Information

on the basic problems of

radio and television

in 2024

National Broadcasting Council KRRiT)

Warsaw, March 2025

National Broadcasting Council
(KRRiT)

RESOLUTION NO. 95/2025
of 19 March 2025

Pursuant to Article 9(1) in conjunction with Article 12(1) and (2) of the Act of 29 December 1992 the Broadcasting Act (Journal of Laws of 2022, item 1722 and of 2024, item 96), the National Broadcasting Council

has decided

1. To adopt the *Information on the basic problems of radio and television in 2024*, which constitutes an appendix to the resolution.
2. Present the *Information on the basic problems of radio and television in 2024 to:*

   - The *Sejm* of the Republic of Poland,
   - The Senate of the Republic of Poland,
   - The President of the Republic of Poland.

3. Present the Information on the basic problems of radio and television in 2024 to the Prime Minister

Chairman of the
National Broadcasting Council
/ - / Maciej Świrski

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1. Threats to media pluralism and freedom of speech – selected examples

One of the most serious threats to pluralism and media pluralism in Poland is the unlawful takeover of the public media at the end of 2023, the effects of which we are still seeing today. *Telewizja Polska* (Polish Television-*TVP*), *Polskie Radio* (Polish Radio-*PR*) and *Polska Agencja Prasowa* (Polish Press Agency – *PAP*) were formally put into liquidation, which allowed the government to take full control over them. The authorities used this fictitious liquidation to replace the existing management and organisational structures with people loyal to the ruling parties. In practice, the public media have become a propaganda tool, promoting pro-government narratives and attacking the opposition. Examples of such activities include the one-sided presentation of political events, ignoring topics inconvenient to the government, and regular disinformation campaigns targeting the opposition and independent journalist

The government has also used economic mechanisms that have effectively reduced the space for independent media. Opposition media are regularly hounded by pro-government public and commercial media that support the government's narrative. In addition, pro-government media houses cut off opposition newsrooms from advertising revenue, effectively limiting their ability to function in the market. Furthermore, the Council of Ministers has redirected a significant portion of the advertising budgets from state-owned companies and institutions that previously supported public media to commercial media favourable to the government. Thus, pro-government commercial media or internet portals sympathetic to the authorities receive a steady stream of funds that allows them to dominate the media.

At the same time, the government continues to subsidise public media with public funds, despite its declared intention to abolish it, which constitutes a form of illegal state aid. These subsidies are used to maintain propaganda content on *TVP* and *Polskie Radio* (Polish Radio), which ensures the government's permanent control over their message/content. At the same time, a bill is being drafted that would ban advertising in public media, which would further marginalise their financial potential, making them completely dependent on state subsidies. Such a regulation, although at first glance might look like an action supporting independence and transparency, in reality would further strengthen the government's monopoly over public media.

Poland is an example of how it is possible to create the illusion of pluralism while manipulating the media in a way that prevents true independence and diversity of voices. Actions such as the forcible takeover of the public media, the exclusion of journalists from conservative media, e.g. *TV Republika*, from press conferences of government representatives, economic pressure on these media and manipulation of legal regulations are examples of the restriction of media freedom in hybrid systems. In the long term, such practices can lead to further consolidation of power and marginalisation of independent narratives.

1.1. Negative effects of the process of liquidation of the public media

The unlawful process of liquidation of public media in Poland caused them irreparable financial, organisational and image losses.

Problems with the fulfilment of the public mission

At the end of December 2023 and in 2024, there were problems with the fulfilment of the public mission by *TVP*. The monitoring carried out by the National Broadcasting Council (*KRRiT*) shows that the public television station did not fulfil its mission to the full extent, as required by law, because from 20 December 2023, it did not broadcast *TVP3 Regionalna* and regional programmes created by 16 local branches of *Telewizja Polska* (Polish Television), *TVP Info* and TVP World. In addition, it did not provide viewers with scheduled main news and current affairs programmes, as well as services such as websites and the regular offer in the TVP GO and VOD[1] applications. Public demonstrations in defence of public media and freedom of speech were held in front of TVP buildings in Warsaw and the headquarters of local broadcasting branches.[2]

The National Broadcasting Council (*KRRiT*) has compiled an extensive two-part report on this subject, edited by Dr Agnieszka Glapiak, entitled ‘Chronology of the Liquidation of the Public Media in Poland’.[3] These reports describe the changes in the functioning of *TVP*, *Polskie Radio* (Polish Radio) and regional radio, the actions of the liquidators, the removal of programmes and well-known presenters from the airwaves, which caused a difficult-to-recover drop in viewership, the removal of articles, audio and video materials from websites, problems with the implementation of the public mission, and the dismissal of journalists and employees.

For more detailed information on the timeline, see the *National Broadcasting Council (KRRiT) Activity Report in 2024.*

Public service media companies in liquidation are primarily uncertain about their future. They reserve for themselves the fulfilment of their mission on the condition that they can continue to operate.[4]

According to the applicable law,[5] the liquidators of joint-stock companies, and thus the liquidators of the public media companies, which operate on the basis of Article 26 of the

[1] KRRiT Report, *Degree of fulfilment of the public mission by TVP after 20 December 2023 and TVP programme audience losses and advertising market shares from 20.12.2023 to 31.01.2024,* https://www.gov. pl/web/krrit/stopien-realizacji-misji-publicznej- przez-tvp-po-20-grudnia-2023-r-oraz-straty-ogladalnosci-programow-tvp-i-udzialow-w-rynku-reklam-od-20122023-r-do- 31012024- r [Accessed on: 11.02.2025].
[2] KRRiT Report: *Chronology of the liquidation of public media in Poland*, https://www.gov.pl/web/krrit/komunikat-krrit-na- temat-publikacji-raportu-o-likwidowaniu-mediow-publicznych [Accessed on: 18.02.2024].
[3] KRRiT report: *Kalendarium likwidowania mediów*..., art. cit.
[4] KRRiT's own data from the programme and financial plans of public media companies for 2025 and from the Charters of Obligations for 2025-2029.
[5] Art. 468 par. 1 of the Commercial Companies Code.

Broadcasting Act exclusively in the form of state-owned companies with a single shareholder, are obliged to take liquidation measures, including the termination of the company's current business and all its undertakings. The liquidators may only take on new business if it is necessary to complete ongoing proceedings for the purpose of liquidating the company.

It should be emphasised that the objectives of the liquidation process are contrary to the public service broadcasting remit planned for five years. This is one of the factors that prevented the conclusion of Charters of Obligations of the remit for 2025-2029 between public broadcasters and the National Broadcasting Council. The second important argument was the lack of legal regulations ensuring permanent public funding other than subscription fee funds, as these revenues only partially cover the costs of fulfilling the mission.[6]

The public media constitute a segment of the market for which the Broadcasting Act imposes special obligations towards the state, society and culture. The law defines these obligations as a public mission, indicating certain tasks and responsibilities. They are diverse: from technical and technological, through protection, maintenance and supplementation of collection archiving, to programme activities, i.e. providing for the benefit of all of society and its individual parts with diverse programmes and other services in the field of information, journalism, culture, education, sports and entertainment, which is to be characterised by pluralism, balance, impartiality, innovation, high quality and integrity of the message.

Unfortunately, the Broadcasting Act does not define qualitative indicators. As a result, the way they are implemented is left to the free interpretation of each broadcaster. The legislator also failed to provide the National Broadcasting Council with the possibility (e.g. through a statutory delegation to issue relevant regulations) to interpret the individual terms mentioned above and to indicate the methodology used to evaluate programmes. This is an urgent task for the owner – the Ministry of Culture and National Heritage – which has the legislative initiative, or for the parliament.

This demand, as well as other *de lege ferenda* remarks, has been included in the chapter **‘Proposed directions of legislative changes’** of this *Information* document.

A drastic drop in viewership

After the reintroduction of the news channel TVP Info (broadcasts were suspended from 20 to 29 December 2023), this channel experienced the biggest drop in viewership. The average TVP Info audience is only a quarter of the pre-20 December 2023 period and does not exceed

[6] Communique of the National Broadcasting Council (KRRiT) of 13 November 2024 on the refusal to authorise the chairman of the National Broadcasting Council to conclude agreements on the determination of the subscription fee schedule for public media companies for the years 2025-2029, https://www.gov. pl/web/krrit/krrit-jednoglosnie- odmowila-upowaznienia-przewodniczacego-macieja-swirskiego-do-zawarcia-porozumienia-w-sprawie-ustalenia-kart-powinnosci- mediow-publicznych-na-lata-2025—2029 [Accessed on: 11.02.2025].

100,000 viewers. The biggest drop occurred between 20 and 31 December 2023, when the audience fell by 92% compared to the same period in 2022. In January 2024, TVP Info lost almost 70% of its viewers, and in October 2024 it had as much as 77% fewer viewers compared to 2023.

Table 1. **Viewership of TVP Info in the years 2023 - 2024**

AMR – Average Minute Rating				
	2023	**2024**	**CHANGE**	**% CHANGE**
January	277,613	91,264	-186,349	-67%
February	294,277	78,009	-216,268	-73%
March	272,282	72,432	-199,850	-73%
April	236,432	63,028	-173,404	-73%
May	240,053	63,169	-176,884	-74%
June	264,845	63,248	-201,597	-76%
July	261,289	64,264	-197,025	-75%
August	265,651	61,141	-204, 510	-77%
September	268,945	105,944	-163,001	-61%
October	330,388	74,517	-255,871	-77%
November	338,465	80,689	-257,776	-76%
December	227,223	85,754	-141,469	-62%

Source: Elaboration by the Office of the National Broadcasting Council (KRRiT) based on research by AGB Nielsen Media Research

The drop in viewership also affects individual news programmes broadcast on TVP. According to AGB Nielsen Media Research, TVP's leading news programme, *‘19.30’*, has lost – depending on the month – from 30 to over 40% of its viewers. The dramatic nature of the situation is even more evident in the audience figures: in January 2024, the *‘19.30’* news programme had almost 800,000 fewer viewers than *‘Wiadomości’* (the ‘News’); in February and March, there were around 950,000 fewer viewers, and in November and December, over a million fewer viewers than *‘Wiadomości’* in a comparable period.

Table 2. **Viewership of *'Wiadomości'* (the 'News') vs *'19.30'* in the years 2023-2024**

AMR – Average Minute Rating				
January	2023	2024	CHANGE	% CHANGE
	2,651,235	1,901,986	-749,249	-28%
February	2023	2024	CHANGE	% CHANGE
	2,650,514	1,676,460	-974,054	-37%
March	2023	2024	CHANGE	% CHANGE
	2,574,233	1,618,900	-955,333	-37%
April	2023	2024	CHANGE	% CHANGE
	2,233,013	1,466,506	-766,507	-34%
May	2023	2024	CHANGE	% CHANGE
	2,085,194	1,318,412	-766,782	-37%
June	2023	2024	CHANGE	% CHANGE
	2,050,415	1,268,112	-782,303	-38%
July	2023	2024	CHANGE	% CHANGE
	2,014,336	1,158,523	-855,813	-42%
August	2023	2024	CHANGE	% CHANGE
	2,100,115	1,265,793	-834,322	-40%
September	2023	2024	CHANGE	% CHANGE
	2,335,797	1,619,410	-716,387	-31%
October	2023	2024	CHANGE	% CHANGE
	2,780,680	1,593,546	-1,187,134	-43%
November	2023	2024	CHANGE	% CHANGE
	2,698,492	1,583,929	-1,114,563	-41%
December	2023	2024	CHANGE	% CHANGE
	2,866,537	1,605,863	-1,260,674	-44%

Source: Elaboration by the Office of the National Broadcasting Council based on AGB Nielsen Media Research.
The data refers to the broadcasts of 'Wiadomości' (the 'News') *and '19.30' on TVP 1, TVP Info and TVP Polonia.*

'Panorama', TVP2's main news programme, which has been broadcast at 6.00 p.m. for years, disappeared on 20 December 2023. It was not reinstated until 10 January 2024, when it was also moved to 10.00 p.m. Further changes to the broadcasting time were made, and at the beginning of September 2024, the programme was taken off TVP2, where it had been present for over 30 years, and moved to TVP Info.

According to AGB Nielsen Media Research, in 2024, ‘Panorama’ had on average over 70% fewer viewers than during the previous year. In 2024, compared to 2023, it lost over a million viewers. Frequent changes in the broadcast time during the year do not give a chance to improve these indicators.

Table 3. **Viewership of ‘Panorama’ in 2023-2024**

AMR – Average Minute Rating				
January	2023	2024	CHANGE	% CHANGE
	1,589,120	546,007	-1,043,113	-66%
February	2023	2024	CHANGE	% CHANGE
	1,637 218	460,063	-1,177,155	-72%
March	2023	2024	CHANGE	% CHANGE
	1,487,012	424,757	-1,062,255	-71%
April	2023	2024	CHANGE	% CHANGE
	1,251,188	461,929	-789,259	-63%
May	2023	2024	CHANGE	% CHANGE
	1,145,394	493,237	-652,157	-57%
June	2023	2024	CHANGE	% CHANGE
	1,143,645	346,799	-796,846	-70%
July	2023	2024	CHANGE	% CHANGE
	1,148,940	407,222	-741,718	-65%
August	2023	2024	CHANGE	% CHANGE
	1,199,914	401,591	-798,323	-67%
September	2023	2024	CHANGE	% CHANGE
	1,193,916	778,012	-415,904	-35%
October	2023	2024	CHANGE	% CHANGE
	1,552,055	316,150	-1,235,905	-80%
November	2023	2024	CHANGE	% CHANGE
	1,644,090	369,526	-1,274,564	-78%
December	2023	2024	CHANGE	% CHANGE
	1,621 312	372,668	-1,248,644	-77%

Source: Elaboration by the Office of the National Broadcasting Council based on AGB Nielsen Media Research.
The data refers to the broadcasts of ‘Wiadomości’ (the ‘News’) *and ‘19.30’ on TVP 1, TVP Info and TVP Polonia.*

'Teleexpress' resumed broadcasting on 4 January 2024 and this programme also recorded huge audience losses. On average, there were one third fewer viewers. In terms of numbers, this is a decrease from almost 500,000 to over 800,000 viewers.

Table 4. **Viewership of 'Teleexpress' in the years 2023-2024**

AMR – Average Minute Rating				
January[7]	2023	2024	CHANGE	% CHANGE
	2,583,604	1,970,505	-613,099	-24%
February	2023	2024	CHANGE	% CHANGE
	2,434,214	1,676,298	-757,916	-31%
March	2023	2024	CHANGE	% CHANGE
	2,159,258	1,521,188	-638,070	-30%
April	2023	2024	CHANGE	% CHANGE
	1,881,582	1,307,128	-574,454	-31%
May	2023	2024	CHANGE	% CHANGE
	1,711,684	1,199,938	-511,746	-30%
June	2023	2024	CHANGE	% CHANGE
	1,671,826	1,356,909	-314,917	-19%
July	2023	2024	CHANGE	% CHANGE
	1,648,290	1,171,539	-476,751	-29%
August	2023	2024	CHANGE	% CHANGE
	1,697,960	1,131,515	-566,445	-33%
September	2023	2024	CHANGE	% CHANGE
	1,772,583	1,299,157	-473,426	-27%
October	2023	2024	CHANGE	% CHANGE
	2,114,142	1,389,089	-725,053	-34%
November	2023	2024	CHANGE	% CHANGE
	2,507,099	1,669,841	-837,258	-33%
December	2023	2024	CHANGE	% CHANGE
	2,476,066	1,663,017	-813,049	-33%

[7] The data does not include 1, 2 and 3 January 2024, as the programme resumed on 4 January 2024 after a break on 20 December 2023.

Source: Elaboration by the Office of the National Broadcasting Council based on research by AGB Nielsen Media Research

Financial problems of the public media

The lack of financial stability is a huge challenge for broadcasters, which puts public media in a dilemma: fulfilling the mission or commercialisation. This does not make it easy for them to be impartial and fulfil the function of social control and independence from political influence. In addition, the strong competition on the media market in Poland puts public media under constant pressure to fight for viewers.

The anticipated downward trend in subscription fee revenues and the current dysfunctional system of financing public media create numerous problems.

The technological changes in the age of digitalisation, artificial intelligence, social media and streaming platforms are an expensive and multifaceted challenge. Public broadcasters are looking for ways to reach young people who do not need traditional radio and television. The future of public media depends largely on the adaptation of technology and the creation of programme proposals that are in line with the expectations and habits of the audience. Nevertheless, their role in fulfilling the public mission, providing the public with reliable and up-to-date information, and supporting cultural and national identity remains invaluable.

Therefore, there are many arguments in favour of the public media, seen as a social good, being accessible to every citizen and financed by public funds in a clearly defined, legally regulated manner.

The actions of the legislator, who financed public media in the years 2017-2023 with compensation funds due to the lost subscription fee revenue resulting from the exemption from the obligation to pay radio and television subscription fees, can be assessed as ad hoc. Importantly, the compensation funds have significantly improved the financial condition of public media companies but has not solved the problems arising from the lack of stability and predictability of funding for the fulfilment of the public mission.

In 2024, the companies did not receive compensation. As a result of the forcible changes in the public media sector, on 23 December 2023 Polish President Andrzej Duda, '*in view of the flagrant violation of the Constitution and the principles of a democratic state of law',*[8] decided to veto the budgetary bill for 2024, which provided for 3 billion PLN for the public media. The president emphasised that the public media '*must first be reliably and lawfully reformed'*.[9] In 2024, public media companies in liquidation received funding from the state budget, totalling over PLN 2 billion in the form of targeted subsidies.[10]

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[8] The president's comment on the veto of the budget law, https://www.prezydent.pl/aktualnosci/wydarzenia/weto-ustawy-okolobudzetowej-i-zapowiedz-prezydenckiej-ustawy, [Accessed on: 11.01.2025].

[9] Ibid.

[10] Data based on BIP and information from the websites of public media companies about specific subsidies from the Ministry of Culture and National Heritage to *Ensure the continuation of funding for statutory tasks related to the fulfilment of the public mission in 2024, as specified in Article 21(1) of the Broadcasting Act of 29*

In 2024, the National Broadcasting Council allocated 620 million PLN of subscription fees planned for 2024 to the realisation of the public service mission for the benefit of public broadcasters. In addition, due to the flooding that occurred in Poland and the state of natural disaster, the National Broadcasting Council transferred funds from the surplus of PLN 22.3 million generated in 2022 to the public radio and television companies. *Telewizja Polska* (TVP) was obliged to transfer 70% of the funds received for the creation and distribution of regional programmes throughout the local branches.

According to the KRRiT forecast, subscription fee revenues in 2025 will be lower than in 2024 and will amount to PLN 605 million. The National Council divided the forecast funds among 19 companies, with PLN 308.4 million (51%) going to *Telewizja Polska*, PLN 148.3 million (24.5%) to *Polskie Radio* (Polish Radio) and PLN 148.3 million (24.5%) to regional radio companies. Also in 2025, subscription fee revenues will not be sufficient to fully finance the public mission costs indicated by the public media companies in their programme and financial plans for 2025.

In November 2024, despite a positive assessment of the ways of fulfilling the mission tasks contained in the Charters of Obligations for 2025-2029 provided by the public media companies, the National Broadcasting Council decided that, as in 2019, the estimated costs of fulfilling these obligations made it impossible to finance them from available public funds. The National Broadcasting Council predicted that in each year of the 2025-2029 Charters of Obligations, there would be significant shortfalls in these funds, similar to the difficult financial situation of the public media. Furthermore, the National Broadcasting Council (*KRRiT*) considered the assumption that the public broadcasters' revenues in the subsequent years of the Charters of Obligations would come from state budget subsidies without a clear legal basis to be unjustified. The analysis showed that there is a shortfall of almost PLN 15 billion for the full implementation of the public service remit over a five-year period, as defined in the said Charters for 2025-2029. In the current legal system governing the financing of public service media, there are no regulations ensuring permanent funding from public sources other than subscription fees.

Furthermore, the creation of Charters of Obligations contradicts the objectives of the process of liquidation of public service media companies. Until the legal status of public service media companies is restored in accordance with the Broadcasting Act, especially in light of the judgement of the Constitutional Court of 18 January 2024 (Case No. K 29/23) and the apparent nature of the liquidation proceedings of public radio and television entities, as well as ensuring sufficient and stable public funding for the public mission, there are no grounds for establishing the Charters of Obligations of public radio entities for the years 2025-2029.

In conclusion, there is an urgent need to develop a new system of financing public media that will ensure financial stability for broadcasters and will sufficiently cover the costs of tasks fulfilling the public mission, because the financing of public media from public funds is one of the conditions allowing for their programming and broadcasting activities.

December 1992 (Journal of Laws of 2022, item 1722 and of 2024, item 96) by awarding a special-purpose subsidy referred to in Article 31(2) of the Broadcasting Act of 29 December 1992.

1.2 Disinformation - mechanisms, effects and counteraction

Disinformation and fake news: sources, definitions, research

In a world where information spreads faster than ever before, the truth is becoming increasingly fleeting. Fake news and disinformation are no longer just a propaganda tool, but a real threat to democracy, social stability and the economy. False content manipulates public opinion, influences elections, and causes chaos and polarisation.

Disinformation is not a random phenomenon, but a precisely planned strategy that uses social media algorithms, the emotional impact of content and the psychological mechanisms of the audience. Fake news is often constructed in a way that ensures maximum virality, enabling it to reach millions of users in a short period of time. The modern media environment favours the spread of false information, which can influence public debate, shape political opinions and destabilise society. The main mechanisms behind this process include social media, pseudo-news portals, internet bots and data manipulation.

Social media such as Facebook, ‘X’, TikTok and YouTube are one of the main sources of disinformation. Thanks to algorithms that promote content with high engagement, sensational news has a wider reach than reliable news. A significant channel for spreading false content are pseudo-news portals that pretend to be credible media, publishing manipulated clickbait content aimed at generating traffic and advertising revenue. Bots and troll farms – i.e. automatically generated accounts and organised groups acting in the interest of specific parties – also play an important role in the spread of fake news by massively sharing manipulated information and influencing public opinion. Communication applications such as WhatsApp and Telegram are also important channels for the spread of disinformation. Encrypted messaging apps allow unverified information to be shared in closed groups, making it much more difficult to verify.

Disinformation uses a variety of techniques to manipulate content. Deepfake and other forms of visual manipulation, which involve creating fake photos, videos and audio recordings, are often used. Another popular mechanism is called context switching, which means presenting true information in a misleading light, e.g. using old photos as illustrations for current events. Many false narratives are also based on ‘cherry picking’, i.e. selectively presenting facts in a way that fits a specific narrative. Disinformation also often uses the falsification of data technique, i.e. manipulation of statistics and numbers to mislead the audience. The effectiveness of false content is also influenced by psychological mechanisms of influencing the audience. One of these is the confirmation bias, which means that people are more likely to believe information that agrees with their previous beliefs. The illusion of truth also influences the spread of misinformation; the repeated repetition of false information makes it seem true. Fake news often relies on emotional narratives because information that triggers strong emotions such as fear, anger or outrage is readily shared by users. Another important element of disinformation is the authority effect, which involves using fake experts or celebrities to lend credibility to content.

Disinformation can take on many forms, from typical fake news to the manipulation of facts, as well as images, videos and sounds that subconsciously influence the audience. Contemporary propaganda does not necessarily have to be based on publishing obvious lies

– it is enough to change the context, manipulate emotions or present a half-truth in an attractive, engaging form. In the age of social media, the fight against disinformation is no longer just about exposing lies – it requires an understanding of the mechanisms of manipulation and educating users. Because the more convincing the fake images and recordings become, the more difficult it will be to distinguish reality from illusion.

The main difference between disinformation and manipulation is the change in the meaning of the information:

- disinformation is the deliberate dissemination of false information that is completely untrue or fabricated from scratch: e.g. ‘vaccines cause autism’ – completely false information, not based on any evidence;
- manipulation involves changing the meaning of true information through selective presentation, changing the context, omitting relevant elements or transforming data: e.g. ‘the number of children with autism has increased after the introduction of vaccinations.’ Although the number of autism diagnoses has indeed increased, this does not mean that vaccinations are the cause. This is a manipulative suggestion of a false cause-and-effect relationship.

Manipulative content therefore leads to false conclusions, e.g. through:

- selective presentation of statistical data – e.g. only presenting information that fits a specific narrative while omitting other relevant data;
- manipulation of headlines – an article may contain true information, but its title suggests a completely different interpretation of events, which misleads the reader even before reading the content;
- changing the context of photos and recordings – real visual materials are presented in a different time or geographical perspective, which gives them a false meaning.

In the age of social media, images have become one of the most powerful means of conveying information, but also of spreading disinformation. Photos, videos and graphics are now shared more easily and quickly than text, and their message reaches the audience immediately, often evoking strong emotions. This is why they are an extremely effective tool for manipulation. Memes – humour as a weapon in the battle for narrative, often perceived as innocent entertainment content, in fact, play a significant role in shaping public opinion. Thanks to the simplicity of their message and their viral potential, they can effectively promote manipulated content, perpetuating false beliefs in a subliminal way. Their power lies in their humour and brevity, which makes users eager to share them without thinking about their authenticity. The most common manipulative techniques in memes are ridiculing public figures through quotes taken out of context or photoshopped images, which can change the perception of a person or event. Manipulated data sets are also present in memes, which present false comparisons, leading the audience to draw wrong conclusions. The danger of memes are that, unlike typical fake news, they are more difficult to fact-check, and their subjective and satirical nature makes recipients treat them as ‘harmless fun.’

Deepfake, on the other hand, is the next generation of disinformation. It is even more dangerous because the fake video and audio recordings generated by artificial intelligence can show people in situations that never took place. This technology allows for voice dubbing, changing facial expressions or completely replacing the image, which blurs the line between truth and falsehood. According to the Reuters Institute 2024 Report, deepfakes are one of the greatest threats to the global information space because they require advanced analytical tools to detect them. The more this technology develops, the more difficult it is to distinguish manipulated material from real footage. They are used, among other things, to:

- impersonate politicians and celebrities – e.g. in fake speeches or alleged interviews that can influence the perception of a person;
- create false evidence in political campaigns to discredit opponents;
- manipulate public opinion by creating doctored recordings aimed at social destabilisation.

Deepfake, thanks to the use of neural networks (mainly GAN - Generative Adversarial Networks),[11] makes it possible to swap faces, change the movement of the lips or even generate a voice so that it perfectly resembles a real person. Deepfake technology makes it possible to create recordings in which famous people say or do things that never took place. Initially developed for entertainment purposes, it quickly became a powerful tool for manipulation, threatening the credibility of media reports. Deepfakes are increasingly being used for political manipulation and disinformation, which can destabilise the international situation and influence electoral decisions. Deepfakes can also be used in attacks on the reputation of public figures,[12] for example by generating fake recordings to compromise celebrities, politicians or journalists.

Thanks to social media, which act as information accelerators, fake news can reach millions of people in a matter of minutes. Research[13] conducted by the National Media Institute (*Krajowy Instytut Mediów - KIM*) on behalf of the National Broadcasting Council shows that almost 36% of Poles have come across false video content and over 41% of Internet users have found certain information to be manipulated. What is even worse, senior citizens and people less familiar with the mechanisms of manipulation are particularly susceptible to the influence of disinformation.

The problem lies not only in the scale of false information, but in its effectiveness. The confirmation bias, which makes people more likely to believe content that agrees with their views, is leading to ever greater social divisions. Meanwhile, tools such as deepfakes and automated bots make it possible to create manipulated material on an unprecedented scale. Awareness of the threat is still insufficient. Only 2% of internet users report fake news to fact-checking organisations, which shows that much more education is needed in critical thinking and source verification.

[11] The article explains the concept of Generative Adversarial Networks (GAN) – a machine learning technique used to generate realistic images, sounds and texts, https://www.geeksforgeeks.org/generative-adversarial-network-gan/, [Accessed on: 03.03.2025].
[12] The article discusses deepfake technology and its potential threats to society, https://cyberprofilaktyka.pl/blog/deepfake-jak-sztuczna-inteligencja-moze-nas-oszukiwac_i40.html, [Accessed on: 03.03.2025].
[13] Report by the National Media Institute (*KIM*) on the phenomenon of fake news, https://kim.gov.pl/2024/05/13/fake-newsy-raport-krajowego-instytutu-mediow [Accessed on: 27.02.2025].

The Reuters Institute 2024 Report[14] clearly indicates that disinformation and fake news are becoming one of the greatest challenges of the modern world. The changing dynamics of the media make information manipulation increasingly difficult to detect.

In Poland, this problem is particularly pressing in the context of elections and heated socio-political debates. The bias of public and private media has become one of the key accusations against the country's information landscape. As a result, polarisation is growing, and fake news finds fertile ground in a society that is increasingly distrustful of traditional sources of information.

The scale of disinformation in Poland is influenced not only by internal divisions but also by foreign information operations. Russian troll farms actively interfere in the media space, using false narratives, especially in the context of the war in Ukraine. Their activities aim to undermine trust in state institutions, the media and international organisations.

Although awareness of the dangers of disinformation among Poles is growing, many people still find it difficult to assess the credibility of sources. Traditional media, i.e. television and radio, are often considered more reliable than the internet, although their credibility is increasingly being questioned due to political influence.

Disinformation affects various spheres of life and affects different social groups to varying degrees. The *KIM*[15] survey, conducted among Poles over the age of 15, shows that politics (65.7%) is by far most frequently associated with fake news. It is this area, which shapes the future of the country and electoral decisions, that seems most susceptible to manipulation. The next most frequently mentioned topics were celebrity life (56.4%), social issues (50.9%), the economy (47.1%) and health (43%).

The perception of disinformation varies depending on the gender, education and age of the respondents. Women are more likely to notice fake news about celebrities (62.7% vs. 49.5%), while men are more sensitive to misinformation related to finance (45.8% vs. 34.5%) and the economy (43.2% vs 30.0%).

The level of education has a key impact on the ability to recognise fake news. Among people with a university degree, 78.7% believe that politics is the main area of disinformation, while in the group of people with a lower educational level, this percentage is 51.3%. Similar differences can be seen with regard to social issues (60.7% vs 45.2%). Interestingly, health is the only area in which people with a lower level of education are more likely to recognise fake news (37.5%) than in other areas, although still less likely than people with a higher level of education (54.7%).

[14] The deepfake report is an annual study on media trends, news consumption and disinformation, published at the University of Oxford. The 2024 edition focused on the development of artificial intelligence in journalism, media polarisation and the growing scepticism towards traditional sources of information. https://reutersinstitute.politics.ox.ac.uk/digital-news-report/2024, [Accessed on: 27.02.2025].

[15] Based on the National Media Institute's (*KIM*'s) own data.
Information on the research methodology used by *KIM* can be found in the *National Broadcasting Council (KRRiT) Activity Report in 2024.*

The internet remains the main source of fake news, as indicated by 59.7% of respondents. However, television also ranked surprisingly high (26%), which means that traditional media are not free from manipulation either. The press (10.5%) and radio (3.1%) are perceived as the least susceptible to fake news.

The above data is particularly significant in the context of the systematically declining trust in the media among Poles. The Reuters Institute 2024 Report shows that since 2015, the level of trust in the media in Poland has decreased by 17 percentage points, making our country one of the most polarised in terms of the media in Europe. The main reasons for this trend are political polarisation, government interference in public media and the growing dominance of social media as a source of information. As a result, Poles are increasingly questioning the reliability of traditional news services and looking for alternative channels of communication.

An example of the growing popularity of alternative information sources is YouTube's *'Kanał Zero'* (Channel 'Zero') which quickly attracted a large number of subscribers and became one of the most-viewed independent information sources. This trend shows that Poles are increasingly turning away from traditional media in favour of platforms that they perceive as more independent. However, the popularity of such channels brings with it new risks, including greater susceptibility to disinformation.

Disinformation: dissemination mechanisms and supporting technologies

One of the key mechanisms for the spread of fake news is social media algorithms, which promote content that arouses strong emotions. This means that fake news often spreads faster than reliable information. Information bubbles and so-called 'echo chambers'[16] further exacerbate the problem because the personalisation of content means that users only receive information that is consistent with their beliefs, which reinforces the effect of disinformation. The sensational nature of disinformation means that it is constructed in an emotional and controversial way, which increases its viral potential.

Experts analysing the mechanisms of disinformation indicate that echo chambers are particularly prevalent on social media.[17] Users follow content published by people and organisations that share their views, and the algorithms of digital platforms reinforce this effect by suggesting similar content. This results in a closed circle of specific information and opinions, eliminating access to alternative sources. As a result, recipients function in a media environment that not only limits their contact with diverse information, but also reinforces social divisions. Echo chambers lead to the radicalisation of views and the antagonisation of social groups, fostering conflicts arising from differences of opinion. They reinforce an attitude of 'us' against 'them', where people outside the information bubble are perceived as

[16] Echo chambers – a phenomenon that refers to the amplification of one-sided messages through the multiple reproduction of the same information and opinions, without the possibility of critical verification. In echo chambers, content is repeated by various sources, which makes the recipients, as in the case of bubbles, become more and more convinced of its truthfulness.

[17] The article *Vademecum Bezpieczeństwa Informacyjnego* (Information Security Handbook) explains the phenomenon of the echo chamber, a mechanism involving the reinforcement of specific opinions and the filtration of information in closed environments https://vademecumbezpieczenstwainformacyjnego.uken.krakow.pl/2020/03/10/echo-chamber/? [Accessed on: 03.03.2025].

alien, untrustworthy, and their views as inappropriate or even threatening to the values of the group. Operating in closed media environments has serious consequences. One of the main risks is susceptibility to information manipulation. Audiences with limited access to diverse sources become easier targets for fake news and propaganda. Commercially driven media provide users with content that matches their expectations, which can lead to the reinforcement of misinformation and misconceptions.

Information bubbles and echo chambers also influence the shaping of social and political attitudes. Limited access to diverse perspectives causes recipients to adopt increasingly extreme positions, losing the ability to engage in dialogue and confront their opinions with other points of view. This results in social polarisation, increased tensions and a weakening of the culture of public debate.

Media and disinformation experts point to several ways of limiting the impact of information bubbles and echo chambers.[18] A key element is media literacy, which teaches recipients how to consciously analyse content and verify information. Encouraging the use of diverse information sources and developing critical thinking skills allow for a better understanding of the media landscape and counteract manipulation. It is also important to increase the transparency of algorithms used by social media and to promote information pluralism. Recipients should be aware that the content they see on their news channels is the result of algorithmic selection and not an objective reflection of reality.

Disinformation also often exploits the position of authorities and the media – information disseminated by well-known personalities and popular media portals automatically gains more credibility and reach. The lack of immediate verification of content is also a problem – fake news often spreads at lightning speed, while corrections appear late or are ignored. Another effective method of spreading disinformation is to combine facts with propaganda, making it difficult to distinguish truth from manipulation.

A study conducted by researchers at the Massachusetts Institute of Technology (MIT)[19] in 2018 showed that false information spreads much faster on social media than real news. An analysis of 126,000 tweets and 4.5 million shares revealed that fake news reaches users up to six times faster than reliable information.

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[18] The article describes methods of sentiment analysis in social media, i.e. techniques used to assess the emotional tone of content published online, and emphasises the importance of sentiment analysis in detecting disinformation and hate speech online. https://www.mmediahouse.pl/analiza-sentymentu-w-mediach-spolecznosciowych/?, [Accessed on: 03.03.2025].

[19] Study conducted by researchers from the Massachusetts Institute of Technology (MIT) in 2018 on the spread of false information on social media, in particular on the 'X' platform. https://www.science.org/doi/10.1126/science.aap9559, [Accessed on: 27.02.2025].

Many websites make money from fake news through PPC (Pay-Per-Click)[20] and affiliate marketing [21] – more page views generate more profit. Some websites, posing as independent media, ask users for financial support in the form of subscriptions and donations.

Bots can generate posts, like content, comment and share information to artificially increase their reach. In politics and social media, they are mainly used to:

- massively spread disinformation – bots help increase the visibility of fake news and manipulated narratives;
- influencing the algorithms of social media platforms – mass interactions of bots cause specific topics to appear on trend lists, giving them more weight than they actually have;
- polarising society – by promoting extreme views, bots contribute to the division and radicalisation of users.

Astroturfing[22] involves simulating a grassroots social movement, e.g. through fake accounts commenting on a given topic in a way that suggests mass support or opposition. These activities effectively manipulate public opinion, creating the illusion of consensus, even if in reality a given position does not have widespread support.

Robert Gorwa's report entitled *Computational Propaganda in Poland* revealed that bots and fake accounts play a key role in shaping the political debate in Poland. Significant bot activity was noted in the Polish 'X'. Accounts linked to specific political narratives generated a large proportion of the platform's traffic. The manipulation reached a high level of professionalism, as not only individuals but also political organisations and marketing companies use bots to influence the public debate, which clearly indicates that it is not a random phenomenon but a strategic tool of political and social struggle.

Analyses of the Reuters Institute Report also show that trust in the media in Poland has fallen to 39%, which is a significant regression compared to previous years. This decline can be linked to the flood of disinformation and bots. Audiences are unable to distinguish genuine information from manipulation, leading to a general distrust of information sources. In addition, fake accounts and astroturfing increase social divisions, with each group of recipients recognising some sources as 'true' and others as 'biased.' This increases scepticism towards traditional media, and disinformation not only undermines trust in social networks, but also in newspapers, television and news portals.

[20] This is an online advertising model in which the advertiser pays for each click on their ad. This means that payment is not charged for simply displaying the ad, but only when the user actually clicks on it. PPC advertising most often appears in search engines (e.g. Google Ads) and on social media platforms (e.g. Facebook Ads). It works on the basis of an auction – advertisers bid on specific keywords and algorithms decide which ad is displayed to the user.

[21] Affiliate marketing is an internet marketing model in which a partner (affiliate) promotes a company's products or services in exchange for a commission on sales, clicks or other actions performed by the user. The advertiser only pays when the customer makes a purchase, subscribes to a newsletter or performs another specific action.

[22] Cambridge Dictionary defines astroturfing as the artificial creation of the appearance of grassroots support for an idea, product or political campaign https://dictionary.cambridge.org/pl/dictionary/english/astroturfing [Accessed on: 03.03.2025].

An analysis of the results of both reports reveals the mechanism of the disinformation vicious circle: bots and fake accounts massively spread manipulated content; astroturfing shapes the narrative in society; recipients lose trust in the media seeing accusations of bias and misinformation – the decline in trust in the media is causing an increase in the popularity of alternative information sources. The conclusions for the media world are clear – it is necessary to constantly monitor content and conduct reliable research on the phenomena occurring in it.

Deepfake and AI have become powerful tools for disinformation, enabling the creation of realistic fake content with a huge impact on society. They are used in politics, the media and cyber-attacks. AI enables the automatic generation of fake news on a large scale, taking disinformation to a new level. Both technologies not only make it difficult to distinguish truth from manipulation, but also enable the mass production of fake content with potentially catastrophic consequences.

Artificial intelligence plays a key role in the automation of disinformation production. Algorithms such as GPT-3, GPT-4 or Bard can generate realistic-sounding articles that are difficult to distinguish from reliable content. AI can create disinformation on a large scale, contributing to the manipulation of public opinion by:

- creating fake articles – in experiments conducted by OpenAI researchers, artificial intelligence was able to generate fake reports of events that never took place, reinforcing the disinformation message. Research has shown that language models such as GPT-2 can generate realistic but fictitious articles on any topic. Due to the potential dangers of misinformation, it was initially decided not to release the full version of GPT-2. However, later, after further analysis, the full version was published, sparking discussions on the ethical use of such technologies; [23]
- automating troll profiles – AI allows you to create fake social media accounts that post manipulated content, controlling social moods. Artificial intelligence is used to create fake social media accounts. Police departments in the US have been trained to create such profiles using AI to support ongoing investigations. These fake accounts, often featuring realistic AI-generated photos, can be used to monitor suspicious activity or gather information; [24]
- manipulating opinions on social media – AI bots comment on articles, spreading manipulated narratives in a way that is difficult to detect. AI is also used to generate fake comments and content on social media to manipulate public opinion. OpenAI has revealed cases in which tools such as ChatGPT were used to create fake articles and comments aimed at influencing public sentiment and spreading misinformation. Such activities can lead to the polarisation of society and political destabilisation.

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[23] The article describes OpenAI's decision to make the full version of the GPT-2 model public, despite previous concerns about its potential use to create disinformation and fake content. https://mamstartup.pl/openai-zdecydowal-sie-wypuscic-pelna- wersje-algorytmu-gpt-2-do-generowania-tekstow [Accessed on: 03.03.2025].

[24] The publication emphasises that the development of AI enables realistic generation of online personas, which is both an operational tool for services and a threat in the context of disinformation and manipulation of public opinion https://cyberdefence24. en/army-and-services/fake-profiles-in-social-media-created-using-artificial-intelligence-so-was-the-police-trained? [Accessed on: 03.03.2025].

Automation using AI makes the production of fake news faster, cheaper and more difficult to detect. In addition, false content can be dynamically adapted to the audience, which increases its effectiveness. A report by *Originality.ai*, a company specialising in the detection of AI-generated content, reveals that more than 40% of the analysed Facebook posts were created using AI. The analysis covered 8,855 posts published between November 2018 and November 2024, of which 41.18% showed signs of AI-generated content. A particularly noticeable increase occurred after the introduction of ChatGPT in 2023, when the number of such posts more than quadrupled. The report highlights the growing impact of AI technology on content creation on social media, raising questions about the authenticity of online communication.

Removal and labelling of false information and the problem of content moderation

Social media platforms use various mechanisms to limit the impact of disinformation:

- Marking content as untrue – Facebook and Instagram use warnings on posts containing disinformation. Such content has limited reach and is accompanied by links to verified information.
- A warning system on ‘X’ – before deleting an account, users receive warnings for spreading disinformation. In the past, ‘X’ used special labels to indicate that the content may be false.
- Demonetisation of fake news – YouTube and Facebook limit the ability to earn money from content containing misinformation by denying creators access to affiliate programmes.
- Blocking and deleting accounts – troll farms and bots are regularly deleted, especially during election periods. In 2020, ‘X’ deleted thousands of accounts linked to disinformation campaigns from China and Russia.
- Temporary account suspension – users who repeatedly post false content can be temporarily blocked.

Although these mechanisms help to limit disinformation, they also have their drawbacks. Many users believe that labelling posts as fake news only reinforces the Streisand effect[25] that, paradoxically, it increases interest in the content.

Despite advanced technologies, content moderation faces serious challenges. One of the main dilemmas is the balance between fighting disinformation and protecting freedom of speech. It often happens that algorithms mistakenly classify true information as fake news, which leads to the unjustified removal of content and censorship of public debates.

[25] The Streisand effect is a phenomenon in which an attempt to censor, hide or remove information leads to it becoming even more widespread. The name comes from an incident involving Barbra Streisand in 2003. In the age of the internet and social media, any attempt at censorship can lead to the opposite effect, causing content to go viral. In the context of misinformation, the Streisand effect can work against social media platforms – when content labelled as ‘fake’ or ‘misinformation’ is removed, conspiracy theorists often see this as ‘proof’ that the truth is being hidden, which paradoxically increases interest in the material.

Another challenge is coordinated manipulation of moderation, where authoritarian governments and influence groups report uncomfortable content as disinformation in an attempt to silence critics. In some cases, platforms have removed content from independent journalists based on mass reports without proper verification.

Another problem is the lack of uniform moderation rules, which leads to a situation where the same content can be removed from one platform but remain available on another. The lack of consistent standards makes it difficult to effectively fight disinformation on a global scale.

More and more governments and international organisations are demanding greater transparency in the activities of digital platforms. The key problem is the lack of public access to information about moderation algorithms, the number of pieces of content removed and the mechanisms for assessing the truthfulness of information.

The European Union has introduced the Digital Services Act (DSA), which requires platforms to disclose how their algorithms work and how decisions to remove content are made.

For more information on the Digital Services Act (DSA), see Chapter 1.3 of this *Information* document and the *National Broadcasting Council Activity Report in 2024.*

The United States is also pushing for greater transparency in the moderation of political and social content, especially after the controversies surrounding the 2016 and 2020 presidential elections.[26]

Some platforms have started to publish transparency reports that include data on removed content and detected fake news. One example is Facebook, which has introduced a 'Content Review' tool that allows users to check why a post has been labelled as disinformation. Despite these initiatives, many moderation decisions are still made behind closed doors, and users have no insight into the criteria on which content is blocked.

In addition to moderation mechanisms, social platforms are increasingly involved in educating users about disinformation. The aim of these activities is to raise awareness among recipients and teach them how to verify information independently. One of the most important educational projects is the Google News Initiative, through which Google provides training in information verification for journalists and teachers. Facebook has launched a campaign called 'Media Literacy for Everyone', which aims to teach people how to recognise fake news and analyse the credibility of sources.

YouTube, as one of the largest video platforms, has implemented a system for labelling content containing unconfirmed information and adding links to reliable video sources.

[26] This article analyses the impact of traditional and social media on the electoral process in the USA during the COVID-19 pandemic. The publication focuses on legal and systemic aspects, indicating how the media shaped the public debate, what disinformation mechanisms were used, and what consequences digital electoral communication had for democracy. See: https://compress.edu.pl/e-wydania/item/rola-mediow-tradycyjnych-oraz-mediow-spolecznosciowych-podczas--pandemic-presidential-elections-in-the-usa-legal-and-political-aspects [Accessed on: 3.03.2025].

'X' is experimenting with the Community Notes programme, which allows users to add context to potentially misleading tweets. This allows the community to judge the reliability of the information itself, rather than relying solely on moderation algorithms.

Although educational campaigns are a step in the right direction, their effectiveness is limited. Many people still believe fake news and ignore the platforms' warnings, which shows that technology alone will not solve the problem of misinformation – education and the development of critical thinking remain crucial. Social media platforms face a huge challenge in the fight against misinformation. On the one hand, they use increasingly sophisticated algorithms to detect fake news; on the other, they face the problem of over-moderation and systemic failures. Governments and international organizations are pushing for greater transparency of platforms' activities, demanding disclosure of moderation mechanisms and strengthening the accountability of tech giants.

The impact of disinformation on trust in government and the media

Contemporary public debate is increasingly becoming an arena for harsh and aggressive statements that not only divide society but also lead to increased resentment and tensions between different social groups. One of the key phenomena accompanying this process is hate speech, i.e. the use of language that offensively, humiliatingly or discriminatorily refers to individuals or groups based on their origin, religion, orientation, worldview or other identity characteristics. This phenomenon is a challenge for both legal systems and civil society. Both Polish and international regulations do not clearly define the term 'hate speech'[27] but its main features are widely analysed in legal literature. It is generally accepted that it includes statements that spread hostility, prejudice and intolerance and can lead to real acts of violence or social exclusion. International organisations such as the Council of Europe are taking action to limit the phenomenon of hate speech. The recommendations of the Committee of Ministers of the Council of Europe emphasise that all forms of expression that justify or incite discrimination and aggression against national, ethnic or religious groups should be counteracted. Hate speech is also included in legal acts concerning cybercrime, which indicates the significant role of electronic media in its dissemination.

In Poland, hate speech, although it does not have a single legal definition, is the subject of numerous legal analyses and case law. An example is the judgement of the Regional Court in Katowice from 2009, in which it was defined as a particularly offensive language that harms the personal rights of another person and is intended to express strong dislike or even hostility. The European Court of Human Rights took a similar stance, emphasising that such statements do not contribute to a constructive debate and only violate the freedom of speech and the rights of others.

In the context of the media, the problem of the brutalisation of public debate and hate speech has been the subject of numerous decisions by the National Broadcasting Council.

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[27] Recommendation R (97)20 of the Committee of Ministers of the Council of Europe on combating hate speech. https://www.mowanienawisci.info/post/rekomendacja-r-97-20-komitetu-ministrow-rady-europy-nt-mowy-nienawisci, [Accessed on: 03.03.2025].

They concerned cases of spreading racist or discriminatory content or content that violates the dignity and rights of individuals or social groups.

More information on the decisions issued by the National Broadcasting Council can be found in the *Report on the Activities of the National Broadcasting Council in 2024.*

The phenomenon of the brutalisation of language in public debate and the presence of hate speech in the media pose serious challenges to democracy and social cohesion. Modern media, especially electronic and internet media, have a huge impact on the shaping of public opinion. The responsibility for the shape of the debate lies with both the media and the recipients of the content, who can contribute to building a culture of dialogue based on respect and equality.

A qualitative exploratory study[28] conducted by the National Institute of Media (*KIM*) on behalf of the National Broadcasting Council (KRRiT) shows what strategies media consumers in Poland use to deal with disinformation. Their approach to media content is shaped by both the level of threat awareness and the willingness to verify information. The study distinguishes several main types of recipients who approach media messages in different ways.

The first group consists of critical analysts, i.e. people who are aware of the scale of disinformation and its potential consequences. They are highly vigilant of media content, systematically compare information from different sources, and, when in doubt, turn to official news portals and fact-checking tools. This enables them to accurately distinguish reliable news from manipulated messages, making them resistant to disinformation.

The second group consists of sceptics who are cautious about media content but do not actively engage in verifying it. Although they approach information with a great deal of distrust, they often remain passive without taking additional steps to check its reliability. Their scepticism does not always lead to a better understanding of the media reality – in many cases, it can result in giving up the search for truth and adopting an attitude full of doubt towards all messages, regardless of their source.

Another category consists of uncritical recipients who base their knowledge on favourite and often one-sided sources of information. They do not question their credibility, rarely confront the content with other opinions and do not attempt to verify the facts themselves. This attitude makes them particularly susceptible to manipulation and false information, especially when media messages reinforce their pre-existing beliefs.

The last group to be distinguished here are the ignorant, i.e. people who consciously avoid getting involved in media topics. They treat information as unreliable, irrelevant or even harmful, and therefore give up following and analysing it. Their attitude often stems from the belief that the media is not a reliable source of knowledge about the world, which results in a complete distancing from media messages. As a result, they remain unaware of many important events and social processes, which can lead to their information isolation.

[28] Based on the National Media Institute's (*KIM*) own data.

Each of these groups reacts differently to disinformation and has a different level of resistance to manipulation. Critical analysts are the most aware part of society, actively counteracting false messages. Sceptics show distrust, but their passivity means that they are not always able to effectively distinguish truth from falsehood. Uncritical recipients accept media content without reflection, which makes them particularly vulnerable to manipulation. On the other hand, the ignorant completely reject the media as an informational source, avoiding contact with information, which can lead to a lack of orientation in key social, political and economic issues.

Awareness of these different strategies allows for a better understanding of the mechanisms that determine society's susceptibility to disinformation. The key challenge remains media literacy and the development of tools to support reliable verification of information, so that more and more people can be aware and critical of the messages they receive from different sources.

The reason for such attitudes is information bubbles. *KIM*, diagnosing the phenomenon of fake news, described it extensively in 2023 as part of qualitative research conducted with media scholars and experts operating in the electronic media market.[29]

Effects of disinformation

Disinformation mechanisms are used to manipulate public opinion, create false narratives and arouse unfounded fears or emotions. Although this can apply to almost any field, some areas are particularly susceptible to this kind of manipulation due to their social importance and the possibility of influencing political, economic or health decisions.

One of the most frequently exploited areas of disinformation is politics and electoral processes. Information manipulation in this sphere often takes on the form of campaigns aimed at discrediting opponents, spreading false accusations of alleged electoral fraud or creating fabricated political scandals. Such activities can significantly influence election results and shape public sentiment, destabilising democratic processes.

National security and international conflicts are similarly vulnerable. Information warfare is waged not only on the battlefield, but also in the media sphere, where propaganda and manipulated news are spread. False reports about military operations, the fuelling of fear and mistrust, as well as disinformation about cyberattacks or terrorist threats are tools used to influence societies and their perception of reality.

Public health and medicine are an important area, which has become particularly apparent during the COVID-19 pandemic. Disinformation about the effectiveness of vaccines, alleged miracle cures or conspiracy theories about hidden medicines has led to information chaos, an increase in scepticism towards health institutions and a decline in trust in experts. The spread of medical myths can have serious consequences, including endangering the health and lives of citizens.

[29] The report also emphasises the impact of disinformation on public opinion, social polarisation and trust in institutions. See: https://kim.gov.pl/2024/05/13/fake-newsy-raport-krajowego-instytutu-mediow/ [Accessed on: 03.03.2025].

A similar mechanism can be observed in the economic and financial spheres. Speculation and deliberate misinformation about the state of the markets, bankruptcies of large companies or economic instability can cause investor panic, destabilise exchange rates and affect public sentiment. False information about tax policy, inflation or the state budget is sometimes used for political purposes, reinforcing divisions and mistrust of public institutions.

The world of science and technology also has to deal with disinformation. The development of artificial intelligence, genetic engineering and 5G networks has given rise to numerous conspiracy theories that play on the fear of the unknown and create a false image of technological progress. Examples include false information about the alleged harmfulness of 5G technology or the belief that pharmaceutical companies are hiding effective treatments for incurable diseases.

Society and culture are also not free of disinformation. Staged celebrity scandals, fake crime news or manipulated narratives about immigration often appear in the public sphere, leading to polarisation and unfounded fears. Similar mechanisms can be observed in the sphere of religion and ideology. False information about immigrants or religious groups can stir up fear and lead to an increase in xenophobic attitudes.

Disinformation messages often include false information about the activities of the church, clergy or social movements, aimed at reinforcing divisions and prejudices.
Disinformation most often affects areas that arouse strong social emotions and have a real impact on people's lives. The greater the interest in a given topic, the more susceptible it is to manipulation. This is why it is so important to build awareness and critical thinking skills in order to effectively distinguish reliable information from manipulated messages.

One of the most significant effects of disinformation is the polarisation of society. The dissemination of manipulated information often leads to the radicalisation of attitudes and the entrenchment of existing political, cultural and ideological differences.

The erosion of trust in public institutions (governments, parliaments, courts, international institutions), as well as in the media, scientists and experts, is one of the most damaging effects of disinformation. The dissemination of false content undermines the credibility of official sources of information, leading to social disintegration and the destabilisation of democratic systems.

The process of erosion of trust in public institutions is self-perpetuating. A decline in trust in institutions weakens their legitimacy, which leads to a rise in the popularity of populists, further weakening of the state and a deepening of the crisis of trust. Social media further amplifies this effect, as people increasingly get their information from echo chambers that reinforce their distrust of official sources. The growing cynicism of citizens towards politics results in lower voter turnout and less engagement in civil society.

In addition, populism and extreme political polarisation weaken democratic institutions. Populists undermine the authority of governments, courts and the media, resulting in a lack of faith in the state's ability to act in the interests of its citizens.[30]

The effects of a loss of trust can be serious.[31] First and foremost, they pose a threat to democracy, as the undermining of the integrity of electoral processes and the judiciary can lead to political instability and increased susceptibility of societies to authoritarianism. Public institutions become less effective because citizens are less willing to cooperate with the state administration and law enforcement becomes more difficult. The crisis of confidence also has economic consequences: countries perceived as legally and politically unstable attract fewer investments, which hinders economic development. In addition, the weakening of social ties makes people trust each other less and less, which leads to increased radicalisation and atomisation of society.

The erosion of trust in public institutions is a serious challenge that can lead to political destabilisation, weakening of the state and deterioration of citizens' quality of life. Rebuilding trust requires long-term and consistent efforts towards transparency.

Integration of advanced monitoring and analysis tools

Although artificial intelligence is used to create disinformation, its potential to counter fake news is equally enormous. Advanced algorithms can analyse language patterns, identify irregularities in content and automatically flag suspicious material. AI-based tools are able to search through millions of pieces of data in real time, which allows for faster detection of manipulation and speeds up the process of information verification by independent fact-checking organisations.

Innovative solutions based on blockchain technology can play a key role in building trust in information sources. Thanks to the immutability of the ledger and the ability to trace the origin of data, blockchain can serve as a tool for confirming the authenticity of news. These systems make it possible to create a global, standardised content labelling system in which each piece of information could be verified against its source, which can act as warnings placed on product packaging.

Modern technologies enable not only the detection of disinformation, but also the analysis of its mechanisms and sources. Advanced social media monitoring systems, using network analysis and machine learning techniques, allow for tracking disinformation campaigns in real time. This makes it possible not only to react quickly to emerging threats, but also to create databases containing patterns of false content dissemination, which can be used to

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[30] The Bureau of Parliamentary (*Sejm*) Analyses (BAS) also discusses strategies to counter disinformation and actions taken by states and international organisations to protect the information sphere from deliberate manipulation campaigns
https://orka.sejm.gov.pl/WydBAS.nsf/0/6E995E55906AF97AC1257F45003EA318/$file/Infos_206.pdf
[Accessed on: 03.03.2025].

[31] The report analyses the impact of social change on the level of trust in public institutions in Europe https://www.eurofound.europa.eu/en/publications/2018/societal-change-and-trust-institutions,
[Accessed on: 03.03.2025].

develop more effective prevention strategies. By analysing mechanisms and sources, large language models (LLMs) can learn to predict an increase in disinformation activity in the media and thus pre-empt these activities. In addition, by knowing the mechanisms, LLM can effectively design pre-bunking activities dedicated to the most vulnerable social groups such as:

- interactive online educational modules – courses and simulations that would present manipulation mechanisms – such as deepfake, recommendation algorithms or clickbait techniques. The simulated scenarios should learn to recognise the typical characteristics of disinformation already at the pre-exposure stage;
- gamification-based mobile games and apps that engage users in the process of detecting and analysing false information. Thanks to gamification elements, critical thinking skills can be developed while learning to recognise manipulative techniques in a friendly and engaging way;
- browser plugins and educational chatbots – which constantly monitor the websites visited and display short, educational messages about potential risks related to disinformation. Chatbots, integrated with popular social platforms, could provide guidance on content verification and explain why certain information can be misleading;
- automatic early warning systems analysing trends and detecting early signs of disinformation. This would provide up-to-date information on potentially false narratives before they gain popularity;
- virtual and augmented reality (VR/AR) simulations – which would allow users to participate in virtual workshops or simulations showing how disinformation is created and disseminated;
- cooperation with social media platforms – integrating pre-bunking measures directly into social media algorithms – by displaying contextual warnings or educational infographics.

In-parallel implementation of these measures, supported by advanced technologies, can significantly increase society's resilience to manipulative narratives and make it easier for users to recognise false information quickly and effectively.

The future of regulation and adaptation of legal systems

The dynamic development of technology poses new challenges for legislators. Legal regulations must keep up with the rapid pace of change in the digital sphere in order to effectively counteract disinformation. Developing regulations that are adapted to dynamic technological changes and introducing international standards for content labelling and verification are key elements of a forward-looking strategy to combat fake news. Cooperation between states, international organisations and the private sectors will be crucial in building resilience to information manipulation.

Modern technologies are a double-edged sword: they pose a serious threat by enabling the creation and rapid spread of disinformation, but they also offer tools that can radically change the way we fight fake news. It is crucial to understand that technology itself is neither good nor bad - it all depends on how it is used. This is why educational initiatives, the development of digital competences among citizens and close cooperation between the technology sector and public institutions are so important.

The need for continuous investment in research into technologies that detect disinformation is the basis of a forward-looking strategy to protect against fake news. Research projects that combine knowledge of computer science, sociology and law will enable the development of innovative solutions capable of adapting to a dynamically changing digital environment. International cooperation and technology transfer can contribute to the creation of global content monitoring and verification systems.

Technology, while crucial, is no substitute for education and critical thinking. Strengthening public media awareness, training in the analysis and verification of information, and social campaigns to promote reliable journalism are the foundations that must accompany the implementation of new technologies. Only through a comprehensive approach that combines technical innovation with educational transformation will it be possible to build an information space that is resistant to manipulation.

Modern technologies present both a challenge and an opportunity in the fight against disinformation. On the one hand, tools such as deepfakes, advanced recommendation algorithms and the automation of the distribution of fake content generate new threats that can destabilise public opinion and undermine trust in the media. On the other hand, the same technologies offer innovative methods of detecting and counteracting manipulation – from AI systems analysing content, through blockchain-based solutions, to advanced platforms monitoring online activity.

An integrated approach combining technological development, public education and effective legal regulations is a key aspect of a forward-looking strategy to combat disinformation. Only through the cooperation of state institutions, the private sector and non-governmental organisations will it be possible to create a safe, transparent information space that minimises the negative effects of fake news and protects the foundations of a democratic society.

Modern technologies are a tool that, if used properly, can become a pillar in the fight against disinformation. In the face of dynamic digital changes, it is necessary to constantly search for innovative solutions and build social awareness in order to counteract threats and use the full potential of technology for the public good.

An effective strategy to fight disinformation

We live in an age of information overload, in which the line between truth and manipulation is blurring faster than ever before. Modern technologies, which were supposed to facilitate access to information, have simultaneously become a weapon in the hands of disinformation creators. Deepfakes, recommendation algorithms and troll farms enable the rapid distribution of fake content, influencing social moods, electoral decisions and global stability. Artificial intelligence, machine learning and big data tools open up new possibilities in the detection of manipulation and content analysis, which should be utilised in the fight against disinformation before falsehood becomes indistinguishable from truth

Social media and streaming platforms, which were supposed to democratise access to information, actually act as amplifiers of narratives, often regardless of their truthfulness. Recommendation algorithms suggest content that is consistent with users' previous beliefs, locking them into information bubbles and increasing their susceptibility to disinformation. Similarly, deepfake technology, originally used to create realistic visual effects, has become a propaganda tool. Fake recordings of politicians or celebrities can trigger diplomatic crises, undermine the credibility of institutions and manipulate public opinion on an unprecedented scale.

In the past, organised media campaigns were needed to spread propaganda; today, an army of bots and automated troll farms are enough to introduce false information into the public space in a fraction of a second and make it appear authentic. Comments, shares and artificially generated ‘trends’ can turn a lie into a viral phenomenon in no time at all. In a world where machine-generated content spreads faster than humans can verify it, traditional fact-checking methods are no longer sufficient.

Effectively counteracting disinformation requires a complex strategy based on both technology and public education. Key elements of the fight against disinformation include:

• social campaigns – educating citizens on how to recognise false information;

• training for journalists and influencers – improving the skills of people who shape public opinion;

• publishing reports on disinformation – social platforms should transparently report on the removal of fake news;

• content labelling system – the introduction of a global labelling system for fake news will make it easier to recognise it;

• detection of disinformation campaigns – the use of algorithms to identify and block organised propaganda activities;

• coordination at the international level – joint initiatives by organisations such as the UN, NATO and the EU will increase the effectiveness of actions;

• restoration of the Government Plenipotentiary for the Security of the Information Space of the Republic of Poland [*Pełnomocnika Rządu ds. Bezpieczeństwa Przestrzeni Informacyjnej RP*];

• archiving of fake news – creating a database of false content will facilitate the analysis of disinformation trends;

• cooperation with tech companies – global platforms should cooperate with fact-checkers and provide tools for content analysis.

The lack of a coordinated fight against fake news can lead to the manipulation of public opinion, influence on election results and social decisions, social polarisation, health risks (e.g. anti-vaccination fake news), financial fraud and loss of trust in the media and public institutions.

The skilful use of artificial intelligence can paradoxically become the best weapon in the fight against disinformation. Advanced algorithms can analyse huge amounts of data in real time, recognise false narratives and identify deep fakes based on micro irregularities in image or sound.

Media literacy is equally important, however: without an aware and critically thinking audience, even the most advanced technologies will not be able to stop the flood of disinformation.

Unfortunately, digital disinformation is not a temporary problem. It is a new battleground for truth, where human frailty, political interests, technological innovation, and the big money of tech giants collide. Only by finding a balance between freedom of expression and the need for regulation, between technological development and its ethical use, can success be achieved. In the digital and media-driven future, the fate of reliable information lies in the hands of those who can distinguish fact from manipulation before it is too late.

Thus, it is important to remember that disinformation is a global problem that requires comprehensive action on many levels. The key elements of an effective strategy are legal regulations, media literacy, the development of fact-checking tools and international cooperation. Only by combining these measures can we rebuild social trust and protect democracy from information manipulation.

Information on the activities of the National Broadcasting Council (KRRiT) regarding the fight against disinformation can be found in the *National Broadcasting Council (KRRiT) Activity Report in 2024.*

1.3. Risk of using the Digital Services Act (DSA) as a tool to suppress freedom of speech and manipulate the information sphere

The introduction of the Digital Services Act (DSA) in the countries of the EU is one of the most important regulatory steps in the area of digital technologies and platforms. The DSA was created in response to the growing dominance of Big Tech platforms over the information sphere and their impact on societies, economies and democracies. It is a regulation that aims to change the power dynamics between tech giants and users, putting more control over information back in the hands of societies.

Formally, the DSA aims to increase the transparency and accountability of technology platforms for the content they disseminate. Platforms such as Facebook, ‘X’ and Google have become central information hubs, but their operation has so far been based mainly on commercial principles, maximising user engagement, often at the expense of the quality and reliability of the content they provide. The DSA changes this logic by requiring platforms to operate more transparently, especially with regard to the algorithms that determine the visibility of content. Platforms will have to disclose how their algorithms work and offer users the option to customise or disable them, thus reducing polarisation and the impact of controversial content.

One of the most innovative aspects of the DSA is the obligation for platforms to actively act against disinformation and illegal content. In the past, many platforms argued that they were not responsible for the content published by users, presenting themselves as neutral communication tools. The DSA changes this paradigm by obliging platforms to quickly remove illegal content, such as hate speech, incitement to violence or election manipulation. At the same time, it introduces appeal mechanisms to prevent arbitrary content removal and protect freedom of expression.

The Digital Services Act also regulates the protection of user data, especially in the context of micro-targeting of advertisements. Technology platforms have built their business models on the analysis of user behaviour and personalisation of advertising content. The DSA introduces stricter regulations on the use of personal data, limiting the possibility of profiling users without their explicit consent. These changes could revolutionise the way platforms earn from advertising and strengthen the protection of user privacy.

The DSA also changes the relationship between platforms and regulators. Until now, platforms have operated largely unsupervised, defining their own rules and content moderation mechanisms. The new regulations introduce oversight mechanisms by national and European regulators, who will monitor compliance with the new rules and impose sanctions for violations. In this way, the European Union aims to increase the accountability of tech giants, which may affect the way they operate not only in Europe but also worldwide.

However, the introduction of the DSA is highly controversial, especially in the context of the possibility of using this regulation as a tool to suppress freedom of speech and manipulate the information space. Critics point out that the DSA, instead of strengthening democracy, can be used to limit public debate and legitimise censorship in the hands of unelected EU bureaucrats who are not subject to direct citizen control. Of particular concern are announcements using the DSA to eliminate ‘external influences on elections.’ Although it may sound like an action to protect democracy, history shows that such mechanisms can be abused to suppress criticism and eliminate inconvenient narratives.

An example of how such regulations can be used in practice is the situation in Romania, where the presidential election was annulled under the pretext of external interference. As it later turned out, it was not Russian activity on TikTok or other social media platforms that had the greatest impact on public opinion, but the campaign conducted by the country's ruling party and, consequently, the election of the ‘wrong’ candidate. This shows that regulations of this kind, instead of protecting democracy, can be used as a pretext to undermine election results, manipulate the democratic process and suppress critical voices.

Fears that a similar scenario could repeat itself in other European countries are entirely justified. In Poland, in the context of the 2025 presidential elections, there is a risk that the

DSA will be used to restrict the public space for narratives critical of the government under the pretext of fighting ‘disinformation’ or protecting the ‘integrity of the elections.’ In a situation where those in power have the opportunity to influence the interpretation of what constitutes ‘illegal content’, social media platforms may be forced to remove inconvenient information or block critical voices altogether, or the result may be challenged on the basis of the DSA for alleged ‘foreign influence’ if the elections do not go the way the current government wants. It should be added here that in the vast majority of EU countries, the body coordinating the implementation of the DSA, or the so-called competent body is the regulator, the equivalent of the National Broadcasting Council (KRRiT).

In Poland, however, the government is deliberately marginalising the National Broadcasting Council in this matter, avoiding placing the implementation of the DSA under the competence of the National Broadcasting Council. Perhaps this is because they are aware that the National Broadcasting Council in its current composition will never agree to challenge the election result on the basis of the propaganda delusions of a government that has lost public support.

The content moderation mechanisms that will be applied by the platforms may further exacerbate the problem. To avoid financial sanctions, the platforms will tend to remove content excessively, which may lead to cases of preventive censorship. Automatic moderation mechanisms, such as algorithms that detect allegedly illegal content, often work with errors, unable to distinguish between truly harmful content and controversial content that falls within the limits of freedom of speech. A drastic example from the past is Facebook censoring and suspending the account of a Polish journalist, the editor-in-chief of one of the main daily newspapers in Poland, for posting a photo of the current Polish Navy flag on his profile. Facebook considered it a ‘fascist’ symbol. There are many more such examples. They illustrate how Big Tech approaches user-generated content. Conservative or national content is routinely censored.

The DSA, although intended as a regulation to promote platform accountability and user protection, may in fact be used as a tool to suppress freedom of expression and manipulate the information sphere. The main challenge will be to ensure that these regulations do not become a political tool used by governments or EU institutions to control narratives in the public sphere. The success of the DSA will depend on transparency in its enforcement and on the introduction of effective mechanisms to protect freedom of speech and prevent its abuse.

The history of Romania and possible scenarios in Poland show that regulations such as the DSA carry both the hope for a more transparent digital sphere and serious threats to democratic values. In the hands of unelected bureaucrats, they can become a tool of control rather than liberation, requiring vigilance from citizens and human rights organisations to prevent their abuse. In an era where social media has a huge impact on democracy and society, such regulations must be implemented with the utmost caution so as not to undermine the values they are meant to protect.

More detailed information on the role that the National Broadcasting Council should play in the implementation of the DSA in Poland and the actions it has taken in this regard can be found in the *National Broadcasting Council (KRRiT) Activity Report in 2024.*

2. The television programme audience in 2024[32]

The National Broadcasting Council (KRRiT) conducted regular analyses of the viewership of public and licensed television programmes. Quarterly reports monitored changes in the audience and market share of television programmes in Poland, including those of the public broadcaster.

In 2024, public television as a whole recorded a decrease in its share of the television audience compared to the same period a year ago (-5.29 p.p.). In 2023, TVP had a 26.82% share of the television audience, while in 2024 it had only 21.53%. This means that the public sector lost as much as 5.29 p.p., which was the biggest drop since 2013 and negatively affected TVP's market, advertising and image position.

Lower shares in the TV audience were mainly observed in the case of:

- the specialised news programme TVP Info (-3.51 p.p.),
- the largest universal public programmes TVP 1 (-0.45 p.p.) and TVP 2 (-1.19 p.p.),
- TVP ABC (-0.13 p.p.),
- TVP Seriale (-0.13 p.p.),
- TVP 3 (-0.09 pp.)

Public thematic programmes, on the other hand, recorded slight increases in

audience share:

- TVP Nauka (+0.07 p.p.),

[32] The analysis was carried out on the basis of data from a survey conducted by AGB Nielsen Media Research on a sample of the Polish population over 4 years of age. This survey is currently the only continuous television telemetry measurement available on the Polish market.
The structure of the research panel is based on the data of the Central Statistical Office and the results of the so-called founding survey carried out in two waves on a total sample of 8,000 households.
Currently, i.e. as of 1 January 2022, the research panel consists of 3,500 households (over 9,000 people over the age of 4) located in: 1,104 villages, 164 towns with up to 10,000 inhabitants, 129 towns with 10,000 to 19,999 inhabitants, 122 towns with 20,000 to 49,999 inhabitants, 46 towns with 50,000 to 99,999 inhabitants, 23 towns with 100,000 to 199,999 inhabitants, and 9 cities with 200,000 to 499,999
Inhabitants and 5 cities with more than 500,000 inhabitants. The number defining the current size of the research panel was achieved by gradually increasing it due to changes in the market.

• TVP Dokument (+0.06 p.p.),

• TVP Kultura (+0.04 p.p.),

• TVP Sport (+0.03 p.p.),

• TVP Polonia (+0.04 p.p.).

Among the licensed programmes, the increases mainly concerned the

following programmes:

- Republika (+3.59 p.p.),
- wPolsce 24 (+0.48 p.p.),
- Wydarzenia 24 (+0.29 p.p.),
- TVN 24 (+0.28 p.p.).

The decreases concerned the following programmes:

- TVN (-0.57 p.p.),
- Polsat 2 (-0.52 p.p.),
- Polsat (-0.32 p.p.),
- Polsat News (-0.21 p.p.),
- Polsat Sport 1 (-0.11 p.p.).

The number of people watching TV programmes is decreasing every year. This change affects all ownership groups and is mainly due to the growing popularity of online content.

In 2024, data on the popularity of television among underage viewers was compiled at the Office of the National Broadcasting Council. The analysis covering the years 2005-2023 confirmed that fewer and fewer young viewers watch traditional television. The average daily viewing time of this medium among children and young people is steadily decreasing, and this regularity applies to both the youngest children (4-9 years old) and older children (10-15 and 16-19 years old).

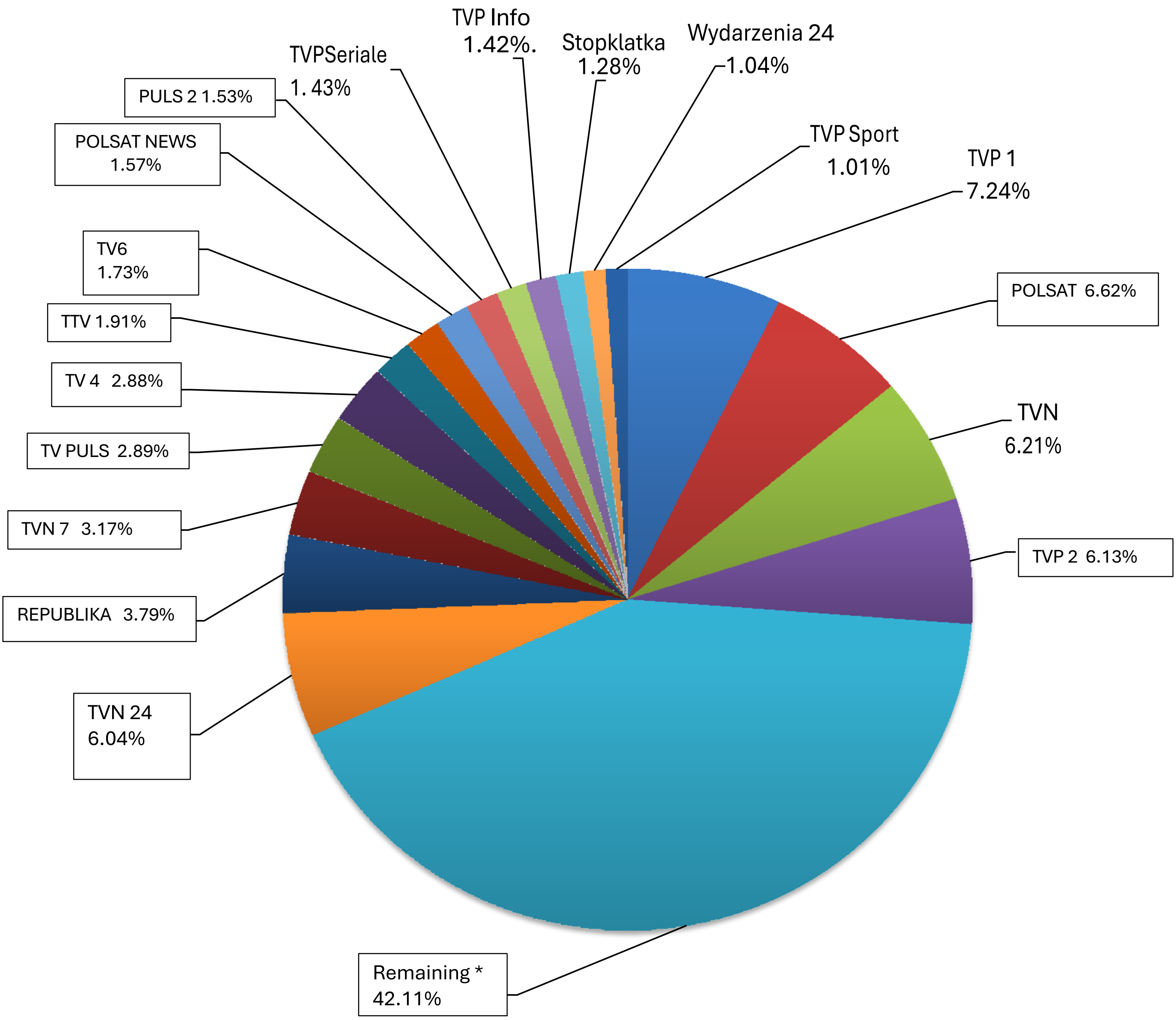
In 2024, the four leading programmes of the main television groups, as in previous years, recorded a drop in audience share. The so-called Big Four (TVP 1 and 2, TVN and Polsat) lost a total of 2.53 p.p., i.e. 8.81%, compared to 2023. This is related to the further fragmentation of the audience, which is distracted by an increasing number of specialised programmes (including the outflow of audience to new programmes available on digital terrestrial television – *Republika* and *wPolsce 24*) and the growing interest in the offer of VoD services and video sharing platforms (VSP).

In 2024, the group of programmes with an audience share of more than 1% increased from 16 to 18. This group was joined by the programmes *Republika, Wydarzenia 24* and TVP Sport (the programme Fokus TV dropped out). The group of programmes that did not reach the one-percent threshold also increased. They accounted for a total of 42.11% of the audience (0.94 p.p. more than in 2023, i.e. 2.23%)

Shares lower than 1%, in the range of 0.9-0.5%, were recorded for fourteen programmes (Fokus TV, TVP 3, Eurosport 1, Polsat 2, Super Polsat, WP, Polsat Sport 1, Zoom TV, TVP HD, Antena HD, *TVP Rozrywka*, Polsat Play, TVN 24 Bis, *wPolsce 24*). However, the largest group with a share below the 0.5% threshold consists of more than 100 programmes.

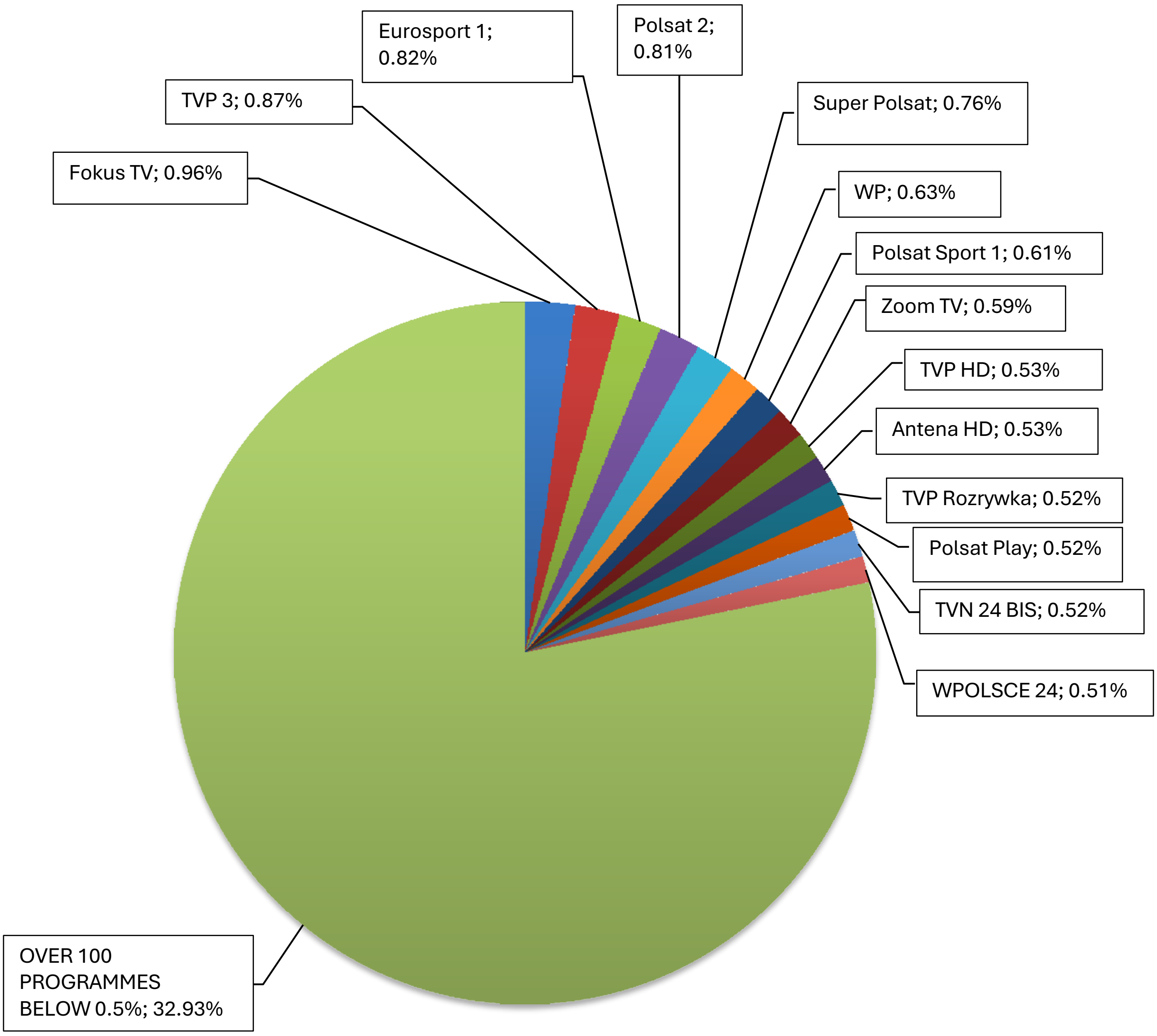
Pie chart 1. **Television market share viewership in 2024**

**Note: the category 'remaining' refers to programmes whose viewership is below 1%*



Source: KRRiT office as based on AGB Nielsen Media Research

Pie chart 2. **<u>Television programmes with a viewing audience of less than 1% (in total representing 42% of the market)</u>**



Source: KRRiT office as based on AGB Nielsen Media Research

Table 5. **Ranking of TV programmes in 2024 with a market share of more than 0.3% (showing the direction of change compared to 2023)** [33]

Item no.	Programme	Viewers	Change	Share	Change (p.p.)	DTTV*
1.	TVP 1	383,853	-41,858	7.24%	- 0.45	MUX 3
2.	Polsat	350,787	-33,347	6.62%	-0.32	MUX 2
3.	TVN	329,026	-46,026	6.21%	-0.57	MUX 2
4.	TVP 2	325,091	-79,972	6.13%	-1.19	MUX 3
5.	TVN 24	320,024	1,497	6.04%	0.28	
6.	Republika	200,955	190,097	3.79%	3.59	MUX 8
7.	TVN 7	167,941	-6,582	3.17%	0.02	MUX 2
8.	TV Puls	153,003	-10,142	2.89%	-0.06	MUX 2
9.	TV 4	152,669	-12,220	2.88%	-0.10	MUX 2
10.	TTV	101,208	4,326	1.91%	0,16	MUX 1
11.	TV 6	91,440	27,520	1.73%	0.57	MUX 2
12.	Polsat News	83,456	-15,072	1.57%	-0.21	
13.	Puls 2	80,907	-6,819	1.53%	-0.06	MUX 2
14.	TVP Seriale	75,924	-10,415	1.43%	-0.13	
15.	TVP Info	75,241	-197,663	1.42%	-3.51	MUX 3
16.	Stopklatka	67,959	3,996	1.28%	0.12	MUX 1
17.	Wydarzenia 24	54,975	13,375	1.04%	0.29	MUX 1
18.	TVP Sport	53,429	-922	1.01%	0.03	MUX 3
19.	Fokus TV	50,871	4,112	0.96%	0.12	MUX 1
20.	TVP 3	46,330	-6,865	0.87%	-0.09	MUX 3
21.	Eurosport 1	43,293	7,619	0.82%	0.18	
22.	Polsat 2	43,152	-30,699	0.81%	-0.52	
23.	Super Polsat	40,165	-3,335	0.76%	-0.03	MUX 2
24.	WP	33,328	2,885	0.63%	0.08	MUX 8
25.	Polsat Sport 1	32,439	-7,385	0.61%	-0.11	
26.	Zoom TV	31,306	-2,269	0.59%	-0.02	MUX 8
27.	TVP HD	27,965	-1,515	0.53%	0.00	
28.	Antena HD	27,935	3,845	0,53%	0.09	MUX 1
29.	TVP Rozryw ka	27,754	-387	0,52%	0.01	MUX 6
30.	Polsat Play	27,536	-4,358	0,52%	-0.06	
31.	TVN 24 Bis	27,426	-1,979	0,52%	-0.01	
32.	w Polsce 24	27,148	25,232	0.51%	0.48	MUX 8
33.	FX	25,725	-4,426	0,49%	-0.05	
34.	TVP Historia	25,419	-3,611	0.48%	-0.04	MUX 3
35.	Nowa TV	24,715	2,261	0.47%	0.06	MUX 8

[33] In yellow – accessible terrestrial TV programmes

36.	TVN Turbo	23,395	-5,024	0.44%	-0.07	
37.	Polo TV	21,903	2,951	0.41%	0.07	MUX 1
38.	Polsat Film	21,838	-3,131	0.41%	-0.04	
39.	Polsat Cafe	21,330	-3,921	0.40%	-0.06	
40.	BBC First	20,949	7,195	0.40%	0.15	
41.	Polsat Seriale	20,647	-3,521	0.39%	-0.05	
42.	TVP Kultura	19,484	1,117	0.37%	0.04	MUX 3
43.	TVP Kobieta	18,169	-687	0.34%	0.00	MUX 6
44.	TVP Polonia	17,927	1,272	0.34%	0.04	MUX 6
45.	National Geographic	17,624	-405	0.33%	0.00	
46.	TVN Fabula	17,409	-1,517	0.33%	-0.01	
47.	Romance TV	17,310	-1,165	0.33%	0.00	
48.	TVP ABC	16,842	-7,976	0.32%	-0.13	MUX 3
49.	Paramount Network	16,634	-1,970	0.31%	-0.03	
50.	Nick Jr	16,592	-4,519	0.31%	-0.07	

*DTTV- Digital terrestrial television

Source: KRRiT office as based on AGB Nielsen Media Research

Most of the programmes at the top of the list above saw a decline in viewership. On the other hand, some programmes available on digital terrestrial television and satellite specialty channels gained popularity.

Among the top ten most-watched programmes in 2024 – as previously indicated – the biggest increase in viewership was for *Republika* (up 3.59 p.p.; i.e. 1,895%), the TVN24 news programme (up 0.28 p.p.; 4.86%) and several programmes available on digital terrestrial television: TVN7 (by 0.02 p.p., i.e. 0.63%), TTV (by 0.16 p.p., i.e. 9.14%), TV 6 (by 0.57 p.p., i.e. 49.14%).

In 2024, the shares of the three main television groups decreased, which together accounted for almost 2/3 of the Polish audience market. The Polsat Group programmes obtained a total share of just over 22%,[34] and TVN Discovery Polska [35] had almost the same

[34] The Polsat Group: Polsat, TV 4, Polsat News, Polsat 2, TV 6, Fokus TV, Super Polsat, Wydarzenia 24, Polsat Sport 1, Polsat Play, Polsat Film, Polsat Cafe, Polsat Seriale, Nowa TV, Polo TV, Polsat Comedy Central Extra, Polsat Viasat History, Eska TV, Eleven Sports 1, Polsat Sport 2, Polsat Viasat Explore, CI Polsat, Polsat Doku, Polsat News 2, Disco Polo Music, Polsat Viasat Nature, Polsat Rodzina, Polsat Sport 3, Polsat JimJam, 4fun Dance, 4fun Kids, 4fun TV, Epic Drama, Polsat Games, Polsat Sport Fight, Eleven Sports 2, Eska TV Extra, Polsat Music HD, Vox Music TV, Eska Rock TV.

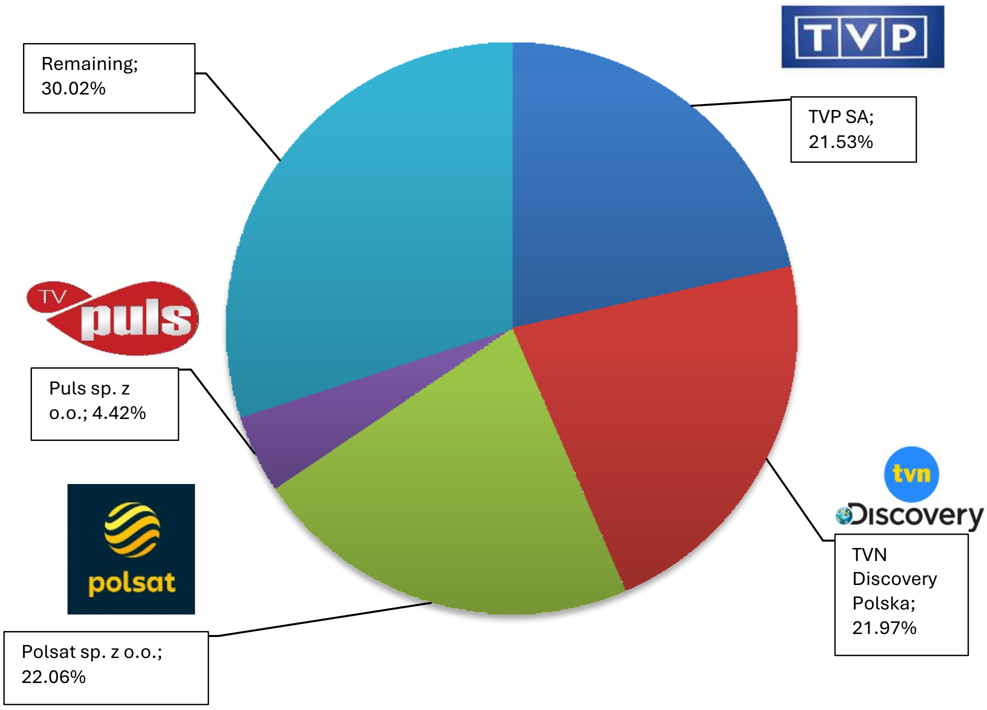
[35] TVN Discovery Polska: TVN, TVN 24, TVN 7, TTV, TVN 24 Bis, Eurosport 1, TVN Turbo, TVN Style, Discovery, TVN Fabuła, Metro, HGTV, TLC, Investigation Discovery, Discovery Science, Food Network, Eurosport 2, DTX, Travel Channel, Discovery Historia, Discovery Life, Animal Planet HD, Cartoon Network, Cartoonito, Warner TV.

share, but less than 22%. The public broadcaster's television programmes obtained even less (TVP 1, TVP 2, TV Polonia, TVP Info, TVP 3, TVP Rozrywka, TVP Kultura, TVP Seriale, TVP Sport, TVP HD, TVP Historia, TVP ABC, TVP Kobieta, TVP Dokument and TVP Nauka).

The audience share of TV Puls was slightly lower than in the previous year (around 4.4%). However, the other channels increased their audience share significantly and now have a combined audience share of over 30%.

The following pie chart diagram shows the distribution of the TV market, including the audience shares of the main channels:

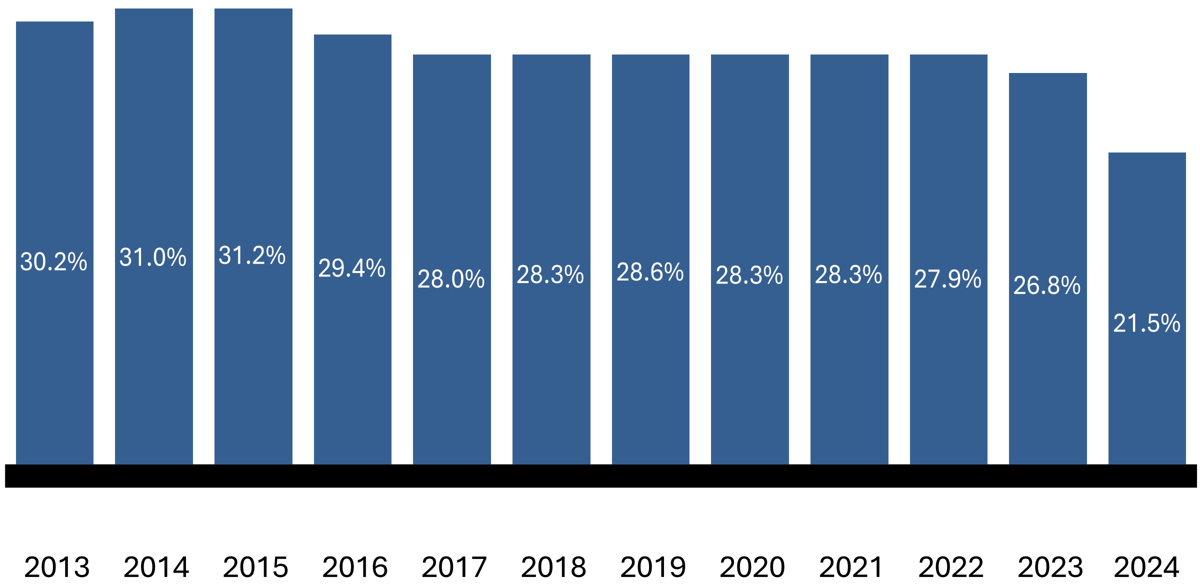
Pie chart 3. **Audience shares by major broadcasting groups in 2024.**



Source: KRRiT office as based on AGB Nielsen Media Research

Public television, compared to the previous year, lost a total of 5.29 p.p. (i.e. 19.72%). The data illustrating this trend is shown in the chart below.

Bar Chart 4. **Total audience share of public television viewers in 2013-2024**



Source: KRRiT office as based on AGB Nielsen Media Research

The table below summarises the details of all public programmes, including a note on the change compared to 2023.

Table 6. **Average audience and market share of public television programmes in 2024.**

Item No.	Programme	AMR	SHR %	Viewers	Change	Share	Change p.p.	NTC
1.	TVP 1	425,711	7.69%	383,853	41,858	7.24%	- 0.45	MUX 3
2.	TVP 2	405,063	7.32%	325,091	79,972	6.13%	- 1.19	MUX 3
3.	TVP Seriale	86,339	1.56%	75,924	- 10,415	1.43%	-0.13	
4.	TVP Info	272, 904	4.93%	75,241	-197,663	1.42%	-3.51	MUX 3
5.	TVP Sport	54,351	0.98%	53,429	- 922	1.01%	0.03	MUX 3
6.	TVP 3	53,195	0.96%	46,330	- 6,865	0.87%	-0.09	MUX 3
7.	TVP HD	29,480	0.53%	27,965	- 1,515	0.53%	0.00	
8.	TVP Rozrywka	28,141	0.51%	27,754	- 387	0.52%	0.01	MUX 6

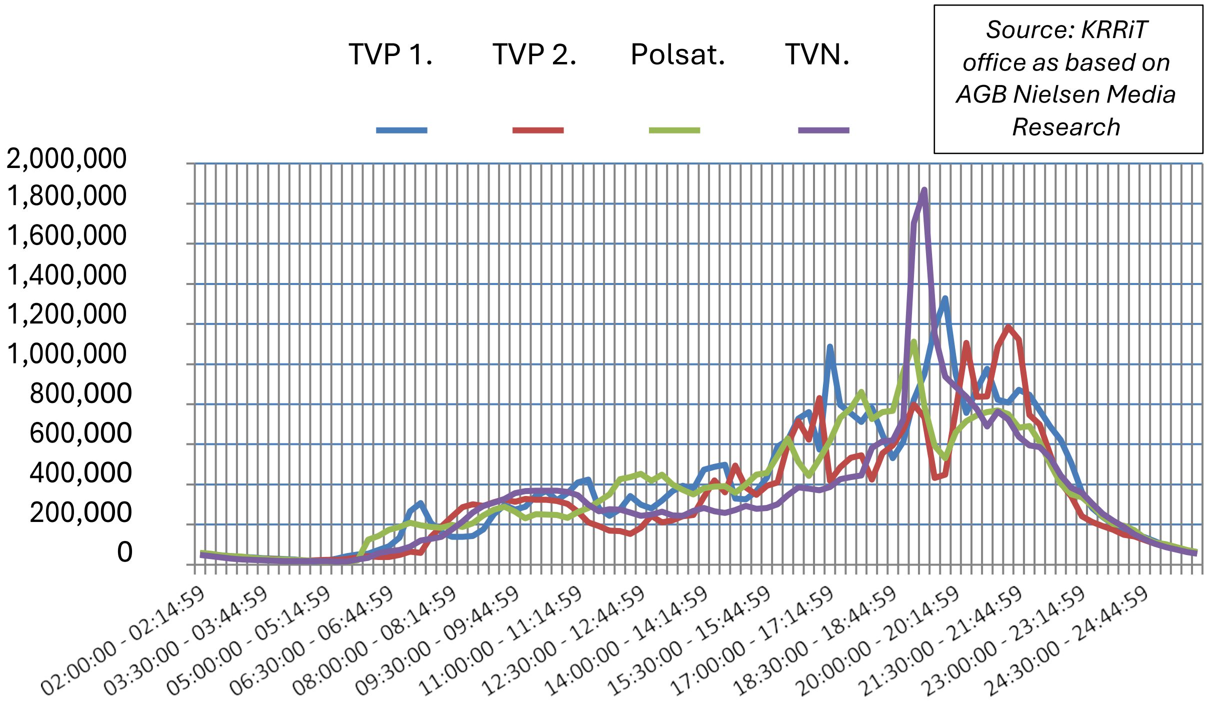
9.	TVP Historia	29,030	0.52%	25,419	↓-3,611	0.48%	↓ -0.04	MUX 3
10.	TVP Kultura	18,367	0.33%	19,484	↑ 1,117	0.37%	↑0,04	MUX 3
11.	TVP Kobieta	18,856	0.34%	18,169	↓-687	0.34%	→0.00	MUX 6
12.	TVP Polonia	16,655	0.30%	17,927	↑ 1,272	0.34%	↑0.04	MUX 6
13.	TVP ABC	24,818	0.45%	16,842	↓-7,976	0.32%	↓ -0.13	MUX 3
14.	TVP Dokument	12,093	0.22%	14,982	↑ 2,889	0.28%	↑0.06	MUX 6
15.	TVP Nauka	9,698	0.18%	13,234	↑ 3,536	0.25%	↑0.07	MUX 6
	TOTAL	1,484,701	26.82%	1,141,644	↓-343,057	21.53%	↓-5.29	

Source: KRRiT office as based on AGB Nielsen Media Research

The time between 6.00 p.m. and 11.00 p.m. remained the prime time for the Big Four channels (TVP1, TVP2, Polsat and TVN), even though the time shifted individually for each channel. TVP1 had the highest viewing figures during the news broadcasts at 5.00 p.m. and 7.30 p.m. (*Teleexpres* and '*19.30'* – formerly, *Wiadomości*), and TVP2 – between 8.00 p.m. and 10.00 p.m. (serial programmes). Also, in the case of TVN and Polsat, the highest average daily viewership was observed during the broadcast of news programmes at 6.50 p.m. (*Wydarzenia* on Polsat) and 7.00 p.m. (*Fakty* on TVN), as well as after 8:00 p.m. (film programmes on Polsat) and after 9.00 p.m. (film series and films on TVN).

Graph No. 5. **Daily audience of TVP1, TVP2, Polsat and TVN in 2024.**

Source: KRRiT office as based on AGB Nielsen Media Research



3. Focus on media markets in 2023.

The analysis of the state of concentration in media markets was prepared on the basis of data for 2023 due to the lack of current data for 2024, which will only be available at the end of the second quarter.[36]

3.1. Television

The creation and distribution of television programmes is an activity based mainly on two pillars: the programme audience market and the advertising revenue market.

The first part presents information on the audience market:

- audience of television programmes broken down by main broadcasters, regardless of the method of distribution;
- viewership of programmes broadcast on terrestrial television;
- viewership of satellite and cable programmes.

In following, data on the viewership of news and current affairs programmes was presented as being of particular importance for pluralism of opinion.

The second part contains information on the advertising market in a similar approach, i.e. first general information – the value and structure of the entire market, and then information on advertising on terrestrial and satellite/cable television.

For each of these approaches, the values of indicators used to assess the degree of concentration of a given market are presented, i.e.:

- C4 index,[37] i.e. the market share of the four largest companies. The higher the concentration index, the more concentrated the industry. The market is generally considered highly concentrated if C4 is greater than 50%;
- The HHI[38] is defined as the sum of the squares of the market shares of all the companies operating in the market, expressed as a percentage. An HHI of over 1,800 is considered to indicate a highly concentrated market.

Data on advertising revenue in the programmes of the so-called Big Four, i.e. TVP1, TVP2, TVN and Polsat, are presented separately. Due to the lack of information on advertising revenue in news and current affairs programmes only, data on this subject could not be presented, so the results were limited to audience figures.

Finally, the report characterised the TV advertising broker market, the functioning of which influences the way the advertising pie is divided and, indirectly, the price of advertising. Due to the fact that it is, in effect, divided between three capital groups – TVN Warner Bros. Discovery (TVN WBD), Polsat Plus and TVP, this information is important in assessing the

[36] The financial results of broadcasters and media service providers are based on the financial statements submitted to the National Court Register (KRS). According to the Accounting Act, they are submitted by 30 April, 30 June or 15 July for the previous calendar year.
[37] C4 or CR – (concentration ratio abbreviation)
[38] HHI – also known as the Herfindahl-Hishman Index, named after its creators.

overall situation in which entities operating in the television advertising market function.

The Audience – the overall TV market

In 2023, more than 75% of the Polish audience market was still divided between three television groups. The public broadcaster[39] achieved a total of almost 27% of the audience share. TVN Discovery Polska achieved 22.28%[40] and the Polsat Group at 22.16%.[41]

TV Puls programmes attracted a larger audience than in the previous year (a total of approx. 4.54%), and the shares of other broadcasters also increased slightly,[42] which together accounted for more than 24% of the viewing audience.

The chart below shows the breakdown of the television market, considering the audience shares of the main groups of broadcasters.

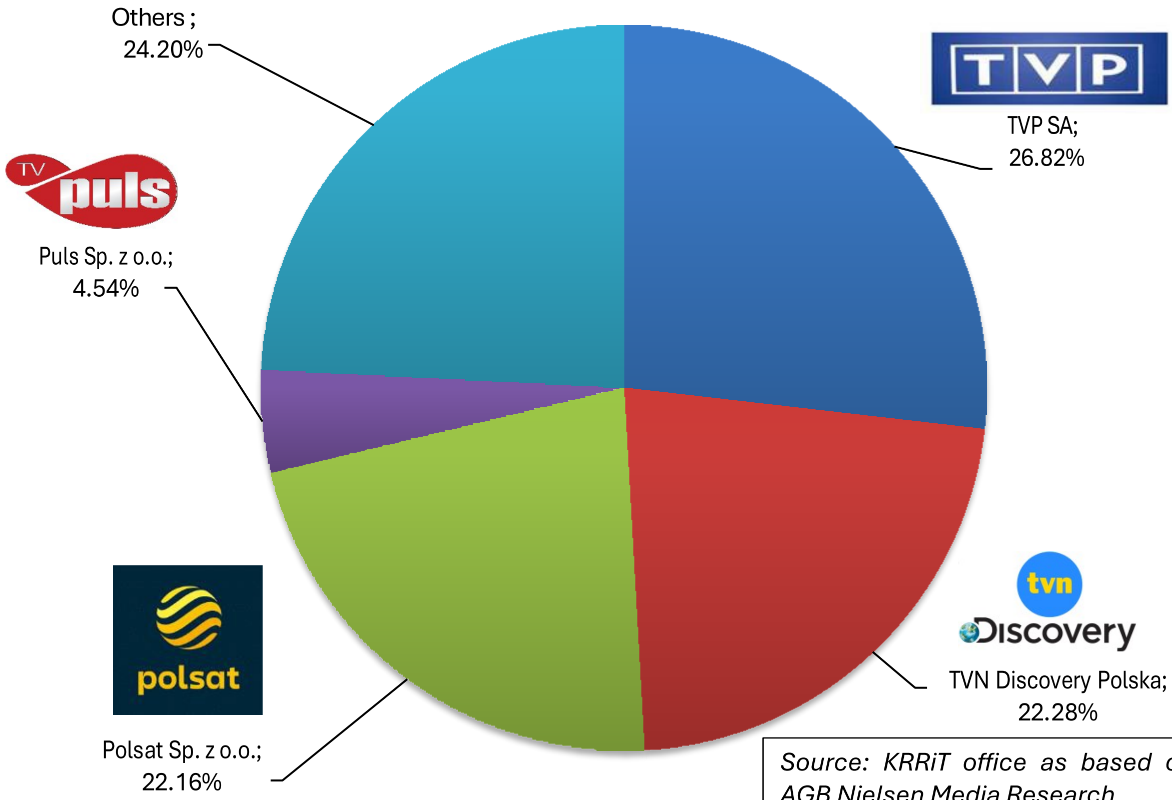
[39] The TVP Group: TVP 1, TVP 2, TV Polonia, TVP Info, TVP 3, TVP Rozrywka, TVP Kultura, TVP Seriale, TVP Sport, TVP HD, TVP Historia, TVPABC, TVP Kobieta, TVP Dokument and TVP Nauka.

[40] TVN Discovery Polska: TVN, TVN 24, TVN 7, TTV, TVN 24 Bis, Eurosport 1, TVN Turbo, TVN Style, Discovery, TVN Fabuła, Metro, HGTV,TLC, Investigation Discovery, Discovery Science, Food Network, Eurosport 2, DTX, Travel Channel, Discovery Historia, Discovery Life, Animal Planet HD, Cartoon Network, Cartoonito, Warner TV.

[41] The Polsat Group: Polsat, TV 4, Polsat News, Polsat 2, TV 6, Fokus TV, Super Polsat, Wydarzenia 24, Polsat Sport 1, Polsat Play, Polsat Film,Polsat Cafe, Polsat Seriale, Nowa TV, Polo TV, Polsat Comedy Central Extra, Polsat Viasat History, Eska TV, Eleven Sports 1, Polsat Sport 2, Polsat Viasat Explore, CI Polsat, Polsat Doku, Polsat News 2, Disco Polo Music, Polsat Viasat Nature, Polsat Rodzina, Polsat Sport 3, Polsat JimJam, 4fun Dance, 4fun Kids, 4fun TV, Epic Drama, Polsat Games, Polsat Sport Fight, Eleven Sports 2, Eska TV Extra, Polsat Music HD, Vox MusicTV, Eska Rock TV.

[42] i.e. those with an audience share of less than 1%.

Pie chart No. 6. **Audience shares by major broadcasting groups in 2023.**



Source: KRRiT office as based on AGB Nielsen Media Research

The HHI index, which considers the combined audience of television programmes grouped according to their affiliation with individual entities operating in this market in 2023, reached a value of 1,747.[43] The decreasing value of the index is influenced by the widespread availability of television programmes that can be received via multiple platforms. The C4 index,[44] which is moving in a similar direction to the HHI, is fluctuating at 75.8% according to the 2023 data.

The Audience – terrestrial television market

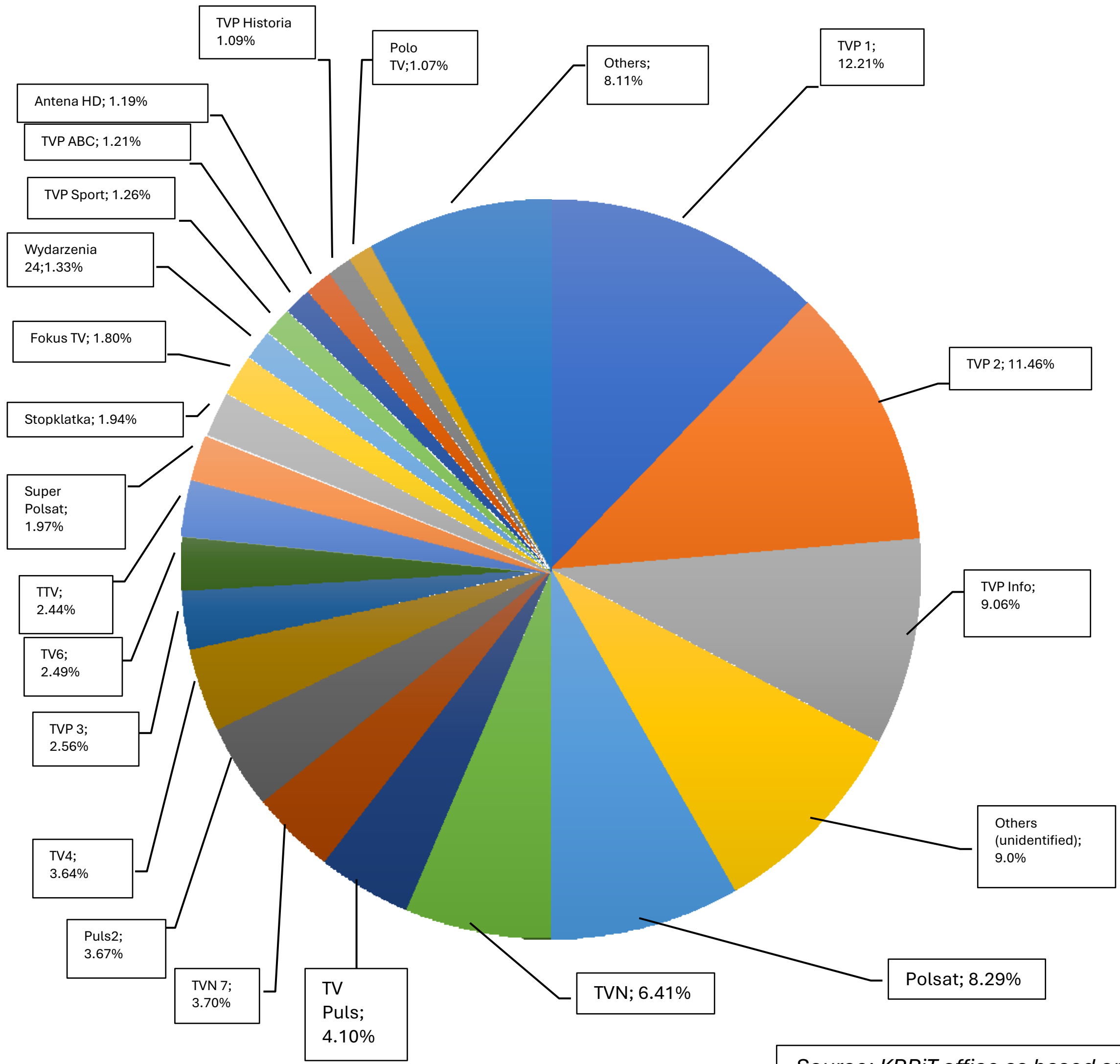
The terrestrial television segment is more concentrated, which is obvious due to the limited number of programmes. In 2023, 22 licensed programmes and public service programmes were broadcast on digital terrestrial multiplexes. Most of them belong to the 'incumbent broadcasters' – TVP, Polsat, TVN Discovery Polska and TV Puls – which broadcast one programme each in analogue before 2011 and then, as a result of a KRRiT decisions, were

[43] The data was calculated according to a different method of calculating the HHI index than previously used in the *Information on the basic problems of radio and television* in *2020-2022*. This study takes into account the sums of the audience ratings of programmes outside C4 for the other groups operating in this market, which in previous years were not specifically identified. However, regardless of the method used to calculate the C4 index, the direction of development of the television audience market is clearly moving towards greater audience dispersion, and thus increased competitiveness.
[44] cf. *Information on the basic problems of radio and television in 2022*, p.121.

granted the right to broadcast one additional programme each under the provisions of the Act on Digital Terrestrial Television.[45] Further digital licences for POLSAT PLUS and TVN WBD were granted in open competitions, with the participation of other interested parties or as a result of the purchase of companies holding licences. TV Puls did not increase the number of licences. In 2023, the number of licences was as follows: for Polsat – 9, TVN WBD – 4, TV Puls – 2. [46]

The provisions of the 2011 Act on the Implementation of Digital Terrestrial Television required TVP to broadcast TVP1, TVP2 and regional programmes digitally. The presence of TVP programmes gradually increased depending on technical possibilities, reaching 17 in 2023.

Pie chart No. 7. **<u>Audience shares of programmes broadcast on digital terrestrial television in 2023.</u>**



Source: KRRiT office as based on AGB Nielsen Media Research

[45] Act of 30 June 2011 on the implementation of digital terrestrial television, Journal of Laws 2011 No. 153 item 903.

[46] A list of all programmes of the individual broadcasters is provided in footnotes 39-41 on the previous pages. The TVNWBD Group includes TVN, TVN 7, TTV and Metro (approx. 49%) among its terrestrial programmes, the Polsat Plus Group includes Polsat, TV4, TV6, Super Polsat, Focus TV,

The strong presence of TVP, Polsat and TVN WBD in digital terrestrial television and the established presence of TV Puls ensure the strong position of the incumbent former-analogue broadcasters in this market segment, regardless of the increasing presence of new channels in the multiplexes that do not belong to these four. There is also a trend towards capital concentration with their participation through the purchase of companies that have obtained licences to broadcast programmes in multiplexes and incorporating them into their resources. This was the case, for example, with TTV, Focus TV and Polo TV.

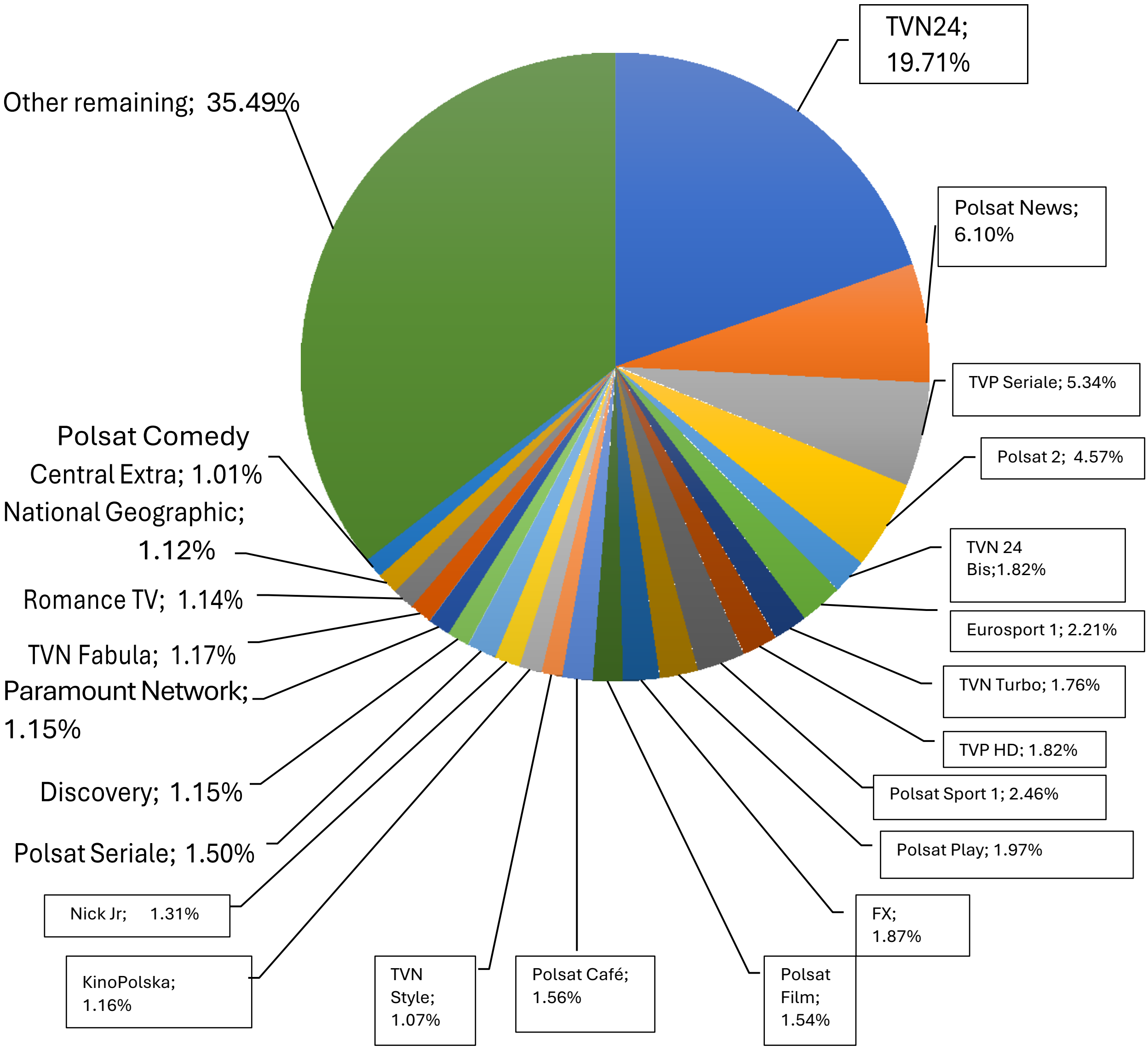
The degree of audience concentration in digital terrestrial television reached a high value of 2,518 in 2023, as measured by the HHI index. The situation is similar for the C4 index, which is 85.12% for 2023.

Both indicators show a high level of concentration. This means that the introduction of a wide range of programmes in the digital terrestrial television segment has not brought about a significant change in audience behaviour. Despite the growing number of participants, this segment remains highly concentrated, with no significant prospects for improvement.

The main reason for this seems to be the high costs of broadcasting programmes in digital multiplexes, which are dictated by the technical operator TP Emitel. The burden of broadcasting costs limits the ability of new broadcasters to invest in programme quality, which is reflected in the viewing figures. In addition, the major broadcasters take advantage of the opportunities offered by their scale of operations and brand strength, as well as their significantly greater financial resources, which allow them to conduct extensive promotional campaigns.

The Audience - satellite / cable TV programme market

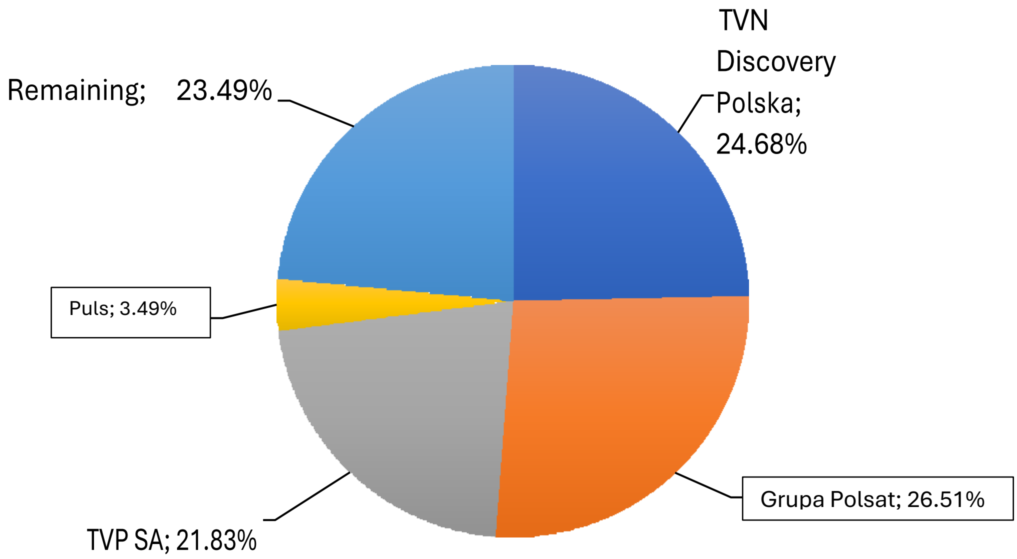
Pie chart 8. **Share of satellite and cable programme audience in 2023**



Source: KRRiT office as based on AGB Nielsen Media Research

Note: The group 'other remaining' includes programmes with an audience share of less than 1%.

Pie chart 9. **Audience shares of satellite and cable programmes and programmes available on digital terrestrial television belonging to TVP, TVN Discovery Polska, Polsat Plus and TV Puls in 2023.**



Source: KRRiT office as based on AGB Nielsen Media Research

Among the approximately 200 television programmes distributed by satellite and cable operators, the programmes belonging to TVP, TVN Discovery Polska and Polsat also play a leading role in terms of audience size. However, a significant number of other programmes, including those of foreign broadcasters with an interesting, high-budget offer of documentaries, feature films and series, means that 23.49% of the audience devotes their time to broadcasters other than those belonging to the C4 group.

This situation would perhaps be even more favourable for entities other than the leading players operating in this market segment, were it not for the fact that, in accordance with the must carry/must offer [47] principle of the programmes of TVP1, TVP2, TVN, Polsat and iTV Puls are present in the most inexpensive packages offered by satellite and cable operators, and the availability of programmes from other broadcasters, including in particular foreign broadcasters, is possible after purchasing more expensive packages. In addition, the advantage that Polsat Plus and TVN gain as a result of cross-sector concentration should be mentioned. These companies also have shares in the satellite operators Polsat Go and cyfra+.

Both indicators – HHI and C4 for the satellite and cable TV segment are lower than their values for the market in general or for the terrestrial TV segment.

In 2023, the HHI for the satellite and cable audience was 2,200 and the C4 was 76.51%. Both indicators indicate a high level of concentration. When comparing these results with the results from the total audience market, the difference is not significant. However, when we compare the results of the terrestrial TV audience segment, both the greater strength and the number of the rest of the market are visible, including in particular such groups as Disney, AXN, Paramount – formerly Viacom CBS, NBC Universal, Fox and Paramount.

It would seem that the satellite and cable programme market is moving towards deconcentration, although this process is very slow. However, due to the fact that viewers are switching to online TV (OTT) and the prices of larger TV packages are discouraging people from using satellite or cable TV, this process may be slowed down.

The interest of the aforementioned global entities in using their productions in the pay-TV model is waning, which is evident in the withdrawal of some programmes from this offer and the transfer of content to SVOD.[48]

The audience – news and current affairs programmes

The degree of concentration in the market for specialised television programmes, distributed regardless of the method of reaching the viewer (terrestrial, cable, satellite), is very high. The dominant role of the main entities – TVN Discovery, TVP and Polsat – is also visible. This is not surprising because these entities have an established position on the market, incomparably large organisational, technical and personnel resources, as well as

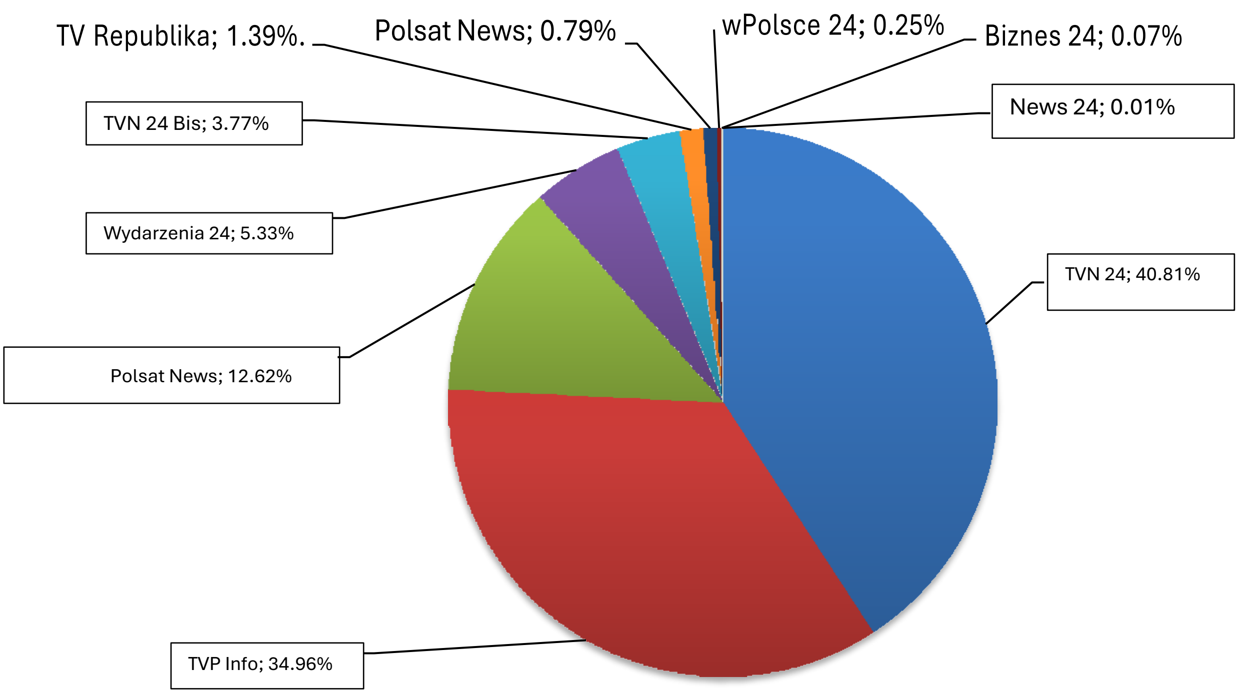
[47] The must carry/must offer principle is established in Articles 43-43a of the Broadcasting Act.

[48] SVOD – Subscription video on demand. SVOD services provide access to a catalogue of films and series after a subscription has been purchased.

extensive experience in creating such content. In addition, the news and current affairs programmes of the established broadcasters are an extension of the topics presented on the main channels with a large audience. TVN and Polsat also expand the audience of their news and current affairs content by using it at different times through additional programmes, e.g. TVN24bis or Polsat News 2 and *Wydarzenia 24*.

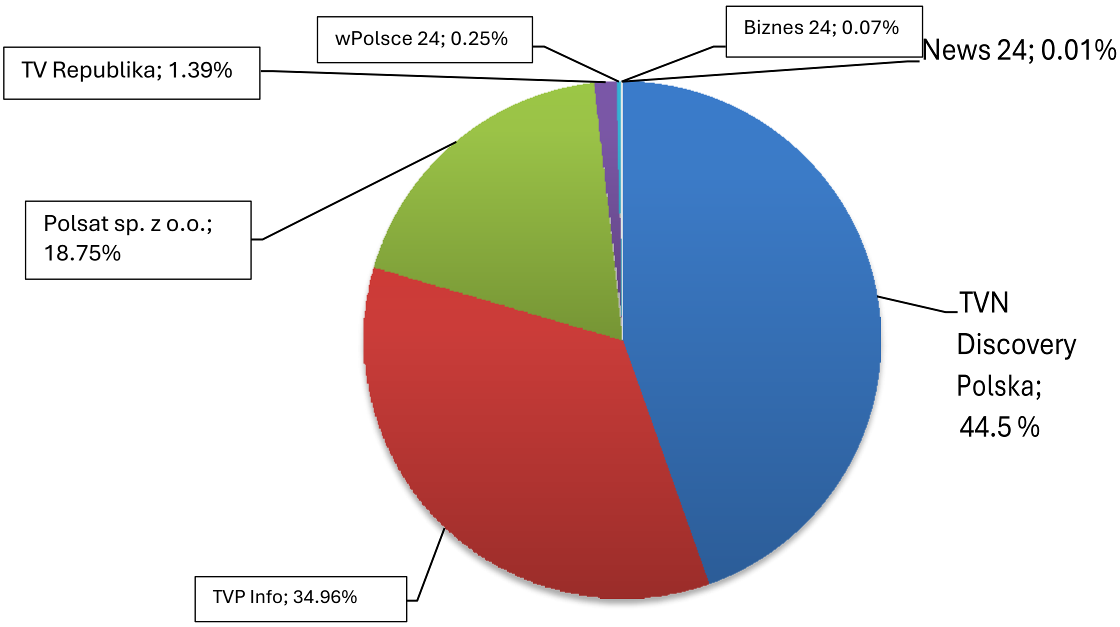
New news and current affairs broadcasters TV *Republika* and *wPolsce24* did not receive their DTT licences until 2024. Until then, they were limited to satellite and cable TV and the internet.

Pie chart No. 10. **Share of news and current affairs programmes broadcast via terrestrial, satellite and cable in the audience of programmes with this specialisation in 2023.**



Source: KRRiT Office compilation based on AGB Nielsen Media Research data for 2023.

Pie chart No. 11. **Share of TV newsgroups and current affairs programmes broadcast via terrestrial, satellite and cable in the audience of programmes with this specialisation in 2023.**



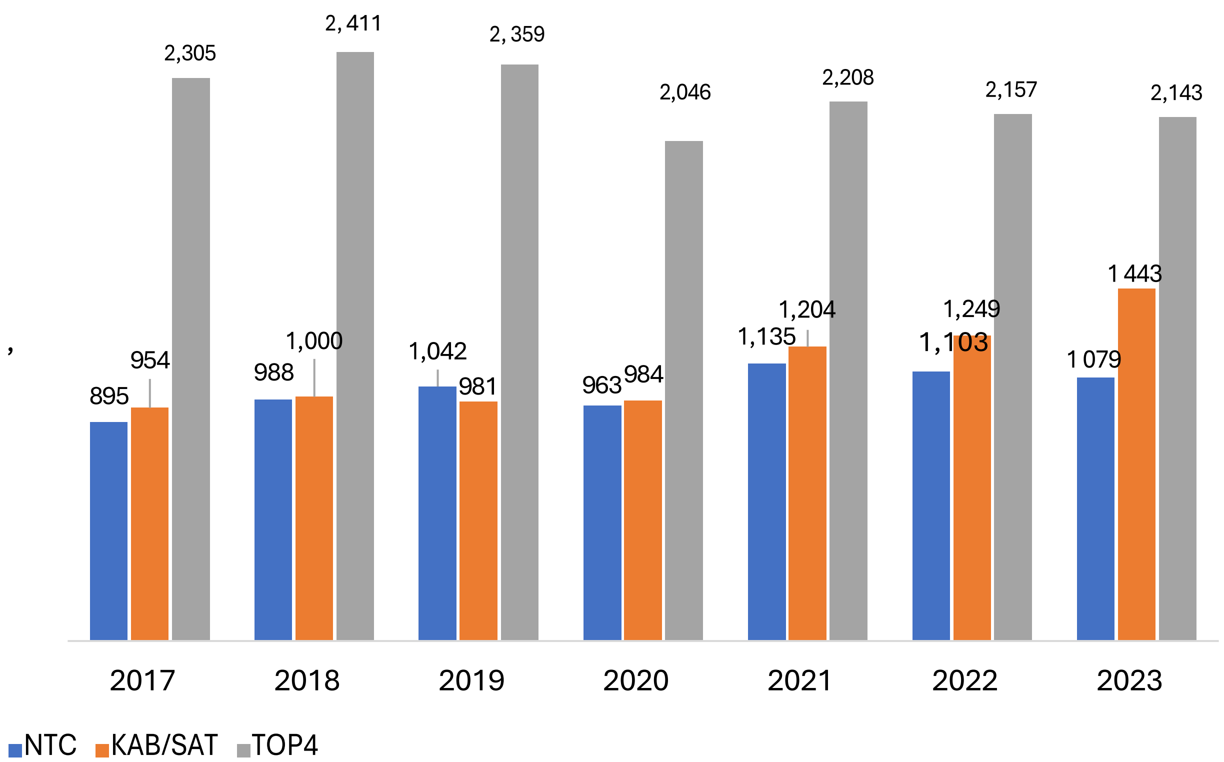
Source: KRRiT Office compilation based on AGB Nielsen Media Research data for 2023.

Highly specialised markets, such as the one in question, do not have much of a chance of deconcentration due to the national nature of the content on the one hand, and on the other hand, due to the economic and technical-organisational barriers to entry, which are higher than in the case of other programmes. Therefore, the results of the HHI index for 2023, which is 3,562, and the value of the C4 indicator at almost 100% (99.68%) should come as no surprise. They confirm the very high concentration in the form of an oligopoly.

Advertising revenue

As previously mentioned, data from the Publicis Groupe[49] report shows that the market value of television advertising in 2023 was PLN 4,665,000,000. Compared to the revenue in 2022, this value has increased by 3.5%. Although television has already lost its position as the advertising market leader, it can still count on further revenue growth. It is worth noting that TV broadcasters also generate revenue from online advertising, obtained through the presence of their content in various forms on the web and from contracts with satellite and cable operators, as well as VOD and OTT.

Graph No. 12. **<u>Advertising revenue in 2023 in terrestrial, satellite and cable TV programmes and in the programmes of the so-called ‘Big Four’, i.e. TVP1, TVP2, TVN and Polsat, regardless of the method of distribution</u>**



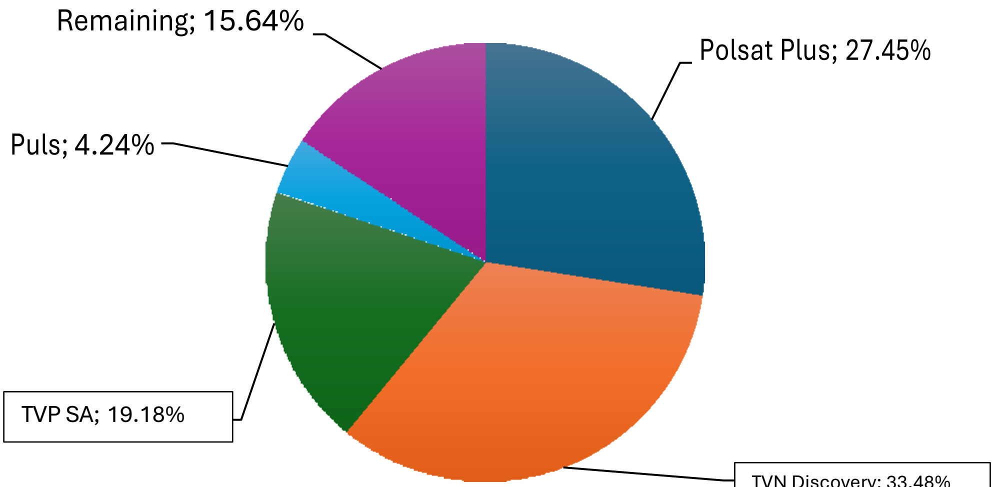
Source: Study by the Office of the National Broadcasting Council based on the Publicis Groupe report, <u>Advertising market in Poland in 2023</u>. *Updated after Q3 2024.*

[49] Publicis Groupe, *<u>Advertising market in Poland in 2023</u>, updated after Q3 2024*

In 2023, revenues from advertising activities, including sponsorship, product placement and commercials on the four main channels (TVP1, TVP2, Polsat and TVN) amounted to approximately PLN 2,143,200,000, i.e. 13,400,000 (-0.6%) less than in 2022, when they reached PLN 2,156,600,000.[50]

The same type of revenue in programmes available on digital terrestrial television (without the four main antennas) decreased by 2.2% and amounted to PLN 1,078,900,000, which, compared to 2022, was a decrease of almost PLN 24,000,000. On the other hand, when analysing the revenue from spot advertisements alone, the decrease amounted to PLN 30,700,000, or 2.9%.

Pie chart No. 13. **<u>Share of television groups in advertising revenue in 2023.</u>**



Source: Study by the Office of the National Broadcasting Council based on the Publicis Groupe report, <u>Advertising market in Poland in 2023</u>. *Updated after Q3 2024.*

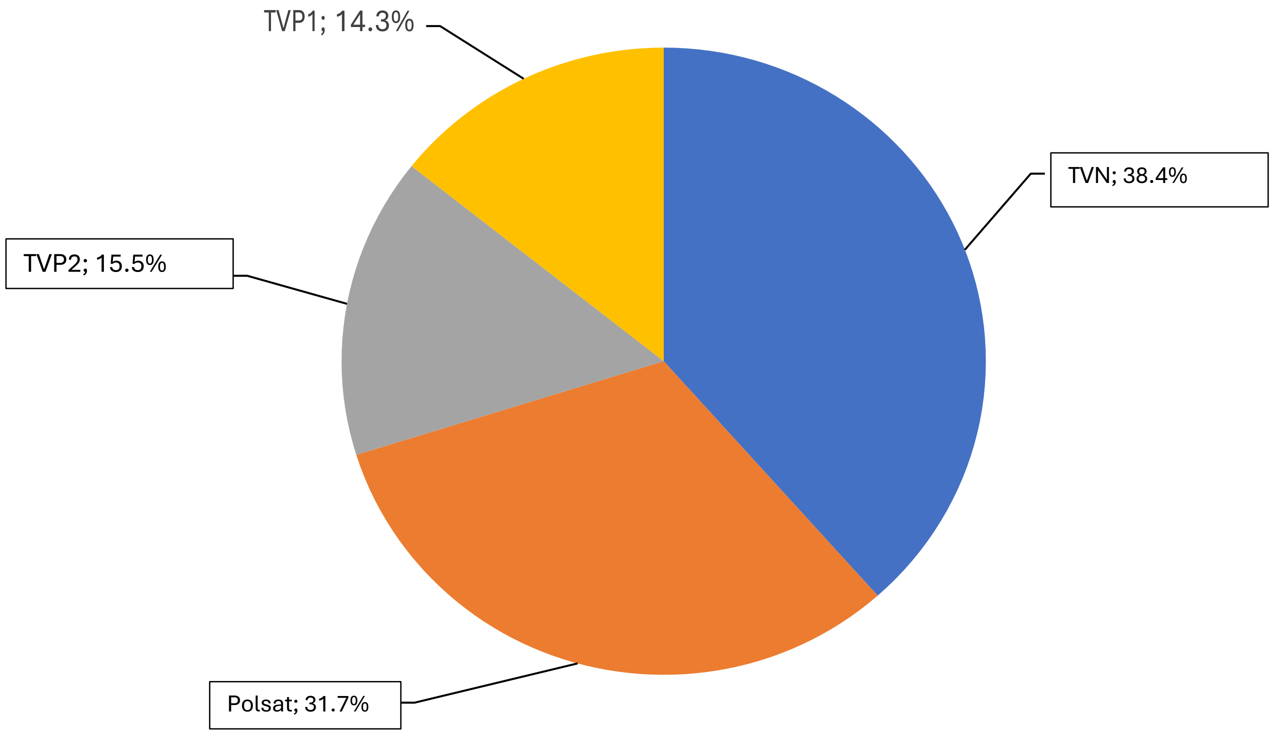
The concentration on the TV advertising market, considering both the overall market (i.e. regardless of the method of distribution) and its individual segments (terrestrial, satellite and cable), is similar to that observed in the audience market. This is due to the fact that advertisers take audience ratings and programme availability into account when planning their budgets.

The established position of the three companies TVN Discovery, Polsat and TVP and the wide distribution of their programmes, particularly on terrestrial television, as well as the strength of their brands and their ability to invest in content, result in more than 80% of TV

[50] Due to their source, these figures differ from the figures provided in the section on broadcasters' financial results. The figures quoted here are estimates of net advertising investment, i.e. estimated advertising revenue after discounts but before VAT, as published by *Publicis Groupe* based on information on advertising contracts. However, in the part concerning the broadcasters' financial results, the data is sourced from the broadcasters' financial statements, and therefore presents the information provided to recipients in the annual financial statements submitted to the National Court Register (KRS).

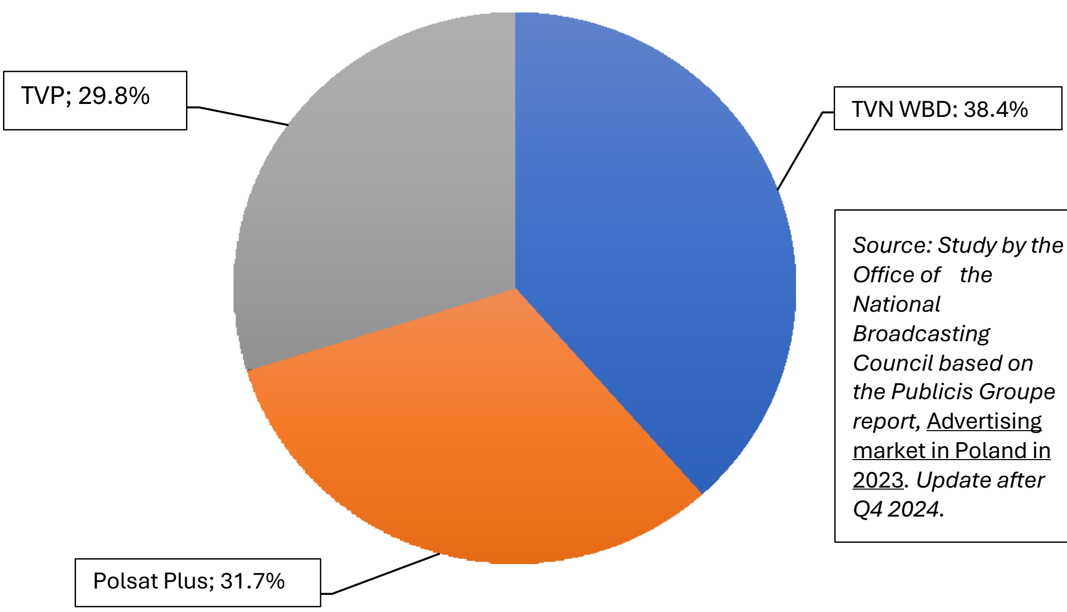
advertising investments being made on their channels. This process is also supported by the high level of involvement of the major companies in various forms of self-promotion and marketing. In 2023, the C4 index for the total TV advertising market was 84.35%, while the HHI was 2,287. Both indices indicate a high level of concentration.

Pie chart No.14. **Share of individual programmes in advertising revenue broadcast in the so-called Big Four programmes in 2023.**



Source: Study by the Office of the National Broadcasting Council based on the Publicis Groupe report, Advertising market in Poland in 2023. Updated after Q4 2024.

Pie chart No. 15. **Share of TV groups in advertising revenue in the so-called Big Four programmes in 2023**



Source: Study by the Office of the National Broadcasting Council based on the Publicis Groupe report, Advertising market in Poland in 2023. Update after Q4 2024.

Advertising revenue of TV advertising brokers

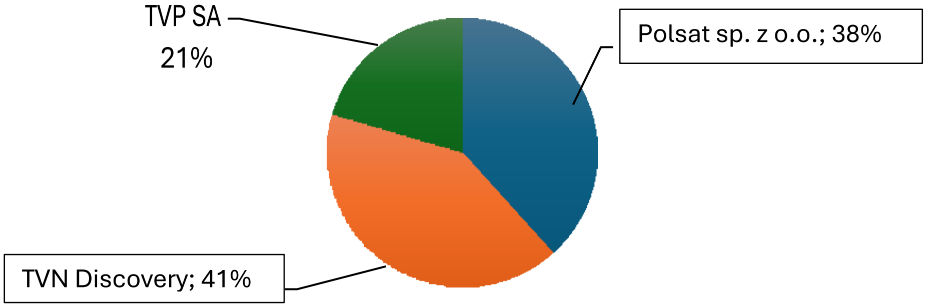
In 2023, TVN Media, as part of the special TVN Premium offer along with all channels of the TVN Discovery Group, had a 41% share in the TV advertising market, and at the same time was a broker for:

• its own programmes: TVN, TVN7, TVN24, TTV - Twoja Telewizja, TVN Fabuła, TVN Turbo, TVN Style, HGTV, Discovery, Metro, Investigation Discovery, TLC, TVN 24 BiS, Discovery Science, Discovery Historia, Discovery Life, Animal Planet HD, DTX, Eurosport, Eurosport 2, Travel Channel;
• Canal+ (MiniMini+, Canal+ Domo+, Planete+, Canal+ kuchnia+, Ale Kino+, teleTOON+, Canal+ Sport, Canal+ Sport2, Canal+ Sport3, Canal+ Sport5, Canal+ Family, Canal+ Premium, Canal+, Canal+ Dokument, Novelas);
• Disney (Disney Junior, Disney Channel, Disney XD);
• Paramount (formerly Viacom CBS) (Comedy Central, Nick Jr, Paramount Network, Polsat Comedy Central Extra, Nickelodeon, Nicktoons, MTV PL, Teen Nick);
• FOX (FX, National Geographic, National Geographic Wild, FX Comedy, Nat Geo People);
• and others such as: Polsat (Food Network), Mainstream Networks (Romance TV), IKO Media Group (Sportklub, Fightklub), Motowizja (Motowizja), Astro (e-sport tv, News24), Idea4 Broadcasting (StudioMED TV), MWE Network (ULTRA TV, TVC), Sanbox Music (MIXTAPE), Red Carpet Media Group (Red Carpet Tv, RedTOP TV), Music Box Polska.

In 2023, Polsat Media had a 38% share in the TV advertising market and brokered for:
• Polsat's own programmes (4FUN.TV, 4FUN DANCE, 4FUN KIDS, Disco Polo Music, Eleven Sports 1, Eleven Sports 2, Eska Extra (Eska TV), Eska Rock TV, Eska TV (8TV), Fokus TV, Nowa TV, Polo TV, Polsat Café, Polsat Doku, Polsat Film, Polsat Games, Polsat Music HD, Polsat News, Polsat News 2, Polsat Play, Polsat Rodzina, Polsat Seriale, Polsat Sport, Polsat Sport Extra, Polsat Sport Fight, Polsat Sport News HD, Polsat 2, Super Polsat, TV 4, TV 6, Vox Music TV, Wydarzenia24);
• Puls, Puls 2;
• Kino Polska (Stopklatka, Zoom TV, Kino Polska, Kino TV, Kino Polska Muzyka, Gametoon);
• Fratria (Telewizja WPOLSCE.PL),
• Telewizja Republika S.A. (TV Republika);
• TVN WBD (Warner TV, Cartoon Network, Boomerang, Cartoonito);
• A&E Television Networks (HISTORY, CI Polsat, History2 (H2));
• Wirtualna Polska (WP);
• AXN (Antenna Group) (AXN, AXN Black, AXN Spin, AXN White);
• Viasat (Epic Drama, Polsat Viasat History, Polsat Viasat Explore, Polsat Viasat Nature);
• BBC (BBC Earth, BBC Brit, BBC CBeebies, BBC Lifestyle, BBC First);
• AMC Networks (Polsat JimJam, AMC, Extreme Sports, Sundance Channel);
• NBCUniversal (13 Ulica, Scifi Universal, E! Entertainment, Golf Channel Polska – to be taken over by MWE Network in June 2023);
• Paramount (CBS Europa, CBS Reality);
• and others such as: Polcast Television (Tele5, Polonia1, Water Planet, Novela TV), JBD SA (Stars.tv), Da Vinci Media (Da Vinci).

The third largest broker in terms of market share is public television. *Biuro Reklamy TVP* (ENG.: TVP ADVERTISING OFFICE) handles TVP1, TVP2 and thematic programmes, which in 2023 resulted in a market share of 21%.

Pie chart No. 16. **Market share of TV brokers in advertising revenue in 2023.**



Source: Study by the Office of the National Broadcasting Council based on the Publicis Groupe report, Advertising market in Poland in 2023. Update after Q3 2024.

When the C4 index is equal to 100%, which is the case here, we are dealing with a strong concentration. This is confirmed by the high HHI index value, which amounted to 3,566 in 2023.

In 2023, the President of the Office of Electronic Communications (UKE) investigated the discounts applied by Polsat Media, TVN Media and TVP's Advertising Office, which provide services to both companies in their capital group and other broadcasters. The purpose of the proceedings was to verify whether the discounts applied by these entities could contribute to the closure of the market for brokerage services in the sale of television advertising.

As a result of the proceedings, the President of UKE stated: 'We have analysed the market situation very thoroughly and we can see that the so-called '*kick-backs'* [51] are currently a certain standard applied by market participants, which does not limit competition between entrepreneurs.'

The proceedings were concluded on 9 November 2023. The Office's analysis did not show that entrepreneurs used practices restricting competition.[52] According to the President of the Office of Competition and Consumer Protection (UOKiK), when choosing a broker, media houses are guided by the matching of media to the needs of the campaign and the client's target group. It was also established that there are no significant barriers on the market that would prevent broadcasters from changing brokers.

According to the President of the UKE, the vast majority of trading on the Polish advertising market currently takes place through media houses, a significant proportion of which belong to global corporations.[53] The existence of strong TV advertising brokers strengthens the position of the TV sector in negotiations with media houses on the purchase of airtime.

[51] Here, '*kick-back'* is a form of 'internal commission' between entities, e.g. on a won customer or asset. The scheme occurs, among others, in the advertising market, e.g. in the cooperation between agencies and media houses with publishers of advertising space or intermediaries. In finance, kickback most often refers to a situation where the entity managing the client's assets shares the profit with the intermediary who acquired that client for a given investment, savings or credit product.

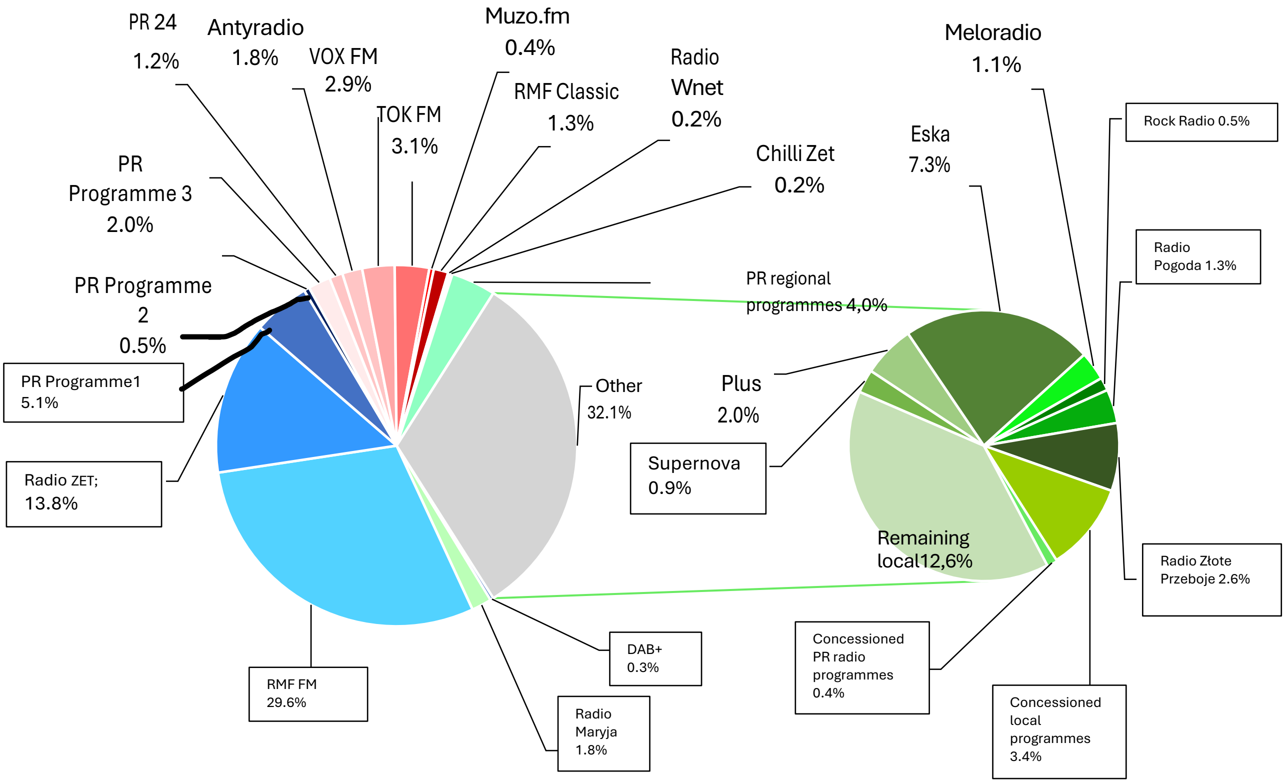
[52] The proceedings focused on examining progressive rebates (also referred to as 'AVB' - Agency Volume Bonus, or *kick-back*). In the proceedings, they were understood as remuneration paid to the media house or advertiser by the entity offering the media space. This discount is a bonus for achieving a sales target or other contractual conditions in a given period. https://uokik.gov.pl/zakonczenie-postepowania-w-sprawie-brokerow-mediowych. The President of the Office of Competition and Consumer Protection (UOKiK) investigated whether progressive turnover discounts distort the decisions of media houses regarding the allocation of budgets for television advertising and thus may encourage the concentration of orders or spending with specific brokers. However, the analysis did not reveal any such tendencies.

[53] Starcom (Publicis Group), GroupM, EssenceMediacom and Mindshare https://www.wirtualnemedia.pl/artykul/starcom-value-media-zenith-najwieksze-agencje-mediowe-ranking-recma-2024-r-w-polsce

3.2 Radio

Audience of radio programmes

Pie chart No.17. **Structure of the radio market - shares of listening time in 2023.**[54]



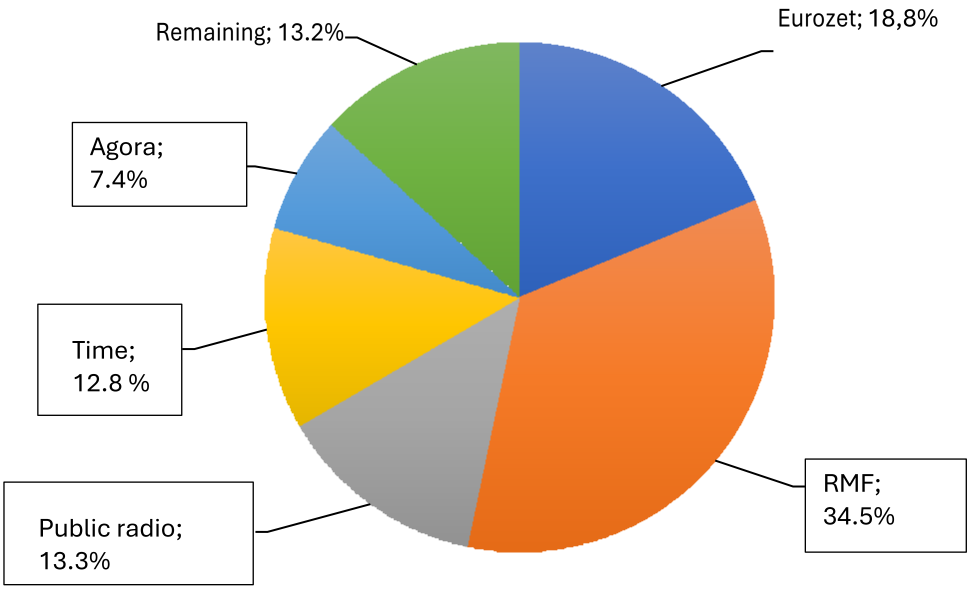
Source: Kantar Polska and Address: Media, Radio in Poland 2023, November 2024.[55]

[54] The pie chart shows the distribution of the radio market among individual programmes and programme groups in terms of listening time. The chart highlights nationwide programmes: RMF FM, Radio Zet, Programmes 1, 2 and 3 of Polish Radio, Polish Radio 24 and Radio Maryja. Then there are the supra-regional programmes: Antyradio, VOX FM, TOK FM, muzo.fm, RMF Classic, Chillizet, Radio Wnet, regional and city public radio programmes, local programmes as a single group and digitally broadcast programmes (DAB+). The local programmes are additionally shown in a smaller circle of the diagram, divided into the programme networks: SuperNova, Plus, Eska, Meloradio, Rock Radio, RadioPogoda, Złote Przeboje, RMF Maxx.

[55] In 2023, the following changes were made to the list of stations surveyed:

- new programmes were included in the audience research: Meloradio (Tarnobrzeg) (June 2023), Radio SuperNova Stalowa Wola (July 2023), SuperNova (Biała Podlaska) (November 2023), Radio Famka (Kraków) (December 2023);
- Several stations have stopped broadcasting, including Plus Gryfice and Plus Lipiany (in January 2023).
- For some programmes, there have been changes in the location and technical conditions of the broadcasting stations, resulting in changes in the technical range of these programmes.

Pie chart No. 18. **Breakdown of the radio market into main groups of broadcasters (share of listening time) in 2023.**



Source: Kantar Polska and Address: Media, Radio in Poland 2023, November 2024.

In the year under review, as in previous years,[56] RMF had by far the strongest audience position among all radio programmes. This was as much as 34.5%.

In February 2019, Agora SA bought a 40% stake in Eurozet. As part of the agreement, it also gained the option to acquire the remaining 60% of its shares from the Czech company SFS Ventures by 2022. This transaction required the approval of the Office of Competition and Consumer Protection. In January 2021, the President of the Office of Competition and Consumer Protection banned this transaction. On 27 February 2023, the Court of Appeal in Warsaw issued a judgement unconditionally approving Agora's acquisition of control over Eurozet sp. z o. o. The judgement is final. As a result of this decision, Agora was able to take full control of Eurozet and consolidate the rights arising from the licence, which may be particularly significant for some local markets where both Agora and Eurozet companies hold licences.

In 2023, Agora's purchase of the remaining shares in Eurozet[57] has not yet been finalized, which is why the two companies are presented separately in the chart. The combined audience share of both companies would be 26.4%. This is still relatively low compared to the market leader. Assuming that the audience shares of Agora and Eurozet are counted together, the Time Group would also be among the four largest companies with a share of 12.8%.

The total audience share of all PR SA programmes and regional radio stations is 13.3%, which seems relatively low, considering the technical reach of public broadcasters compared to commercial ones.

The C4 index in 2023, considering the market structure in historical terms (Agora and Eurozet counted separately), was 79.4%, which indicated an oligopolistic market structure, while counted together - 86.8%. An HHI of 1958 indicates high concentration,[58] and if we count Agora and Eurozet together, the HHI will be 2235. This situation will probably change at the end of 2025, when the effects of the combined forces of Agora and Eurozet will be known.

The situation on the radio market can be summarised as follows:

Broadcasters with a national reach (four programmes) have more than half of the audience of all programmes.

RMF has a strong leading position in the market for listeners of all radio programmes, and in particular for listeners of national programmes. This situation may change as a result of the use of Agora's potential in the creation of Radio Zet.

The merger of Agora and Eurozet increases the level of concentration on the audience market of all programmes by combining the position of Eurozet on the national market with the position of

[56] In 2022 it was 37.1%, in 2021 - 36.2% and in 2020 - 35.5%.
[57] This did not happen until 20 June 2024.
[58] Below 1,000 low concentration, 1,000-2,000 concentration, 1,800 to 2,500 high concentration.

local programmes and the supra-regional programme TOK FM.

TOK FM engages about ¾ of the audience of news and current affairs programmes, although it has a limited technical range compared to PR24.

An analysis of radio listenership at the voivodeship level shows that, in addition to nationwide programmes, listeners most often choose local programmes belonging to the ESKA Group or programmes of regional public broadcasters. Regional markets are concentrated at the same or a higher level than the national market.

National radio stations and regional public radio stations are in a relatively weak position despite their technical reach (coverage of the country and potential audience).

The radio market is a mature market in which no significant changes are taking place. This is due to the limited access to frequency resources. Noticeable changes may occur after the implementation of DAB+ or as a result of further consolidation and acquisitions.

Advertising revenue in radio programmes

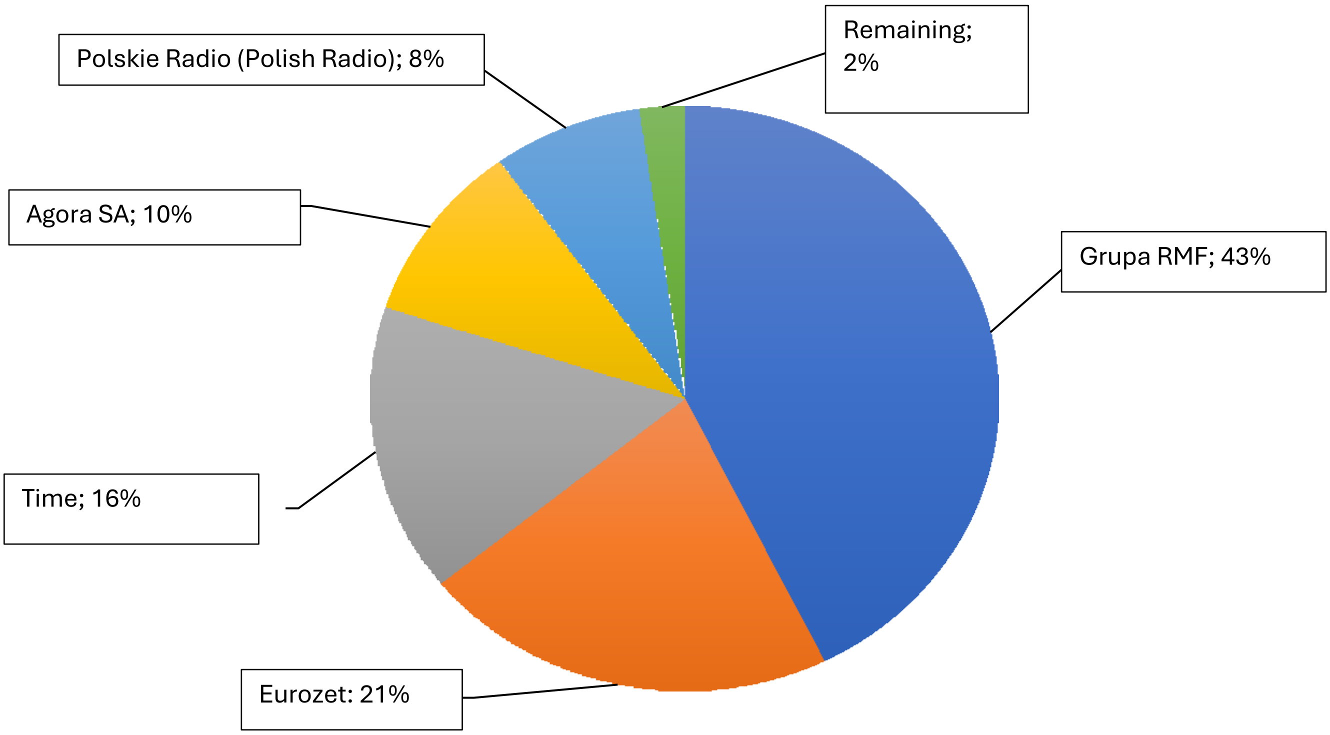
The estimated value of radio advertising in 2023 was PLN 880.9 million. The growth rate of radio advertising revenue compared to 2022 was 12.1%.

Radio advertising brokers

The radio advertising market is different from the television advertising market. Advertisers can buy advertising space directly from each broadcaster and do not use brokerage services. If a broadcaster has a tool for planning advertising campaigns (software), it can be both a broadcaster and a broker. This makes it possible to plan campaigns involving several broadcasters and then act as an intermediary in the purchase of advertising packages. Currently, there are three major brokers on the market: the Eurozet Group, the Time Group and the RMF Group. They also offer non-affiliated stations in their packages. Thus, the revenues of radio brokers roughly reflect the actual revenues of the individual broadcasting groups.

In 2023, the RMF FM Group was in first place in the advertising revenue market with a 43% share. The Eurozet Group achieved 21%, and Time 16%. Agora took fourth place with a 10% share, followed by *Polskie Radio* (Polish Radio) with an 8% share.

Pie chart 19. **Market share of radio brokers in 2022-2023 (according to Kantar Media)**



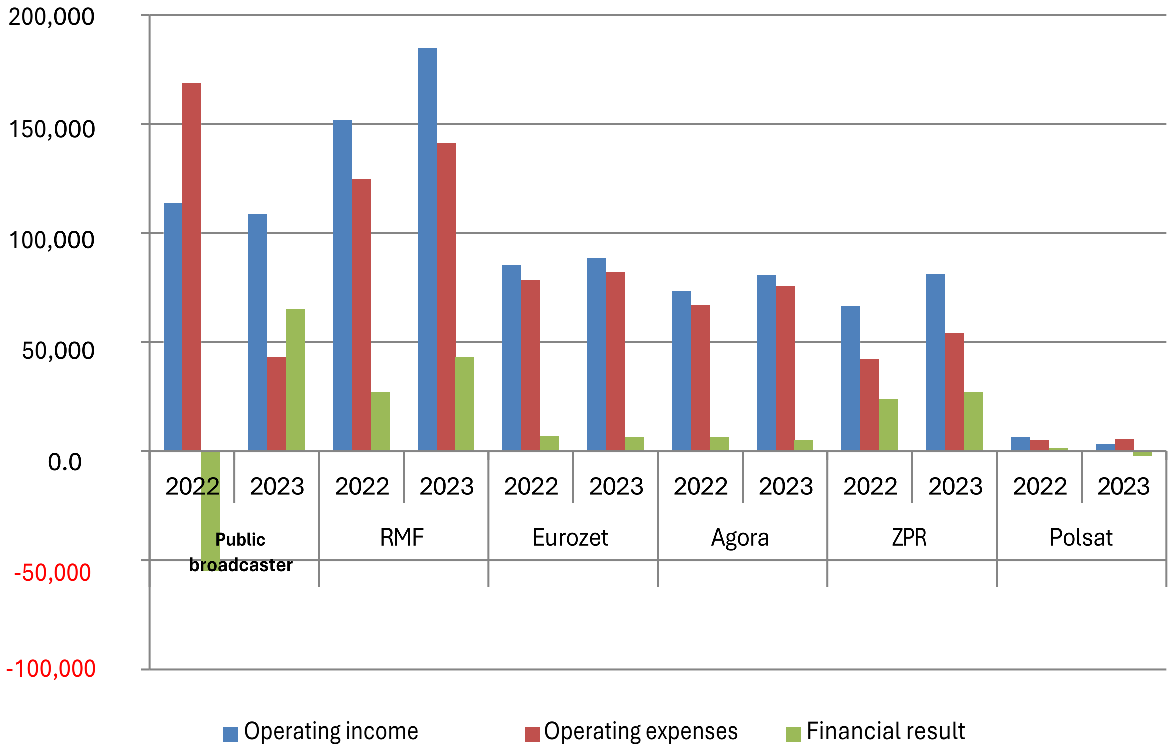
Source: Kantar Polska and Address: Media, Radio in Poland 2023, November 2024.

The C4 and HHI concentration indices for the radio broker market in 2023 were 90% and 2,711, respectively. The broker market is very highly concentrated.

Revenues and operating expenses of radio broadcasters – financial statements

The financial statements of broadcasters show that operating revenues, i.e. revenues from the sale of advertising and other revenues, e.g. from production, rental, sale of intellectual property rights, etc., amounted to PLN 707.8 million in 2023.

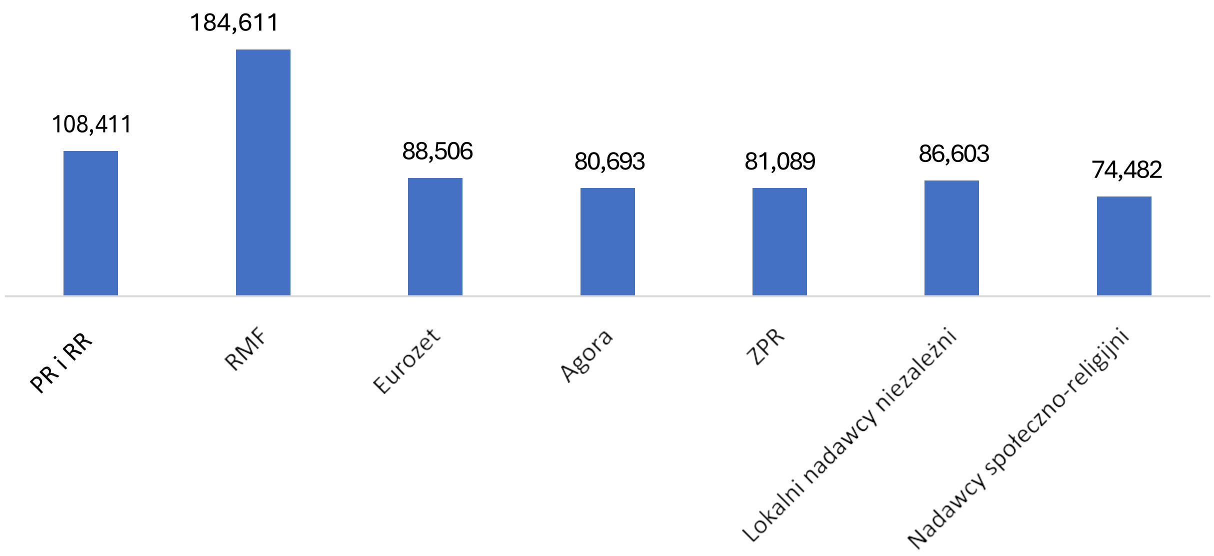
Chart No. 20. **Comparison of operating activities and financial results of radio groups in 2022-2023 (in thousands of PLN)**



	Public broadcaster		RMF		Eurozet		Agora		ZPR		Polsat	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Operating income	113,690	108,411	151,842	184,612	85,348	88,506	73,417	80,693	66,668	81,089	6,616	3,395
Operating expenses	168,686	43,369	124,858	141,255	78,261	81,869	66,860	75,777	42,486	53,989	5,232	5,377
Financial results	**-54,995**	**65,042**	**26,985**	**43,358**	**7,086**	**6,637**	**6,557**	**4,916**	**24,181**	**27,100**	**1,383**	**-1,982**

Source: Study by the Office of the National Broadcasting Council based on data from broadcasters' financial statements for 2023.

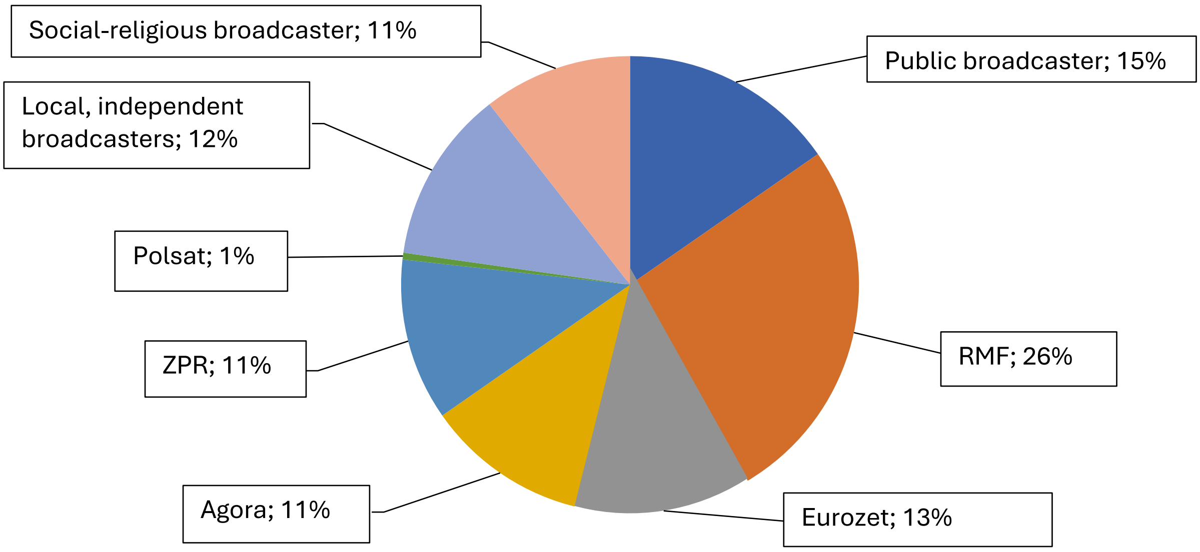
Chart No. 21. **Operating income of radio groups (in PLN thousand) in 2023.**



Source: Study by the Office of the National Broadcasting Council based on data from broadcasters' financial statements for 2023.

The graph does not include data on the Muzo FM programme, which was broadcast in 2023 by Radio PIN S.A. from the Polsat Plus group. The ZPR Media Group took over the Muzo.fm broadcaster from Polsat TV at the end of March 2024. The ZPR Media Group was responsible for the production of the Muzo.fm programme as early as the end of 2022, and in January 2023, its subsidiary Time took over the station's advertising services from Polsat Media. In March 2023, the radio station changed its music format to rock. The programme is now broadcast under the name Eska Rock. Advertising revenue at Muzo FM in 2023 amounted to PLN 2,152,400.

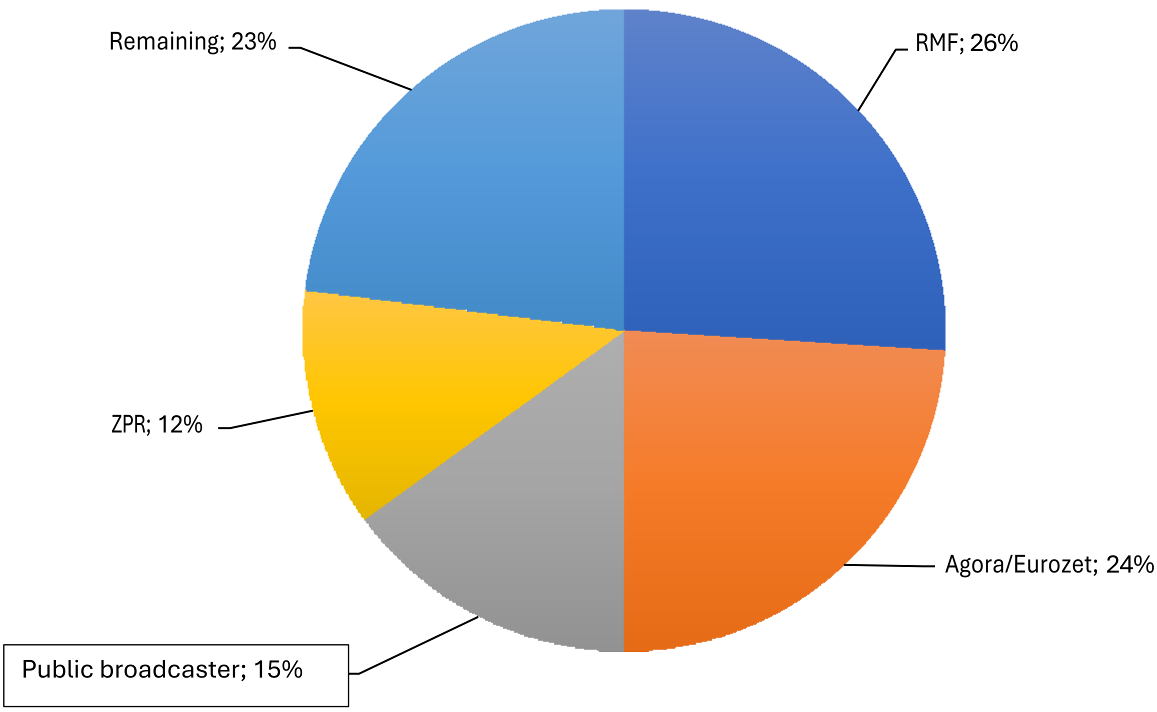
Pie Chart No. 22. **Share of radio groups in operating income[59] in 2023 (in PLN thousand)**



National Broadcasting Council based on data from broadcasters' financial statements for 2023.

[59] Operational revenue = sales revenue + other operating expenses

Chart No. 23. **Share of the four largest companies in operating revenue in 2023.**



Source: Study by the Office of the National Broadcasting Council based on data from broadcasters' financial statements for 2023.

The C4 and HHI concentration ratios for the market for operating revenues, as determined on the basis of the financial statements of radio broadcasters in 2023, were 77% and 1,673, respectively.

3.3. Audiovisual on-demand services (VOD)

Use of VOD

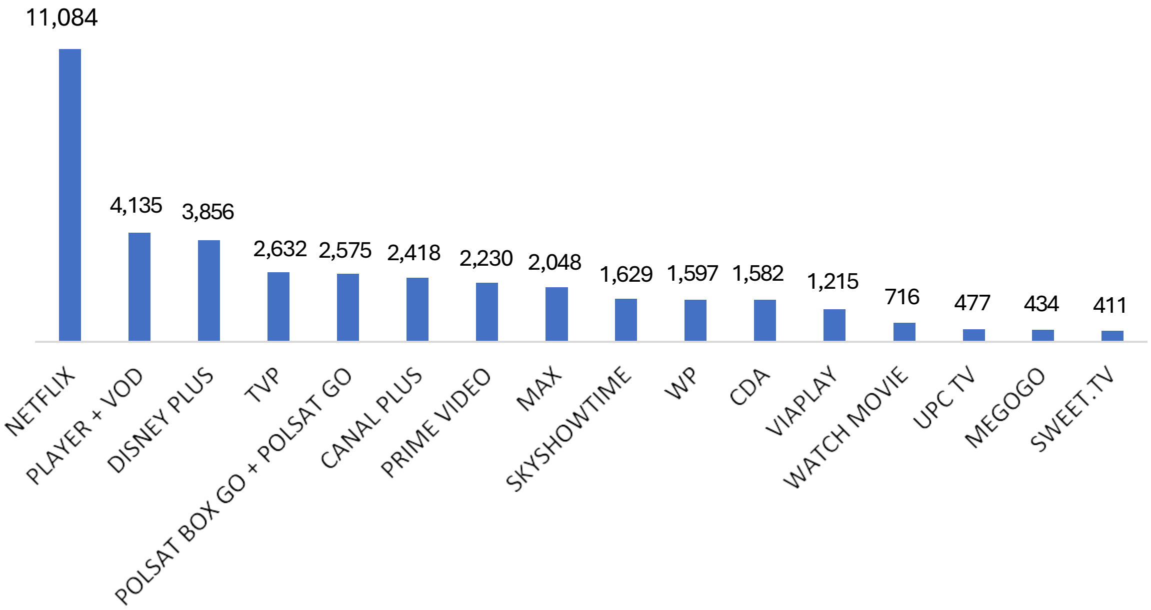
According to the results of the *Mediapanel Gemius* survey for 2023, Netflix remained the most popular VOD service in 2023, with over 11 million users, with services from Polish broadcasters (Player + VOD, TVP and Polsat BOX GO together with Polsat GO) in 2nd, 4th and 5th place.

In third place in terms of the number of users, the recently launched (in June 2022) Disney service achieved a much better result than other global services such as Prime Video,[60] MAX[61] or Skyshowtime. [62]

[60] The website is owned by American businessman Jeff Bezos.
[61] HBO is now owned by Warner Bros. Discovery.
[62] Owned by Comcast and Paramount Global.

The longest-running service, Canal+, is still quite popular. Its brand is known to the Polish audience from the beginning of the development of the television market in Poland.

Graph No. 24: Number of users[63] of VOD streaming platforms in 2023 (in thousands) – not all visits to the site are to view content

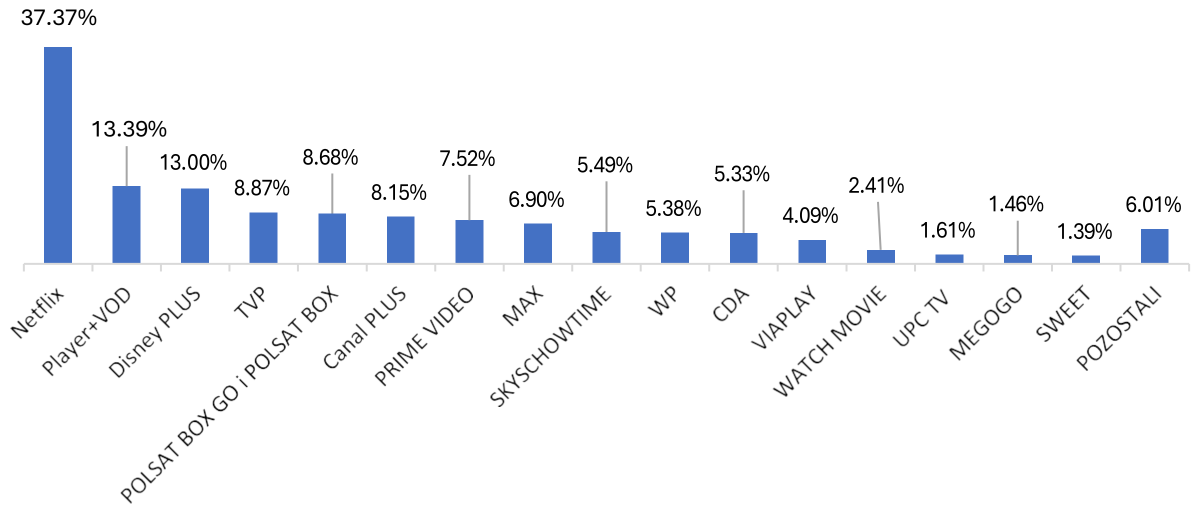


Source: Study by the Office of the National Broadcasting Council based on the Mediapanel Survey conducted by Gemius from 1 January to 31 December 2023; indicator: real users, internet.

Other streaming platforms did not exceed a reach of 1% in 2023.[64]

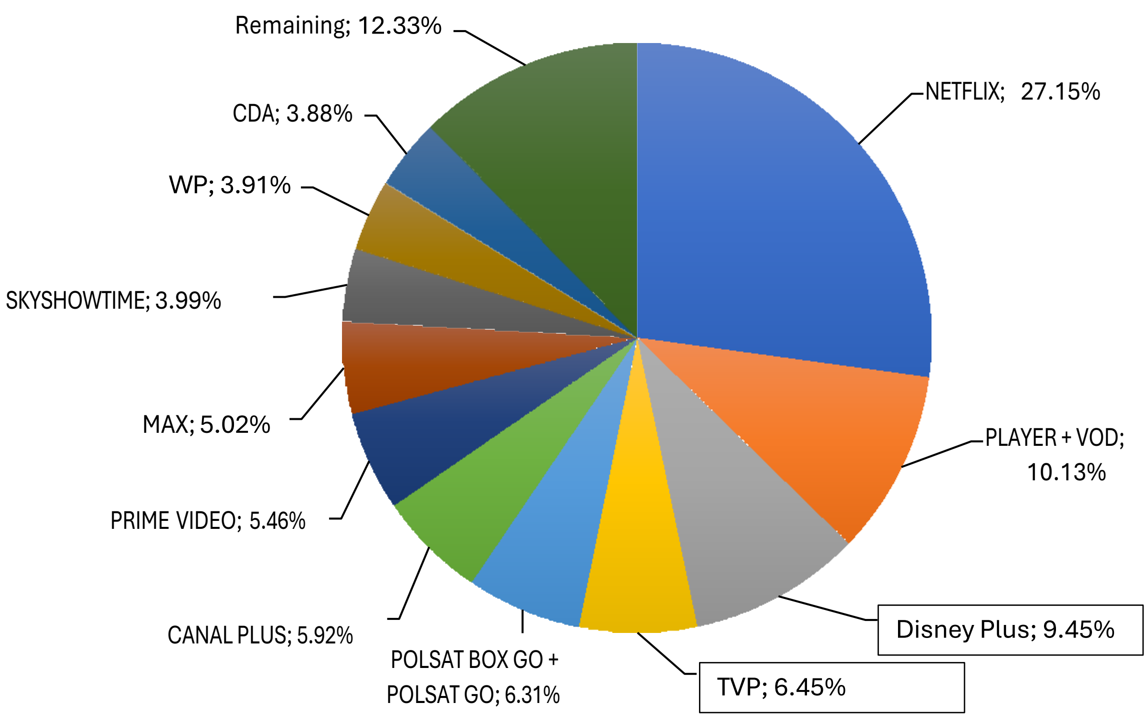
[63] The Mediapanel Gemius study uses the term real user. The real users indicator shows the number of people in a given target group who have received the content of a given medium in a defined period of time.
[64] Reach is the ratio of the number of people in a target group who have visited a selected node to the total number of people in the target group. The indicator is expressed as a percentage. This group includes Arte.TV, GO Net, Rakuten, Chilli, Telewizja online, Orange, Weeb TV, Toya, Eleven Sports, Televio, 35MM, Cineman, Ninateka, Netia, Play Puls, Film Box.com

Graph No. 25: **Reach of VOD streaming platforms in 2023**



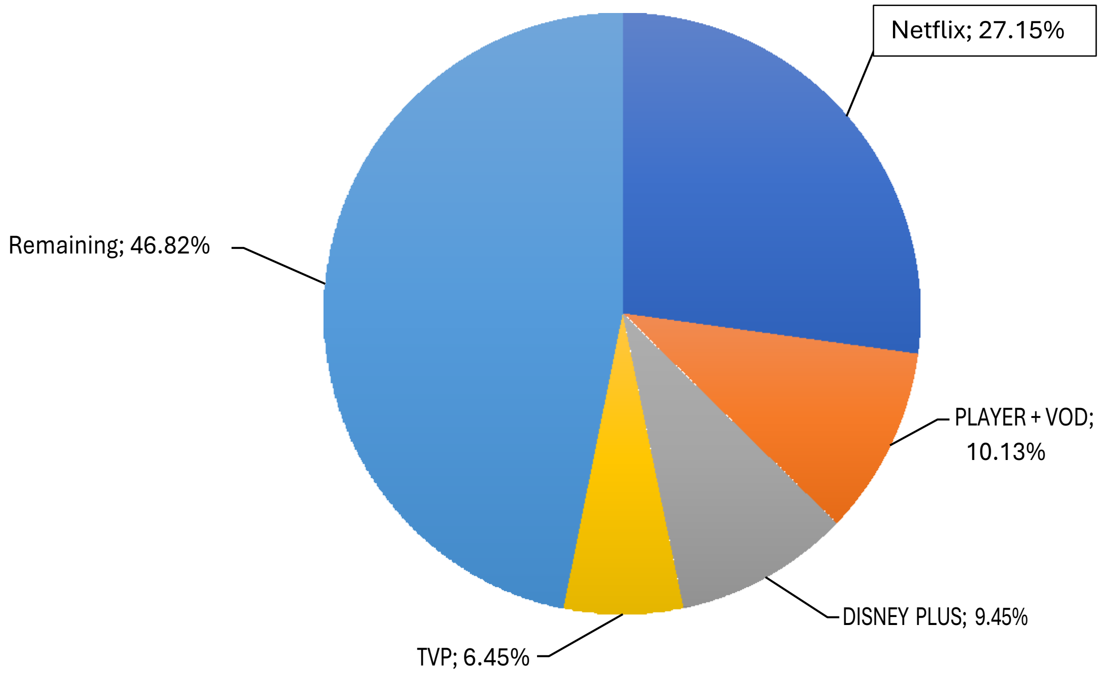
Source: Study by the Office of the National Broadcasting Council based on the Mediapanel survey conducted by Gemius from 1 January to 31 December 2023; indicator: reach, internet.

Pie chart No. 26: **Share of VOD streaming platforms in the number of users in 2023**



Source: Study by the Office of the National Broadcasting Council based on the Mediapanel survey conducted by Gemius from 1 January to 31 December 2023; indicator: real users, internet.

Pie chart No. 27: **Share of the four largest VOD streaming platforms in the number of users in 2023.**



Source: Study by the Office of the National Broadcasting Council based on the Mediapanel Survey conducted by Gemius from 1 January to 31 December 2023; indicator: real users, internet.

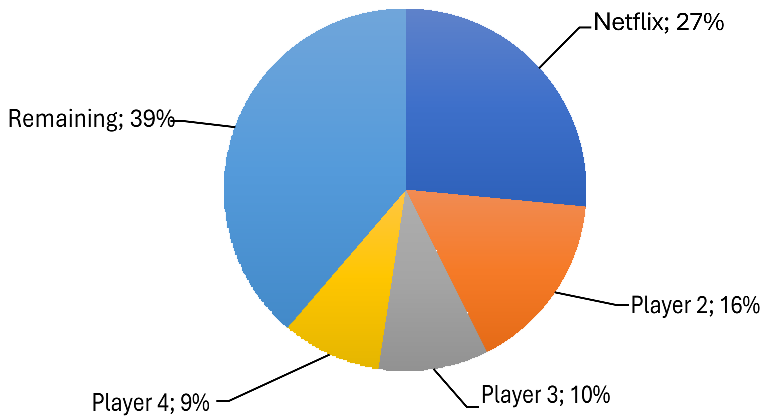
The VOD market, although in a high growth phase, is relatively unconcentrated. However, this may change, given that new foreign services have been appearing over the past several years. Still, more than 50% of users choose Netflix and Polish VOD services.

The C4 and HHI concentration ratios for the market of revenues from the sale of television programmes to satellite and cable operators in 2023 were 53.18% and 1,154 respectively.

Subscription-based VOD

According to data from the PMR report *the pay-TV and VOD services market in Poland 2024. Market analysis and development forecasts for the period 2024-2029*, the number of households using SVOD services in 2023 was 7.89 million. Netflix is the undisputed leader of the SVOD market in Poland, both in terms of the number of subscribers and revenue.

Pie chart No. 28. **Share of the four largest SVOD services in the number of subscriptions in 2023.**



Source: Study by the Office of the National Broadcasting Council (KRRiT) based on PMR VOD and pay-TV market in 2023. Forecast for 2024-2029

The C4 and HHI concentration ratios for the SVOD subscription market in 2023 were 61% and 1,371 respectively.

The C4 and HHI ratios may be higher due to the fact that Player and Max are owned by Warner Bros.[65]

The market value of subscription video on demand (SVOD)

According to PMR's report *the pay-TV and VOD services market in Poland Market analysis and development forecasts for 2024-2029*, the value of the pay VOD services market in Poland in 2023 was PLN 2.3 billion, with a growth rate of 28% year-on-year. The penetration of pay VOD services in Polish households is on a strong upward trend. It reached 65% in 2023, overtaking pay-TV services. The top four players accounted for more than 75% of the money spent by subscribers on SVOD in Poland.

With relatively low revenue shares compared to Netflix, 3 out of 4 of the largest SVOD platform streaming services operating on the Polish market, the C4 index, which in 2023 amounted to approximately 77%, is not very high. However, the HHI index score of 2,682 indicates a very high level of concentration because all other market participants score significantly lower than the market leader.

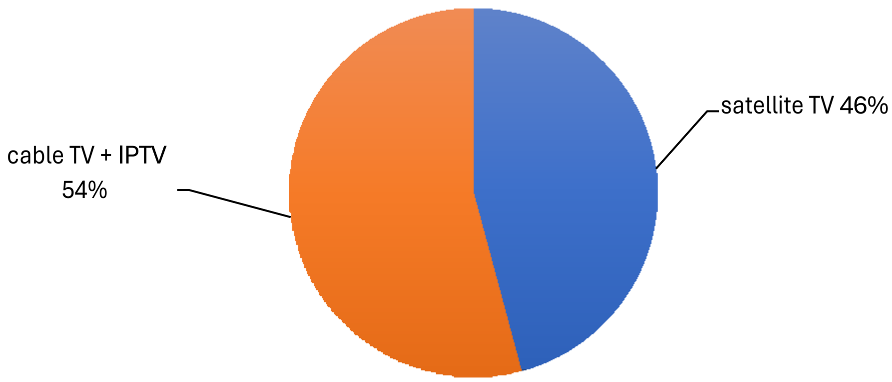
3.4. Pay TV services

Pay TV subscribers (SAT+CAB+IPTV) [66]

In 2023, the number of subscribers to all types of pay TV services amounted to 10.4 million (a decrease of 0.5%), of which cable TV including IPTV had a total of 5.6 million subscribers and digital satellite TV had nearly 4.8 million.

[65] In January 2024, the HBO platform, followed by HBO Max, changed its name to MAX as a result of rebranding and a new organisation of the service after Warner Bros. (now Warner Bros. Discovery) bought all shares in HBO and withdrew from the Polish market.
[66] Transmission network: IPTV uses a closed network, ensuring stable image and sound quality with dedicated equipment from the provider, while OTT is the transmission of a television signal through any internet connection. IPTV operators include GonetTV and IPTV Polska.

Pie chart No. 29. **Share of pay-TV subscribers in Poland in 2023.**



Source: Study by the Office of the National Broadcasting Council based on PMR - The pay TV and VOD services market in Poland 2024. *Market analysis and development forecasts for 2024-2029*

The five largest operators account for 83% of the pay-TV market. These are: Polsat Plus Group, Canal +, P4, Vectra and Orange.

The C4 and HHI concentration indices for the pay-TV market by number of subscribers in 2023 were 75% and 1,637, respectively.

Digital satellite TV subscribers

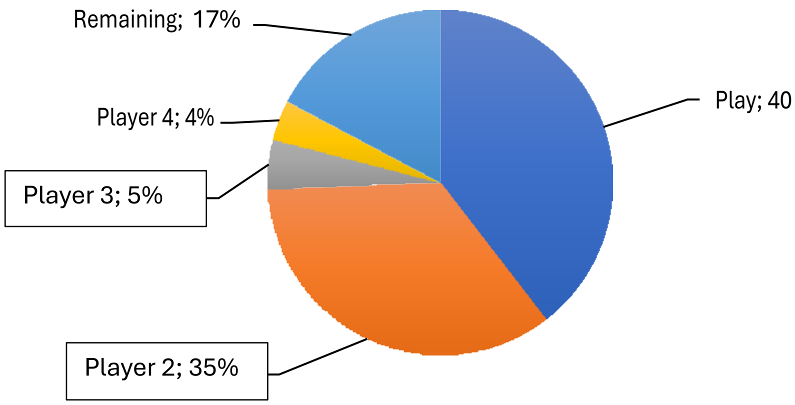
In 2023, around 30% of households in Poland used digital satellite TV services, i.e. 4.8 million (PMR data). In practice, there are two players on the market (Polsat Plus Group and Canal+) controlling almost 100% of the shares. In 2023, Orange had around 15,000 subscribers. Due to the low result, Orange's shares were not included in the calculation of market concentration.

The C4 and HHI concentration indices for the market by the number of pay satellite TV subscribers in 2023 were 100% and 5,200, respectively. This indicates a duopolistic market structure.

Cable and IPTV subscribers

According to PMR, the number of cable and IPTV subscribers in Poland totalled 5.6 million in 2023.

Pie Chart 30. **Share of major cable and IPTV players in the number of subscribers in 2023.**



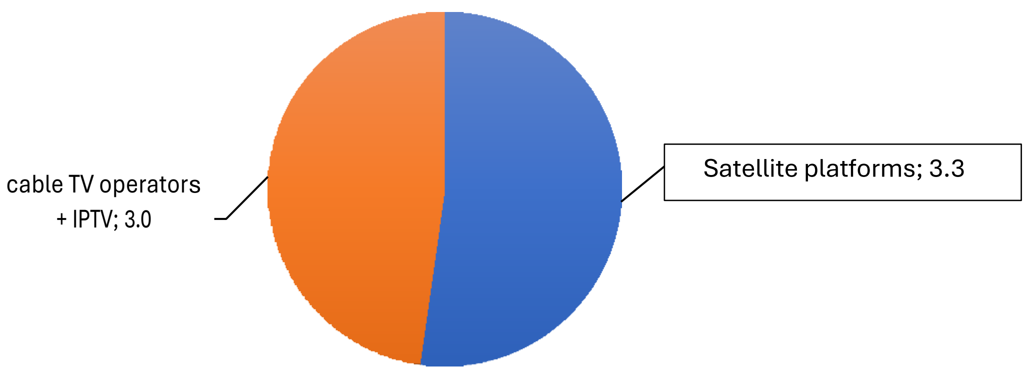
Source: Study by the Office of the National Broadcasting Council based on data from the PMR report Pay-TV and VOD services market in Poland. Forecast for 2024-2029

The C4 and HHI concentration indices for the pay (digital) cable TV market by number of subscribers in 2023 were 96.6% and 3,900, respectively, i.e. a state of very high concentration.

Value of the pay-TV market

The value of the pay-TV market, according to the PMR report *Pay-TV and VOD services market in Poland. Forecast for 2024-2029*, in 2023, amounted to PLN 6.2 billion (-0.8%).

Pie Chart No. 31. **Value of individual types of pay TV services in market revenues in 2023 (in PLN billion)**



Source: Study by the Office of the National Broadcasting Council based on PMR The pay TV and VOD services market in Poland 2024. Market analysis and development forecasts for 2024-2029

Satellite operators account for 52% of the pay-TV market, cable TV and IPTV operators for 48%.

3.5. Conclusions

The described markets show a high or very high degree of concentration, some of them have the character of an oligopoly or even a duopoly.

The results of the analysis also indicate the significant influence of large Polish and foreign corporations, whose strong position is, among other things, a consequence of cross-concentration in several segments of the media market, i.e. television, radio, press and telecommunications. This is particularly evident when the functions of a broadcaster and a broker are combined. This situation leads to excessive concentration and significantly limits the development opportunities of other content providers and prevents new market entrants. [67]

Depending on the technical conditions for the dissemination or distribution of radio or television programmes, there are various scenarios for the further development of individual markets. As in any area requiring access to infrastructure and high market entry costs, deconcentration processes are unlikely. Even assuming that the National Broadcasting Council will strive to introduce new entities to the radio and television markets, they will strive for concentration through various types of consolidation activities - capital, technological or programme-licensing or marketing.

4. Local media, their role and problems

There are more than 150 local TV stations on the Polish television market. These stations operate on the basis of licences granted by the National Broadcasting Council. Local TV programmes are broadcast mainly via cable networks. Some local TV stations now also provide their viewers with access to content via the internet.

Local television stations are often grassroots initiatives. They are mostly run by local, independent entrepreneurs who often use income from other sources than television to finance their activities. The stations' programmes are almost entirely self-produced and focus on local topics, events and issues affecting the residents of a particular city or district.

Currently, local television stations do not have a clearly defined legal status. Moreover, they are a scattered and diverse group of small entities with no coherent representation to defend their common interests. The lack of a clear legal status, combined with the need to compete with strong corporate suppliers, makes it impossible to effectively reach frequencies, concessions, operators or satellite platforms.

Local television stations, like large commercial licensed stations, make their living from the sale of airtime and advertising. In addition, they raise funds from producing content for nationwide television stations. However, the greatest potential comes from advertising. The local character of the stations significantly limits their attractiveness to large advertisers, who can significantly boost the budgets of local broadcasters.

Information about the activities of the National Broadcasting Council (KRRiT) for local media, including the postulate regarding their financial support, was included in the *Report on the activities of the National Broadcasting Council (KRRiT) in 2024* and in the *Report on the activities of the National Broadcasting Council (KRRiT) in 2023*.

[67] Cf. *Information on the basic problems of radio and television in 2022*, Warsaw, May 2023, p. 123.

Total reach of local television

In 2024, the average viewership of local television among Poles aged 15 and over was 9.8% [68] (any station watched in the last three months preceding the interview; measurements were taken between July 2023 and June 2024). The average total number of viewers who declared watching local television in the last three months was therefore 3,100,000.

In relation to the number of inhabitants, local television stations gathered the most viewers in the last three months in the Silesian (649,000), Greater Poland (446,000) and Lower Silesian (302,000) Voivodeships.

Table 7. Number of viewers of local television (viewing in the last 3 months) in the provinces in relation to the number of inhabitants. Data from 2024.

	Number of viewers in the last 3 months (in thousands)	% of viewers among residents of the provinces
Śląskie (Silesian)	648.6	17.5%
Wielkopolskie (Greater Poland)	446.0	15.2%
Dolnośląskie (Lower Silesian)	302.0	12.2%
Podlaskie (Podlaskie)	112.0	11.6%
Opolskie (Opole)	85.4	10.6%
Łódzkie (Łódź)	200.0	9.9%
kujawsko-pomorskie (Kuyavian-Pomeranian)	163.8	9.6%
Lubuskie (Lubusz)	80.0	9.6%
warmińsko-mazurskie (Warmian-Masurian)	103.3	8.9%
Zachodniopomorskie (West Pomeranian)	123.2	8.8%
Podkarpackie (Subcarpathian)	140.7	8.0%

[68] Study *Coverage of local television* by the National Media Institute (*KIM*), 2024. Telephone survey, sample size N=148,965 inhabitants of Poland aged 15+.

Małopolskie (Lesser Poland)	209.7	7.3%
Świętokrzyskie (Holy Cross)	69.9	6.9%
Pomorskie (Pomeranian)	129.4	6.5%
Lubelskie (Lublin)	106.9	6.2%
Mazowieckie (Masovian)	217.5	4.7%

Source: National Media Institute (KIM); Local TV coverage study

Audience profile of TV stations

A comparison of the demographic profile of local TV viewers with the total population of Poland 15+ shows that, compared to the general population, there are significantly more women and people over 65 years of age among those who watch local TV (in relation to the last 3 months), and therefore more often not working. There is also a relatively higher proportion of people with less education in the audience.

Table 8. **Profile of local TV viewers (declaring viewing in the last 3 months before the interview). Data from 2024.**

	Local TV viewers (last 3 months)	total population in Poland 15+
gender		
women	54% +	52%
men	46%	48%
Age group		
15-29 yrs.	12% -	18%
30-49 yrs.	26% -	37%
50-64 yrs.	25%	22%
65+	37% +	23%
Education level		
Primary	44% +	38%
Secondary school	33%	31%
Higher education	23% -	30%
Size of town of residence		
village	33%	40%
Town up to 100,000 inhabitants	41% +	32%

Town between 100,000 – 500,000 inhabitants	17%	16%
Cities above 500,000 residents	9%	12%
Professional status		
working	40% -	54%
studying	7%	9%
Not working	55% +	40%

+ / - – result significantly higher / lower than the result for the total population of Poland 15+

Source: National Media Institute (KIM); Local TV coverage study

Reach of local television stations - nationwide data (TOP 15)

Local TV stations have different coverage areas. There are also some that can be seen across the country thanks to widespread cable distribution. Stations with national coverage include TVT and WTK. As a result, these stations have the largest reach, as measured by the number of viewers who reported having watched the program in the past three months.

Table 9. **Local TV coverage - viewership by last 3 months (TOP 15). 2024 data.**

	Number of viewers (last 3 months) (in thousands)	% of total viewers (3.1 million)
Telewizja TVT	273.2	8.7%
TELEWIZJA WTK	236.1	7.5%
TV Toya	100.6	3.2%
TV Mazowsze	83.7	2.7%
ECHO24	70.4	2.2%
TV Asta	68.5	2.2%
TV Bolesławiec	66.5	2.1%
TV Olsztyn	58.2	1.9%
Lubelska.tv	54.5	1.7%
TV Toruń	49.0	1.6%

Telewizja PRO ART	49.0	1.6%
TV Podlasie (Hajnówka)	46.9	1.5%
Telewizja Kujawy	44.0	1,4%
Telewizja Kalisz	43.3	1.4%
TV Kaszuby	41.7	1.3%

Source: National Media Institute (KIM); Local TV coverage study

Reach of local television stations - data for the provinces (TOP 5)

The table below includes the number of viewers of the five largest local TV stations in a given province (declared audience of the station in the last 3 months). The data presented includes average results for all of 2024.

Table 10. **Local TV coverage in the provinces - viewership in the last 3 months (TOP 5). 2024 data.**

woj. dolnośląskie (Lower Silesian voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
ECHO24	70.4	2.9%
TV Bolesławiec	66.5	2.7%
TV Sudecka	33.4	1.4%
TV Dami Wałbrzych	26.1	1.1%
Master TV Głogów	23.7	1.0%
woj. kujawsko-pomorskie (Kuyavian-Pomeranian)	Number of viewers in thousands	% viewing audience among residents per particular province
TV Toruń	49.0	2.9%
Telewizja Kujawy	44.0	2.6%
TVK SM Grudziądz	30.7	1.8%
Inowrocławska Telewizja Miejska	9.9	0.6%
Krajna.tv	6.9	0.4%
woj. lubelskie (Lublin)	Number of viewers in thousands	% viewing audience among residents per particular province

Lubelska.tv	54.5	3.2%
Master TV Łuków	16.1	0.9%
Telewizja spółdz. mieszkaniowej Puławy	12.1	0.7%
Kanał S	9.6	0.6%
Biłgorajska TK	8.1	0.5%
woj. lubuskie (Lubusz voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
Teletop Telewizja Gorzów	28.1	3.4%
Index Zielona Góra	15.2	1.8%
Telewizja Horyzont Słubice	10.3	1.2%
TV Żagań	7.7	0.9%
Telewizja Lubuszan	7.0	0.8%
woj. łódzkie (Łódź voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
TV Toya	100.6	5.0%
Telewizja Piotrków	18.4	0.9%
Telewizja Kablowa Bełchatów	14.8	0.7%
"Ósemka" Telewizja Regionalna - Sieradz	14.7	0.7%
Twoja Telewizja Lokalna TTL - Bełchatów	13.8	0.7%

woj. małopolskie (Lesser Poland voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
Telewizja TVT	47.9	1.7%
RTK Lokalny Nowy Sącz	19.6	0.7%
Chrzanowska TV Lokalna	16.9	0.6%
Nasza Telewizja Sądecka - Nowy Sącz	16.2	0.6%
starnowa.pl	14.2	0.5%
woj. mazowieckie (Masovian voivodeship)	**Number of viewers in thousands**	**% viewing audience among residents per particular province**
TV Mazowsze	77.0	1.7%
TV Dami Radom	35.2	0.8%
Telewizja Żyrardów TVŻ	17.0	0.4%
TEL-KAB TV – Pruszków	16.5	0.4%
TV Wschód	14.4	0.3%
woj. opolskie (Opole voivodeship)	**Number of viewers in thousands**	**% viewing audience among residents per particular province**
Telewizja TVT	28.9	3.6%
TV Pogranicze	6.8	0.8%
woj. podkarpackie (Subcarpathian voivodeship)	**Number of viewers in thousands**	**% viewing audience among residents per particular province**
TVL Telewizja Lokalna Tarnobrzeg	21.5	1.2%
tvBieszczady.pl	18.6	1.1%
STELLA Telewizja Kablowa	15.4	0.9%
TV Sędziszów Małopolski	15.2	0.9%
Dębica TV	14.1	0.8%
woj. podlaskie (Podlasie voivodeship)	**Number of viewers in thousands**	**% viewing audience among residents per particular province**
TV Podlasie (Hajnówka)	39.0	4.0%

TV Narew	26.1	2.7%
TV Suwałki	24.0	2.5%
TV Sokółka	20.3	2.1%

woj. pomorskie (Pomeranian voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
TV Kaszuby	41.7	2.1%
Twoja Telewizja Morska	31.6	1.6%
TV Słupsk	21.8	1,1%
TeTka Tczew	21.2	1.1%
Truso.TV	7.6	0.4%
woj. śląskie (Silesian voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
Telewizja TVT	156.8	4.2%
TV Zabrze	30.8	0.8%
TV Orion	22.8	0.6%
Raciborska Telewizja Kablowa	19.0	0.5%
Imperium (TV Imperium)	15.6	0.4%
woj. świętokrzyskie (Holy Cross voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
TV Świętokrzyska	24.1	2.4%
Lokalna.TV - Ostrowiec Świętokrzyski	24.0	2.4%
Telewizja Starachowice	12.8	1.3%
TKN24 Końskie	9.9	10%
woj. warmińsko-mazurskie (Warmian-Masurian voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
TV Olsztyn	58.2	5.0%
Truso.TV	12.3	1.1%
TV Mazury	11.0	1.0%
Bart-Sat	9.8	0.8%
Macrosat	8.1	0.7%
woj. wielkopolskie (Greater Poland voivodeship)	Number of viewers in thousands	% viewing audience among residents per particular province
TELEWIZJA WTK	184.7	6.3%
TV Asta	53.9	1.8%

Telewizja PRO ART	49.0	1.7%
Telewizja Kalisz	43.3	1.5%
Telewizja Wielkopolska w Koninie	37.1	1.3%

woj. zachodniopomorskie (West Pomeranian voivodeship)	Number of viewers (in thousands)	% viewing audience among residents per particular province
Zachodniopomorska Telewizja	24.2	1.7%
TV Max	23.6	1.7%
Telewizja Kablowa Kołobrzeg	16.6	1.2%
Telewizja Police	15.5	1.1%
TV Asta	14.6	1.0%

Source: National Media Institute (KIM); survey of local television coverage

Organisation of the local radio market

Local stations, which are available in certain regions of the country and influence the development of the media market in a given area, make up a large part of the Polish radio market. There are several radio networks in Poland that unite local radio stations under a common name. These stations broadcast a single programme, supplemented by local news, weather and traffic reports, which gives these stations a local flavour. The strongest local radio network is Radio Eska with 43 stations.

Other radio networks that operate on a similar basis are the Złote Przeboje network (25 stations), the RMF MAXX network (23 stations), the Meloradio network (20 stations), Radio Plus (18 stations), the Eska2 network (16 stations), Radio Pogoda (8 stations) and Rock Radio (4 stations).

Local stations, which are usually independent and not part of large radio groups, usually have one transmitter and address their programme to the residents of one specific city or region.

Regional Polish Radio stations operate within the framework of the Audytorium 17 Group, an agreement under which 23 radio stations cooperate to represent them on the national and supra-regional market.

Catholic radio stations cooperate within the Forum of Independent Catholic Radio Stations, which brings together 21 diocesan and religious stations.

Total reach of local radio stations

The average daily radio coverage in 2024 was 55.8% [69] of the total of inhabitants of Poland aged 15 and over. Average radio coverage in individual provinces varies, although

[69] *Audio Track* survey, National Media Institute (KIM), telephone survey, sample size N=148,965 inhabitants of Poland aged 15+

only in a few is it statistically significant.

In 2024, broader radio coverage – compared to the result for Poland as a whole – was recorded in the Podkarpackie (Subcarpathian) (57.9%), Świętokrzyskie (Holy Cross) (57.8%), Wielkopolskie (Greater Poland) and Lubelskie (Lublin) (both 57.7%) provinces.

The provinces with the lowest radio coverage are Lower Silesia (53.1%), West Pomerania (54.2%) and Masovia (54.7%).

Table 11. **Radio coverage in the provinces. Data from 2024.**

	Number of listeners (in millions)	% of listeners among voivodeship inhabitants
Podkarpackie (Subcarpathian voivodeship)	1.0	57.9%
Świętokrzyskie (Holy Cross voivodeship)	0.6	57.8%
Wielkopolskie (Greater Poland) voivodeship	1.7	57.7%
Lubelskie (Lublin voivodeship)	1.0	57.7%
Opolskie (Opole voivodeship)	0.5	57.2%
Podlaskie (Podlaskie voivodeship)	0.5	56.4%
Pomorskie (Pomeranian voivodeship)	1.1	56.2%
Małopolskie (Lesser Poland voivodeship)	1.6	56.0%
kujawsko-pomorskie (Kuyavian-Pomeranian voivodeship)	0.9	55.7%
Śląskie (Silesian voivodeship)	2.1	55.6%
warmińsko-mazurskie (Warmian-Masurian voivodeship)	0.6	55.5%
Lubuskie (Lubusz voivodeship)	0.5	54.9%
Łódzkie (Łódź voivodeship)	1.1	54.9%

Mazowieckie (Masovian voivodeship)	2.5	54.7%
Zachodniopomorskie (West Pomeranian voivodeship)	0.8	54.2%
Dolnośląskie (Lower Silesian voivodeship)	1.3	53.1%

Source: National Media Institute, Audio Track survey

Reach of local radio stations – data for provinces (TOP 5)

The following table presents the reach of the main local radio stations (TOP5) – grouped in networks, cooperating in groups or operating independently – in individual provinces. The data presented includes average results for the whole of 2024.

Table 12. Daily coverage of local radio stations in the provinces (TOP 5). Data from 2024.

woj. Dolnośląskie (Lower Silesia voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	200.2	8.1%
Radio Wrocław	66.5	2.7%
Muzyczne Radio	62.2	2.5%
Radio Złote Przeboje	47.4	1.9%
Radio PLUS	42.1	1.7%
woj. kujawsko-pomorskie (Kuyavian-Pomeranian voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	70.3	4.2%
RMF MAXX	61.9	3.7%
Polskie Radio PiK	51.7	3.1%
Radio HIT	35.5	2.1%
Radio GRA	31.3	1.9%
woj. Lubelskie (Lublin voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	104.1	6.1%
Polskie Radio Lublin	72.0	4.2%
Radio PLUS	31.2	1.8%
Radio Złote Przeboje	28.2	1.6%

RMF MAXX	18.1	1.1%
woj. Lubuskie (Lubusz voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	51.8	6.3%
Radio Zachód	30.0	3.6%
Radio PLUS	19.1	2.3%
RMF MAXX	15.2	1.8%
Radio Gorzów 95,6 FM	15.1	1.8%
woj. Łódzkie (Łódź voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	133.5	6.6%
Radio PLUS	44.9	2.2%
Radio Parada	42.6	2.1%
Nasze Radio	30.0	1.5%
Radio Łódź	26.5	1.3%

woj. Małopolskie (Lesser Poland voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	129.0	4.5%
RMF MAXX	89.4	3.1%
Radio PLUS	59.8	2.1%
Radio Kraków	55.0	1.9%
Radio Złote Przeboje	46.2	1.6%
woj. Mazowieckie (Mazovian voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	274.4	5.9%
RMF MAXX	90.0	1.9%
Radio PLUS	86.7	1.9%
Radio POGODA	78.1	1.7%
Radio Złote Przeboje	47.8	1.0%
woj. Opolskie (Opole voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Radio Park	81.2	10.2%
Radio Opole	55.6	7.0%
Eska	35.3	4.4%
Rock Radio	14.7	1.8%
RMF MAXX	13.6	1.7%
woj. Podkarpackie (Subcarpathian voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	110.3	6.4%
Polskie Radio Rzeszów	70.1	4.0%
RMF MAXX	37.1	2.1%
VIA - Katolickie Radio Rzeszów	26.9	1.6%
Eska2	24.2	1.4%
woj. Podlaskie (Podlasie voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Polskie Radio Białystok	64.5	6.7%
Eska	43.4	4.5%
Radio 5	25.8	2.7%
RMF MAXX	24.1	2.5%
Radio JARD	22,8	2,4%
woj. Pomorskie (Pomerania voivodeship	Number of listeners (in thousands)	% of listening audience among residents per particular province

RMF MAXX	84.6	4.3%
Radio PLUS	77.8	3.9%
Radio KASZEBE	67.1	3.4%
Eska	59.9	3.0%
Radio Gdańsk	50.1	2.5%

woj. Śląskie (Silesia voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Polskie Radio Katowice	136.8	3.7%
RMF MAXX	117.5	3.2%
Radio Bielsko	107.0	2.9%
Radio 90 FM	97.1	2.6%
Radio Silesia	80.6	2.2%
woj. Świętokrzyskie (Holy Cross voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Radio Kielce	72.2	7.1%
RMF MAXX	70.6	7.0%
Eska	32.5	3.2%
Radio Ostrowiec	17.9	1.8%
Radio Złote Przeboje	7.8	0.8%
woj. warmińsko-mazurskie (Warmian-Masurian voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	69.4	6.0%
Polskie Radio Olsztyn	59.7	5.2%
Radio PLUS	33.5	2.9%
Meloradio	23.5	2.0%
Radio 5	16.8	1.5%
woj. Wielkopolskie (Greater Poland voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Eska	213.8	7.34%
RMF MAXX	60.6	2.08%
Radio CENTRUM	43.3	1.49%
Radio Poznań	39.6	1.36%
Radio Złote Przeboje	36.4	1.25%
woj. Zachodniopomorskie (West Pomeranian voivodeship)	Number of listeners (in thousands)	% of listening audience among residents per particular province
Radio Szczecin	70.4	5.0%
Polskie Radio Koszalin	34.6	2.5%
Radio PLUS	33.3	2.4%
Radio Złote Przeboje	15.3	1.1%
Twoje Radio	11.2	0.8%

Source: National Media Institute (KIM); Audio Track survey

5. Proposed directions of legislative changes

The legislative demands that the National Broadcasting Council (KRRiT) made in 2024 regarding the draft laws implementing the DSA and AI Act and the Ministry of Culture and National Heritage's concept for implementing the European Media Freedom Act (EMFA) were discussed in the *National Broadcasting Council (KRRiT) Activity Report in 2024.* They relate, among other things, to:

• the position of the National Broadcasting Council in the system of government and its due role in the application of the DSA, EMFA and AI Act;

• the issue of public media reform and modernisation of the system of its financing.

The National Broadcasting Council also draws the legislator's attention to the urgent need to introduce effective legislative solutions concerning:

• ownership changes and capital concentration in the media and the elimination of inconsistencies between media law and competition law in this area;

• financial support for local media through the creation of a special fund. [70]

In addition, for many years the National Broadcasting Council has been reporting the need to amend the Broadcasting Act in order to harmonise, organise and clarify its provisions based on the regulatory practice of the National Broadcasting Council.

In view of the above, the National Broadcasting Council presents the following *de lege ferenda* comments (a non-exhaustive list):

- Elimination of the obligation to be entered in the register of programmes distributed in favour of the obligation to be entered in the list of operators distributing programmes and the obligation to provide information on the programmes distributed.
- Coverage by the must-carry rule of all programmes distributed terrestrially. Radio and television programmes launched in crisis and emergency situations – launched to provide occasional information transmission – should also be covered by the must-carry rule.
- Change of overly restrictive regulations regarding the fulfilment of the reporting obligation to be entered in the list maintained by the Chairman of the National Broadcasting Council by entities providing audiovisual media services upon request through video sharing platforms; for this purpose, it should be assumed that, apart from the commercial nature of the activity, the service offered must also be in competition

[70] Cf. Chapter 6.3, *National Broadcasting Council (KRRiT)Activty Report in 2024*, and Chapter 13.5, *Report on the activities of the National Broadcasting Council in 2023*.

with linear broadcasting (television) and have a high impact (e.g. number of

- followers/number of views).
- Replacing criminal liability for broadcasting radio or television programmes without a licence and distributing radio or television programmes without a licence with administrative sanctions.
- Uniformity of the characteristics of prohibited content with regard to radio and television programmes, on-demand audiovisual media services and video-sharing platforms.
- Standardisation of information obligations regarding the duty to provide information on the identity of the persons making up the bodies of the service provider, with regard to broadcasters, providers of on-demand audiovisual media services and video-sharing platforms.
- Unification of the rules concerning the ban on sponsorship of sports broadcasts by political parties, trade unions, employers' organisations and entrepreneurs whose main activity consists in the production, sale or other provision of goods or services, the advertising of which is prohibited, with regard to radio and television programmes, on-demand audiovisual media services and video-sharing platforms.
- Definition of the template for the annual report to be submitted to the National Broadcasting Council (KRRiT) by providers of on-demand audiovisual media services and introduction of the obligation to submit the report electronically via an application.
- Definition in the Broadcasting Act of the terms ‘programme distributor’,
- ‘user’, ‘catalogue’ and ‘local media’ in the Broadcasting Act due to the significant importance of the terms in question.
- Clarification of the term ‘children's programmes’ by indicating unambiguous criteria distinguishing this type of programme, also with regard to on-demand audiovisual media services.
- Granting the Chairman of the National Broadcasting Council the right to request information (identifying data) from video sharing platform providers about the providers of audiovisual media services provided via the video sharing platform.
- Granting the Chairman of the National Broadcasting Council the right to impose a penalty on an operator distributing radio and television programmes in the event of failure to fulfil the obligation to present materials, documents and provide explanations (analogous to a media service provider) – implementation of the provisions of Article 10(2).
- The amount of the financial penalties imposed depends not on the amount of remuneration of the person managing the entity's operations, but on objective criteria, such as the average monthly remuneration in the enterprise sector.

- Imposing on the video-sharing platform provider the obligation to report to the National Broadcasting Council (KRRiT) any possibility of violating the law in on-demand audiovisual media services included in the catalogue posted on a given video-sharing platform.

- Establishing sanctions for broadcasters for:

    - violating the rules on the protection of minors' personal data

    - failure to comply with the obligation to submit to the National Broadcasting Council (KRRiT) an annual report on the fulfilment of obligations regarding the accessibility of programmes for people with disabilities for the previous calendar year;

    - violation of the regulations concerning the principles of recording and storing programmes, advertisements and other transmissions

    - violation of the rules concerning the broadcasting of commercial messages accompanying programmes for children.

- Establishment of sanctions for video sharing platform providers for:

    - failure to publish the information about the provider required by law on the provider's website;

    - violation of the obligation to notify the Chairman of the National Broadcasting Council (KRRiT) of changes in the factual and legal status covered by the entry in the register;

    - violation of the rules regarding the protection of minors' personal data;

    - failure to comply with the obligation to keep copies of broadcasts, user-generated videos, commercial communications and other communications made publicly available for a period of not less than 28 days from the date of their removal from the video-sharing platform or the termination of their sharing, and to present them to the Chairperson of the National Broadcasting Council (KRRiT) upon receiving a relevant request;

    - violation of the provisions of the KRRiT regulation specifying the method of separating and labelling commercial messages in broadcasts, videos created by users and other messages posted on the video sharing platform, before and after their completion, and commercial messages posted on the video sharing platform, but not related to user-generated videos or performances;

    - failure to provide information or provision of unreliable information at the request of the Chairman of the National Broadcasting Council, as specified in Article 10(2) of the Act on Radio and Television Broadcasting.

    - Making the amount of the financial penalty that the Chairman of the National Broadcasting Council may impose on a video sharing platform provider for violating the provisions of the Act more realistic - the current upper limit of the sanction is far too low, given the possible scale of the video sharing platform's activities.

- Establishing an obligation for providers of on-demand audiovisual media services to keep records of sponsored broadcasts and broadcasts in which product placement has been used.
- Defining qualitative indicators (pluralism, balance, impartiality, innovation, high quality, integrity of the message) for the objective evaluation of public media activities and authorising the National Broadcasting Council (KRRiT), e.g. through a statutory delegation to issue relevant regulations, to interpret individual terms and indicate the methodology used in the evaluation of public media programmes.
- Deletion of the provision in Article 6(3)(4) stating that: 'The National Broadcasting Council shall submit a report to the European Commission on the application by video-sharing platform providers of measures to prevent the sharing of the content referred to in Article 47p(1).' The Audiovisual Media Services Directive does not impose an obligation to submit such a report to the European Commission.
- Introduction of real technological neutrality of the law by deleting programme distribution technologies - the law is not uniform in this respect.