditions such as digitalization, globalization, marketization etc.

We can speculate whether the dominance of gradual transformations in media developments has to do with the overall Swedish political, cultural, and economic context, which also, seems to be characterized by gradual transformations instead of very drastic changes/events happening 'overnight'. In some sense, however, we need to be cautious about taking the premise of gradual transformation for granted. We might simply miss important data, which is easy in the case of Sweden, which is so rich of knowledge that might point in different direction. Another reason is that that the owl of Minerva flies at dusk, i.e. in some cases it is not until long time afterwards that one can understand which event and/or actor was crucial for the development.

In the *legal domain*, political actors on the national level seem to be of greatest importance for understanding developments in risks and opportunities. During the period of analysis, 2000–

³²¹ https://gupea.ub.gu.se/bitstream/handle/2077/32107/gupea_2077_32107_3.pdf?sequence=3

³²² <https://www.statensmedierad.se/ovrigt/about-the-swedish-media-council> (retrieved 2022-02-11)

2020, Swedish governments of diverging political colours have imposed new regulations on the media sector that could be perceived as risks to media freedom: the implementation of public value tests, the replacement of the licence-fee system by taxation system and reluctance to protect public service media in the constitution. The political steps taken are based both on adaptations to overall digital media developments, EU directives and increasing ideological polarization in some distinctive media policy areas.

However, the role of politics is complex. In other media policy areas, political confrontation has declined and common support behind more efficient media subsidies has emerged. The ongoing revisions of the existing subsidy systems certainly entails better opportunities to offer news media services in different parts of the country and reach more people. The role of national political actors in regulation processes is thus ambiguous; they are basically reactive; they respond to external developments and their corresponding actions are resulting in laws and regulations that include both risks and opportunities for deliberative communication.

At the organizational level, media companies must naturally comply with the regulatory framework, but they do also sometimes act as lobbyists in media policy processes and defend their own self-interests. During the last decades, in particular private media conglomerates have been involved in public campaigns aimed at restricting public service media activities online and they have also initiated their own inquiry on the topic (The so-called Public Service Commission). At the same time, public service media companies have on their side provided lawmakers with several arguments for strengthening public media positions.

Even if both private and public media organizations have been relatively successful in incorporating their arguments into the public debate, they cannot be considered particularly important actors who produce risks and opportunities in this area. The most important contribution of media companies here is likely mostly related to the self-regulation accountability mechanisms and a well-functioning system aimed at maintaining trust and credibility in news media.

At the group and individual level, prospects for influencing legal processes are even more limited. Specific interest groups such as the journalists' trade union and publishers' associations often express views on media regulations but cannot be perceived as important or key actors. Outside the sectors of media and politics, public interest in media regulatory frameworks is limited and seldom more generally discussed in public fora. However, the increasing polarization regarding public service media has resulted in more emotional and confrontational debates between groups and individual, particularly on social media platforms. So far, these debates have generally not found their ways into the decisive political and legislator processes.

In the *journalism domain*, the organizational level is the most important for analyzing risks and opportunities. Influences on journalism practices at the political level are highly controversial in line with the commonly accepted arm's length principle governing relations between media and the state. The few politicians commenting upon journalistic content in programs and articles are also regularly condemned in public debate for questioning the autonomy of news media. The principle of media freedom regarding newsroom work practices is widely accepted by the political system and offers good basic opportunities for professional news journalism.

Media companies play a bigger role in determining journalism conditions. Structural transformations have taken place on media markets due to increased economic pressures and loss of advertising revenues. This development has resulted in an increasing number of media mergers and closures of local newsrooms to save money. The risks to the production of news journalism are obvious as the number of newsrooms and journalists decline in several geographic areas of the country.

The implementation of more cost-effective newsroom procedures, driven by digitalization, metrics, and multiplatform production conditions, may also contribute to more streamlined and

audience-oriented content of lower journalistic quality but which are cheaper to produce. At the same time, newsroom values of journalistic professionalism are still valid and should not be underestimated when analyzing production conditions. Investigative journalism is practiced, and enjoys more resources being spent on it, at least in bigger national media companies. Overall, it is relevant to perceive media companies mainly as drivers of risks for news journalism, and only to a minor degree contributing to improving opportunities for journalism watchdog role.

At the individual level, journalists' work is generally deteriorating. This is to some extent a consequence of market-driven newsroom transformations, but also because threats and harassment of journalists have become more common. This development certainly entails risks to professional journalism. The threats against journalists are sometimes expressed by single persons, but quite often also articulated in posts and threads associated with groups on social media, in particular right-wing populist factions. In these groups, journalists are generally perceived as representatives of political elites with a hidden agenda to promote left-wing ideas and perspectives in reporting.

When it comes to tech-oriented media-related competencies among journalists, one could, roughly speaking, divide the period 2000-2020 into two phases, the first one (2000-2010) being relatively tech-optimistic and the other one characterized by a more realistic understanding of journalists' digital multitasking and multimodal skills in editorial milieus/newsrooms or in the field. The latter case, which is then primarily associated with the first decade, could be understood as the media sectors' desire to be a central node in the information society; to be modern and digitally cutting-edge and to embrace technical innovations, and so forth.

The agents of this development were all those individuals in managerial or editorial environments who could be considered early adopters of different technological trends, assumed to be relevant for the development of media. Part of this notion was thus the multitasked journalist who would, by means of smart tech solutions, be able to manage work tasks that were previously handled by several different employees. But gradually – and now we are moving into the later decade (2010-2020) – this instead became associated with the budding crisis in the media sector with ever-shrinking economic resources. This then presumably laid the foundations for a less romanticized understanding of tech-oriented skills and thus led to the bad working conditions and de-professionalization of the journalistic profession instead. In turn, this also created a less obvious connection between tech-advanced skills among media practitioners and the media's role as contributor of deliberative communication. In this case, the introduction of new digital technology became more of a risk than an opportunity for deliberative communication. The main agents of this process were then very much the management teams of media companies.

In the *media usage patterns domain*, the individual level is very important. Swedish media consumers live in a high-choice media environment and media diets vary significantly between individuals. The increased supply of media options available entails both risks and opportunities for deliberative communication. The opportunities to gain more knowledge about what is going on in society have never been better but the same is true for the opportunities to completely avoid news and information. Knowledge gaps may increase and jeopardize prerequisites for mutual understanding and constructive dialogues between groups of citizens.

However, individual media consumption patterns do not occur in a vacuum. Media choices offered also depend on media actors' behaviour and strategies. Households' media budgets are limited and the costs of media subscriptions, pay-tv fees, mobile devices and pay walls on web sites influence peoples' choice of media usage. In the case of Sweden, the dramatically increased media supply in recent decades – offering more consumer choice – has resulted in less money spent on media providing news and journalism.

In this domain, it is also necessary to underline the importance of global companies offering new services to audiences worldwide. The accumulated power of global monopolies such as Google and Facebook have significant implications for democratic societies (Moore & Tambini, 2018). The continuous introduction of new digital channels and social media platforms certainly drives fundamental changes in media usage patterns.

In the *media user competencies domain*, it can be said that Sweden is a country with a high level of competencies in terms of using different media, also among the elder generation, and knowledge about competencies is well-developed (this thanks to institutions such as *Nordicom* and *Statens Medieråd*). However, this does not mean that there are no differences or digital divides within Sweden. For example, such divides could be linked to citizens' socio-economic background.

6.1. Final comments

The studies of the four domains in this paper confirm to a large extent the ideas suggested in previous research about the Nordic media model, namely that media system features of the Nordic countries seem to develop and change, while retaining key features (Syvertsen et al., 2014). The book of the *Media Welfare State* analyzed four periods: establishment of universal service in telecommunication and broadcasting (1875-1950), expanding public service, decline of party press and press support (1950-1980), deregulation and competition in broadcasting (1980-1990) and digitalization and convergence of media services (1990-). In this paper, the following period between 2000-2020 has been investigated.

An overall conclusion based on this review of media developments in Sweden suggests that observing the continuity factor may be equally as relevant as possible changes and shifts in trends. However, in our view, continuity should not primarily be perceived as an absence of change, but rather an adaptation to new realities within the framework of durable principles. There have certainly been important transformations over the last few decades, such as the breakthrough of digital and social media and the increased use of mobile devices by almost everyone. News media have moved to digital platforms and competition with other types of content is higher, but news media are still followed by most Swedish citizens. Resilience seems to be a stronger force than reshaping.

In the case of Sweden, insidious transformations have been further facilitated by a comparably pragmatic relationship between the state and public and private media. The democratic values of professional journalism are widely acknowledged by the state, political actors, public agencies, and private companies. Thus, deteriorated working conditions for news media are generally perceived as a societal problem that needs to be met by political actions. The continuous establishment of new media inquiries and the political intention to protect a well-functioning dualistic public/private media system is probably not enough to prevent global media trends from happening in Sweden, but they may slow down transformation processes at least from a short time perspective.

Basic challenges from accelerating digital media developments and continuing social fragmentation of media usage patterns remain as distinctive features of the contemporary Swedish media landscape but have so far not originated from significant single moments, or critical junctures, where conditions for media democratic functions have changed dramatically. On the contrary, tendencies of resilience can be observed where existing functions and relations have been sustained and, in some cases, advanced. If these tendencies will continue to be as strong in the future is however an open question. In the long run, it may be wise to foresee a future in which the Swedish media landscape, step by step, undergoes a transformation and becomes less likely to meet standards of deliberative communication.

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