

Policy windows and converging frames: a longitudinal study of digitalization and media policy change

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Abstract

This study analyzes how media industry players have influenced media political solutions to digitalization, using data from the daily press and policy documents in the period from 1998 to 2017 as sources. It concentrates on two specific areas of media policy: public service broadcasting (PSB) and press subsidies. Based on a media policy field approach, this study identifies key collective frames and the players that promote them, and shows how policy windows are created. The study finds that there is strong continuity in terms of the basic frames used to discuss media policy and in the actors involved in creating collective frames, which means that the incumbents maintain their positions. Converging frames that include several industry problems are activated to an increasing degree to initiate and influence media policy actions.

Keywords

converging frames, digitalization, media policy field approach, policy windows, press subsidies, PSB

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Introduction

During the past two decades, digitalization has thoroughly impacted the way media content is produced, distributed, and consumed, as well as its key business models. Digitalization has not only forced media industry players to change and adjust but also put pressure on media policy makers to update existing regulation models and support schemes and even introduce new ones (Sjøvaag and Krumsvik, 2017; Storsul and Syvertsen, 2007). Thus, digitalization entails new conditions not only for the media industry but also for media policy making. A key asset for media industry players in harnessing opportunities for digitalization – or hampering unfortunate consequences – is to create collective frames that serve the players' interests, that is, collectively shared understandings of what the real problems with digitalization are and how policy makers should solve them. As Brüggemann et al. (2016) stated, 'Frames render complex reality into cognitive shortcuts that circumscribe the range of possible actions available to policymakers' (p. 535).

This article examines how media industry players have framed the challenges and opportunities of digitalization, in their effort to influence media policy formation, from the early stages of digitalization and until today, and gauges the impact of these frames. We conduct a longitudinal study on Norwegian media policy debates related to digitalization processes, as covered in the daily press and key policy documents from 1998 to 2017. The study focuses on two specific areas of media policy: public service broadcasting (PSB) and press subsidies. Similarly to the case in many northern European countries, these policy instruments have been pivotal to Norwegian media policy (Syvertsen et al., 2014; see also Hallin and Mancini, 2004), but are considered to require revision in light of digitalization. We argue that Norway is a particular interesting case for investigating the impact of digitalization on policy making as it is one of the most digitalized countries in the world, indicating a strong push for change, but at the same time represents a preservative policy system which favors continuity. Despite this apparent tension, Norway has been successful in safeguarding media diversity through the digital transformation, allowing us to analyze it as a 'best case' that can inform studies of policy debates more widely.

The article contributes to literature on the impact of digitalization on media policy by studying it relative to its historical context, thus acknowledging that technological change is subject to processes of social and cultural definition. This idea is particularly important in relation to a term such as digitalization that has been linked to the notion of an ever-imminent crisis, and where the last version of the crisis risks defining the phenomenon as such (Alexander et al., 2016). On a theoretical level the article contributes to media policy studies by applying a holistic theoretical framework, that takes both the impact of existing institutional structures and cultures, as well as the potential power of new actors into account (Fligstein and McAdam, 2011; Steen-Johnsen et al., 2019). Thus, this empirical investigation provides the basis for discussing the general question of what key collective frames – and the players promoting them – can tell us about factors that provide continuity and change in the media policy field.

The Media Policy Field (MPF) approach

Although a range of studies demonstrate how media policy processes unfold (see, for instance, Flew et al., 2016; Freedman, 2008; Simpson et al., 2016), including studies that

take a stakeholder and advocacy perspective (Van den Bulck, 2012; Van den Bulck and Donders, 2014) and a media ecosystem perspective (Raats and Pauwels, 2013), the studies have tended to address how media actors work to frame singular policy processes (see, for instance, Donders et al., 2018; Donders and Raats, 2012; Herzog and Karppinen, 2014). Studies taking an historical or holistic approach are rarer (see, however, Ibarra and Nord, 2014; Nord and Von Krogh, 2015). Applying a holistic and historical perspective to the media policy change, as we do in this article, brings out the fundamental dynamics of how problem definitions are shaped and evolve, first; by showing the importance of existing cultural frames for the policy solutions sought, even under conditions of disruption, and second; by fleshing out how such frames condition the power and action of different media players.

The study makes use of the Media Policy Field (MPF) approach (Steen-Johnsen et al., 2019), a framework for studying the conditions for media policy formation in times of change. The framework aims to provide a holistic understanding of the complex set of social, cultural, and political processes among public and non-public actors in a field, by combining lessons from organizational field approaches (the theory of strategic action fields; Fligstein and McAdam, 2011) with a theory of policy development (the multiple streams approach; Kingdon, 1995). The MPF approach states that underlying any field is a set of collective frames that defines the aims, the relationships, and the rules, and it proposes three analytical foci points for the study of the forming of new media policy: collective frames, incumbent and challenger roles, and policy windows (Steen-Johnsen et al., 2019).

The focus on *collective frames* highlights that under the pressure of disruptive changes, the shared understanding of the rules of the field are expected to become increasingly contested (Fligstein and McAdam, 2011). New forms of action might gradually gain legitimacy, and established ones may become illegitimate. Thus, to understand the formation of a media policy, there is a need to investigate the different action logics and action frames that have currency in the field and trace their transformation and the emergence of the new ones (Steen-Johnsen et al., 2019; see also Freedman, 2010). In our case, the focus on collective frames implies paying attention to how industry players have defined the problems of digitalization, as well as which solutions these players have promoted.

The focus on *incumbent and challenger roles* highlights that although the power structure in a settled field is stable, in a disruptive field it may be changing and unstable and new forms of strategic alliances may occur (see also Freedman, 2006). Incumbents are generally seen as organizations and institutions that are well-established within a field and adapted to and benefitting from current political and economic arrangements within it. Examples within the cases studied here are public service broadcasters and major newspapers. Exposed to the common threat of a transforming environment, incumbents might cooperate to a greater extent to build new political coalitions or restructure existing ones. The MPF approach stresses the importance of social skills, that is, the ‘cognitive capacity for reading people and environments, framing lines of action and mobilizing people in the services of these action “frames”’ (Fligstein and McAdam, 2011: 7). In short, social skills enable actors to develop frames that resonate with different groups, either rationally or emotionally, and serve as tools for mobilization within a given field. Incumbents and challengers may possess this type of skill. In our case, focusing on incumbents and challengers implies paying attention to who says

what and with which interests. We also acknowledge that the actors' positions and self-definitions as incumbents and challengers may change over time, in particular as competition becomes globalized.

Finally, the focus on *policy windows* highlights how individual and collective policy entrepreneurs may take advantage of the opening up of possibilities for forming a new policy in times of change. Policy windows exist when three streams are coupled or joined: the problem stream, which refers to the conditions that are interpreted as problems; the policy stream, which refers to accessible solutions to the problem; and the politics stream, which refers to the larger political context and the 'national mood', that is, 'macro-political issues such as election results, changes of administration, interest group campaign or changes in public opinion, which makes one solution more applicable than the others' (Herzog and Karppinen, 2014: 421; see also Kingdon, 1995). For challengers, the potential for changing media policy is highly dependent on the ability to mobilize coalitions around new collective frames, which changes in the field may allow for. Incumbents, however, often have advantages over challengers because typically, the incumbents have developed skills and competence in mobilizing broader coalitions within the industry and with policymakers. In this study, the focus on policy windows implies paying attention to situations where media players are able to use a particular political climate to link a definition of the problem of digitalization with policy solutions that seem beneficial to the players.

We employ all the three analytical elements of the MPF approach and analyze changes in collective frames, incumbent and challenger roles and policy windows in the two selected policy fields of PSBs and press subsidies. The hypothesis is that digitalization processes cause a disruption that destabilizes the incumbent actors and leaves room for challengers and innovators even in a strongly institutionalized policy system, such as the Norwegian one. This core topic is pursued through the two cases.

Cases and context

The Norwegian media model is often described in terms of the northern European democratic corporatist model (Hallin and Mancini, 2004), which is characterized by the broad reach of the press market, relatively high degrees of political parallelism, strong professionalization, and extensive state intervention in the form of strong public service broadcasters and subsidies for the press. The relatively high degree of homogeneity of the northern countries – Norway, Sweden, Denmark, Finland, and Iceland – justifies the formation of a separate Nordic cluster within the northern European model (Brüggemann et al., 2014: 1056; see also Syvertsen et al., 2014). In the context of this study, two aspects of the Nordic model should be pointed out: First, public policy measures are crucial to media development, leading to much attention to media policy by media industry players. This situation might be different from that found in states with weaker public policies, and where solutions are more often sought in the market. Second, the model exhibits strong corporatist traits, which means that central media players are invited to participate in all major policy processes. Corporatist traits have created a strong degree of proximity between policy makers and the industry, in particular the incumbents of the Norwegian MPF, such as the PSBs, major media conglomerates, as

well as the media owner association. There is a tendency within this arrangement to seek consensual solutions (Syvertsen et al., 2014).

Strong PSBs, partly funded by license fees, are common media political instruments in the Nordic countries that enjoy high levels of public legitimacy. In Norway, PSB was launched in 1933, when NRK was established as the national radio broadcaster under the same principles as the British Broadcasting Corporation (BBC) and many other public service institutions in Western Europe (Syvertsen, 2003). NRK kept its national broadcasting monopoly until the early 1990s, when TV 2 and P4 were introduced as private and commercial television and radio channels, both with public service obligations. Today, the Norwegian broadcasting market contains public and private, national and international players. PSBs still hold strong positions, and NRK is the most viewed television and radio channel, in addition to having a strong online presence with online news and streaming services (Meld. St. 15, 2016–2017).

Another central instrument in Nordic media policies is generous press subsidies to create and maintain diversity in the newspaper industry (see also Brüggemann et al., 2014; Sjøvaag and Pedersen, 2018). In Norway, press subsidies were introduced in 1969 as a direct financial support scheme for economically disadvantaged newspapers, with the aim of ensuring diversity in the news market (NOU 2010:14: 33). Three types of newspapers were included: small, local newspapers, newspapers in markets with a larger competitor, and newspapers catering to different ideological or other views. In addition, an indirect press subsidy, the so-called value-added tax (VAT) exemption, was introduced in 1970. Daily newspapers, books, and some subscription publications were exempted from the VAT based on the principle that the free word should not be subject to tax (NOU 2010:14: 40).

Method: a longitudinal study of media policy debates

The article builds on a longitudinal study of Norwegian media policy debates related to digitalization processes, as covered in the daily press and policy documents from the early stages of digitalization until today, taking lessons from media policy and media history studies (Briggs and Burk, 2002; Karppinen and Moe, 2012). News and debate articles on digitalization and media policy issues were sampled from the Norwegian business newspaper *Dagens Næringsliv* (DN) during the 20-year period 1998 to 2017. In total, the sample contains more than 2000 articles, based on the keywords ‘media policy’, ‘PSB’, ‘media diversity’, ‘press/media subsidy’, and ‘media ownership’. The material was made electronically searchable. DN was selected because of its prominent role in covering media policy issues, most notably through the paper’s distinct media section, ‘Etter børs’, which covers media policy and media industry issues every day. Although the discourse in DN by no means reflects the full discourse on digitalization and media policy issues in the Norwegian press, the newspaper covers the main positions in the debates under study, as a central forum for this type of debate. An advantage of this methodological choice is that we studied the debates on digitalization systematically and over an extensive period of time. Analytically, we have categorized the material according to a historical and a thematic dimension, focusing on PSB and the press respectively. Within this two-dimensional approach, we have identified main actors, problem

definitions as well as proposed solutions and outcomes for the main policy processes that occurred during the period (e.g. the debates about how to define a digital PSB remit and how to harmonize the VAT rate for printed and digital news media).

The study also uses policy documents to investigate the political discourse surrounding digitalization processes and media policy formation over time, as well as the outcome of these processes. All the budget propositions on media policy for the 20 year period were systematically reviewed, as well as other important policy documents, such as green papers, white papers, and policy reports related to the identified main policy processes in the period. This approach allowed us to establish a holistic view of a specific period of time. However, it did not permit detailed insights into the complexity of political decision-making within specific processes or behind-the-scenes rationales that qualitative interviews with key actors would have revealed. Future studies should use more in-depth methods to investigate how actors strategically navigate within specific policy processes, especially in situations when policy windows occur.

PSB in the digital age

The first case study concerns the role of PSB in a digital age. By introducing new structures for conveying media content to citizens, digitalization spurred several key media political debates, in which two of the most salient were about the limits of PSB expansion into new digital platforms and services (a digital PSB remit) and the ownership of digital infrastructure.¹ The first debate on a digital PSB remit concerned the essence of what it means to be a PSB and what its core services should be, in terms of content and platforms. This debate peaked twice during the study period, leading up to, first, the Social Democratic government's (2005–2013) decision to include new digital platforms and services in NRK's official mandate in 2007, and second, the successor Conservative government's (2013–) decision to retain NRK's broad remit in 2015. In between these two peaks, NRK's role in the digital market as well as its broader societal role was however constantly debated (see NOU 2017:7). Several commonalities with PSB debates in other countries can be pointed out (see, for example, Lowe and Bardoeel, 2008; Hujanen and Lowe, 2003), which shows the general character of these discussions and the dilemmas they raise. What was striking in this material, however, was the key role that NRK played in highlighting its importance as a non-commercial, 'digital locomotive' that could – if given the opportunity – bring out the best of digitalization, not only for the audience or the media industry but also for society in general (Dagens Næringsliv, 2010), as well as the weight that these frames and arguments were given by policy makers. NRK has thus been an incumbent with significant skills in providing collective frames with impact.

In the first 'battle' for a digital remit, which took place from the late 1990s to the political decision in 2007, NRK put forth three main suggestions, all directed at allowing expansion. NRK stressed that it should be allowed to include online and mobile services in its portfolio, that is, to be allowed to extend beyond radio and television broadcasting (see also Moe, 2009). Highlighting that digitalization would condition citizens future participation in democratic processes, NRK's broadcasting director at the time rhetorically asked policy makers, 'whether or not they wanted NRK to play a key role or if

market forces alone should regulate the new media market' (Dagens Næringsliv, 1998). Second, NRK argued that it should be allowed to have a broad remit, and not be reduced to providing small, niche services otherwise not covered by commercial and private media players. NRK stressed its role as a protector against international players that entered national borders due to digitalization: 'For the Minister of Culture and the NRK Board, the number one job should be to make NRK a solid, strong home guard in the coming world war against knowledge and culture, understanding and meaning making' (Dagens Næringsliv, 2001b). Third, NRK argued for the right to form strategic partnerships and alliances with other (commercial) players to stay competitive and secure the broadcaster's relevance in the 'digital landscape' (Dagens Næringsliv, 2000).

NRK's claim for expansion, a broad remit, and strategic partnership were met with criticism and debate by a wide range of players, among them incumbents in neighboring markets (such as news organizations) and smaller broadcasters representing challenger roles. Several opponents claimed that NRK was given too-broad authorization to expand, and could end up too popular and dominant as a result (Dagens Næringsliv, 2002). This alternative frame stressed the anti-competitive and market destructive effect of NRK, rather than the democracy frame. Opponents also highlighted the importance of keeping NRK non-commercial, accusing the broadcaster of using digitalization as an excuse to tap into commercially oriented services (Dagens Næringsliv, 2001c). NRK's claim for space for commercial maneuvering was criticized by leaders of competing media companies (Dagens Næringsliv, 2007d), public representatives (Dagens Næringsliv, 2007b), media scholars (Dagens Næringsliv, 2002, 2007c), and even other Nordic public service channels (Dagens Næringsliv, 2007a).

In the first round, NRK ended up winning most of its battles regarding a digital remit: NRK's remit was to include mobile and online platforms, a strategic partnership, and overall acceptance for the importance of being broad and popular to fulfill its obligations (St.meld. nr. 30, 2006–2007; see also St.meld. nr. 6, 2007–2008). NRK was even allowed to run advertising on its webpage, as the Labor Party minister of culture stressed the need to keep NRK 'as little commercial as possible, yet also allowing for new business models' (Dagens Næringsliv, 2007d). A collective frame that could explain NRK's success was that digitalization puts the role of national media players and their mandate to secure freedom of expression, democracy, as well as national identity, culture, and language at risk.

This frame was far from stable, however, and repeated challenges to it meant that NRK also had to continuously adjust the frame to make it fit the new situation. By 2012, it had come under attack from a number of industry players, as well as left-wing parties that claimed NRK had been given too broad and generous operating conditions, leaving little room for others (Dagens Næringsliv, 2012b). With the Conservative government that took office in 2013, after eight years with a Social Democratic and, in their words 'NRK-friendly' government, a new and more restrictive policy toward NRK was signaled. For instance, the new political platform (2013) stated the government's ambition to 'modernise media policy instruments and agencies' and limit NRK's 'ability to use its secure financial position to weaken the activity base of independent institutions' (p. 54). This goal is echoed by several examples in the press material in which media industry players (representing incumbent and challenger roles) argued for the need to take actions

toward NRK and reduce its 'dominant position' (Dagens Næringsliv, 2012b, 2013a, 2015b). In these debates, NRK was no longer presented as a guarantor of democracy, but as a threat. However, when private and commercial players (once again) claimed that NRK was reducing their market position by producing 'free', high-quality content on all available platforms NRK framed itself specifically as a bulwark against the 'global super players', such as Netflix, YouTube, and Facebook that had by then become very salient (Dagens Næringsliv, 2013b; see also Dagens Næringsliv, 2015a, 2016d; Sjøvaag et al., 2018). Furthermore, NRK stressed that 'global super players' were a threat not only to NRK but also to all national media, thus widening the frame to include its competitors. NRK hence stressed the need to secure national media, not only NRK. Although many expected the Conservative government to make radical changes in PSB policy, the white paper (Meld. St. 15, 2016–2017; Meld. St. 38, 2014–2015) contained surprisingly few radical changes. On the contrary, the paper confirmed NRK's importance in securing democratic values, clearly illustrating how neither the new government nor NRK's competitors had managed to utilize the policy window and make substantial changes to NRK's position.

The second major debate regarding broadcasting and digitalization in the period from 1998 to 2017 was about securing a national digital infrastructure. This debate also spanned several years, included many 'sub-battles', and had several commonalities with similar debates in other countries (Papathanassopoulos, 2002), before a digital terrestrial network was finally chosen and launched in 2007. Underlying these debates were questions about how different models for digital distribution would affect the positions of established industry players, and later on, to what degree digital (and global) third-party platforms would allow PSBs (and other national media providers) to maintain ownership and control. As in the debate about the digital remit, NRK successfully used the frame defining PSBs as a guardian of democracy and national interest, but in the case of the digital infrastructure, alliances with other incumbents were both possible and necessary.

When the debate about PSB and digital infrastructure first appeared on the political agenda (the late 1990s), it was about the transition from analogue to digital television distribution. This transition was discussed in several policy documents (St.meld. nr. 30, 2006–2007; St.meld. nr. 46, 1998–1999) and in the press before a digital terrestrial television network was launched in 2007, with NRK, TV 2, and the telecom operator Telenor as the network owner and operators (Storsul and Sundet, 2006). Several types of distribution infrastructures were discussed (terrestrial, cable, satellite, and broadband), and different players favored different types of networks depending on what kind of market position they would enable the players to take. Broadband, cable, and satellite distributors typically argued for anything other than a terrestrial distribution network, claiming that the latter was 'old fashioned', had limited capacity, and provided few opportunities for interactivity. Some also claimed that the claim for terrestrial distribution was driven by NRK (to serve NRK's interest), and NRK was accused of overstepping its role (Dagens Næringsliv, 2001a). NRK and TV 2, on the other side, argued that the terrestrial network was the only way to provide the whole nation with an equitable (public service) offer, and even added value in terms of new channels and services. NRK stressed that it was 'necessary for securing PSB for everyone' and furthermore, made the public service

broadcasters ‘content locomotives for digital media more generally’ (Dagens Næringsliv, 2007e). NRK and TV 2 thus stressed their role in defending national and cultural interests against competition from international channels and players. This argument was obviously important for the Ministry of Culture, which pointed to the need to ‘secure the whole population with digital television when planning for the transition from analogue to digital distribution’ (St.prp.nr. 1 (2006–2007): 111). The debate about digital infrastructure activated questions not only about what kind of network to prioritize in the future and how to finance the digital transition, but also what kind of players should be given the key positions in these scenarios. A key collective frame, actively produced by the PSBs in cooperation with Telenor (the major Norwegian telecom operator), was that only a national distribution network controlled by Norwegian players would secure a democratic television service for the whole population.

Later, the debate about infrastructure turned to accessibility on digital platforms controlled by third-party providers, spun by the growth of global platform providers, such as Netflix, Facebook, and YouTube. These platforms represented a direct business threat to players financed by advertising or subscription, but the problem for NRK was that these platforms made the competition for audiences (in particular, for young audiences) harder, and they took away ownership and control of how to present content (Dagens Næringsliv, 2015a). For instance, if NRK were to distribute some of its content on YouTube, how should the content be regulated, moderated, and presented? In these debates, PSBs and other national media companies increasingly shared the same collective frame that defined digital ‘super players’ as a common threat, putting pressure on policy makers to regulate and tax these companies to make them contribute to the larger public good. One major private media player in Norway, Schibsted, stated, ‘The media market is now boundless in the cloud above us, and the power is concentrated in the hands of a few global players called Google and Facebook’ (Dagens Næringsliv, 2016a; see also Dagens Næringsliv, 2016b, 2016c).

In sum, the understanding of the crisis due to digitalization opened up several policy windows related to PSBs, which put traditional media political instruments at stake. Throughout the period, mainly NRK but also TV2 successfully maintained the collective frame that strong, broad, and well-funded PSBs and nationally owned digital infrastructures were crucial to maintain the core goals of Norwegian media policy; foremost, democracy, equal access to information, and preservation of national identity. This frame was repeatedly challenged by other actors that argued that too-strong PSBs could have destructive effects on the market (see also Nielsen et al., 2016, for similar debates in other countries). This line of argumentation was, however, constantly and successfully countered by the NRK. Theoretically, this could be interpreted as a situation where incumbent actors mobilize their resources in times of disruption, and are able to maintain their position (Steen-Johnsen et al., 2019).

Digitalization and the press

The second case study concerns the call for policy changes within the press sector. In the period from 1998 to 2008, the press underwent much the same transition from paper to digital distribution as the PSBs, but without this becoming the basis for media policy

debates. While NRK needed political approval to extend services and switch distribution platforms, this was not the case for the press. Instead, the two major policy debates concerned the direct press subsidy and the VAT exemption. Digital distribution fundamentally problematized the eligibility for these arrangements because new, online-only actors could claim that they were producing similar content as the printed press actors, only online. As traditional newspapers were published both in print and online, maintaining zero-rated VAT on their printed product and full 25% VAT on the online product became untenable and a hindrance to digital innovation.

Press subsidies had, for a long time, been contested, even before the digital era. Actors on the right of the political spectrum were critical of this kind of state intervention because it could hinder innovation, while the political parties on the left defended it on the basis of securing media pluralism. Policy debates during the period from 1998 to 2008 centered mostly on who should benefit from the policy incentives (St.meld. nr. 12, 1998–1999), as well as on proposed cuts in direct support (NOU 2000: 15; St.meld. nr. 57, 2001–2001). However, from 2008 onward increased attention was given to the financial problems facing the newspaper sector due to the digitalization processes, which dramatically intensified the call for policy change. Changing consumption patterns from print to online reading, non-sustainable online business models, and unstable stock markets following the financial crisis in 2008 were key problems in the early phase, while the competition from Google, YouTube, and Facebook, as well as NRK's online position, became more pertinent at the end. The overall framing of the crisis was the potential death of newspapers in Norway that could threaten media diversity – a key policy ideal. Another great concern was that the crisis would negatively affect investigative journalism and quality news (Nielsen and Ganter, 2018; Steen-Johnsen et al., 2016).

The Ministry of Culture, then led by the Labor Party, created a Press Support Commission in 2009 to examine the effectiveness of existing policies in the press sector and suggest policies for the digital age. Questions about platform harmonization were of particular concern, as press support and zero-rated VAT were directed at print publications only. In the period leading up to the Commission's report, incumbents and challengers used the policy window to promote different solutions to the problem. Concerning direct press support, three main positions were identified in the material. First; a call to maintain and increase press support to strengthen vulnerable newspapers and enhance diversity. This position was promoted by the Norwegian Association for the Media Industry (MBL), the National Union for Journalists (NJ), as well as the newspapers that benefited from this policy (niche newspapers and newspapers with a larger competitor serving the same community or city). The MBL asked for a 25% increase in direct press support. The second position called for a redistribution of support to a wider selection of content producers. The Norwegian Specialized Press Association argued that the direct support should be based on evaluations of the content, not the distribution platform: 'It is about time that the current press support system is pensioned once and for all – and that we face the consequences in the enormous changes in media consumption. Equal treatment and media support based on content should be on the agenda' (Dagens Næringsliv, 2009c). The third solution, mainly promoted by challengers and large news organizations that did not benefit from production support, was to transform it into funding that incumbents and challengers could apply for on an equal foot, for instance, support for digital

transformation processes in the media industry (Dagens Næringsliv, 2009b), for innovation projects or journalistic projects instead of for publications (Dagens Næringsliv, 2009a). This would mean scrapping existing policy measures in the press and introducing new incentives.

Production support was the most debated media political issue from 2008 to 2010, while the VAT exemption was given more attention from 2010 and onward. Challengers, including actors from sectors other than the press, argued that they also should benefit. The Norwegian Specialized Press Association actively sought to expand the definition of eligible recipients, and the commercial PSB, TV 2, likewise argued that zero-rated VAT policy should involve broadcasters that produced news. A central dilemma that divided incumbent press organizations was whether to lobby for a flat low VAT for print and digital newspapers or to protect the zero-rated VAT for the printed press and target low-rated VAT for digital newspapers. This issue was particularly challenging as at printed newspapers were so far the most profitable platform while the online business models had still not reached profitability. Newspapers that were reluctant to move onto digital platforms strongly opposed a solution that would add VAT on printed newspapers, while the largest newspapers with the strongest digital presence were undecided about what solution would be the most effective.

The final report of the Press Support Commission was published December 2010 (NOU 2010: 14). Conclusions were that production support should be continued as a way to counter the financial challenges in the media market and the support should include digital newspapers. Concerning the VAT, two competing solutions were presented. The first model was based on a continuation of the zero-rated VAT for print newspapers, combined with a reduction from 25 to 8% VAT for digital news outlets. The other solution was a flat 8% VAT for print and digital news publications. The proponents of the latter solution argued that it would enhance digital innovation, and ensure a reallocation of existing funding without an increase in the budget.

A complex political process followed in which challengers and incumbents competed for policy solutions that would benefit their organizations. The Press Support Commission stated the importance of direct press support to secure diversity in the press sector, but the political actors on the right and the left disagreed about the level of direct support. Press support for digital and printed newspapers was, in the end, sought by the Labor-led government, as a way to secure media diversity. The question of the VAT was still undecided, however, and a number of public hearings ensued. A key actor in the press sector, Schibsted, supported an 8% flat VAT for all news media, fearing a 25% VAT on digital news, and managed to get the MBL on board (Dagens Næringsliv, 2012a). The editors from newspapers that mainly published print editions at the time again vehemently rejected the suggestion. The Labor-led government decided to put the VAT policy on hold and argued for further investigation. Consequently, the policy window closed (Dagens Næringsliv, 2013d). Industry actors called it a breach of promise, and a shared feeling of frustration was expressed across the sector.

In 2013, when a coalition consisting of the Conservative Party and the Progress Party won the general election, and formed a minority government, the conditions for policy change were altered. The Conservative Party had campaigned on cutting the direct support, but at the same time continuing the work on a flat low VAT, as well as limiting the

mandate of the public service broadcaster NRK (Dagens Næringsliv, 2013c). Neither standpoint proved politically viable in the new climate. Due to the severity of the financial crisis facing the industry and the competition from global companies, the Labor Party, now in opposition, suggested a zero-rated VAT if news organizations promised moderation in salaries and dividends. Incumbent actors and press organizations intensified their claims for policy action to protect the Norwegian media sector against global companies like Facebook and Google ‘stealing’ advertising, and campaigned for a zero-rated VAT for print and digital newspapers, a policy solution that had been deemed impossible only a few years earlier (Dagens Næringsliv, 2014). Press actors eventually managed to get support from all parties in opposition concerning the zero-rated VAT, and consequently, they had support in Parliament. The zero-rated VAT was finally implemented in January 2016, and all editorial-driven paid-for news media on mobile, computers, TV, and radio were included in the incentive; however, the specialized press and journals were excluded.

In sum, the sense of crisis linked to digitalization in the press sector opened up a policy window in which new and old policy measures in the field were negotiated. Although new policies were proposed, the debate finally centered on the two existing policy measures, the VAT exemption and direct press support. In the end, both incentives were protected, expanded, and modernized to meet the problems caused by digitalization, reaffirming the collective frame that the state is responsible for protecting diversity through active policy incentives. Political and industry actors adjusted their claims and thus, were able to make use of a policy window at the end of a long and complex policy process, which allowed for a high level of consensus concerning the final solutions.

Concluding remarks: global competition and converging frames

In this article, we explored how media industry players framed the challenges and opportunities of digitalization in the period from 1998 to 2017, linked to public support for PSBs and the press. Based on the MPF approach, a core assumption was that the Norwegian media policy field, during a period of disruption, would open up for challengers that could create alternative policy frames and put incumbents’ positions at risk. The analysis yielded the opposite conclusion: The set of actors involved in framing and debating digitalization and media policy remained remarkably stable throughout the study period. The set included major media actors, interest organizations, politicians, bureaucrats, and some opinion leaders and academics, but to a lesser degree challengers representing new media or technological platforms. The incumbents were able to maintain their position, in terms of framing power and in terms of policy outcomes even in this phase of transition, and protective measures such as a broad PSB remit, VAT exemption, and direct press support were maintained, and even extended. The overall frame that was successfully promoted was that established media, necessary to fulfill the democratic goals of Norwegian media policy, must be protected against the negative effects of digitalization.

According to the MPF approach, incumbents tend to dominate stable fields, and seek to consolidate their power within fields that are in disruptive states, even with more difficulty. The present study tells us more about the factors that may be of importance for

such reassertion of incumbent power in times of disruption, thus adding to our theoretical understanding. On the one hand, levels of social skill of incumbent actors in forging frames that are legitimate within a specific policy context is confirmed as crucial. On the other hand, the successful result for incumbents was also linked to the urgency of the threat of digitalization, which put strong pressure on the politics stream and created policy windows that could be used by these skillful actors. Finally, the Norwegian corporatist model of policy making, including an active role of the state, strong proximity between actors and an emphasis on consensual solutions, may be a model that favors incumbents and their social skill, more than a system where solutions to problems are mainly sought through the market. This model may be seen as conservative and as serving incumbents' interest, but this case study still shows the inherent potential for renewal of existing policy measures that have benefited both major and minor players and opened up some arrangements for new types of media actors. So far it may seem that the measures that were put in place after long and winding policy debates have served to ease some of the transition to digital formats. Even though the conditions for policy reform will vary between media systems, this study of the Norwegian case can still tell us something about the potential role and value of national state policies faced with global challenges.

This study contributes to the existing literature on media policy formation processes (Donders et al., 2018; Flew et al., 2016; Simpson et al., 2016) by contextualizing policy processes historically, institutionally and across sub-sectors. A core finding was that distinctions between media types and platforms were blurred with digitalization, as global competition became a cross-cutting challenge for all actors. Actors from different sub-sectors hence converged in a shared frame stating the need to protect the national media industry against global competition to ensure the democratic goals of the Norwegian media policy. Global media platforms may thus constitute the 'perfect enemy' for creating policy windows and support for policy solutions that maintain the position of national players.

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Note

1. A third key debate was how to finance PSBs when digitalization changed the funding regimes rooted in linear viewing modes and frequency limitations, but this debate is not included owing to space considerations.

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