From traditional to electronic distribution of the press

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Abstract

The fact that the press has entered the digital era forced publishers to change their philosophy of operation and adapt to the needs and expectations of the contemporary recipient of the content. One of the fields where these changes are particularly evident is the distribution of the press. This article discusses briefly the stages of formation of the state monopoly in the field of press distribution in the Polish People's Republic, and then presents the evolution of the system after 1989 until the market of 'trade in press' is formed. The second part presents changes in the methods of operations of press publishers relating to the distribution of the content over the Internet.

Keywords: distribution, e-edition, press market, digitization, paywall

In order to understand the changes that are currently taking place on the Polish press market, it is necessary to examine the process of transformation which the press market has undergone since 1989. It is believed that the date of official liquidation of *Robotnicza Spółdzielnia Wydawnicza* [Workers' Publishing Cooperative] *"Prasa-Książka-Ruch"* (RSW)[1] marks the symbolic and actual date of the beginning of deep and structural changes within the press. RSW controlled the vast majority of newspapers and magazines published on the Polish market. Generally, only the press of ZSL (*Zjednoczone Stronnictwo Ludowe*, United People's Party) and SD (*Stronnictwo Demokratyczne,* Alliance of Democrats), military publications, and religious (mainly Catholic) newspapers and magazines associated with both

[1] The process of liquidation of RSW finally ended in 2001. At that time, the Warsaw Commercial Court issued a decision to remove RSW from the register of companies. The liquidation of the corporation lasted for 11 years. Quoted after: *Koniec z RSW (No more RSW)*, *Gazeta Wyborcza* no. 263, edition of 10 November 2001, p. 28, http://www.archiwum.wyborcza.pl/Archiwum/1,0,1584408,20011110RP-DGW,KONIEC_Z_RSW,.html

the hierarchy and the PAX Association or with *Społeczny Instytut Wydawniczy* [Social Publishing Institute] *"Znak"* escaped its influence[2]. It should also be noted that at that time RSW was, among other things, the largest publishing corporation in this part of Europe. It carried out publishing, printing, trade, cultural, educational, and distribution operations. It was an organization of a total nature; it manufactured its products, and dealt with their distribution and marketing. In fact, ninety percent of the press publishing market belonged to RSW; it was also a monopolist in the field of printing and distribution[3].

In 1990, the future and functioning of RSW belonged to the issues raised by the Solidarity during the "Round Table" debates. In the end, the Act on Liquidation of RSW came into force on April 6, 1990. The main intention of the Act was to demonopolize the existing and to create a new, independent and pluralistic press market. The legislator provided for that this task was to be carried out by the Liquidation Committee appointed by the Prime Minister. As a result of operations of the Liquidation Committee, thirteen months after its appointment, the press monopoly of the State ceased to exist in the summer of 1991[4]. As noted by Tomasz Mielczarek, the main consequence of the liquidation of RSW was ideological demonopolization and depoliticization of the Polish information press, which was accompanied by the depletion of the offer[5]. At the same time, there were launched multidimensional transformations in the Polish press market. They were accompanied by a drastic slump in readership and radical changes in the philosophy and principles of distribution of the printed press.

The slump in readership was also directly associated with the deregulation of the press distribution system. As it is indicated by Jan Kania, distribution constitutes part of a larger system – the press market. It occupies a necessary and important place within the

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[2] T. Leszkowski *Prasa na gruzach partyjnego koncernu. Likwidacja RSW "Prasa-Książka-Ruch" (The Press on the Ruins of a Party-Related Corporation. Liquidation of RSW "Prasa-Książka-Ruch")* http://histmag.org/Prasa-na-gruzy-partyjnego-koncernu.-Likwidacja-RSW-Prasa-Ksiazka-Ruch-8099. Viewing date: 9 March 2015

[3] http://smkozak.w.interia.pl/books/likwidacjapzpr1.pdf

[4] K. Schliep *Prywatyzacja prasy (Privatization of the Press*) [in:] *Media i dziennikarstwo w Polsce 1989-1995 (Media and journalism in Poland 1989-1995)* G.G. Kopper, I Rutkiewicz, K.Schliep (eds.), Ośrodek Badań Prasoznawczych Uniwersytetu Jagiellońskiego, Krakow 1996, p. 129 et seq.

[5] T. Mielczarek *Raport o śmierci polskich gazet (Report on death of Polish newspapers)*, Warszawa 2012, p. 23 et seq.

system as a subsystem with specific tasks[6]. In the *Dictionary of media terminology* (Słownik terminologii medialnej), press distribution is defined as a regular distribution of editions of newspapers and magazines in the form of subscription or copy sales carried out in newsagents and shops, etc., and in the form of door-to-door sales. Distribution may be carried out by the publisher on its own or may be entrusted to an institution specialized in this field[7]. This definition also embeds the distribution in the market space and assigns it with sale and distribution tools. As it is further noted by Kania, the press market is part of the entire national media system. These dependency relationships cause that the properties of the media system functioning at a given time have a decisive impact on the organization of the distribution system. Therefore, a thesis can be advanced that the press market, and thus the distribution system are determined by the media system model predominant at a given time[8]. Therefore, along with the reform of the media system in Poland after 1989, the press market was also changing dynamically, and the distribution system underwent transformation therewith.

When discussing the issue of distribution of the printed press in Poland, it is impossible to omit the historical background, which influenced significantly the shape of this sector for the following decades.

The tradition of press distribution in Poland dates back to 1918. At that time, Jan Gebethner and Jakub Mortkowicz, well-known booksellers, established *Polskie Towarzystwo Księgarni Kolejowych RUCH* (Polish Society of Railway Bookstores RUCH). Their company was based on a modern format of tobacconists – retailers offering newspapers, tobacco and other small goods located at stations[9]. The press distribution in Poland after the Second World War was decentralized. Various publishing houses, private companies, as well as the so-called newsboys were engaged in the distribution. However, the process of distribution

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[6] J. Kania *Wpływ zmian w kolportażu na sprzedaż dzienników i czasopism w Polsce (The impact of changes in distribution on the sale of newspapers and magazines in Poland*), *Zeszyty Prasoznawcze* no. 3-4/2008, Krakow 2008, p. 154 et seq.
[7] W. Pisarek, Z. Bauer, E. Chudziński, K. Wolny-Zmorzyński (ed.) *Słownik Terminologii medialnej* (*Dictionary of media terminology)*, UNIVERSITAS, Krakow, 2006, p. 96.
[8]. J. Kania *Wpływ* …, op.cit.
[9] http://ruch.com.pl/o-nas/o-firmie/

centralization began as early as in 1949. On December 20, 1949, an agreement was signed as a result of which there was created a multi-facility *Państwowe Przedsiębiorstwo Kolportażowe "Ruch" (Distribution State Enterprise "Ruch")*, subordinate to the Ministry of Post Service and Telegraphs and, in the area of coordination of publishing and distribution issues, to the President of the Council of Ministers. The establishment of a single enterprise responsible for distribution of the press and elimination of other entities due to granting exclusive rights in this regard were to facilitate the centralized control of the press distribution. The next step was the creation of *Centrala Kolportażu Prasy i Wydawnictw „Ruch”* (Central Office for Distribution of Press and Publications "Ruch") in March 1953, which was superior to distribution enterprises called henceforth press and book dissemination enterprises[10]. In the 1960s, "Ruch" was a thriving enterprise, using its monopoly in a skilful manner. Regardless of what the motives of such a policy were, "fresh" newspapers could be acquired in the remotest corner of the country. "Ruch" built village book and press clubs at its own expense[11].

The progressing centralization of the entire economy also affected the production and dissemination of the press. In 1969, in place of the Central Office for Distribution of Press and Books "Ruch", the Union for Dissemination of Press and Books "Ruch"[12] *(Zjednoczenie Upowszechniania Prasy i Książki "Ruch")* was created. On January 1, 1973 the state enterprise "Ruch" was absorbed by the concern RSW "Prasa-Książka-Ruch" although the move had no legal grounds[13].

This gave the new entity virtually monopoly in distribution[14]. The collapse of trade and the crisis of the 1980s affected adversely the condition of the company, and its turnover dropped dramatically, pushing "Ruch" on the verge of bankruptcy. In 1989, the situation of

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[10] M.M Siuda *Kolportaż oraz upowszechnianie prasy na Kielecczyźnie w latach 1945-1952 (Distribution and dissemination of the press in the Kielce region in the years 1945-1952)*, Volume 2/13, Kielce 2010, p. 81 et. seq.

[11] *Czy zanim (Whether before), Gazeta Wyborcza* no. 635, edition of 18 July 1991, p. 12,”, *Rocznik Bibligraficzno-Poznawczy* http://www.archiwum.wyborcza.pl/Archiwum/1,0,6060691,19910718RP-DGW,Czy_zanim,.html (date of access: 15 November 2015)

[12] M.M Siuda *Kolportaż ….*, op.cit.

[13] RSW Prasa-Książka-Ruch was established in 1973, after the merger of RSW Prasa, the largest press publisher in Poland with the Książka i Wiedza publishing house, as well as the Ruch distrubition company.

[14] S. Bratkowski, *Ruszyć "RUCH" (To Move "Ruch"), Gazeta Wyborcza* no. 223, edition of 07/03/1990, p. 5, http://www.archiwum.wyborcza.pl/Archiwum/1,0,6017908,19900307RP-DGW,Ruszyc_RUCH,.html.

"Ruch" was just catastrophic. The number of newsagents was decreasing. The margin that was collected by "Ruch" was high and, what is important, diversified. A lower rate was applied to its own publications, and a higher one to publications of external companies. Moreover, as a monopolist, "Ruch" did not care for its contractors, especially those with publications of low circulation, weaker magazines and those that should reach specific circles and newsagents. There was no issue of the circulation control or any sensible circulation policy[15]. It is worth noting that in 1990, "Ruch" had a network of 22.2 thousand newsagents[16]. Thus, when in 1990, at the seat of the RSW Liquidation Committee, a presentation was held of beautiful and colourful kiosks of various shapes, which were to be introduced within a year or 18 months, it raised hopes for a return to the good tradition of press distribution. However, instead of the announced changes, the property of "Ruch" fell into ruin, and the infrastructure of kiosks in Poland looked miserably in the early 1990s. Gradually, there were fewer and fewer old local kiosks, and those that were still operating received publications delayed or in an excessive or insufficient number of copies. At the same time, the prospect of a new press distribution network was ebbing away. Western companies withdrew their offerings discouraged by long waiting[17]. In view of these developments, the Union of Press Publishers *(Unia Wydawców Prasy)* voiced its opinion on the state of the press distribution in Poland. It was pointed out that there was no clear concept for transformation of "Ruch" and the Ministry of Industry, to which "Ruch" was subordinate, neglected the issue. What is more, it was emphasized that the press distribution was not only an economic problem of the "Ruch" company, but it also affected the freedom of expression and access to information[18]. However, it should be emphasized that certain attempts to solve the problem of distribution were made just after the collapse of the monopoly of RSW. The RSW

[15] D. Fikus W. Giełżyński *Rozparcelować molocha* (To Parcel out a Huge Corporation), *Gazeta Wyborcza* no. 116, edition of 18 October 1989, p. 5, http://www.archiwum.wyborcza.pl/Archiwum/1,0,6057196,19891018RP-DGW,Rozparcelowac_molocha,.html

[16] *Koniec RSW (The End of RSW), Gazeta Wyborcza* no. 234, edition of 20 March 1990, p. 1,http://www.archiwum.wyborcza.pl/Archiwum/1,0,6018110,19900320RP-DGW,KONIEC_RSW,.html

[17] *Czy zanim (Whether before), Gazeta Wyborcza* no. 635, edition of 18 July 1991, p. 12, http://www.archiwum.wyborcza.pl/Archiwum/1,0,6060691,19910718RP-DGW,Czy_zanim,.html (date of access: 15 November 2015)

[18] *Bezruch w „Ruch" (A slump in "Ruch"), Gazeta Wyborcza* no. 747, edition of 29 November 1991, p. 2, http://www.archiwum.wyborcza.pl/Archiwum/1,0,6035196,19911129RP-DGW,Bezruch_w_Ruchu,.html

Liquidation Commission proposed to transform "Ruch" into a company of the State Treasury as early as at the beginning of 1990, even before the fate of printing houses and publications was decided. There was prepared a conception for transformation. However, such a solution could not be pushed at that time. Two workers' cooperatives that were established after the liquidation of RSW attempted to take over the distribution. However, the Liquidation Commission believed that such fragmented distribution would not be able to cope with its task, and kiosks would free themselves of the press, transforming into ordinary shops[19]. The idea of the nationalization of press distribution was rejected likewise. Neither was accepted the proposal suggesting that "Ruch" should focus solely on wholesale and freight forwarding, and retail trade should be left to independent entrepreneurs, the market of which should be based on the principles of competition[20]. The idea to establish a state-owned company on the basis of "Ruch", which then would be transformed into a joint stock company by introducing foreign and domestic capital, as well as offering shares to publishers and employees, seemed to be most rational[21].

Another idea for solving the issue of the press distribution was that the distribution of the press should be taken over by the postal service. Such a solution emerged in 1993. However, the problem was that only weeklies, fortnightlies, monthlies and quarterlies were to be distributed through the postal service. The postal service justified its decision on excluding newspapers from the distribution with inadequate technical preparation for delivering daily newspapers on time. According to the Union of Press Publishers, resignation of the postal service from distribution of dailies meant that residents of localities where there were no kiosks would have been generally deprived of daily newspapers. Until then, they had received newspapers along with correspondence, delivered by postmen under a contract with "Ruch"[22].

Ultimately, the concept of transformation of "Ruch" into a company was

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[19] *Czy zanim*, op.cit.
[20] S. Bratkowski, *Ruszyć "RUCH" (To Move "Ruch"), Gazeta Wyborcza* no. 223, edition of 07/03/1990, p. 5, http://www.archiwum.wyborcza.pl/Archiwum/1,0,6017908,19900307RP-DGW,Ruszyc_RUCH,.html
[21] *Czy zanim*, op.cit.
[22] B.Ciepłowska *Ludzie zejdźcie z drogi! (People Get out of the Way!), Gazeta Stołeczna* no. 42, edition of 19 February 1993, p. 3, http://www.archiwum.wyborcza.pl/Archiwum/1,0,11349,19930219WA-DLO,Ludzie_zejdzcie_z_drogi,.html

reconsidered. This process was carried out in stages. The RSW corporation was liquidated by the Act of 22 March 1991. Subsequently, the RSW Liquidation Committee transferred assets of Ruch, separated from RSW, to the Minister of Industry. By its Order of 29 April 1991, the Minister of Industry, in turn, established *Przedsiębiorstwo Kolportażowo-Handlowe Ruch* (Distribution and Trade Enterprise Ruch), which was then transformed into a sole-shareholder company of the State Treasury - Ruch S.A.[23] The new company took over the assets of the liquidated RSW "Prasa-Książka-Ruch". At that time, there were created 26 branches and 188 organizational units of a lower level, which were divided into teams and branch offices servicing a wholesale and retail network[24]. Simultaneously, in 1991, the Kolporter company was founded, which would eventually become the largest competitor of "Ruch" in the field of press distribution.

Along with the ownership transformations and formation of the free market, the principles of press distribution were developed in Poland. As it is indicated by Jan Kania, the principles of press distribution have the nature of norms or standards adopted for application by all entities of the press market, in particular by publishers and distributors. They form a logical systemic whole intended to serve the freedom of the press and access to the press. Their application, which is emphasized by the author, results not only from the practice confirmed by the so-called distribution agreements entered into between publishers and distributors, as well as wholesale and retail distributors, but also from the popularization of all sorts of publications (professional and scientific). Therefore, these are principles known to distributors who, by entering into agreements, accept their application. Jan Kania mentions here the following principles: availability to all publishers, neutrality and equal treatment, top-down pricing, editions held by the publisher at its disposal, the distributor's right to returns. They form a complementary parity of rights and obligations of the parties to a distribution agreement, which distinguishes this type of agreements as intended exclusively for the press. In other words, each distribution agreement must take into account the

[23] E. Szafrańska, a spokesperson of Ruch S.A. *Ruch nie z RSW (Ruch not with RSW), Gazeta Wyborcza* no. 161, edition of 13 July 1994, p. 17, http://www.archiwum.wyborcza.pl/Archiwum/1,0,157917,19940713RP-DGW,Ruch_nie_z_RSW,.html
[24] http://ruch.com.pl/o-nas/o-firmie/

principles of distribution. If it fails to include them, it is a different type of agreement (e.g. purchase and sale or brokerage agreement, etc.)[25].

However, as the author indicates, from the beginning of the functioning of the free press market in Poland, the largest publishers have treated the distribution principles selectively. They mostly accepted those that organized settlements and guaranteed financial security. They did not pay much attention to the principle of dissemination, which is essential for the distribution. The most important issue was to stimulate competition among wholesale distributors and retailers. This orientation at fierce competition in the field of distribution resulted in a dizzying increase in the number of wholesale distribution companies in the early 1990s. Until 1996, the main focus of actions of distributors strongly competing among themselves was the general development of sales. In 1996, the Chamber of Press Publishers demonstrated almost one hundred wholesale operators engaged in distribution of newspapers and magazines, as well as a fast growing number of retail outlets, which in the end contributed to the development of the entire press market[26].

In the late 1990s, the value of press sales began to stabilize, which caused a change in the direction and nature of competition among distributors, still fuelled by publishers. It turned towards the inside of the sector and underwent a phase of increasingly intense rivalry for the stabilized sales potential. As a result of this reorientation, wholesalers started to drop out of the market rapidly. Over the next few years, most of them ceased to operate, some were taken over by larger operators, and some changed completely their profile of market activity. In 2000, wholesale distribution activities were carried out by ten companies, and in 2008, a duopoly was created by and large on the market, which was held in almost 90% by Ruch and Kolporter, with only three other minor players[27].

An analysis by the Chamber of Press Publishers shows that in 2012, Kolporter S.A. had a market share at the level of 46%, whereas the share of Ruch S.A. in the press distribution market was 34.4%. Others had much smaller market shares: Garmond Press 8.3%, Franpress

[25].J. Kania *Wpływ* …, op.cit.
[26] Ibidem.
[27] Ibidem.

3.2%, Poczta Polska 2.5% Mail, Pol Perfect, a supplier to In Media, 0.6%[28].

In the subsequent years, shares of distributors in the press distribution market were as follows: in 2013 and 2014, an undoubted leader was Kolporter, holding 49.67% of the market in 2013 and 50.15% in 2014, whereas Ruch had 32.04% and 30.46%, respectively. The third of the largest press distributors had shares at the level of 10.33% in 2013 and 13.25% in 2014. Other participants of the press distribution market achieved in total a market share of 7.96% in 2013 and 6.04% in 2014[29].

Simultaneously with the evolution of the market structure of the wholesale distribution, the situation in the retail distribution was also changing dynamically.

As indicated by Walery Pisarek, sales of the press in 'retail outlets', namely the so-called kiosks, was the main channel of distribution in Poland, and subscriptions of newspapers and magazines played a relatively small role. For example, in 1994 about 90% of the press was distributed in kiosks. As emphasized by the author, in the era of the monopolistic position of RSW, a party-controlled press and publishing concern, kiosks were assigned with cultural and propaganda tasks. Although the trade in press accounted for only ten percent of their turnover, the country was evenly saturated with the network of such points of sales. During the years 1989-1994, the number of kiosks increased even further. Sales of the press in grocery stores and gas stations also developed. Moreover, new, private kiosks emerged. However, what is of importance, the distribution of outlets selling the press became less even throughout the country. It resulted from the fact that there were liquidated kiosks with too low a turnover, thus in villages and on the outskirts of towns. On the other hand, new kiosks were created in places of intense pedestrian traffic. Hence, in a

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[28] *Kolporter zyskuje, Ruch traci (Kolporter gains, Ruch loses),* http://www.press.pl/newsy/prasa/pokaz/39385,Kolporter-zyskuje_-Ruch-traci , date of viewing: 14 February 2015.

[29] The analysis was based on circulations of paid titles of 26 publishers, including all - except for Spes - publishers of appearing dailies. The sum of circulations of these publications corresponded to 98.6 percent of the circulations of paid titles registered by *Związek Kontroli Dystrybucji Prasy* (ZKDP) (Association for Control of Press Distribution) in February 2014. At the same time, the examined circulation constituted approx. 68 percent of circulation of all (paid and free) press titles in Poland, estimated on the basis of data of the Central Statistical Office. Source: *Kolporter liderem rynku dystrybucji prasy, Ruch traci udział w rynku (Kolporter leads on the press distribution market, Ruch loses its market share),* http://www.wirtualnemedia.pl/artykul/kolporter-liderem-rynku-dystrybucji-prasy-ruch-traci-udzial-w-rynku, date of access: 15 February 2015.

place where once a single kiosk of "Ruch" used to stand, several others, located in its immediate vicinity, competed with it at the end of 1995[30].

Until 2005, there were more and more retail points of sale of newspapers and magazines. As J. Kania points out, it was facilitated, mainly by such factors as high unemployment rate, continuing tradition of purchasing at medium and small retail points of sale, creation of new formats of retail outlets, and support for retailers provided by wholesale operators fiercely competing with one another. It resulted in the largest saturation of retail points of sale of the press in Europe. It reached the level of 75 thousand points in 2006.[31] According to an analysis by the Chamber of Press Publishers, the number of retail outlets of Ruch amounted to 22.7 thousand, and the number of those of Kolporter remained at the level of 27.2 thousand in 2012. Garmond Press had 5.6 thousand points of sale, while Franpress had 350. In total, 60.9 thousand points of sale operated on the market[32]. In 2013 and 2014, Kolporter had the largest number of outlets, 27,528 in 2013 and 27,000 in 2014. Ruch had 22,200 and 21,500, respectively. The third was, as in the case of market shares, Garmond Press with the number of points of sale at the level of 7027 in 2013 and 8700 in 2014. Other distributors had approximately 800 points of sale[33].

When analysing the situation in the distribution after 2005, one should point out, following Jan Kania, a few fundamental features and processes. First and foremost, the wholesale distribution fell into recession. It was related to the stagnation on the press market and, consequently, the struggle of the main players, Ruch and Kolporter, for staying on the market. In the end, it resulted in a decrease in the number of retail outlets they were

[30] W. Pisarek *Zmiany ofert na rynku prasy codziennej (Changes in the offer on the market of the daily press)* [in:] *Media i dziennikarstwo w Polsce 1989-1995 (Media and journalism in Poland 1989-1995)* G.G. Kopper, I Rutkiewicz, K.Schliep (eds.), Press Research Centre of the Jagiellonian University, Krakow 1996, p. 38 at seq.

[31]. J. Kania *Wpływ zmian w kolportażu na sprzedaż dzienników i czasopism w Polsce (The impact of changes in the distribution on sales of newspapers and magazines in Poland*), *Zeszyty Prasoznawcze* no. 3-4/2008, Krakow 2008, p. 154 et seq.

[32]. *Kolporter zyskuje, Ruch traci (Kolporter gains, Ruch loses),* http://www.press.pl/newsy/prasa/pokaz/39385,Kolporter-zyskuje_-Ruch-traci , date of viewing: 14 February 2015.

[33] *Kolporter liderem rynku dystrybucji prasy, Ruch traci udział w rynku (Kolporter leads on the press distribution market, Ruch loses its market share),* http://www.wirtualnemedia.pl/artykul/kolporter-liderem-rynku-dystrybucji-prasy-ruch-traci-udzial-w-rynku, date of access: 15 February 2015.

servicing and a reduction in the volume of editions accepted for distribution, as well as attempts made by the distributors to reduce the width and depth of the range of titles on the market. Similarly, the situation of the retail distribution presented quite a bleak picture. It resulted mainly from the fact that there was underway a process of eliminating traditional kiosks with the press from city centres, accompanied by a decrease in interest of wholesale distributors in points with a low turnover. At the same time, the level of profitability from the sale of newspapers and magazines continued to decrease, with increasing costs of maintenance of the same points. Ironically, the situation was aggravated by a fall in unemployment, which resulted in a decreasing interest in running the sale of newspapers. Moreover, a gradual transition from the 'distribution of the press' model to the 'trade in the press' model was also taking place[34]. Processes occurring in the area of the Internet constituted counterbalance to the processes creating a duopoly in the area of distribution of the printed press. Together with the development of the digitization, the market of the Web press started to develop, and new forms of electronic distribution of the press were created. Initially, publishers had a rather sceptical approach to digital opportunities. However, with time, the press market opened to the Internet seeing its potential, as well as the evolution of readers' behaviour.

One of the first markets that developed at that time was the market of paid content. On the Polish market, the process of creation of a platform for chargeable content sharing proceeded in stages. In July 2012, gateways announcing the introduction of fees for access to the content appeared on dozens of newspaper websites. Their purpose was to force Internet users to register (without a fee), which was to enable the creation of a database of potential users. Over the next two months of the platform operations, its users could enjoy free access to the newspaper sites, provided that they were registered[35]. To encourage Internet users to register on these websites, in August the publishers tried to persuade the reader that he/she was to be a member of an 'elite group', support 'honest journalism', and gain access to the

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[34] J. Kania *Wpływ* ..., op.cit.

[35] A. Todorczuk *Powoli się dogadują (They are reaching an agreement slowly), Press* no. 7(198), 01.07-31.07.2012.

premium content[36]. However, in September, there were introduced the pre-announced charges, and thus access to the content offered became limited. Originally, in the case of each of the websites, from several to twenty percent of the content was behind the paywall[37]. Publishers assumed that the content that was to be behind the paywall would be unique. More extensive journalistic forms such as reportage, essays, feature articles, interviews, advice, and even cultural news or celebrity gossip were to be found. The paid content did not include the news. The exceptions were regional newspapers that had closed access to certain regional news. To a large extent, such a policy resulted from a desire to determine for what content the reader was willing to pay[38].

The first multi-title platform was the system of limited access "Piano". It was created by the Piano Media company, which had operated on the market since 2011 and specialized in nationwide solutions for digital subscriptions. The Piano solutions are applied by websites of newspapers, magazines and other media in Poland, Germany, Great Britain, the United States, India, Spain and Slovakia[39]. This is a common charging system for the content made available on the Internet, access to which is restricted by a 'paywall'. The access to paid materials is limited by the common system of user registration operated by Piano Media. After making a payment, with the use of a single login, the user can view the paid content of all websites covered by the platform. Importantly enough, the presence of publishers on the Piano platform does not limit their autonomy. They can continue to operate their websites; they have also retained complete freedom as regards the scope and genre of the content for which they want to charge Internet users[40]. However, initially, publishers did not fully understand the essence and philosophy of the 'paid content'. As it is emphasized by Rafał Oracz, the President of OMG Poland, in the first stage of Piano operations *'publishers did not care about money. The current actions are an attempt to produce online content and engage*

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[36] J. Przybylski *Cel: jeden procent (Target: one percent), Press* no. 9(200), 01.09-30.09.2012, p. 22 et seq.
[37] A. Todorczuk, *Powoli …,* op.cit.
[38]J. Przybylski *Cel…* ,op.cit.
[39] *Piano Media łączy się z inną firmą od monetyzacji treści w Internecie - Press+ (Piano Media merges with another company engaged in the monetization of the content on the Internet - Press +)*
http://www.press.pl/newsy/internet/pokaz/46423,Piano-Media-laczy-sie-z-inna-firma-od-monetyzacji-tresci-w-Internecie---Press_09.09.2014
[40]G. Kopacz, *Ściana płacy (Charging Wall), Press* no. 1(192) 1.01-31.01.2012, p. 48 et seq.

Internet users. It seems that the publishers 'throw' behind the paywall those articles that used to be available only on paper. It makes sense from an economic point of view, but it may turn out to be insufficient because the added value of a printed edition is something more than the value of the very content. I hope that - as announced - the publishers start producing content dedicated to online editions' [41].

The business model of the platform was supposed to be simple: the largest gain was to be achieved by the provider of the website on which the Internet user had paid a monthly fee (40%); another 30% was to be distributed among other publishers whose websites the Internet user would visit in a given month. The remaining 30% was to be received by Piano[42]. The common charging system was to open the second channel (apart from online ads) for publishers to raise money from the Internet, and also to prevent Internet users from escaping to the competition offering free content. Piano's idea was based on the assumption that there would be no competitors offering free content of a similar quality because they would also introduce charges[43]. Moreover, the publishers perceived another tangible benefit from the introduction of charges. It was noticed that the user who had paid for access to a service spent much more time on this website than other users spent on open websites. This peculiar loyalty was also recognized and appreciated by advertisers[44]. What is worth emphasizing, publishers also perceived the Piano platform as another plane to which the competition among them had been transferred. They were still competing for the reader and user on equal terms; the only difference was the fact that the user paid for the content instead of having free access to it[45].

After a year of operations of the Piano platform in Poland, both publishers and users began to draw first conclusions and make evaluations. Unfortunately, the balance was rather unfavourable. The first accusation against the system was the absence of the expected dynamic development of the platform. It turned out that the system had been joined by fewer publishers than it had been originally assumed by the creators of the platform.

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[41] *Pierwsze takty Piano (The first bars of Piano), Press* no. 0(201) 01.10-31.10.2012, p. 46 et seq.
[42] A. Todorczuk, *Powoli …,* op.cit.
[43] G. Kopacz, *Ściana płacy (Charging Wall), Press* no. 1(192) 1.01-31.01.2012, p.
[44] A. Todorczuk, *Powoli …,* op.cit.
[45] J. Przybylski, „Cel…", op.cit.

Publishers also complained about the lack of complete information, including as regards data on how many customers had bought access to the online content through Piano. From the point of view of the platform users, the situation also left much to be desired. Piano had failed to provide functionalities promised to the users at the launch, such as a single service aggregating the content of all pages covered by the paywall. Furthermore, the platform had failed to offer a unique content for which the users were willing to pay and a mobile version of the project. The situation was not improved by a continual turnover of managers responsible in Piano for the development of the platform in Poland[46]. As a result, out of seven companies that joined the Piano platform in 2012, only five publishers remained in 2015; and it was not joined by any new company. Therefore, in order to make the offer more attractive and meet the demands of publishers, Piano Media merged, in August 2015, with Tinypass – a company specializing in providing software for collecting payment for the content on the Internet. Both entities, operating under the name of Piano, planned to launch a new platform called Piano VX to monetize text and video materials. The new platform was to include modules enabling publishers, among other things, to view the base of users at a fast pace; on the other hand, users were to be offered a possibility of temporary access to the platform in exchange for completing a survey or signing up for a newsletter[47].

After a rather unsuccessful marriage of publishers and the multi-title platform of limited access, the next step in the area of paid content on the Internet was the commencement by the publishers of actions aimed at launching their own charging systems for the content offered on the Internet. Some of the publishers introduced such solutions parallel to the Piano system, offering part of their titles behind the launched paywall, and some of them on their own websites with an individual charging system. At present, on the global publishing market, there are three types of the so-called paywalls – paid models for monetization of the online content:

a) *hard paywall* – limiting all access to the content on a website for unregistered (non-

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[46] More on the subject: R.Gluza *Adam Wojdyło odpowiada za rozwój Piano w Polsce (Adam Wojdyło responsible for the development of Piano in Poland),* http://www.press.pl/newsy/internet/pokaz/46329,Adam-Wojdylo-odpowiada-za-rozwoj-Piano-w-Polsce. Date of viewing: 20 February 2015 and A.Todorczuk, *Pauza Piano (Piano Rest), Press* no. 3(206), 01.03-31.03.2013, p. 8.

[47] I. Kołacz, *Piano zmienia strategię (Piano changes its strategy), Press* no. 9(231) 01.09-30.09.2015, p. 14.

paying) users,

b) *metered paywall* – a measurable model, which is the most popular model in the world today: the publisher determines a list of free articles that can be read by users in a month; after it has been reached, the user must pay for other articles. This model also takes other forms, like the solution introduced by *The New York Times,* consisting in providing free access to ten articles and collecting fees for the subsequent ones[48]. Another solution adopted by *The Washington Post* consists in a variant application of the metric paywall. A registered user has access, as part of a lower subscription, to the regular and mobile version of the website. A higher subscription opens unlimited access to the content of *The Washington Post* on all platforms. On the other hand, Internet users who are not subscribers to the printed edition can open 20 materials on the website for free. What is worth emphasizing, the digital wall does not include texts from the first page of the Internet edition or classified ads. Moreover, these limits do not apply to specific social and professional groups, e.g. pupils, students or teachers at their place of work or study[49]. In turn, *The Boston Globe* introduced an intermediate solution: it virtually separated free texts from those chargeable. Thus, there were created two different websites (paid and free) for two different groups of readers[50].

c) *freemium* – users have most of the content at their disposal for free, and they pay only for access to the premium content selected by the editors. The idea of this model comes down to closing access to exclusive contents such as e.g. interviews, extended articles, and archives, while leaving free access to agency information[51]. A phenomenon on a European scale is, however, a solution introduced by *Die Tageszeitung*, in which readers can pay for the online content, but not necessarily. What is more, Internet users can decide for themselves about the amount of payment (with a minimum threshold determined by the publisher). Although it gives rise to controversy and discussions in the environment, this solution brings tangible benefits to the publisher. Income from voluntary contributions allows the editors to

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[48] A. Małuch *Płatność od metra (Charges per meter)*, *Press* no. 1-2(216) 02.01-28.02.2014, p. 8.

[49] *Nie „czy” tylko”jak (Not 'if' but 'how'),* T. Deptuła - US Section, *Press* no. 3(216), 01.03-31.03.2014, p. 63 et seq.

[50] Ibidem.

[51] *Nie „czy” tylko”jak (Not 'if' but 'how'), Press* no. 3(216), 01.03-31.03.2014, p. 63 et seq.

pay for jobs of two journalists[52].

The introduction by publishing houses of their own paywalls involves several improvements apart from the possibility of content monetization. First of all, it gives the publishers certain flexibility. It enables them to monitor constantly the sales process and to maintain direct contact with the user. As a result, they are able to adapt the offer more effectively to the recipient's expectations in terms of the content, as well as marketing and promotional solutions[53].

The introduction of paywalls by the press publishers and closing of access to the free content have affected the functioning of the whole online market of information dissemination. These changes are visible at all levels, from necessary changes in the business and organizational model of operations of the editorial staff, through changes in reading habits and rules of using the content placed on the Internet, to changes in the structure and area of competition on the market. The introduction of paywalls by the publishers has also caused that they have started to compete directly with Web portals. The initial period when the press entered the Internet, during which the publishers did not manage well, which was used by portals to strengthen their position and take over a large part of users, another period has begun of soliciting for those customers who are willing to pay for the content posted on the Internet. This is due to the fact that the introduction of paywalls by the publishers causes that many portals will lose a large part of the necessary content, which they will have to create on their own or buy from the publishers. Therefore, it involves a change in the philosophy of portals' operations and the necessity of raising additional funds. An example is the Wirtualna Polska Group, which intends to continue to maintain free access to the text and photo content, but also to enter the segment of paid video content over time[54].

In the subsequent stage, associated with the steadily increasing number of readers of the free Web press, the publishers have been forced to change their operational strategy

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[52] *Nie „czy" tylko"jak (Not 'if' but 'how'), K.* Domagała-Pereira - Germany Section, *Press* no. 3(216), 01.03-31.03.2014, p. 63 et seq.
[53] I. Kołacz, *Piano …,* op.cit.
[54] S.M. Stanuch *Druga młodość portali (The Second Youth of Portals), Press* no. 1-2 (225), 02.01-01.03.2015, p. 99 et seq.

again. After limiting access to the free content, there were launched paid equivalents of the printed press. An e-edition of a newspaper was its version including the same, in terms of form and content, editorial material as the one included in the printed edition. This requirement did not apply to inserts and advertisements. Furthermore, the e-edition could be extended by different forms and contents resulting from the possibilities provided by the Internet. At the beginning, e-newspapers enjoyed considerable success. To a large extent, this was due to their low price, but mainly to subscriptions ordered by various institutions of both the business and public sectors. Originally, e-newspapers were available in several formats based on PDF files, which required an installation of appropriate software to enable the user to view the file content. Over time, e-newspapers began to be based on mobile technologies. Smartphones and their enhanced version - iPhones with a touch screen improved greatly the comfort of and facilitated the use of e-press. A new form of mobile distribution of the press became tablets, initiated by iPads. Due to their quite large touch screens, as well as friendly and intuitive navigation, these devices are well suited for reading the press[55]. Also in this case, the publishers adopted and apply equal solutions.

First, they based their strategy in this area on developing applications for smartphones and tablets. These are mostly adaptations of printed editions of a publication, enriched with additional functionalities enabling the user e.g. to customize the form and content. Therefore, the publishers are investing heavily in the development of applications for mobile devices because they perceive them as a source of income in the near future. It arises, to some extent, from the publishers' belief that users of mobile platforms are more willing to pay for high-quality products[56]. On the Polish media market, applications available on mobile devices provide the publishers with additional tools, apart from the opportunity for offering the content. An example is the Adobe Digital Publishing Suite, which is a ready set of tools for creating, distributing and monetizing an interactive content for devices with different operating systems. It includes, among other things, an analytical tool that enables

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[55] T. Mielczarek *Polskie gazety w cyfrowej sieci (Polish newspapers in the digital network), Zeszyty Prasoznawcze*, no. 1-2 (209-210), Kraków 2012, p. 31 et seq.

[56] P. Zieliński *Nadrobione opóźnienie (A delay made up for) Press Magazyn Ekstra* no. 25 March 2012, p. 14 et seq.

an analysis of the qualitative and quantitative content downloaded and read by users with the use of the application. The program is regularly developed and updated.

In Poland, this solution is used, for example, by Agora SA, Ringier Axel Springer Polska, Edipresse Polska S.A., Respublica, and G+J Polska. The Issue Standard program, in turn, is adjusted to small- and medium-sized publishers; it allows them to create interactive magazines and catalogues for mobile devices using PDF files. In this case, the publishers can enrich their files with interactive elements, such as links, audio and video content and photo galleries[57].

Secondly, the publishers decide to create digital kiosks, where a kiosk application is free, and the user pays for the titles purchased with its use.

Thirdly, the publishers create their own content aggregators. Users select the titles of periodicals they are interested in and determine the topics. After this selection has been made, a review of articles appears. The essence of the aggregators is the fact that the articles do not come from PDF editions, but from the constantly updated content of websites of the selected titles[58].

Regardless of the adopted solution, all publishers have taken actions towards creating effective tools and platforms to distribute their own electronic content. The trend towards an increasingly wider content offered on the Internet could not have remained unnoticed from the point of view of research on readership. Therefore, the necessity arose to modify the process and methods applied so far. As it is emphasized by Tomasz Mielczarek, it prompted ZKDP to develop new standards for calculating circulations and sales, and develop a definition of electronic press. A definition of e-edition appeared in the "Regulations for control of circulation and distribution of the press registered in the Association for Control of Press Distribution" in 2004. At that time, 'E-edition' was defined as an electronically distributed version of at least one mutation of a controlled press title. It must contain the same editorial and advertising material as the printed edition in terms of form and content. In the electronic version, the editorial material can be further expanded, and advertisements

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[57] M. Kozielski *Z czym na tablety (With what on tablets), Press* no. 3(206) 01.01-31.03.2013, p. 58 et seq.
[58] K. Domagała- Pereira *Internauto: płać (The Internet User Shall Pay), Press* no. 4(195) 01.04-30.04.2012, p. 52 et seq.

can be adapted to enable the use of opportunities offered by an electronic medium. The e-edition must be published in the same period of sales as the printed edition[59]. In 2012, together with the development of forms of digital newspapers, the definition of e-edition was also expanded.

As we read in the Regulations for Control issued by ZKDP in 2012[60], 'a digital edition' is an electronic version of a controlled press title, unchanged throughout the entire period of dissemination prescribed for a given frequency, which retains the essential characteristics of the printed edition, in particular, an identification of the edition (edition date and number), a linear format (in the form of pagination or another method for viewing the content from its beginning to end) and a vignette. These editions are divided into e-editions and digital mutations:
- an 'e-edition' is a digital edition of at least one of publishing mutations, containing the same press material (especially editorial material, communications, announcements, and advertisements) as the printed edition in terms of form and content. The requirement of the total conformity of the e-edition to the printed edition does not apply to inserts and gadgets. If the printed edition includes editorial materials that the publisher it not entitled to publish in other fields of use, those materials can be removed from the e-edition, which in this case does not constitute a breach of the requirement of conformity of the form and content. In the e-edition, the press material can be further expanded or adapted in a manner that enables the use the technological opportunities.
– 'digital mutations' are digital editions which are not e-editions.

Based on the adopted definition, three categories of 'e-editions' were separated, as indicated by Tomasz Mielczarek. The first one is *a replica*, which is an electronic edition of a newspaper that is a faithful copy of its paper edition. Another one is a replica plus, which should be understood as a type of the press that, in addition to the printed edition, provides its users with such functionalities as interactivity, databases, archives, etc. The third category includes dynamic digital editions that may bear little relation to the original paper. For this

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[59] Regulations for control of circulation and distribution of the press registered in the Association for Control of Press Distribution. The consolidated text applicable from 1 January 2005, 'General rules", www.zkdp.pl
[60] Ibidem.

reason, ZKDP does not take this category into consideration in the process of determining the size of edition[61]. However, as early as in 2012, controversies arose concerning e-editions in terms of sales statistics. First of all, they were related to reporting sales of e-editions and the problem the publishers had with the proper classification of different types of sale. This was due to the lack of uniform interpretations of the Regulations of ZKDP in terms of categorization of e-editions, and thus in terms of recognition which of the actions taken by the publishers were to be classified as distribution (not included in sales statistics) and which as the sale in strict terms. Further controversies arose over too narrow a range of actions considered as the sale of e-editions. The classic sale of e-editions did not take into account copies sold by the publishers to other entities and then e.g. made available under the price of other goods and services or even distributed free of charge (with the purchase of other goods). Moreover, the object of criticism was insufficient flexibility of ZKDP Regulations, whose provisions did not keep pace with rapidly changing realities of the market. Hence, not all sold copies that retained in their content the essential elements of the printed edition (and therefore should have been considered as an e-edition) were included in the overall sales statistics. This was, for instance, the case of editions of the Kindle reader. The overall situation was even more exacerbated by the fact that the largest press distributors such as Ruch and Kolporter had no platforms and sales networks appropriate for e-editions, and by the publishers' policy consisting in the lack of investments in e-editions, which prevented their further distribution. In this case, Polish publishers did not draw on the experience of the US market, which clearly showed that customers did not like the need to use many different applications to have access to all titles. They preferred to have a single one[62].

The presence of newspaper titles on the Internet resulted in a change in the operating rules of a traditional press company and opened for this sector an opportunity for providing information around the clock, previously unavailable for the printed press. Moreover, as it is noted by Henry Pietrzak, through the new possibilities created by interactivity and multimedia, the Internet engaged customers in the process of organizing

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[61] Ibidem.

[62] More on the subject: S. Kucharski *Poprawianie wyników (Improving results), Press* no. 5 (198), 01.05-31.05.2012, p. 48 et seq.

the information.[63] Furthermore, the functioning of the press in the network forced the publishers to take into consideration elements previously unknown to the world of the traditional press: the speed of edition of Internet services, a longer life cycle of publications on the Internet than on paper, the possibility of introducing multiple modifications and additions to published texts, differences in paste-up of websites and printed newspapers, the possibility for readers to post individual comments on the published information, multimedia, the possibility to create more freely a narrative with text, audio, graphic and animation elements, as well as a strictly informative nature of the Internet[64]. The very system of distribution has also changed. The development of e-editions and free access to them, determined generally by the access to the Internet, puts the distribution of the traditional press in a completely different light. A developed network of retail outlets and efficient logistics no longer guarantee maintaining a dominant position on the market by its current leaders such as Ruch or Kolporter. The introduction of the electronic distribution of newspapers by the publishers disrupts the existing balance of forces on the press market. These changes will occur faster and faster, and the traditional distribution will evolve, as it is indicated by Jan Kania, together with the changing press market, probably towards deep digitization.

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[63] H. Pietrzak *Nowe podmioty w przestrzeni medialnej (New entities in the media space),* Wydawnictwo Uniwersytetu Rzeszowskiego, Rzeszów 2012, p. 164.

[64] L. Olszański *Dziennikarstwo internetow (Online journalism),* Wydawnictwa Akademickie i Profesjonalne, Warsaw 2006, p. 14 et seq.

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