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**PROGRAMMING AND DISTRIBUTION OF CONTENT OF PUBLIC BROADCASTERS IN
POLAND. CASE STUDY OF TVP SA FROM 1992 TO 2015**

Abstract: The article is the result of many years' studies in the functioning of the public service broadcaster in Poland, i.e. Telewizja Polska SA (TVP SA). The subject of the study is an analysis of two areas of operation of TVP SA: the process of change in programming, and distribution of the programme offer in the period from 1992 to 2015.

The starting point of the analysis was the adoption of assumptions concerning the changes in the process of content distribution and the development of new programme forms and changes in the manner of consumption of the media (multi-screening).

Key words: programming, distribution, content, digitization, public broadcaster.

INTRODUCTION

The end of analogue broadcasting and the start of digital terrestrial transmission caused significant changes in the process of distribution, reception, and consumption of the media. The hierarchical system characteristic for its one-way flow of information — “up-down” — was replaced with a horizontal system, which relates to the subjectivity of the participants of the communication process and assumes the interchangeability of their roles. This model is characterised most of all by its activity, availability, involvement, and freedom concerning how, where and when media information is consumed (Jędrzejewski 2014). Additional resources of frequency, made available as a result of digitisation, eliminated previous restrictions in the scope of programme broadcasting and made it possible to expand the offer of TV broadcasters, as the distribution of the TV signal on the digital TV market is provided through: cable networks, digital platforms, multiplexes, satellite transmissions, systems of mobile access, or broadband networks (Kowalski 2006). Therefore, digital distribution eliminates individual broadcasters' advantage of coverage existing in the analogue era (Küng 2012). This situation is largely true for the public broadcaster in Poland, i.e. Telewizja Polska SA (TVP SA). In the era of analogue TV, TVP SA — by the decision of the legislator — obtained a privileged position on the market. According to Art. 21 point 1 of the Broadcasting Act, the tasks of public radio and TV include in particular “the creation and dissemination of national and regional radio and TV broadcasting programmes (Art. 21, point 1, Broadcasting Act of 29th December, 1992). This implied that the public broadcasting was the one whose programmes covered the whole country (territory of the Republic of Poland) or region (Sobczak 2001). In order to secure the capability of the public broadcaster to deliver a programme offer for the whole country, it was necessary to take actions aimed at developing an appropriate network of distribution of national channels of TVP SA. Due to this fact, since 1995, in consultation with the Minister of Communication, a project of the National Broadcasting Council, based on a resolution of the Polish regulator of electronic media National Broadcasting Council no. 171/95 of 1995, has been conducted, which has determined the channels necessary for the completion of the above-mentioned network. Eventually, it became necessary to launch low-capacity repeaters, especially in mountain areas. The roll-out of all planned high-capacity sites was supposed to ensure almost 100% coverage (National Broadcasting Council 2003). In turn, commercial broadcasters were able to perform the distribution of the programme offer based only on the assignment of frequency received through a concession procedure. The opening of the TV

market to the digital distribution of content (Ministerstwo Cyfryzacji 2013) deprived TVP SA (in particular TVP1 channel; TVP2 channel had had a slightly lower coverage) of its previous coverage advantage, which had resulted from an almost complete coverage of the country's territory and population.

Another phenomenon changing the TV market is the development of the Internet, and the resulting emergence of the broadband network. Today, the Internet is an omnipresent medium which significantly broadens the diversity and flexibility of traditional electronic media in the area of content distribution. The constant increase of coverage of broadband networks continues to expand the role of this new medium in the radically altered landscape of the existing media. Although originally the Internet was not designed to deliver video content in real time, and the network was no match for terrestrial broadcasting, the technological progress in recent years has eliminated this restriction. The current speed of network transmission allows free on-line access to TV programmes, which results in the Internet becoming an increasingly popular channel of distribution of TV content. At the same time, the quality of offer delivered this way is comparable with the quality of terrestrial broadcast. It needs to be highlighted, however, that the development of streaming media (i.e. on-line delivery of audiovisual content), virtual communities, voice over IP services, and computer-based on-line TV means that the Internet together with its distribution system currently constitutes an attractive sector, both for the possibility of reaching the audience and the creation of programme forms. What remains a challenge for TV broadcasters is the development of an effective combination of off-line and on-line distribution, and popularisation of the offer on all available distribution channels (Ministerstwo Cyfryzacji 2013).

In the light of the above, it can be stated that, in the digital era, the programming process is strictly connected with the kind of channel through which content is to be made available through terrestrial digital TV, tablet, mobile phone, or on-line communication (Eastman, Ferguson 2013).

At the end of the 1990s, a debate was held in literature devoted to media studies concerning which element of the media surrounding would prove the most important for their future. It was suggested then, among various forecasts and predictions, that the media had primarily to turn to their audience and focus on the study, analysis, and satisfaction of the needs of increasingly demanding consumers. The consumer, therefore, was to become king. Without undermining the importance of the audience for the media, it was also highlighted that content was the most important (Kowalski 2013). In turn, in the activity of TV broadcasters, the core business can be singled out, which constitutes the basis of operations supported by investments, defining the organisational structure, functioning of employees etc. According to Robert G. Picard, it is the content that is the core of the activity and competences of media enterprises (Kreft 2012). Without it, the media are not interesting to the audience. Over time, especially in the world of new Internet technologies, the "content is king" claim began to be questioned. As the consumers became increasingly familiar with the world of the Internet, they started to notice its communication-related values more and more. The role of content was changing to the provision of on-line traffic. According to the report on audiovisual policy drawn up for the needs of the European Commission, if "content is king," then distribution remains the key to its kingdom (European Commission 1998: 4). Thus, the third element of the common presence of the media and their content in the form of distribution systems was singled out — "distribution is king." Therefore, it needs to be stated that in media organisations, if the dissemination of content designed for the audience is not ensured, the whole activity becomes pointless, not only economically, but also in relation to the purpose. Thus, an effective synergy of the consumers' perspective, offered content, and distribution systems constitutes today a key to an efficient functioning of media institutions (Kowalski 2013).

However, in order for content to serve its purpose, it must be most of all interesting to the potential consumer and fulfill their various needs. The technological integration of television and broadband Internet has significantly expanded and enriched the programme offer of broadcasters, as traditional TV programmes became supported by the so-called additional content directed at the Internet and content adjusted to multi-platform distribution (repurposing). What is important, new technologies and multiplicative transmitting platforms require that broadcasters diversify the programme offer by genres and formats so as to reach all segments of the audience wherever and whenever possible. In case of public broadcasters, such genres and formats are or are supposed to be those which are particularly unprofitable for the commercial sector and which demonstrate the social nature of public broadcasters, as well as those which increase the attractiveness and availability of the offer, especially for the younger generation (Jędrzejewski, 2014). Furthermore, the evolution of existing TV genres and forms in the digital reality is forced by financial calculations and the necessity to minimise the risk connected with ineffective programme projects. Owing to these factors,

previous TV genres and forms are evolving in the direction of profitable and well-established (e.g. by broadcasters in other countries) forms. Along the development of multi-screen distribution, TV broadcasters began to enrich their offer with formats characteristic e.g. for the Internet.

Also, the change in the media consumption has a significant effect on the process of shaping programme strategies by TV broadcasters. In the digital era, the said change is largely based on multiscreening, whereby the audience are increasingly using a second (or third) screen in order to upload or download content coming from the main screen or which can be their repetition. Therefore, TV broadcasters must create and share modern solutions, including applications for tablets and smartphones, in order to enable problem-free transfer of content from the first screen to the other and back (European Parliament 2013).

All these elements forced TV broadcasters to redefine the existing strategies of TV stations' work. The strategies adopted currently are based on mechanisms which ensure distribution of content to users in any place and at any time. In order for the strategies to be effective, it was very important that TV broadcasters learn the demographic as well as social and economic profile of the audience, while the goal of programme policies became the establishment of consumers' and users' loyalty (García-Avilés 2012). In the era of digital media, the traits of the audience and, what is particularly significant, the habits of use of the media play an important role in the shaping of the kind and degree of demand of the audience for media products as well as largely determine the directions of programme policies (Chan-Olmsted 2014). Therefore, it can be stated that the dimension of the "audience" today is among the vital factors, along with the above-mentioned distribution, affecting the shape of the programme offer of a TV station and sets directions for action as part of programme strategies being created.

Therefore, the programming of TV broadcasters must refer to both the assumptions concerning the new behaviour of content consumers and the audience as well as the expectations; but most of all, it must take into account the processes of content distribution. It also needs to be highlighted that over the last decade the process of distribution of the TV offer has undergone the most radical change and forced TV broadcasters to introduce dramatic changes in this area. In addition, it appears that – in the new TV market landscape – the issue of content distribution will play a key role, because it will determine the position of TV broadcasters on the market, shaped through reaching diverse groups of audiences and content consumers.

METHODOLOGY

The subject of the study is an analysis of two areas of operations of TVP SA in the period from 1992 to 2015, namely: the process of programming transformations, and the process of distribution of the programme offer.

The programme policy was subjected to an in-depth study through an analysis of formal requirements concerning the role and tasks of a public broadcaster, from the perspectives of the programme strategies and programme policy documents adopted by TVP SA. The analysis discusses key determinants of programming as well as both endogenous and exogenous factors influencing the shape of the programme offer of a public broadcaster, which — in the view of the author — greatly affects the issue in question. The development and evolution of distribution channels of the programme offer of a public broadcaster in the new media has been illustrated based on an analysis of the practice of operation of TVP SA as well as guidelines and assumptions contained in the broadcaster's internal documents.

The studies in the programming and distribution of the programme offer by TVP SA constituted the basis for formulating and verifying the following hypotheses:

- 1) In the period from 1992 to 2015, TVP SA did not develop a consistent and long-term programming strategy that would utilise its resources and creative potential.
- 2) TVP SA is not prepared for the multi-platform distribution, both technologically and programme-wise.

The formulated hypotheses determine the research objective, i.e. the presentation of rules, formal bases, and programming strategies of TVP SA as well as factors influencing this process, and an analysis of TVP SA's strategy for development of channels of distribution of the programme offer in the new media and actions taken by TVP SA in this area from 1992 to 2015.

In order to verify the assumed hypotheses, research issues have been specified with a view to provide answers to formulated questions, such as:

- How did TVP SA shape its programme operations in the period in question, i.e. from 1992 to 2015?
- What factors determine the programming process of the Polish public broadcaster?

- In the studied period, how did TVP SA develop the system of content distribution in the new media?
- Did technological changes in the area of production and distribution of content affect the programming process of TVP SA? If so, what were these changes?

The debate over the processes of communication which took place in the second half of 20th century resulted in their being considerably sped up, the reason being – in the view of the author – the development of new channels of media communication. Researchers such as Harold Innis of Marshall McLuhan pointed to the role of technology as a factor influencing these changes (Sasińska-Klas 2014). Although McLuhan (McLun 1964) based his concept on a critical analysis of culture, such as the political economic theory, his notion of technology leading to inevitable transformations in the attitude, social structure, and culture forms created therein is considered a manifestation of technological determinism. The research in this area was continued by, among others, the student of McLuhan, Derrick de Kerckhove, who moved the area of interest onto the plane of media and the Internet. His studies concerning the new media embedded in the traditional culture, supported by innovative technologies, and their impact on human relations and communication are globally acclaimed (Wieczorek-Tomaszewska 2010). The assumption stating that the technological development leads to a change in the manner of functioning and the structure of media organisation affects the content created by them. The area and scope of transformations resulting from the technological development illustrates the scale of challenges faced by TV broadcasters today.

RESULTS

Firstly, as transpires from the analysis, TVP SA designed a series of documents determining the assumptions and strategy of the programming policy. These documents characterise the offer of the public broadcaster and describe the method of maintaining the programme policy of TVP SA.

The first attempts to formulate the rules of creation of a programme offer were made as early as 1994 in the document entitled *Misja Telewizji Polskiej S.A. jakonadawcy publicznego* [Mission of Telewizja Polska SA as a public broadcaster] (Telewizja Polska SA 1994). According to assumptions expressed in the document, it was supposed to be an other-than-commercial offer, containing more serious and ambitious content provided in attractive and valuable forms, created on the basis of domestic culture and tradition. The offered programme was meant to harmoniously combine the performance of the public TV mission and the satisfaction of the diverse needs of the mass audience and its sub-groups, communities, and minorities. In the scope of the programme, the study “*Podstawowe założenia reformy Telewizji Polskiej S.A.*” [Basic assumptions of the reform of Telewizja Polska SA], constituting the basis for the 1999 document “*Reforma Telewizji Polskiej S.A. Rozwiązania systemowe*” [Reform of Telewizja Polska SA. Systemic solutions] (Telewizja Polska S.A 1999) concludes that the public TV should lay strong emphasis on domestic production and broadcast – two universal national channels with a distinct and clearly defined programme profile, as well as a network programme, created by regional branches, with its own specifications, supplementing the offer of TVP SA. In 2000, the public broadcaster adopted a document “*Strategia programowa Telewizji Polskiej do 2004 roku*” [Programming strategy of Telewizja Polska SA until 2004] (Telewizja Polska S.A 2001). In an attempt to define the objectives for the coming years, the document outlines the guidelines for the shaping of the programme offer. It in fact retains solutions proposed a year earlier. TVP SA was supposed to offer a versatile set of programmes, worthy of a common approval. However, the analysis has proven that subsequent years resulted in departure from previous programming assumptions. The programming area of the “*Strategia rozwoju Spółkinalata 2002–2006*” [Strategy of development of the Company for 2002–2006] (Telewizja Polska S.A 2002) concerns mostly the competitiveness of the offers compared to the programmes of commercial stations, in particular in prime time. Thus, at the strategic level, the previous way of shaping the programme policy was abandoned. Furthermore, as transpires from the analysis, the adopted strategy resulted in a change in the system of assessment of the programmes. As a result, the analysis of the audience figures took account only of indices in the so-called commercial group, i.e. viewers aged 16-49, treating viewers over 50 as a second-category audience. Therefore, the programme offer was designed for the purposes of the commercial group, with simultaneous marginalisation of more ambitious programmes. Thus, TVP SA abandoned an attempt to create its own audience. As a result, the following years showed decreasing numbers of viewers, leading to the public broadcaster holding only 21% of shares in the audience market in 2015.

The situation which started in 2002 was not changed by the document adopted in 2005 and entitled “Zasadyrealizowaniaprzez Telewizję Polską S.A. misjipublicznej” [Rules of the performance of the public service by Telewizja Polska SA] (Telewizja Polska S.A 2005). Among others, the document states that the strive of TVP for a versatile delivery of the tasks of a public broadcaster is manifested in the diversification of the offer in terms of addressees, nature of programmes, and other public services and the genre structure. It was indicated that TVP created and disseminated programmes whose nature was different from the ones of commercial broadcasters, yet these programmes had a complementary value as well. In order to supplement the offers of general programmes, TVP was to develop specialist programmes and other public services that would satisfy the narrower, even individualised needs of viewers. These assumptions were the basis for the determination of TVP’s programme standards for subsequent years.

However, as practice proved, programming at TVP SA had little to do with the assumptions in the above-mentioned documents, and was not reflected in the assumed strategic plans of action. For a considerable amount of time, the policy that shaped the programme offers was based on formal requirements, i.e. statutory obligations and events which the public broadcaster was obligated to broadcast; simultaneously, the offer was built on “programme successes”, which were the most successful programmes in terms of viewer ratings. In essence, the programme policy consisted in their “conservation,” because it was these programmes which generated viewing numbers and, as a result, profits. One element which in fact prevented the performance of any long-term programme policy was the so-called confidential determinants of the programming policy, i.e. issues which were connected with the preferences of managers and other decision-makers, influencing the shape and content of the programme. Another variable was also the coincidence which decided the selection of a purchase, and, consequently, about the broadcast, format, or programme.

Under such circumstances, in 2012, the programme offers of TVP SA turned out to be mutually non-complementary and lacking identification with any concrete viewer group. This was influenced mostly by the failure to profile channels, whose programme appeared disorderly and uncoordinated in terms of themes, genres, and target groups. Therefore, it was necessary to clearly define mutual relations of TVP SA’s channels in the aspect of programme, an idea which had been postulated since 1990s. It was assumed that the structure of programming of individual channels would be based on three main theses, including complementarity and avoiding mutual competition, and that the whole programme would consist in counter-programming in relation to the market surroundings.

In 2012, it turned out yet again that TVP SA had no long-term plans for action, including in the programming area. This problem was raised also by the Supreme Audit Office (Polish acronym “NIK;” the head body of state control), which in 2009 and 2011 issued a recommendation for TVP SA to design strategic directions of development of the company and long-term plans of action in the scope of the programme offer.

In 2015, the “Strategia Spółki TVP SA nalata 2016–2020” (Strategy of the Company for 2016-2020) (Telewizja Polska SA, 2015) assumed a return to the professional, modern, and responsible performance of the public service, operations based on the production potential of TVP SA. In the area of competition on the TV market, the public broadcaster was planning to return to the assumptions from before 2002 and bring the “harmful rivalry with commercial broadcasters” to an end. This strategy, however, was not implemented.

Apart from that, the public broadcaster did not utilise its resources and creative potential of its teams. In the studied period, TVP SA failed to create an effective way of acquiring content based on a system of internal producers, also with the use of external productions. TVP SA did not manage to perform its task of digitisation archive resources. Also, a lack of a precise determination of the position of programme councils in the structure of TVP SA and the failure to specify their role in the process of shaping of the programme offer of the public broadcaster deprive TVP SA of supervision over the programme policy of an expert body.

In consideration of the above statements, it can be demonstrated that, from 1992 to 2015, TVP SA did not develop any consistent and long-term programming philosophy that would utilise its resources and creative potential.

Secondly, documents adopted by TVP SA concerning the sharing of content with the use of various platforms, including: “Strategia Rozwoju Spółki Telewizja Polska S.A. 2002–2006” [Strategy of development of the Company Telewizja Polska SA 2002–2006] (TelewizjaPolska SA 2002), “Transformacja technologiczna TVP nalata 2011–2013” [Technological transformation of TVP for the years 2011–2013] (Telewizja Polska SA 2010) or “Strategia TVP S.A. nalata 2012–2015” [Strategy of TVP for the years 2012–2015] (Telewizja Polska SA 2012), in spite of their visions and determination of actions in the programming and technological aspects, did not result in creating a consistent and long-term philosophy of action in the area of multi-platform distribution.

Although TVP SA started actions connected with content sharing with the use of various tools in 1989, in subsequent years – in spite of numerous strategy-related studies and documents – the public broadcaster failed to develop a long-term strategy for action in this area.

In the era of analogue broadcasting, the market position of TVP SA was established largely as a derivative of the so-called coverage advantage. The perspective of a transition to terrestrial digital broadcasting forced TVP SA to take actions aimed at ensuring access to effective channels of distribution of the offer. TVP SA perceived a chance for retaining its position by ensuring an appropriate re-broadcasting of TVP signal on satellite platforms and cable networks, in which must-carry regulations were supposed to ensure presence in the offer of public TV programme operators.

TVP SA took various actions aimed at preparing for digital broadcasting. The year 2002 identified the need for strengthening and increasing the attractiveness of the offer of already existing programmes through the use of modern technologies, a necessity to continue actions aimed at complete transmission to production and broadcasting of programmes in digital technology, or the requirement to adjust the production system to new technologies. In 2010, TVP SA presented its vision of technological development. It determined the actions of the company in a longer time perspective than a year – which was supposed to constitute the basis for the functioning of TVP SA in the era of digital media. In turn, in 2012 it was highlighted that general quality changes were necessary in TVP's programme activity on the Internet, for the development of which a long-term business model had to be defined. Actions were planned aimed at increasing the attractiveness of the Internet offer and adjusting linear content to the multi-platform broadcasting. It was also acknowledged that it was necessary to popularise the offer on all available channels of distribution (own channels and those acquired through cooperation with partners under market rules) and to develop the programme offer and audio-visual services in the new media. Thus, an assumption was made to maximise the reach to the potential viewer.

In spite of adopting the above-mentioned documents, TVP SA could not consistently implement their provisions. The studied period of operation of the public broadcaster in the area of development of channels of distribution of content in the new media proved to be a series of random decisions without any support in the assumptions of adopted documents.

Furthermore, it was a mistake on the part of TVP SA in the scope of multi-platform broadcasting that it did not introduce its own distribution platform. Work devoted to the creation of a satellite-based distribution platform at TVP SA, started in 2005, modelled after the solutions implemented by the BBC, resulted in its launch as late as in 2009. After two weeks, the platform was shut down. Finally, until 2015, the public broadcaster did not manage to create its own tool which could make multi-platform broadcasting possible. As a result, in the studied period, the digital offer of TVP was available through over a dozen major on-line portals and a few hundred websites with varying coverage. One weakness of TVP SA was the lack of a uniform offer on all channels of distribution, which made it impossible for the users to become familiar with the full offer on any device they chose.

A solution that was meant to mitigate, in a limited scope, the effects of the lack of a multi-media platform was the hybrid TV, launched by TVP SA in June 2012. The hybrid platform was a set of services and applications offering alternative ways to reach the content of TVP SA. In the programme area, it gave the opportunity to enrich the offer and increase the attractiveness of individual programmes. In the area of establishing relations and interactions with the users of the platform, the hybrid TV allowed for personalisation of users, creating their communities, as well as provided the opportunity to atomise the audience and reach a specific target group. In 2016, TVP decided to shut the hybrid TV down.

A project to sort, facilitate and eliminate restrictions of existing digital tools of TVP came in the form of the Stream Platform, which – as a brand superior to existing and planned solutions – was meant to be an inter-platform VOD and a live-streaming service on available digital channels. However, the most vital element of the Stream Platform was to be the programme offer expanded by foreign productions, purchase of distribution-only licences under the platform, and development of own productions made solely for the purpose of non-linear distribution. The project was not launched until 2015.

Therefore, as practice shows, numerous changes of the concept of the establishment of the offer in the new media brought TVP SA to a standstill in this area. Also, in the studied period, no solutions were provided for the problem of acquiring content for the new media or the issue of effective management of content held on all available fields of use. The above findings constitute proof that TVP SA is not prepared for multi-platform distribution, both technologically and programme-wise.

In the near future, an evolution of TV towards a new-generation medium can be expected, which will retain the tendency of strengthening the role of the viewer/user. The way in which TV is consumed will probably change. People will no longer be mere viewers or users, but also content producers. TV will become an aggregation point, gathering all information, not only from TV channels and the Internet, but also from peripheral devices. With social overlays in TV programmes, the TV screen will become an information and entertainment hub, with consumers/viewers at its centre (Yiqun 2014). The near future will show whether TVP SA has met the challenges which are the consequence of the current changes. There is no doubt, however, that the lack of long term strategies for action and the resulting lack of adaptation to and preparation – both in the organisational and conceptual aspect – for the requirements of the changing market may soon prove critical for TVP SA.

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