6 Country report Switzerland

Caught between financial pressure, audience expectations, and political ideology

Guido Keel and Mirco Saner

Introduction: national circumstances of a multilingual, small-scaled media society

The Swiss political system is strongly influenced by the direct participation of the people. A large degree of power lies with the citizens and the regional entities (Cantons) in accordance with the principles of federalism. Due to scant centralized power and strong elements of consensus democracy, political processes in Switzerland move slowly and are decentralized. Economically, Switzerland belongs to the wealthiest and most competitive economies worldwide. The standards of living, including education and health care, as well as the costs of living, are among the highest in Europe. Due to its geographical location, its small size, the four language regions, and its relatively large economy, Switzerland is a rather globalized country. This stands in contrast to the political isolation, which stems from a strong tradition of political neutrality in global affairs, and which results, for example, in Switzerland, despite being geographically at the heart of Europe, never being part of the European Union.

The Swiss population is around 8.5 million, of which 25% are foreign residents. The largest share of the population is German-speaking (60%); linguistic minorities are in the French- (25%) and Italian-speaking areas (10%). The fourth national language, Rumansch, is only spoken by about 1% of the population (Bundesamt für Statistik 2023a, 2023b).

As a small but multilingual country with a strong political culture of direct democracy in a federally organized state, the Swiss media landscape has traditionally been characterized by the decentralized structure of small media. This structure is also reflected in the size of audiences and markets, which creates challenging conditions for the financing of media through commercial revenues (Studer et al. 2014, 7). This situation is further challenged by international media organizations in neighboring countries that can easily penetrate the Swiss market. This is especially true for TV, where market shares of foreign media are between 60% and 70% and thus higher than that of Swiss programs (Bundesamt für Statistik, 2023b).

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Innovation in an environment of stagnant media policy

In 2014, the Swiss government published a report on the state of the media in Switzerland (BAKOM 2014). It was a reaction to a parliamentarian inquiry from 2012 which asked how the government planned to guarantee the democratic functions of the media in society. In this report, the government stated that the (journalistic) media in Switzerland continued to undergo a structural change, with an unforeseeable further development. The economic basis of the paid daily press was found to be eroding, and the number of independent publishing houses was decreasing; newspapers had regional monopolies, and the audience, as well as the advertising industry, were found to be increasingly turning to online offerings. As for innovations in terms of new media titles, the report found that only in isolated cases had new, independent news sites been able to establish themselves in the market.

To strengthen the media industry, the government suggested short-term financial measures like a tax decrease for media companies. As for innovations, the government encouraged media professionals to apply for research grants from the Swiss Innovation Agency, a state finance agency that promotes science-based innovation in the interest of the economy and society in Switzerland. The long-term plan suggested supporting not only traditional media structures but also creating a system of state-funded media support independent of the media type, which would enable online media start-ups to profit from such a promotion as well. These plans resulted in a public referendum in February 2022, in which a majority of 55% of the votes were against such a new media law (admin.ch 2022). This last media policy decision against an increase in state support of journalistic media makes any kind of state support to finance innovation in journalism politically difficult for the next few years. Due to these structural framework conditions, the environment and prerequisites for journalism innovation in Swiss media organizations remain challenging.

As the economic situation had grown increasingly challenging, media start-ups, as well as established media organizations, had not only placed high hopes on the new law, but often did not have any alternative plans. Several online start-ups had to give up, as it became clear that after the referendum, any kind of state program to support the media, especially online media, would be politically impossible for the next few years. Examples of online start-ups that ceased to exist are the science journalism portal higgs.ch or kolt.ch, which offered solution-oriented local journalism.

Another blow to the financing of private media companies came with the revision of the Radio and Television Act. The media fee, which until then had to be paid only by owners of radio and/or TV devices, was to be converted into a compulsory household levy. While this may have been seen as a promising option to put media organizations on a stable financial base, it turned out to undermine any form of state subsidy for media even further. The change to a mandatory fee for each household was colloquially called the "media tax" or a compulsory fee by opponents (Kessler 2016). Resistance arose against this planned system change, although the amount to be paid annually was reduced at the same time (2019: 465 Swiss francs; 2022: 335 Swiss francs), and private broadcasters received a higher share of the collected fees.

Furthermore, an increasing and still ongoing public discourse about the regulations of private and service public broadcasters has developed over the last 15 years or so. In 2008, the federal regulator OFCOM implemented the new Radio and Television Act (nRTVG), which linked the licensing and financing of commercial radio and TV stations by fee money to the introduction of an editorial quality management system (EQMS; Wyss and Keel 2009, 116). The requirements concerning quality assurance do not directly refer to the journalistic quality of individual news stories but to the organizational structures in editorial newsrooms and the processes that bring about news programs. With this measure, the regulator tried to ensure the quality of electronic broadcasting without interfering with the private broadcasters' freedom of the press. At the same time, pressure to limit the activities of the mostly fee-financed public broadcasters increased, culminating in 2018 in the No Billag referendum, in which annual broadcasting fees should have been abolished altogether. While the referendum was turned down, the efforts to curtail the public broadcaster regarding its financing on the one hand and on the other its activities online, where it competes against private media organizations, continue. As of 2023, a political initiative is calling for the annual broadcasting fees to be cut roughly in half to 200 Swiss francs ("Halbierungsinitiative").

Actors shaping media policy

The current analysis shows that efforts from the regulatory body to strengthen innovation in the media industry, as well as media laws that include financial support for online media, are an important building block for ensuring future quality-oriented journalism (Saner and Wyss 2023). However, the Federal Council and the Swiss Parliament show a pronounced lack of interest in ensuring national media diversity, combating media concentration, and further developing media promotion (Meier 2015, 172).

State-funded media support thus remains in the form of indirect media support in the print sector and direct support in the broadcasting sector (Saner and Wyss 2019). The Publishers Association (Verband Schweizer Medien VSM), an industry association dominated by big legacy media houses like Tamedia (TX Group), Ringier, the NZZ-Group, and CH Media, strongly lobbies for financial support from the state for their print and online activities, but only in indirect form, as any direct support would be seen as a threat to the freedom of the press.

Due to the federally organized, direct-democratic system, a particularly high number of media critical voices are involved in media policy discourses, which mainly revolve around the journalistic public service and the performance of SRG, the public broadcaster. The SRG has been under constant parliamentarian criticism from right-wing populists for years (Holtz-Bacha 2021, 229; Udris et al. 2021; Udris and Eisenegger 2022, 106), though studies do show that public service can be an important driver of journalism innovations (Puppis and Ali 2023).

Since the OFCOM is part of the Federal Office for the Environment, Transport, Energy and Communications (UVEK), the media sector often is a side issue in larger political debates, compared to other dominant issues such as energy or the construction of transportation infrastructure. Moreover, the media landscape is characterized by a multitude of actors from within and outside the media sphere. To accompany the change in media, the federal government established the Federal Media Commission (EMEK), a permanent expert advisory board for the executive branch with representatives from both media science and practice. The EMEK regularly publishes position papers on macroeconomic industry issues and pleads for the consistent promotion of new journalism innovations (EMEK 2023, 4).

There are various other organizational bodies, think tanks, lobbying associations, nongovernmental organizations on human rights, and the media, which shape the development and review of media policy. On the journalistic side, these discourses are accompanied and evaluated by institutionalized media journalism in mass media and specialized media sites. The impact of media science is rather limited in the political decision-making process. However, there is a wide range of state-sponsored program research on the quality of reporting. This research offers media practice the opportunity to initiate innovation based on results (Grossenbacher 2015; Kolb 2015).

The plethora of agents overall ensure stability and predictability in Swiss media policy but makes it difficult to enforce quick, broadly accepted, and innovative decisions.

Media markets

Up until recent years, three of the four national language regions represented fairly independent media systems, with a stronger orientation to the neighboring countries of the same language than to the other Swiss language regions (German-speaking Switzerland toward Germany and Austria, French-speaking Switzerland toward France, Italian-speaking Switzerland toward Italy). The media spaces and markets are thus quite small and reflect the population in the regions: 5 million in the German-speaking, less than 2 million in francophone Suisse, and just over 0.5 million in the Italian-speaking areas. Only in recent years have the linguistic boundaries within Switzerland been overcome by private media companies in attempts to address bigger media markets. The first and most comprehensive attempt in this direction was the establishment of 20 Minutes in 1999, a free daily newspaper in three languages and with editorial offices in all parts of the country. Other examples are the French language editions of both the tabloid newspaper Blick and the online news site Watson.ch. However, despite these attempts to overcome language barriers, the audiences and the journalistic cultures remain fairly separated, and the national media market is rather fragmented.

Regulatory framework

Article 16 of the Swiss constitution guarantees the freedom of opinion and information. Every person has the right to form their own opinion and, more relevant to the media, has the right to publicize and spread their opinion. Furthermore, each person has the guaranteed right to receive information from "generally accessible sources." The freedom of the media is separately made explicit in article 17, which states that the freedom of the press, radio, and TV, as well as other kinds of public distribution of information, is guaranteed. As the constitution was last revised in 1999, the potential of the internet could not yet fully be foreseen. However, this last part of article 17 is usually seen as applying to online media, as they are not otherwise mentioned.

Furthermore, the constitution contains article 93 that declares fundamental rights concerning radio and TV, and states those services are to contribute to the forming of opinions on political and societal issues, to foster cultural development, and, as another requirement, to be entertaining for the general public. Other than that, the independence of both radio and TV broadcasters is constitutionally guaranteed. Furthermore, in paragraph 4 of article 93, the constitution states that they are to consider and take into account the needs of other media types, especially the printed press.

Paragraph 4 is relevant in the context of the development of online activities or commercial activities in general based on the following argument. Since print media titles do not profit from audience fees, they are at an economic disadvantage when competing with fee-supported media, especially the public service provider SRG, which currently receives 1.2 billion Swiss francs per year in audience fees, a sum that is larger than the annual budget of any private Swiss media organization.

The regulatory framework in Switzerland thus mainly differentiates between traditional print media, which are privately organized, and electronic media (radio and TV), which include both private and public service organizations.

For private print and online media, there are no regulatory limits besides the general, not media-specific legal framework, which deals with the protection of the individual, including data protection, the organization of fair competition, and other general legal aspects.

For electronic media, there are two types of regulations. One for the public service programs of the national broadcasting company SRG SSR[1] and one for the private broadcasters. Both types of broadcasters profit from audience fees. It is thus sometimes referred to as a "media tax" (see p. 000), even though it is not collected by the state. Generally, there is a direct correlation between the size of the audience fee a broadcaster receives and the quantity of applied regulatory rules. About 90% of the fees go toward the public service provider SRG SSR, which in return also has the least freedom concerning commercial activities and must meet the highest expectations toward the public value of its program, as stated already in article 93 of the constitution. At the other end of the spectrum, private stations, which choose to do without a share of the audience fee, enjoy the greatest freedom in the context of commercial activities, choice of program content, or geographical area in which a program is broadcast. This has consequences for both the liberty at which media organizations can innovate and the resources they have.

As SRG SSR is financed with mandatory fee money, there are limits to its online services defined by federal regulations and the broadcasting license. Online content must be linked to parts of the TV program; otherwise, the length of a news piece is limited. As this restricts the opportunities for innovations with online services, these constraints are under discussion. However, in order to avoid uneven competition between private and largely fee-financed SRG SSR, protection of the private media organizations has so far been upheld.

It is generally agreed that to continue to face the challenge of digitization, these restrictions must be reviewed, also because the younger generations turn away from linear radio and TV. For example, in 2022, SRF television reached 22% of people under the age of 29 years, but 85% were over 60 years old (Mediapulse TV-Data), so if SRG is not allowed to venture into online programs, it is doomed to lose its audience, which would mean the loss of a relevant media public service in the each of the linguistic regions.

The federal government, in an initial discussion about the new broadcasting license (due in 2025), described the SRG mandate as serving society and democracy, strengthening social cohesion, and focusing its activities on information, education, and culture. For entertainment and sports, SRG should focus on those areas not covered by private organizations. While the government reinforced the will to uphold a fee-based public service, which serves all parts of the country and society, it also sets boundaries for the directions in which SRG can develop and innovate.[2]

In the context of the content of electronic media, licensed stations are obliged to provide a certain quality of content. They are required to "present the totality of events and perspectives in an adequate way." Only if a "sufficient" quantity of providers cover a geographical area are the broadcasters exempted from this requirement.

The radio and TV law further attempts to foster competition between private broadcasters by preventing the concentration of broadcasting stations with a clause that requires media companies to own no more than two radio and two TV stations. Furthermore, article 45 states that if there are several applications for a license within the same area, the application of the organization that "enriches the diversity of opinions and programs" is to be preferred. In practice, this means that when applications are comparable, the regulator gives the license to the organization that has no other media activities.

Due to numerous developments that have worsened the legal situation for journalistic media and media professionals in recent years (Cueni 2023), Switzerland currently lies in 12th place in the Reporters Without Borders country ranking of press freedom (Reporters Without Borders, 2023). There have also been positive achievements, such as the Öffentlichkeitsgesetz, which has existed since 2004. This law allows media professionals to gain access to official documents. However, because of article 293 in the Penal Code, media professionals can be punished if they publish "confidential information." In 2017, parliament rejected the deletion of this law, even though it can be seen as a contradiction to the control function of the media. Moreover, parliament amended the Code of Criminal Procedure in March 2023. Whether this change will impact the legal situation in practice is unclear; in any case, it expresses a general skepticism in the national parliament toward too much media freedom. Furthermore, strategic lawsuits against public participation (SLAPP) to delay or prevent unwanted journalistic publications are increasingly used strategically by organizations.

Swiss media industry: diversification over investments in journalism

The Swiss broadcasting media landscape is dominantly shaped on the one hand by the public broadcaster SRG SSR and on the other by a handful of private legacy media, which originated in the newspaper business but have expanded into online media in the last two decades. The private media landscape is dominated by four large media houses: TX Group, Ringier, and a joint venture of CH Media and NZZ-Group originated in the 19th century being developed from large print media titles, while SRG SSR was founded mid-20th century to establish national radio and TV programs as a public service. The private media organizations not only have their roots in print media; they are still primarily focused on print media but are developing into online media. In recent years, some of them have acquired private radio and TV stations (mostly CH Media and NZZ-Group), have developed a diverse and nationwide print portfolio (TX Group), or have expanded into Eastern European and non-European media markets (Ringier). SRG SSR, founded to provide radio and TV programs, has increasingly been developing online activities to keep up with the change in media use habits and routines by a newer generation of media users.

These private organizations are comparable in size, with media and non-media activities' revenues of roughly 1 billion Swiss francs. They are not only substantially smaller than SRG SSR (revenue of 1.6 billion Swiss francs) but substantially smaller than media companies in neighboring countries, which also serve the Swiss media market, albeit with a limited range of activities.

In the print media sector, media concentration processes have been occurring since the mid-20th century, but in combination with a decrease in advertising revenues in print media and, at the same time, a drop in income due to the decline in subscriptions. Consequently, the financial situation has become more challenging. Creating synergies by concentrating efforts has increasingly become the response to this challenge. Thus, the number of news titles, especially in print media, has been decreasing steadily over the last few years and decades. This applies even more to the number of independent newsrooms, as newsrooms have increasingly converged into centralized organizations that serve a large array of media outlets.

Media use has generally shifted from print to digital media channels (including social media). As of 2021, online media have taken over opinion power in the country for the first time, and social media is in the process of overtaking both print and radio, as Media Monitor Switzerland 2021 shows (Medienmonitor Schweiz 2022). The opinion power share of online media was 30% in 2021, and any departure from this trend is not foreseeable. The strong importance of social media is also confirmed by the current James study (Külling et al. 2022). The most important opinion-forming, journalistic online media in German-speaking Switzerland include 20min.ch and srf.ch. However, despite a constant decline in the overall circulation of newspapers over the years, print products still find their buyers.

Additional to the main legacy organizations, which still use print distribution channels, there has been a wide variety of journalism start-ups, niche media, or para-journalistic initiatives that have tried to establish themselves in the editorial gaps that the media concentration has created or in thematic areas neglected by legacy media. These start-ups and niche media are typically local, digital-only news services financed by a combination of users, foundations, or donors. They all share the difficulty of finding a sustainable business model. As a consequence, many of the new agents that emerged over the last ten years have already disappeared.

Private legacy media companies have suffered greatly from declining revenues, which led to concentration, cost-cutting measures, and, consequently, a loss of diversity and quality in information journalism. However, legacy media houses like TX Group or Ringier still achieve significant net profits through activities in nonjournalistic fields. Thus, there are often few resources or little will to face the challenges posed by innovations in order to keep up with new ways of media use and a fragmented audience. While most media houses have initiated internal labs or other organizational units to create innovation, the business strategies of these organizations are prioritizing profitable nonjournalistic activities over investments in journalism.

Professional development in journalism

On a microlevel, individual attitudes of journalists toward journalism and change in their professional field can affect how innovation is fostered, accepted, and implemented. The international journalism survey "Worlds of Journalism" provides data on Swiss journalists on a wide range of aspects.

In the context of the role perception of journalists, survey data over the years show a lot of stability (Dingerkus et al. 2018, 124). The most relevant roles reflect norms of journalistic objectivity: they think that journalists should foremost "report things as they are" and "be a detached observer." More activist roles such as "provide information people need to make political decisions" or "promote tolerance and cultural diversity" are mentioned less often. The data from an ongoing survey in 2023 confirms this finding, with a slight shift toward more active roles.

When looking at sociodemographic aspects, the data over time show that the journalistic profession in Switzerland has become more diverse. The percentage of female journalists has increased over time, from 17% in 1980 to 39% in 2015, and this trend holds steady. As for ethnic diversity, journalists with a country of origin other than Switzerland are still vastly underrepresented compared to their share in society in general; nevertheless, misrepresentation is continuously decreasing (Dingerkus et al. 2018).

Furthermore, the data from journalism surveys over the years show that the journalistic profession has become ever more academic, meaning that the percentage of journalists with an academic degree has increased from 54% in 1998 to 70% in 2015 (Dingerkus et al. 2018, 121). It is noteworthy that in the French- and Italian-speaking areas, journalists are a lot more likely to have an academic degree than in the German-speaking area.

In the context of the perceived sources of influence, journalists list ethical considerations first. The following categories, however, all deal with resources, i.e., a lack thereof: time pressure, information access, and resources to do research.

In 2015, it was further asked how certain aspects had changed in relevance over the previous five years. The influence of social media on journalistic work was seen to have increased the most; the third-most increase was seen for user-generated content such as blogs. Besides these two technical aspects, which change the interaction with the audience, economic aspects were also seen to have increased in relevance: competition, profit-making pressure, and PR and advertising considerations.

Based on the data available from journalists' surveys, journalists and the journalistic profession thus seem to change rather reluctantly. Ethical norms prevail and thus make journalists hesitant to question long-standing practices that are linked to journalistic norms. Factors or sources of influence that might bring about change to the journalistic profession are either technological, financial, or economic (see also Stöber 2005; Lauerer, Dingerkus, and Steindl 2019). However, these influences are often seen as a threat to professional norms rather than a chance to improve processes and products. A larger share of female journalists might topple long-standing hierarchies and bring new perspectives to newsrooms, just like the growing diversity in ethnic backgrounds of journalists. As for the academization of the journalistic profession, it remains to be seen what its impact on the power to innovate might be. University-trained journalists might be better prepared to reflect on journalism as a profession and a societal institution, as well as more familiar with findings from research that challenge journalistic routines and traditions.

At the same time, an orientation toward traditional norms and idealized views on journalism – e.g., in its relation to the audience – might make journalists less open to innovations, which they might view as unjournalistic because they have not been described as such in their rather normative journalism courses. To act as moderator of public discourses might, for example, be less in line with a traditional understanding of journalists as observers and neutral reporters of reality.

Conclusion

Swiss journalistic media are far from exploiting their innovation potential. On a macro- and mesolevel, the lack of resources due to a failing business model of relatively small media organizations in small-scaled, fragmented markets can be seen as the cause for a modest degree of innovation in the Swiss media system. Media policy that would foresee measures such as state subsidies to support initiatives or better protection of journalistic work could help to overcome this problem. However, the political culture of Switzerland, with slow, decentralized processes and a weak central state, does not allow for the timely development of such regulation. Therefore, the conditions for innovation in Swiss media are difficult. This overall assessment is consistent with evaluations from expert interviews and case study interviews conducted by the Journalism Innovations in Democratic Societies (JoIn-DemoS) research consortium between 2021 and 2022. This finding complements results from surveys among journalists, which indicate that on the microlevel of individual actors, due to professional attitudes and working conditions, little innovation is to be expected. If individual journalists are to initiate innovative ideas, they are most likely to come from the fringes and not from the core of well-established media organizations.

Notes

1. The association's official name is *Schweizerische Radio- und Fernsehgesellschaft* (*SRG*), in German; *Société suisse de radiodiffusion et télévision* (*SSR*) in French, *Società svizzera di radiotelevisione* (*SSR*) in Italian, and *Societad svizra da radio e televisiun* (*SSR*) in Romansh.
2. https://www.bakom.admin.ch/bakom/de/home/das-bakom/medieninformationen/medienmitteilungen.msg-id-90247.html.

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