



United Nations
Educational, Scientific and
Cultural Organization

UNESCO
INSTITUTE
for
STATISTICS

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A GUIDEBOOK OF BROADCAST AND NEWSPAPER INDICATORS

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UNESCO

The constitution of the United Nations Educational, Scientific and Cultural Organization (UNESCO) was adopted by 20 countries at the London Conference in November 1945 and entered into effect on 4 November 1946. The Organization currently has 195 Member States and 8 Associate Members.

The main objective of UNESCO is to contribute to peace and security in the world by promoting collaboration among nations through education, science, culture and communication in order to foster universal respect for justice, the rule of law, and the human rights and fundamental freedoms that are affirmed for the peoples of the world, without distinction of race, sex, language or religion, by the Charter of the United Nations.

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The UIS was established in 1999. It was created to improve UNESCO's statistical programme and to develop and deliver the timely, accurate and policy-relevant statistics needed in today's increasingly complex and rapidly changing social, political and economic environments.

The UIS is based in Montreal, Canada.

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Foreword

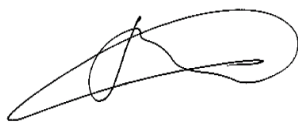
The advancement of knowledge and mutual understanding depends *inter alia* on our capacity to facilitate a free flow of information and enable the development of free, independent and pluralistic media. This is increasingly evident in the context of a world that is striving to reduce poverty, advance social equity and ensure sustainable development, but also a world that is home to increasing numbers of radio and television broadcast channels, social media platforms, Internet availability, and digital and other rapidly converging new technologies that demand policy attention, particularly in the domain of media development.

UNESCO's *Media Development Indicators* defines these indicators in line with the priority areas of the International Programme for the Development of Communication (IPDC): promotion of freedom of expression and media pluralism; development of community media; and human resource development (capacity building of media professionals and institutional capacity building). These indicators have been promoted by UNESCO for integration in national development frameworks. The UNESCO Institute for Statistics (UIS) has used UNESCO's *Media Development Indicators* to develop the new media survey instruments that have been used to carry out two pilot surveys in collaboration with 56 national counterparts in 2011 and 2012.

Building on the results gathered through these pilot surveys, a core set of indicators covering both traditional and new media are presented through the provision of definitions, formulae, purpose, analysis and operational limitations. While not an exhaustive list, these indicators can be easily calculated based on readily available administrative data within most countries. The results will be comparable and will shed light on the factors and trends which are shaping media on the global and national levels.

As a contribution towards addressing the lack of cross-nationally comparable data in this field at the present time, this guidebook is a valuable tool for media professionals, policymakers and researchers. With time, this guidebook will be adapted to reflect revisions made to the UIS media questionnaire in an effort to better capture data in different contexts. We acknowledge that assessing media development across countries cannot be achieved only with quantitative data. Nevertheless, this guide of indicators is an additional item to the tools designed by UNESCO to assist national actors to monitor and evaluate media development, facilitate planning and strengthen actions that can, in turn, lead to the attainment of professional and pluralistic media landscapes.

"Media have an essential role in the development of the Information Society and are recognized as an important contributor to freedom of expression and plurality of information" (WSIS, 2003).



Hendrik van der Pol
Director
UNESCO Institute of Statistics



Guy Berger
Director, Freedom for Expression and Media Development
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Abbreviations and acronyms

BMO	Broadcast media organization
HHI	Herfindahl-Hirschman Index
ICT	Information and communications technology
IPDC	International Programme for the Development of Communication
LAMP	Literacy Assessment and Monitoring Programme
MDI	Media Development Indicators
M&E	Monitoring and evaluation
PSB	Public service broadcasting
UNESCO	United Nations Educational, Scientific and Cultural Organization
UIS	UNESCO Institute for Statistics
WSIS	World Summit on the Information Society

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This guide was prepared by Georges Boade, under the initial supervision of Claude Akpabie, and later under the supervision of Martin Schaaper.

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Executive summary

This guidebook has been developed for use by professionals, policymakers and the research community involved in media development around the world. Its development was based on the UIS questionnaires on media statistics (*see Appendices II, III and IV*). This guide is not intended to provide a full set of monitoring and evaluation indicators, but rather a limited number of indicators that can easily be calculated based on administrative data available within most countries. For this reason, this tool is flexible, open to changes and can be adapted to the context of a given country. Over time, the guidebook will be updated according to changes to the questionnaire and data requirements.

Qualitative indicators that may emerge from the regulatory framework questionnaire are not a concern of this guide; the guide is more quantitative in nature rather than constituting a qualitative assessment tool that is required for the in-depth analysis of laws and regulations. At the time of publication (May 2013), 54 country profiles have been published on the UIS website and further countries may be added in the future. The profiles present national regulations and data on broadcast and print media.

1. Background and context

In 1945, the Constitution of UNESCO established the Organization's responsibility to advance mutual understanding among people through all means of mass communication, including the promotion of the free flow of ideas by word and image. The Windhoek Declaration (1991), and the subsequent regional declarations adopted in Almaty (1992), Santiago (1994), Sana'a (1996) and Sofia (1997), also proclaimed the commitment of UNESCO Member States to the strengthening of free, independent and pluralistic media.

The Millennium Declaration (2000) and the two World Summits on the Information Society (Geneva, 2003 and Tunis, 2005), reinforced international agreement to respect policy principles, including freedom of expression and the free flow of information, ideas and knowledge, which are essential for the growth of the information society and beneficial to development.¹

The emerging demand for indicators to measure media development arises from several sources. One is the perspective in which, traditionally, the role of the media has been regarded as central to improving human rights. This also links to freedom of expression as it was recognised as a core component of the 1948 United Nations Universal Declaration of Human Rights: "Everyone has the right to freedom of opinion and expression; this right includes freedom to hold opinions without interference and to seek, receive and impart information and ideas through any media and regardless of frontiers." The mass media are crucial to freedom of expression as they provide the public platform through which this right is effectively exercised within any community, and they can help to enable the fulfilment of other rights as well. Many stakeholder groups in human rights have an interest in media development indicators.

The idea of the mass media as a platform for democratic debate embraces a wide variety of overlapping functions (Gunther and Mughan, 2000). Principally, the media can be seen as a watchdog, agenda setter and gatekeeper in the coverage of politics and elections (Norris, 2009). Media outlets are channels through which citizens can communicate with each other, acting as a facilitator for informed debate between diverse social actors and encouraging the non-violent resolution of disputes. The media disseminate stories, ideas and information and act as a balance on the "natural asymmetry of information" between governors and governed and between competing private agents.

A second source of interest in measuring media development is in the wider development community. The Paris Declaration, endorsed on 2 March 2005, is an international agreement to which over 100 ministers, heads of agencies and other senior officials committed their countries and organizations to increase efforts in harmonisation, alignment and management of aid. To improve results, they called for a set of actions and indicators that could be monitored.² This agreement contributed towards the growing need for donors, practitioners and international agencies to assess and measure the impact and effectiveness of work on media development. In parallel, the Paris Declaration contributed towards a growing consensus that country ownership of development programmes was essential and that direct budget support was the most appropriate means of achieving this. However, this agreement also emphasised that aid delivered in this way can only be effective if public funds are used efficiently and transparently by recipient governments. In this process, the media are central to promoting greater openness and accountability.

¹ <http://www.itu.int/wsis/>

² http://www.oecd.org/document/18/0,3343,en_2649_3236398_35401554_1_1_1_1,00.html

To these arguments can be added the fact that, in working towards the broader goals of human development, the availability of information is critical for enhancing decisionmaking and economic efficiency. New information and communication technologies (ICTs), in particular, operating in an environment of freedom of expression, have facilitated unprecedented innovation, information sharing and knowledge management. Recent years have seen a growing emphasis on the role of the media in strengthening the most effective distribution of development aid, for example by highlighting social needs in complex humanitarian disasters and calling international attention to emergency relief (James, 2006; Besley and Burgess, 2002). Journalists and reporters can contribute to the strengthening of good governance by promoting government transparency and public scrutiny of those with power, and by exposing corruption, maladministration and corporate wrongdoing. The media can also serve as a national forum, a means by which a society can learn about itself and build a sense of community, and shared values. Media can be a vehicle for expression of both cultural diversity and cultural cohesion.

The media may potentially fulfil any or all of these democratic and development-related functions or none of them. In some contexts, the media may reinforce the power of vested interests and exacerbate social inequalities by excluding critical or marginalised voices. In more established democracies, the role of the media has come under growing criticism from those who believe that some journalistic practices are undermining democracy by the trivial, antagonistic and personalised nature of their coverage. At their most extreme, the media can also reinforce social conflict and divisiveness, particularly in a pluralistic society (Wolfsfeld, 2004).

Given these important roles, what standards do we need to deliver effective media development? Debate continues about the best way to strengthen the performance of the mass media for the public interest (McQuail, 2009). In the past, many liberal advocates have argued for minimal state interference in the media as the necessary condition for an environment that can support democracy. Others have argued that the construction of a modern media environment capable of supporting democracy and good governance requires a more proactive role by the state by providing infrastructure, funding public and community broadcasting, and ensuring the most appropriate regulatory environment. Norris and Zinnbauer (2002) argue that independent journalism, as a potential check on the abuse of power, is a necessary but not sufficient means of strengthening good governance and promoting human development. They suggest that these goals are achieved most effectively under two further conditions: first, in societies where channels of mass communications are independent of established interests, and second, where there is widespread public access to these media. For its part, the Windhoek Declaration (endorsed by UNESCO in 1991) highlighted the importance of media freedom laws, pluralism in ownership and content, and professional independence as three key conditions for the media's optimum role. These insights have all informed UNESCO's work in developing a comprehensive instrument for measuring media development.

It is on this broader basis that in March 2008, the Council of the UNESCO-managed Intergovernmental Programme for the Development of Communication (IPDC) endorsed the Framework on Media Development Indicators (MDIs) (UNESCO, 2008). This instrument, which goes beyond quantitative data, had been applied in more than a dozen countries by May 2013 to identify development gaps that different stakeholders could address in these national contexts. The MDIs measure five pillars of media development (regulation of press freedom, regulations of economic structure, democratic performance by the media, capacity in the media and infrastructure). Unlike the UIS indicators, the MDI studies are not designed for cross-

national comparisons. They are intended for internal mapping of gaps and measurement of progress in regard to such gaps. More details follow in Section 3.

To meet emerging and growing demands for information which can both complement and contribute to the MDIs, the UNESCO Institute for Statistics (UIS) undertook a thorough evaluation of its existing media survey instruments on broadcast and newspaper statistics. Two Expert Group Meetings (Delhi and San José, 2009) were convened by the UIS in coordination with the UNESCO HQ Division for Communication Development³. This process identified a comprehensive list of policy-relevant and feasible data items for inclusion in a revised UIS media survey instrument, including a glossary of key terms and concepts. As a result of these meetings, a new UIS survey instrument on media statistics was developed as well as this *Guidebook of Indicators*.

The process of aligning the UIS instruments with the MDI framework is an on-going challenge. The existing UIS media statistics questionnaires are designed to collect quantitative data about broadcasting and newspapers, as well as more qualitative assessments on media regulations in each country. This enterprise contributes towards verifying many core indicators in the MDI framework.

2. Why a guidebook of indicators for media development?

Media development refers to the development of both the media-related infrastructure and the human resources whose performance can support and sustain a media and information literate society. It builds and maintains a media environment that supports traditional and new media, open information systems and freedom of expression.⁴

This guidebook describes a set of baseline indicators that should be considered as part of monitoring and evaluation (M&E) of a country's media development. Countries can collect specific disaggregated data at the media organization level, and conduct sample-based surveys such as audience and readership surveys, and then disseminate relevant data to the regulatory authorities, media and civil society in order to support the decisionmaking processes of these constituencies.

The target audiences for this guidebook are:

- national authorities;
- media professionals;
- development partners; and
- researchers and users of media data.

The aim of the guidelines is to share with readers how to interpret indicators and use data derived from the UIS media statistics questionnaire and published in the UIS Data Centre.⁵

³ Now part of the Division for Freedom of Expression and Media Development.

⁴ http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/unesco_mil_indicators_background_document_2011_final_en.pdf

⁵ <http://stats.uis.unesco.org/>

3. The UNESCO Media Development Indicators framework

The aim of the wider UNESCO MDI framework⁶ is to provide stakeholders involved in media development with a tool for:

- ✓ assessing the state of the media in a given national context;
- ✓ providing recommendations to national stakeholders and guide the formulation of media-related policies;
- ✓ monitoring and impact evaluation of media development programmes; and
- ✓ guiding media development assistance efforts.

The MDI framework is structured around five categories, each addressing a number of issues. The framework provides a range of indicators that help assess the state of media development and the means of verification in a country, with a focus on specific issues. The five media development categories as stated in the MDI framework are:

Category 1: A system of regulation conducive to freedom of expression, pluralism and diversity of the media. Existence of a legal, policy and regulatory framework which protects and promotes freedom of expression and information, based on international best practice standards and developed in participation with civil society.

Category 2: Plurality and diversity of media, a level economic playing field and transparency of ownership. The state actively promotes the development of the media sector in a manner which prevents undue concentration and ensures plurality and transparency of ownership and content across public, private and community media.

Category 3: Media as a platform for democratic discourse. The media, within a prevailing climate of self-regulation and respect for the journalistic profession, reflects and represents the diversity of views and interests in society, including those of marginalised groups. There is a high level of information and media literacy.

Category 4: Professional capacity building and support for institutions that underpins freedom of expression, pluralism and diversity. Media workers have access to professional training and development, both vocational and academic, at all stages of their career, and the media sector as a whole is both monitored and supported by professional associations and civil society organizations.

Category 5: Infrastructural capacity is sufficient to support independent and pluralistic media. The media sector is characterised by high or rising levels of public access, including among marginalised groups, and the efficient use of technology to gather and distribute news and information, appropriate to the local context.

The UIS instrument contributes information of relevance to Categories 1, 2, 3 and 5 (see *Section 6*).

⁶ <http://www.unesco.org/new/en/communication-and-information/media-development-indicators-a-framework-for-assessing-media-development/>

4. Monitoring and evaluation of media regulations

Measuring media development is premised on monitoring relevant indicators, and the potential to evaluate these indicators depends on their scope and purpose.

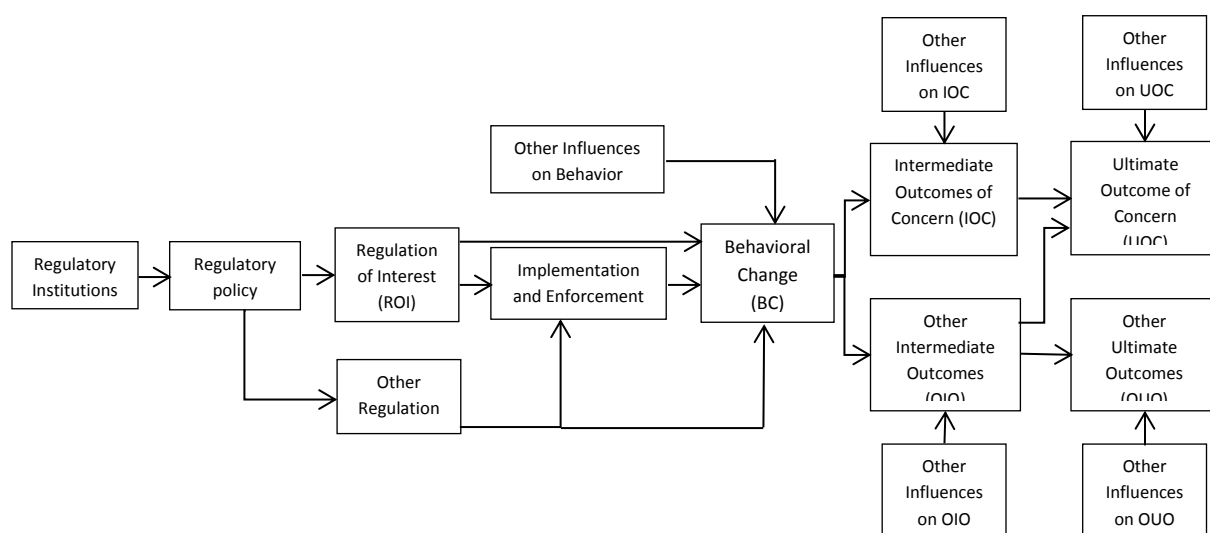
One aim of an evaluation can be to determine the extent to which a regulation or a policy has met or is meeting its objectives. Several evaluation methodologies from quantitative to qualitative or a combination of both have been used in the literature (Rossi, 2004). The effects of the regulations on the desired outcome may need to be evaluated. An example is a media ownership regulation that aims to avoid undue concentration of media among a small number of operators, and to promote pluralist media. In this situation, any allocation of a new additional broadcast licence to a broadcast media organization (BMO) can be based, among other parameters, on the current audience and market share of that organization in a given market area. To evaluate the impact of such ownership regulation, high quality data and indicators are needed, such as:

- ✓ the number of BMOs, the number of channels per BMO, the audience and market share for each channel and BMO, as quantitative indicators for media ownership concentration,
- ✓ information on the owners of BMOs, including their gender, the editorial lines of channels and the gender of the chief editorialists, the main orientation of channels (generalist or thematic) as qualitative indicators for pluralism and diversity.

UIS pilot surveys have shown that in most developing countries there is usually no institutionalised monitoring or evaluation mechanism for media industries. As an immediate consequence, systematic baseline data such as the number of broadcast channels in service (as distinct from the number of licences), or the number of daily newspaper titles, is minimal. Yet, there are regulations designed and implemented by the regulatory authorities that need to be evaluated, based on specific indicators that point beyond the existing administrative records, such as the audience or readership share. Such data is only feasible to collect by means of conducting sound sample surveys. Budgetary issues naturally come into play in these circumstances.

Figure 1 illustrates the conceptual map for the evaluation of a regulation, assuming that it has been fully implemented (among other regulations within the industry and the macro environment). Other regulations can have a positive or negative effect on the outcomes of a specific regulation; the difficulty is in isolating the effects that are attributable solely to the regulation of interest.

Figure 1. A causal map of regulation and its effects (OECD, 2012)



Source: OECD, 2012. http://www.oecd.org/gov/regulatorypolicy/1_coglianesse%20web.pdf

5. Limits of UIS media statistics questionnaires and the need for further development

A large number of indicators suggested in the UNESCO MDI framework are qualitative. The same applies in part to UNESCO's 2012 development of Gender Sensitive Indicators for Media. This is challenging because these types of indicators can open the door to subjective data. Further, some issues such as specific regulatory laws or broadcast programmes call for content analysis which is beyond the scope of this guide.

Nevertheless, qualitative evaluations of the state of media development have been conducted in a number of countries using the MDI framework with the support of the UNESCO Communication and Information Sector. With the UIS regulatory framework questionnaire, it is now also possible to collect uniform quantitative data on a set of regulatory issues, along with a degree of qualitative data. The two approaches can be considered together to provide the researcher with elements of the environment in which the media operate.

It must be acknowledged that the UIS indicators are not exhaustive. Newspaper titles and radio/television channels that are solely available online to national audiences have been excluded due to the current conceptual and operational difficulties of identifying and collecting such data. In addition, the questionnaires do not cover social media such as Twitter and Facebook which have become an important overlapping component of the mass media environment.

Countries adopt different rules or laws to regulate their media industries. The state of media development in a country is influenced by the quality of regulations that have been implemented. The media industry is governed by a number of laws and rules that are enforced by the regulatory authority and other competent authorities. Such rules or laws may include quotas for domestically originated programming, or rules and laws on ownership and cross-media ownership. Channel reach, audience share, market share or the absolute number of media outlets owned by a single media organization are among the criteria used to set the limits of ownership. In some countries, a media organization that already owns a national newspaper title may not be allowed to own a radio or television channel in the same market. These

elements suggest that one aspect of evaluation of the media development landscape is evaluating the effect of specific regulations on the media industry. Information collected by the UIS broadcast, newspaper and regulatory framework questionnaires, and the associated indicators outlined in this report, promise to achieve much in this regard.

Tables 1, 2 and 3 illustrate the mapping of available indicators against each category of MDIs. They readily show that some important issues raised by MDIs are not yet addressed in the UIS questionnaires. Several major challenges listed below deserve further attention in future attempts to provide a comprehensive range of indicators mapping all major dimensions of contemporary media environments.

i) Scope

This guidebook is focused on the specifications of largely quantitative (and to a lesser degree qualitative) indicators that are derived from the media statistics questionnaires. Not all issues highlighted in the MDI framework are covered in the current UIS questionnaire, in part due to the questionnaire's length. An excessively long questionnaire could jeopardise the quality of data collected as a result of the burden to the respondent, the subjective nature of some issues and the complexity of qualitative analysis of laws and regulations. For these reasons, the selection of data to be collected is based on several factors, among them data availability and their relevance to the MDI framework. These data should be considered as a minimal set of items available to countries to develop their media statistics systems and databases, or a minimal M&E baseline data set.

ii) This guidebook contains three sets of indicators distributed across the radio and television broadcast, the newspaper industry and the legal framework.

The indicators proposed here focus on the traditional domestic media environment within each country, defined in terms of radio and television broadcast channels (public, private and community) and newspapers (sub-national and national). Yet it is important to recognise that these traditional mass media, while remaining important, represent only a partial and incomplete mapping of the primary channels of information and communications available through the mass media, social networks and interpersonal forms of communication available to many citizens in contemporary societies.

In future, the issues of media development in the MDI framework should further elaborate on the new information and communication technologies. This includes mobile phones, which are increasingly the principal channels of interpersonal communications in many parts of the world. For example, if there is no inter-operability in telecommunications providers, the ability of the data-ready mobile phone to provide widely available content may be inhibited. The issues identified in the MDI framework highlighting the need for an appropriate system of regulation, pluralism of ownership, diversity of contents, professional capacity building and infrastructure capacity building are all relevant for new ICTs, although they often need rethinking within this context.

iii) Further complex measurement challenges arise from the growth of multi-media platforms.

Focusing on the pluralism and diversity of the radio, television and newspaper sectors provides a limited perspective given the growth of access to complex multi-media platforms connecting diverse informational channels and communication networks. For those with access to the Internet through computers or mobile phone apps, technological developments have transformed the availability of news and information (Pew 2010). Many continue to use

traditional radio and television sets and the printed press as their primary source of news and information. But in societies with growing Internet access, these sources are now increasingly supplemented by the growing popularity of online television and radio news, public affairs and entertainment programmes (such as thousands of Internet radio channels), as well as by online access to newspapers, magazines and other informational websites. A related development has been the popularity of streaming video websites (exemplified by YouTube), coupled with the ubiquity of mobile phones with cameras capable of recording video content, facilitating "citizen journalism". Social network sites (such as Twitter and Facebook) have also become important sources of information and communications directly connecting citizens to one another. These sites provide alternative channels of commentary and distribution where citizens filter, assess, discuss and share news stories. Social networks become particularly useful when disseminating information in complex humanitarian disasters where traditional communication networks have collapsed, such as during the recent earthquakes in Haiti and Chile, or more recently hurricane Sandy in the Americas.

Growing interactivity has also broken down the traditional one-way flow of news and information from the media to consumers. For example, recent years have witnessed the dramatic expansion of online commentary and web blogs uploaded by thousands of independent journalists, civil society activists and ordinary citizens. Census data and household and individual-level surveys monitoring citizen access and use can be used to provide more comprehensive mapping of the media audience. At the same time, the attention to traditional media remains warranted for the reason that this sector remains the primary source of public news and content produced under professional journalistic standards and ethics, even when this content is amplified through, and curated on, many other platforms.

iv) *Lastly, the expansion of cosmopolitan communications across national borders also poses important challenges to studying national media environments* (Norris and Inglehart, 2009).

Many modern forms of communication are typically accessible, irrespective of national borders. They are satellite and cable television channels, as well as the Internet, despite existing barriers such as their limited public access, a lack of technological infrastructure, and state control. Focusing on the domestic media environment within any nation-state represents only a partial and incomplete picture of the total communications environment available to its citizens today.

Despite these limitations, UNESCO has gone a long way towards assessing national media development by creating a framework which lends itself to coherently assessing the broadcasting and newspaper landscape, and by ensuring that most quantitative aspects of these indicators can be verified through the UIS media survey instruments. It is imperative that these tools remain dynamic and in line with experience and the changing environment in order to be used and adapted by practitioners. The challenge remains for UNESCO, and specifically UIS, to continue to adapt the framework and tools in striving towards an accessible and verifiable model for assessing media development in changing global conditions.

Tables 1, 2 and 3 show the correspondence between the indicators covered in this guide and sub-component issues of the MDIs. As explained above, several areas are not covered by the current questionnaires. Many of the issues that are not covered can be treated by additional qualitative assessments and via studies such as those currently conducted at the country level with the assistance of UNESCO. The UIS indicators can be seen as proxies in several cases, in that they do not all measure directly the issue of interest, but coupled with other aspects (qualitative), they have definite relevance.

Table 1. Mapping the UIS broadcast questionnaire and indicators to the MDI framework

MDI framework	Issue of interest	BROADCAST																			
		Proportion of broadcast media organizations by ownership	Proportion of broadcast media organizations by ownership and type of media owned	Proportion of broadcast media organizations by ownership, also owning a newspaper title	Proportion of channels by ownership and type of media	Average number of channels per broadcast media organization, by ownership and media type	Proportion of channels per type of media and technical penetration	Proportion of channels per type of media and transmission signal	Proportion of channels per type of media and technical transmission platform	Proportion of digital channels by type of media and technical transmission platform	Proportion of digital channels by type of media and ownership	Proportion of community channels per type of media and type of community organization	Replacement ratio between newly established and closed channels	Proportion, out of total channels owned by BMOs, owning at least one of the major 4 channels	Audience share of the 4 major channels, by type of media	Audience share of the BMOs owning channels among the 4 major channels	Market share of the BMOs owning channels among the 4 major channels	Herfindahl-Hirschman Index (HHI)			
Indicator 2.1) State takes positive measures to promote pluralist media	Effective regulations to prevent undue ownership concentration and promote plurality	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Licensing process for the allocation of specific frequencies to individual broadcasters promotes diversity of media ownership and programming content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Indicator 2.2) State ensures compliance with measures to promote pluralist media	Regulators allocate digital licenses to a diverse range of commercial and non-commercial operators							<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>										
Indicator 2.3) State actively promotes a diverse mix of public, private and community media	Where broadcasting regulation covers digital broadcasting, public service stations are automatically granted licenses for digital broadcasting										<input checked="" type="checkbox"/>										
Indicator 2.4) Independent and transparent regulatory system	Regulatory system ensures equitable access to the frequency spectrum to a plurality of media, including community broadcasters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Table 1 (cont'd). Mapping the UIS broadcast questionnaire and indicators to the MDI framework

MDI framework	Issue of interest	BROADCAST																
		Proportion of broadcast media organizations by ownership	Proportion of broadcast media organizations by ownership and type of media owned	Proportion of broadcast media organizations by ownership, also owning a newspaper title	Proportion of channels by ownership and type of media	Average number of channels per broadcast media organization, by ownership and media type	Proportion of channels per type of media and technical penetration	Proportion of channels per type of media and transmission signal	Proportion of channels per type of media and technical transmission platform	Proportion of digital channels by type of media and technical transmission platform	Proportion of digital channels by type of media and ownership	Proportion of community channels per type of media and type of community organization	Replacement ratio between newly established and closed channels	Proportion out of total channels owned by BMOs owning at least one of the major 4 channels	Audience share of the 4 major channels, by type of media	Audience share of the BMOs owning channels among the 4 major channels	Market share of the BMOs owning channels among the 4 major channels	Herfindahl-Hirschman Index (HHI)
Indicator 2.5) State and Civil society organizations actively promote development of community media	Specific quotas or targets for the reservation of parts of the radio-frequency spectrum to community broadcasters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>													
	Positive state measures to support community print and broadcast media e.g. preferential pricing, discounted tariffs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>													
Indicator 2.7) State plan for spectrum allocation promotes diversity of ownership and content	Plan ensures that broadcasting frequencies are shared equitably among public, private and community broadcasters and among national, regional and local broadcasters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
Indicator 3.1) The media – publicly funded, private and community-based – serve the needs of all groups in society*	Media use language/s which reflect the linguistic diversity of the target area	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>													
	Media use language/s relied upon by marginalised groups	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>													

Table 1 (cont'd). Mapping the UIS broadcast questionnaire and indicators to the MDI framework

MDI framework	Issue of interest	BROADCAST	Proportion of broadcast media organizations by ownership	Proportion of broadcast media organizations by ownership and type of media owned	Proportion of broadcast media organizations by ownership, also owning a newspaper title	Proportion of channels by ownership and type of media	Average number of channels per broadcast media organization, by ownership and media type	Proportion of channels per type of media and technical penetration	Proportion of channels per type of media and transmission signal	Proportion of channels per type of media and technical transmission platform	Proportion of digital channels by type of media and technical transmission platform	Proportion of digital channels by type of media and ownership	Proportion of community channels per type of media and type of community organization	Replacement ratio between newly established and closed channels	Proportion out of total channels owned by BMOs owning at least one of the major 4 channels	Audience share of the 4 major channels, by type of media	Audience share of the BMOs owning channels among the 4 major channels	Market share of the BMOs owning channels among the 4 major channels	Herfindahl-Hirschman Index (HHI)
Indicator 5.1) Media organizations have access to modern technical facilities for news gathering, production and distribution	Community media are equipped with appropriate technical facilities to reach marginalized communities							<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
	Media organizations make use of multi-platform delivery systems								<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
	Public, private and community media use ICTs to generate citizens' engagement with the media										<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							
Indicator 5.2) Marginalized groups have access to forms of communication they can use	The public broadcaster is technically accessible nation wide							<input checked="" type="checkbox"/>									<input checked="" type="checkbox"/>		
	The state takes positive steps to ensure maximum geographical reach of all broadcasters								<input checked="" type="checkbox"/>										
	Community-based broadcasters or publications have high or growing levels of penetration in their target area								<input checked="" type="checkbox"/>										

Table 2. Mapping the UIS newspaper questionnaire and indicators to the MDI framework

MDI framework	Issue of interest	NEWSPAPER	Proportion of daily and non-daily titles	Proportion of titles per ownership	Proportion of titles per publication format and frequency of publication	Proportion of titles per frequency of publication and geographic coverage	Number of daily titles per million literate inhabitants	Proportion of titles per business model	Average circulation per publication format and frequency of edition	Share of circulation per issue of the 4 major titles	Replacement ratio of titles
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						
Indicator 1.11) The media is not subject to prior censorship as a matter of both law and practice	There are no explicit or concealed restrictions upon access to newsprint, to distribution networks or printing houses		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>						
Indicator 2.1) State takes positive measures to promote pluralist media	Effective regulations to prevent undue ownership concentration and promote plurality			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Table 3. Mapping the UIS legal framework questionnaire and indicators to the MDI framework

MDI framework	Issue of interest	Legal framework questionnaire item
Indicator 1.2) The right to information is guaranteed in law and respected in practice	National law or constitutional guarantee on the right to information	LF17 & 18
	Public is aware of and exercises right to access official information	
Indicator 1.4) Journalists' right to protect their sources is guaranteed in law and respected in practice	Journalists can protect confidentiality of their sources without fear of prosecution or harassment	LF13
Indicator 1.7) Regulatory system works to ensure media pluralism and freedom of expression and information	Regulator has scope to ensure that the broadcasting sector runs in a fair, pluralistic and efficient manner and is empowered by law to promote fairness, freedom of expression, of views and ownership, public service programming and accessibility of broadcasting services to the general public	LF4 & LF12
Indicator 1.8) The state does not place unwarranted legal restrictions on the media	No legal provisions dictating who may practice journalism or requiring the licensing or registration of journalists	LF13
Indicator 1.11) The media is not subject to prior censorship as a matter of both law and practice	There are no explicit or concealed restrictions upon access to newsprint, to distribution networks or printing houses	LF3 & LF11
	Broadcasters and print publications are not required to register with or obtain permission from a public body	
Indicator 2.1) State takes positive measures to promote pluralist media	Effective regulations to prevent undue ownership concentration and promote plurality	LF1, LF3, LF4, LF7, LF9, LF11, LF12, LF15 & LF16
	Specific legislation on cross-ownership within broadcasting and between broadcasting and other media sectors to prevent market dominance	LF15 & LF16
	Regulations recognise the distinction between small and large players in the media market	LF15 & LF17
	Licensing process for the allocation of specific frequencies to individual broadcasters promotes diversity of media ownership and programming content	LF1, LF3, LF4, LF7, LF9, LF11, LF12, LF15 & LF16
	Government actively monitors and evaluates the consequences of media concentration	LF4 & LF12
Indicator 2.3) State actively promotes a diverse mix of public, private and community media	State does not discriminate between public, private and community media in the granting of access to information	LF17 & LF18
Indicator 2.4) Independent and transparent regulatory system	Regulatory system ensures equitable access to the frequency spectrum to a plurality of media, including community broadcasters	LF4
	Decisionmaking processes about the allocation of frequencies between public, private and community broadcasters are open and participatory	LF3 & LF4
	Decisionmaking processes about the allocation of frequencies between public, private and community broadcasters are overseen by a body that is free from political or commercial interference or control by any vested interest	LF3 & LF4
Indicator 2.5) State and CSOs actively promote development of community media	Specific quotas or targets for the reservation of parts of the radio-frequency spectrum to community broadcasters	LF7
Indicator 2.8) Independent and transparent regulatory system	Broadcast licensing processes and decisions are overseen by an independent regulatory authority, which meets international standards	LF3

Table 3 (cont'd). Mapping the UIS legal framework questionnaire and indicators to the MDI framework

MDI framework	Issue of interest	Legal framework questionnaire item and observation
Indicator 3.1) The media – publicly funded, private and community-based – serve the needs of all groups in society	Media use language/s which reflect the linguistic diversity of the target area	LF7 & 14
	Community media (print or broadcast) is produced for specific groups e.g. indigenous and tribal peoples, refugees	
Indicator 3.3) The goals of public service broadcasting (PSB) are legally defined and guaranteed	The PSB has specific guarantees on editorial independence and appropriate and secure funding arrangements to protect it from arbitrary interference	LF5
	The PSB is publicly accountable, through its governing body	
Indicator 3.5) Independent and transparent system of governance	The PSB is overseen by an independent governing body whose autonomy is legally guaranteed	LF5
Indicator 3.7) Print and broadcast media have effective mechanisms of self-regulation	Media organizations have clear codes of ethics, and sound editorial guidelines	LF2 & LF10
	At the industry level, systems exist for hearing public complaints about alleged violations of ethical standards	LF2, LF4, LF10 & LF12
Indicator 3.9) Effective broadcasting code setting out requirements for fairness, balance and impartiality	Regulation to ensure respect for the principles of fairness, balance and impartiality during elections e.g. allocation of air time to candidates, reporting of opinion polls, quotas for political advertising, party election broadcasts, prevention of undue coverage to public authorities as prescribed in the national electoral code	LF4 & 12
Indicator 3.10) Effective enforcement of broadcasting code	Proper system for dealing with public complaints	LF2, LF4, LF10 & LF12
Indicator 3.14) Media practice is not harmed by a climate of insecurity	Confidentiality of sources is protected in law and respected in practice	LF13
Indicator 5.3) The country has a coherent ICT policy which aims to meet the information needs of marginalised communities	Existence of a digital migration policy and strategy	LF8

The following section of these guidelines is devoted to specifying a set of quantitative indicators derived from the UIS 2012 questionnaires on broadcast and newspaper statistics. These indicators should be interpreted together with contextual information, some of which is collected through the legal framework questionnaire, which focuses on selected regulation issues. There are two sets of indicators; the first set is related to the broadcast industry, while the second refers to the newspaper industry.

Within each indicator, the following elements are discussed:

- ✓ definition;
- ✓ purpose;
- ✓ data requirement;
- ✓ method of data collection;
- ✓ data sources;
- ✓ computation formula;
- ✓ analysis and interpretation;
- ✓ methodological and definitional issues and/or operational limitations.

For those indicators that can be disaggregated in several ways, additional indicators are listed together with their computational formula. In the broadcast section, the indicators are organized into three subsets: broadcast media organizations, broadcast channels, and the characteristics of the four major radio and television channels. In the newspaper section, the indicators refer to the total number of domestic titles and the characteristics of the four major dailies.

The legal framework questionnaire collects data on a selection of qualitative regulatory issues, focusing on the responsibilities of the regulatory authorities for media, the accountability of the public broadcaster, the required entitlements to operate a media, the practice of journalism and media ownership rules and laws. All these issues may need analysis of the laws and regulations that affect them, sample observations and factual data. For example, the existence of ownership rules or laws is initial information that needs to be further analysed to investigate the nature of the rules and the variables or criteria that are important.

6. Legal framework

The legal framework for media is made up of laws and rules that govern the media industry in each country. Across countries, several actors play greater or lesser roles in the development of laws and regulations, the right to operate a media or the development of the communication infrastructure.

The UIS questionnaire on the legal framework (see Appendix II) collects qualitative data, with most questions requiring a yes/no answer. It focuses on several issues related to the laws and rules, the responsibilities of the regulatory and self-regulatory authorities, and the accountability of the public broadcaster in three areas: editorial line, appointment of members and finance.

Except for the item on the prescribed quotas for domestically produced content in private and foreign broadcast channels, all other items refer mainly to a list of documents that need content analysis, which is beyond the scope of this document. However, the value of these baseline data is the contextualisation of the quantitative data and derived indicators that are collected through the broadcast and newspaper statistics questionnaires (see Appendices III and IV).

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Appendix I. Indicator specifications

Radio and television broadcast

Proportion of broadcast media organizations by type of ownership		
<p>Definition: Number of domestic broadcast media organizations whose ownership type is public, private or community expressed as a percentage of the total number of domestic broadcast media organizations.</p>	<p>Purpose: To measure the presence of broadcast media organizations of a given ownership type</p>	
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of domestic broadcast media organizations by ownership type ▪ Total number of domestic broadcast media organizations (as the sum of broadcast media organizations over public, private and community ownerships) 	<p>Method of collection: Administrative data collection</p>	<p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{BMO_o}{\sum_{o=pu,pr,c} BMO_o} * 100$ <p>where BMO_o is the number of domestic broadcast media organizations in which ownership (o) may take the three values of public (pu), private (pr) and community (c)</p>		
<p>Analysis and interpretation: A percentage which is nil is an indication of the absence of a given media ownership type in the country's media landscape. A high percentage may signal an imbalance of broadcast media ownership type between the given ownership type and the other two ownership types. A percentage of 100 shows that media in the country belong to a single type of ownership.</p>	<p>Methodological and definitional issues or operational limitations: The ultimate goal is to evaluate if there is a diverse mix of public, private and community media. There is no standard reference value with which the proportions are to be compared in order to infer a balance between ownership types. The level of balance could depend on factors such as the country's administrative organization, the size and structure of the population and its linguistic diversity. The proportion of channels per ownership type and their geographic coverage, audience share and technical penetration are among the indicators to consider when evaluating the balance between media ownership types.</p>	
Derived indicators		
<p>Percentage of public broadcast media organizations:</p> $\frac{BMO_{pu}}{\sum_{o=pu,pr,c} BMO_o} * 100$	<p>Percentage of private broadcast media organizations:</p> $\frac{BMO_{pr}}{\sum_{o=pu,pr,c} BMO_o} * 100$	<p>Percentage of community broadcast media organizations:</p> $\frac{BMO_c}{\sum_{o=pu,pr,c} BMO_o} * 100$

Proportion of broadcast media organizations by type of ownership and type of media owned	
<p>Definition: Number of domestic broadcast media organizations of a given ownership type (public, private or community), that own media of a given type (radio, television) expressed as a percentage of the total domestic broadcast media organizations of the targeted ownership type.</p>	<p>Purpose: To measure the types of ownership across radio and television To assess the concentration of broadcast media organizations of a given ownership type in a specific type of media To assess the existence of cross-media ownership under current regulations</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of domestic broadcast media organizations by type of ownership and type of media owned ▪ Total number of domestic broadcast media organizations 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{BMO_{o,t}}{\sum_{t=r,tv,rtv} BMO_{o,t}} * 100$ <p>where $BMO_{o,t}$ is the number of domestic broadcast media organizations whose ownership type (o) may be one of the three values: public (pu), private (pr) or community (c) that own a given media type (t), taking one of the three values of radio only (r), television only (tv) or both radio and television (rtv)</p>	
<p>Analysis and interpretation: Two categories of BMOs are considered for analysis: those owning only radio channels or only television channels, and those owning both radio and television channels. A percentage related to the ownership of radio only or television only which is nil is an indication that current broadcast media organizations of a given ownership type do not own the specific types of media (radio or television), or own both radio and television. If this indicator is simultaneously nil for both categories, then there are no BMOs with the targeted ownership type. A high proportion indicates that broadcast media organizations of the given ownership type are concentrated in a specific type of media. A value of 100 means that current broadcast media organizations of a given ownership type operate only media of a single type, or own both radio and television. If in the latter case the indicator is not nil across private and community ownership, this indicates that cross-media ownership is allowed for the non-public broadcaster.</p>	<p>Methodological and definitional issues or operational limitations: This indicator alone is not enough to measure the media concentration within a given ownership and media type. It should be combined with other indicators such as the audience share for channels and BMOs. In several countries cross-media ownership is only prohibited for private and community broadcasters, while the public broadcaster owns both radio and television channels.</p>

Proportion of broadcast media organizations by ownership also owning a newspaper title	
<p>Definition: Number of broadcast media organizations owning a newspaper, expressed as a percentage of total BMOs of a given ownership type.</p>	<p>Purpose: To measure the existence of cross-media ownership between broadcast and newspaper industries, particularly at the ownership level (public, private and community). This indicator also aims to assess media concentration through cross-media ownership</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ BMOs owning a newspaper by ownership type ▪ BMOs by ownership type 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{BMO_{o,np}}{BMO_o} * 100$ <p>where $BMO_{o,np}$ is the total number of domestic broadcast media organizations of a given ownership type (o), denoted BMO_o, also owning a newspaper (np)</p>	
<p>Analysis and interpretation: A value which is nil indicates that there are no BMOs of a given ownership type that also operate newspapers. A value above zero indicates the existence of cross-media ownership between the broadcast and newspaper industry. A value near 100 shows that in the country, the tendency of the media owners is to be present in both media industries. The control of information by a given number of BMOs can also be inferred, based on audience and circulation shares.</p>	<p>Methodological and definitional issues or operational limitations: To evaluate its global influence on the media landscape, or the level of ownership concentration, the shares of channel audiences must be combined with circulation of titles owned by a given BMO.</p>

Proportion of channels by ownership and type of media		
<p>Definition: The number of channels of a given type of media per ownership type, expressed as a percentage of total channels.</p>	<p>Purpose: To measure the extent to which channels of a given type of media are concentrated in a given ownership type To evaluate ownership policies at the aggregate level, particularly allocation of frequencies to the community broadcast media</p>	
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of channels per ownership type and type of media ▪ Total number of channels per type of media 	<p>Method of collection: Administrative data collection</p>	
	<p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>	
<p>Formula:</p> $\frac{N_{o,t}}{\sum_{o=pu,pr,c} N_{o,t}} * 100$ <p>where $N_{o,t}$ is the number of channels of media type t (radio or television) with ownership o (public, private, community)</p>		
<p>Analysis and interpretation: One can consider simultaneously the proportion of a given type of media across the three ownership categories. A value nil of this indicator across types of media for a given ownership type means the total absence of the targeted ownership type on the media landscape. In this case, specific policies or regulations may be needed to encourage the presence of the missing types of media. A high value indicates ownership concentration of a given type of media in a given sector.</p>	<p>Methodological and definitional issues or operational limitations: There are no reference values to compare the balance of channels across the three ownership categories. To evaluate media concentration additional indices are to be combined, such as the Herfindahl-Hirschman Index (HHI) which is calculated based on the market share of the BMOs. Ownership policies should avoid undue concentration of media in a few individuals or families. The evaluation of such policies is feasible with disaggregated data at the owners' level, in combination with the channel audience and market share.</p>	
Derived indicators		
<p>Percentage of public radio channels:</p> $\frac{N_{pu,r}}{\sum_{o=pu,pr,c} N_{o,r}} * 100$	<p>Percentage of private radio channels:</p> $\frac{N_{pr,r}}{\sum_{o=pu,pr,c} N_{o,r}} * 100$	<p>Percentage of community radio channels:</p> $\frac{N_{c,r}}{\sum_{o=pu,pr,c} N_{o,r}} * 100$
<p>Percentage of public television channels:</p> $\frac{N_{pu,tv}}{\sum_{o=pu,pr,c} N_{o,tv}} * 100$	<p>Percentage of private television channels:</p> $\frac{N_{pr,tv}}{\sum_{o=pu,pr,c} N_{o,tv}} * 100$	<p>Percentage of community television channels:</p> $\frac{N_{c,tv}}{\sum_{o=pu,pr,c} N_{o,tv}} * 100$

Average number of channels per broadcast media organization, by ownership and media type	
<p>Definition: The size, in terms of number of channels owned by the average broadcast media organization, for a given ownership (public, private and community).</p>	<p>Purpose: To evaluate the size of an average BMO based on the total number of channels owned. To assess the effectiveness of ownership rules based on number of channels owned where they do exist</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number channels per ownership and type of media ▪ Number of BMOs per ownership and type of media owned 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{N_{o,t}}{BMO_{o,t}}$ <p>where $N_{o,t}$ is the number of channels with media type t (radio, television) and ownership o (public, private, community)</p>	
<p>Analysis and interpretation: Where this indicator is nil, there is no channel (radio or television) of the target ownership (public, private or community). A value below 1 is an indication that a channel can be operated by several BMOs. This is the case for community radio channels in some countries. A value of 1 may imply that ownership is limited to a single channel, but this must be validated by means of the regulations. A low value above 1 indicates that ownership rules exist. Referral to the regulatory framework is required to identify the criteria that are applied. A high value may indicate the absence of, or flexible, ownership rules. In this context, monitoring the distribution of audience and market share becomes an important function for the regulatory authority, to avoid undue concentration and control of information by a small group of operators.</p>	<p>Methodological and definitional issues or operational limitations: This indicator gives an indication of potential ownership concentration in the country. Based on regulations, several other parameters should be considered. For example, where audience or market share at the BMO level is one of the ownership rules, these figures need to be combined with the number of channels to provide the right status for the application of ownership rules.</p>

Proportion of channels per type of media and technical penetration	
<p>Definition: Number of channels covering a given range of households expressed as a percentage of the total.</p>	<p>Purpose: To measure the potential audience of channels, and to infer the geographic coverage of channels (national, sub-national) of a given ownership</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of channels per type of media and per technical penetration ▪ Number of channels per ownership and technical penetration 	<p>Method of collection: Administrative data collection and audience studies</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{N_{t,p}}{N_t} * 100$ <p>where</p> <p>$N_{t,p}$ is the number of channels with media type t (radio or TV) with a given technical penetration (p), coded as follows:</p> $\begin{cases} 3 = \text{above 75\% of households} \\ 2 = \text{between 25\% and 75\% of households} \\ 1 = \text{below 25\% of households} \end{cases}$ <p>N_t is the total number of channels of type t (radio or TV)</p>	
<p>Analysis and interpretation:</p> <p>The proportions of channels per type of media (radio or television) across the three technical penetration ranges are to be considered together for interpretation.</p> <p>At the national level, a high proportion of channels with technical penetration above 75% of households shows that most channels are available for the entire population, and the opportunities for obtaining information are the same on average across the country. The public broadcaster particularly has the mission to serve the national population, and should belong to this category.</p> <p>If a high percentage of channels have a technical penetration below 75% of households this means that most of the available channels are local or regional and that the population does not have the same opportunities to obtain information. In general, this is expected to be the case for community channels, or private channels that promote local news and target a specific market. This can also be an indication of limited technological or financial capacity to enable the expansion of channels across the country. To appreciate the plurality of voices or the diversity of available media, parameters such as owners' identity and programme content should be considered.</p>	<p>Methodological and definitional issues or operational limitations:</p> <p>While this measure provides information on the potential audience of channels, it does not provide any information on the number of channels available to particular segments of the population. Even in countries with channels offering high levels of technical penetration, there may be areas of the country with limited access to specific media. Determining the fraction of the population with limited access to any media would require household surveys and geographic information systems.</p>

Proportion of channels per type of media and transmission signal	
<p>Definition: Number of channels, which use a given transmission signal to broadcast content to the audience, expressed as a percentage.</p>	<p>Purpose: To measure the expansion of digital technology in the broadcast industry To verify the migration from analogue to digital technology over time</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of channels per type of media and transmission signal ▪ Number of channels per ownership and transmission signal 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{N_{t,s}}{N_t} * 100$ <p>where $N_{t,s}$ is the number of channels of type of media t (radio or TV), of which the transmission signal (s) is analogue only (a), digital only (d), or both analogue and digital ($a-d$)</p>	
<p>Analysis and interpretation: At the national level, a high proportion in the analogue category is an indication that the country is behind in terms of digital migration. One can refer to the existing deadline for digital migration to evaluate if the calendar is respected or will be respected. Potentially, specific policies need to be elaborated and implemented that take into consideration the capabilities of households to own digital equipment. This is an issue in developing countries where a majority of individuals, in rural areas in particular, have not always the financial resources to acquire new equipment. At the ownership level, the proportions of analogue signal should be compared with those in the other ownership categories. A dominating high proportion in a given ownership may infer limited capacities to follow the digital technology.</p>	<p>Methodological and definitional issues or operational limitations: Care must be taken in interpreting the fraction of channels that are both analogue and digital. This may be indicative of a situation where the infrastructure is being upgraded to full digital distribution or a situation in which the majority of the content is distributed digitally yet certain distributors convert the channels to an analogue format to increase the availability to viewers lacking digital equipment.</p>

Percentage of channels per type of media and technical transmission platform	
<p>Definition: Number of channels which use a given transmission platform to reach its audience, expressed as a percentage.</p>	<p>Purpose: To identify the most used platform, at the national level and per ownership</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of channels per type of media and technical transmission platform ▪ Number of channels per ownership and technical transmission platform 	<p>Method of collection: Administrative data collection</p>
	<p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{N_{t,f}}{N_t} * 100$ <p>where $N_{t,f}$ is the number of channels of type t (radio or TV) of which the technical transmission platform (f) is: terrestrial only=1, cable only=2, satellite only=3, combined=4</p>	
<p>Analysis and interpretation: At the national and ownership levels, proportions related to each platform type should be considered together for interpretation. The predominance of a given platform will be observed where the proportion is high compared to the others, while its absence will be identified by a nil value in the proportion.</p>	<p>Methodological and definitional issues or operational limitations:</p>

Proportion of digital channels by type of media and ownership		
Definition: Number of digital channels (including both analogue and digital) out of the total channels of a given ownership, expressed as a percentage.		Purpose: To assess the allocation of digital licenses to a diverse range of commercial and non-commercial operators
Data requirement: <ul style="list-style-type: none"> ▪ Number of channels per type of media and ownership ▪ Number of digital channels per type of media and ownership 		Method of collection: Administrative data collection Data source(s): Ministry in charge of media, regulatory authorities, national statistical office
Formula: $\frac{N_{t,d,o}}{N_{t,o}} * 100$ <p>Where: d = digital $N_{t,d,o}$ is the number of digital channels of type t with ownership o $N_{t,o}$ is the total number of channels of type t with ownership o</p>		
Analysis and interpretation: A proportion of 100 means that all the channels of a given ownership are digital, while a proportion of zero means that none of the channels of the given ownership is digital.		Methodological and definitional issues or operational limitations: Where the infrastructure is being upgraded to full digital distribution or there is a situation in which the majority of the content is distributed digitally yet certain distributors may convert to an analogue format for their systems or to increase the availability to viewers lacking digital equipment.
Derived indicators		
Proportion of digital radio channels of which ownership is:		
Public:	Private:	Community:
$\frac{N_{r,d,pu}}{N_{r,pu}} * 100$	$\frac{N_{r,d,pr}}{N_{r,pr}} * 100$	$\frac{N_{r,d,c}}{N_{r,c}} * 100$
Proportion of digital television channels of which ownership is		
Public:	Private:	Community:
$\frac{N_{tv,d,pu}}{N_{tv,pu}} * 100$	$\frac{N_{tv,d,pr}}{N_{tv,pr}} * 100$	$\frac{N_{tv,d,c}}{N_{tv,c}} * 100$

Proportion of digital channels by type of media and technical transmission platform	
<p>Definition: Number of digital channels, which use a given transmission platform to reach their audience, expressed as a percentage.</p>	<p>Purpose: To identify the most used platforms between terrestrial, cable, satellite or combined platforms by available digital channels</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of digital channels per type of media and technical transmission platform ▪ Number of digital channels per ownership and technical transmission platform 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{N_{t,s,f}}{N_{t,s}} * 100$ <p>where $s = d = \text{digital}$, and f is the technical transmission platform that takes values 1 to 4:</p> $f = \begin{cases} 1 = \text{terrestrial only} \\ 2 = \text{cable only} \\ 3 = \text{satellite only} \\ 4 = \text{combined} \end{cases}$	
<p>Analysis and interpretation: At the national and ownership levels, proportions related to each platform type should be considered together for interpretation. The predominance of a given platform will be observed where the proportion is high compared to the others, while its absence will be identified by a nil value in the proportion. This indicator can be obtained at the ownership level.</p>	<p>Methodological and definitional issues or operational limitations:</p>

Proportion of community channels per type of media and type of community organization			
Definition: Number of channels per type of community organization, expressed as a percentage of total community channels per type of media.		Purpose: This indicator provides an assessment of presence in the media landscape of the different categories of community organizations	
Data requirement: <ul style="list-style-type: none"> ▪ Total number of community channels ▪ Number of channels per type of community organization 		Method of collection: Administrative data collection	
		Data source(s): Ministry in charge of media, regulatory authorities, national statistical office	
Formula: $\frac{N_{c,t,co}}{N_{c,t}} * 100$ <p>where $N_{c,t,co}$ is the number of community channels of type t (radio, TV) that are owned by community organizations of type, co =</p> $\left\{ \begin{array}{l} 1 = \text{community associations} \\ 2 = \text{educational institutions} \\ 3 = \text{religious institutions} \\ 4 = \text{other institutions} \end{array} \right.$			
Analysis and interpretation: For a given type of community organization, a value of zero indicates its absence in the media landscape of the given type. A value of 100 indicates a concentration of community channels only in a given media organization type. Specific policies may be needed to favour the emergence of the other types of community organizations.		Methodological and definitional issues or operational limitations: There is no reference value to compare this indicator to, which can infer a balanced distribution of community channels across the types of organizations.	
Derived indicators			
Proportion of community radio channels owned by:			
Community associations:	Educational institutions:	Religious institutions:	Other institutions:
$\frac{N_{c,r,1}}{N_{c,r}} * 100$	$\frac{N_{c,r,2}}{N_{c,r}} * 100$	$\frac{N_{c,r,3}}{N_{c,r}} * 100$	$\frac{N_{c,r,4}}{N_{c,r}} * 100$
Proportion of community TV channels owned by:			
Community associations:	Educational institutions:	Religious institutions:	Other institutions:
$\frac{N_{c,tv,1}}{N_{c,tv}} * 100$	$\frac{N_{c,tv,2}}{N_{c,tv}} * 100$	$\frac{N_{c,tv,3}}{N_{c,tv}} * 100$	$\frac{N_{c,tv,4}}{N_{c,tv}} * 100$

Replacement ratio between newly established and closed channels	
<p>Definition: The ratio between the newly established channels to those that ceased operations in a given year, per type of media.</p>	<p>Purpose: To assess the viability of channels for a given type of media, by ownership. This ratio indicates a net increase or decrease in the supply of channels per type of media and ownership</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Total number of channels that are newly established per type of media (radio, television) during the reference year ▪ Total number of channels that ceased operations per ownership (public, private, community) and type of media (radio, television) during the reference year 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{N_{o,t,nw}}{N_{o,t,cl}}$ <p>where $N_{o,t,nw}$ is the number of channels per type of media t (radio, TV) with ownership o (public, private, community) which are newly established</p> <p>$N_{o,t,cl} > 0$ is the number of channels per type of media t (radio, TV) with ownership o (public, private, community) which are closed during the reference year</p>	
<p>Analysis and interpretation: A ratio less than 1 indicates that more channels ceased operations than were newly established. It is translated into an absolute decrease of the supply of channels of a given ownership. For example, a ratio of 0.5 indicates that the number of newly established channels was equal to half of the number of channels that ceased operations. A ratio of 1 indicates that in a given reference year the number of newly established channels was the same as those that ceased operations. A ratio above 1 indicates an absolute increase of the supply of channels.</p>	<p>Methodological and definitional issues or operational limitations: Replacement is evaluated just at the level of quantity of channels. This ratio needs to be calculated for each main orientation category and geographic coverage, for each ownership type. Alternative measures should also be considered such as the growth rates, the failure or exit rates and the entry rates. These measures will permit distinguishing between markets that have similar growth rates but within them one market that is relatively static with few new channels and few failed channels from a market where there are many failures but also many new channels developed to replace the failed channels.</p>

Proportion out of total channels, of total channels owned by the 4 major channels' BMOs	
<p>Definition: Number of channels owned by the 4 major channels' BMOs expressed as percentage of total channels of a given type (radio or television).</p>	<p>Purpose: To assess media ownership concentration by the 4 major channels' BMOs, across the broadcast industry To assess the effectiveness of media and cross-media ownership limitations or rules where they exist</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of domestic channels per BMO and media type t (radio or television) 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{\sum_{i=1}^4 N_{i,t}}{N_t} * 100$ <p>where $N_{i,t}$ is the total number of channels of type t (radio or TV) owned by the BMO that operate the i^{th} channel among the major 4 N_t is the total number of domestic channels of type t (radio or TV)</p>	
<p>Analysis and interpretation: To provide a sound interpretation at the broadcast industry level both radio and television channels should be considered. A value of 100 across radio and television indicates perfect control of the media industry by only the BMOs owning the 4 major radio or television channels. This situation can be compared with the existing cross-media ownership regulations. If there are no cross-media ownership limitations or rules, diversity and plurality of voices could be a challenge. A value of zero in a given industry only means that both radio and television industries have different major players. Cross-media ownership may be prohibited in the country, or some ownership rules have prevented the major players from owning additional channels in the other industry. A high value in one broadcast industry and a low value in the other industry may be a result of cross-media ownership rule limitations, which can be verified in the current regulations.</p>	<p>Methodological and definitional issues or operational limitations: This indicator should be combined with audience or market shares of the BMOs owning the 4 major channels.</p>

Derived indicators			
Proportion out of total channels owned by BMOs owning at least one of the 4 major radio channels:		Proportion out of total channels owned by BMOs owning at least one of the 4 major television channels:	
4 major radio channels' BMOs	each BMO level with a major radio channel	4 major television channels' BMOs	each BMO level with a major television channel
<p>a) $\frac{\sum_{i=1}^4 N_{i,r}}{N_r} * 100$</p> <p>b) $\frac{\sum_{i=1}^4 N_{tv/i}}{N_{tv}} * 100$</p> <p>$N_{tv/i}$ is the number of TV channels that are owned by the BMO of which one of the radio channels is ranked i^{th} among the 4 major channels</p>	<p>a) $\frac{N_{i,r}}{N_r} * 100$</p> <p>b) $\frac{N_{tv/i}}{N_{tv}} * 100$</p> <p>$i = 1, 2, 3, 4$</p>	<p>a) $\frac{\sum_{i=1}^4 N_{i,tv}}{N_{tv}} * 100$</p> <p>b) $\frac{\sum_{i=1}^4 N_{r/i}}{N_r} * 100$</p> <p>$N_{r/i}$ is the number of radio channels that are owned by the BMO of which one of TV channels is ranked i^{th} among the 4 major channels</p>	<p>a) $\frac{N_{i,tv}}{N_{tv}} * 100$</p> <p>b) $\frac{N_{r/i}}{N_r} * 100$</p> <p>$i = 1, 2, 3, 4$</p>

Audience share of the 4 major channels, by type of media	
<p>Definition: The sum of audience shares across the channels that are ranked among the 4 major channels.</p>	<p>Purpose: To measure audience concentration and, indirectly, if the market is controlled by only a few companies To assess the effectiveness of media ownership limitations or rules based on audience share, where BMOs own more than one channel among the 4 major channels</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Audience share per domestic channel and media type that are among the 4 major channels 	<p>Method of collection: Administrative data collection Samples survey for audiences</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\sum_{i=1}^4 A_{i,t}$ <p>where $A_{i,t}$ is the audience share of the i^{th} channel with media type t (radio or television)</p>	
<p>Analysis and interpretation: A low share indicates that the audience market is very fragmented, which can also be the result of sub-national channels predominance, or a competitive market. A share close to 100 indicates that the majority of the audience is served by 4 domestic channels. Based on additional parameters such as the size of population and main orientation of the channels, one may infer that there is room for more channels. The regulatory authority should monitor the sector to avoid undue concentration, which could be the result of a corporate merger or demand for new channels by a given BMO already controlling a large domestic audience.</p>	<p>Methodological and definitional issues or operational limitations: This indicator is an initial assessment of media concentration in terms of audience. But it could be the case that all of the smaller channels are controlled by a single BMO or that each smaller channel is controlled by a different BMO. These are two very different concentration levels but this measure cannot distinguish between them. There is no reference value to which this indicator should be compared, in order to infer control or fair competition among BMOs. The audience shares at the BMO level, which own the major four channels and the Herfindahl-Hirschman Index (HHI) can be used as complementary indicators. However, the HHI can only be calculated at the BMO level. It is assumed that audience shares of all BMOs are known or that the BMOs owning the major 4 channels are the biggest in terms of total audience share while the rest of the BMOs would be considered as the 5th BMO of the target market.</p>
Derived indicators	
<p>Audience share of the 4 major radio channels</p> $\sum_{i=1}^4 A_{i,r}$	<p>Audience share of the 4 major TV channels</p> $\sum_{i=1}^4 A_{i,tv}$

Audience share of the BMOs owning the 4 major channels	
<p>Definition: Sum of audience shares across all channels owned by each of the 4 major channels' BMOs, by type of media.</p>	<p>Purpose: To assess the weight and control of audience by the 4 major channels' BMOs, across the type of media To assess the effectiveness of media and cross-media ownership limitations or rules based on audience share, where they exist This indicator can also be calculated at the BMO level.</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Audience share of each channel of media type t (radio or television) which is owned by the specific BMO of which at least one channel is among the 4 major channels 	<p>Method of collection: Administrative data and audience research companies</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\sum_{i=1}^4 \sum_{j=1}^{K_{i,t}} A_{i,j,t}$ <p>where $K_{i,t}$ is the number of channels of type t (radio or TV), owned by BMO_{i}, with the i^{th} channel among the major 4 $A_{i,j,t}$ is the audience share of a given media type t (radio or TV) channel owned by BMO_{i}</p>	
<p>Analysis and interpretation: The best way to appreciate the control of audience at the BMO level or by the 4 major channel owners is to consider this indicator across both radio and television at the same time. This way, one can assess the level of cross-media ownership. Percentages close to 100 for both radio and television audiences show a control of the radio and television audiences by a maximum of 4 BMOs. When owners of the 4 major radio channels are distinct from those of the 4 major television channels, this results in a value of 0 in one of the two derived indicators. One may check if this is due to cross-media ownership limitation rules or laws.</p>	<p>Methodological and definitional issues or operational limitations: Alone, this indicator does not give the full picture, but should be combined by the related indicator which focuses on market share. In addition, a BMO owning one of the 4 major channels may not be the largest BMO. A different BMO may not have a top 4 channel but owns so many small channels that its total audience share is the largest.</p>

Derived indicators	
Audience share of the BMOs owning the 4 major radio channels	Audience share of the BMOs owning the 4 major television channels
<p>a) $\sum_{i=1}^4 \sum_{j=1}^{K_{i,r}} A_{i,j,r}$</p> <p>b) $\sum_{i=1}^4 \sum_{l=0}^{K_{i,tv}} A_{i,l,tv}$</p> <p>where $i=1$ to 4 is one of the 4 major radio channels</p> <p>$K_{i,r}$ is the total number of radio channels owned by BMO_i $A_{ij,r}$ is the audience share of a given radio channel owned by BMO_i $K_{i,tv}$ is the total number of TV channels owned by BMO_i $A_{i,l,tv}$ is the audience share of a given TV channel owned by BMO_i j is the total number of radio channels owned by BMO_i that can take values from one to $K_{i,r}$ l is the total number of television channels owned by BMO_i that can take values from zero to $K_{i,tv}$</p>	<p>a) $\sum_{i=1}^4 \sum_{j=1}^{K_{i,tv}} A_{i,j,tv}$</p> <p>b) $\sum_{i=1}^4 \sum_{l=0}^{K_{i,r}} A_{i,l,r}$</p> <p>where $i=1$ to 4 is one of the 4 major television channels</p> <p>$K_{i,tv}$ is the total number of television channels owned by BMO_i $A_{ij,tv}$ is the audience share of a given television channel owned by BMO_i $K_{i,r}$ is the total number of radio channels owned by BMO_i $A_{il,r}$ is the audience share of a given radio channel owned by BMO_i j is the total number of television channels owned by BMO_i that can take values from one to $K_{i,tv}$ l is the total number of television channels owned by BMO_i that can take values from zero to $K_{i,r}$</p>

Market share of BMOs owning the 4 major channels	
<p>Definition: Sum of market shares across all channels owned by the 4 major channels' BMOs by type of media.</p>	<p>Purpose: To assess the weight and control of the market by the 4 major channels' BMOs across media types To assess the effectiveness of media and cross-media ownership limitations or rules based on market shares where they exist This indicator can also be calculated at the BMO level.</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Market shares of the 4 major channels' BMOs, by type of media 	<p>Method of collection: Administrative data</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office and audience research companies</p>
<p>Formula:</p> $\sum_{i=1}^4 \sum_{j=1}^{K_{i,t}} M_{ij,t}$ <p>where $K_{i,t}$ is the number of channels of type t (radio or TV) owned by BMO_{<i>i</i>}, with the i^{th} channel among the major 4</p> <p>$M_{ij,t}$ is the market share of the a given media type t (radio or TV) channel owned by BMO_{<i>i</i>}</p>	
<p>Analysis and interpretation: The control of broadcast services at the BMO level or at the level of the 4 major owners can be assessed by considering this indicator across both radio and television at the same time. In this way, the radio and television industries can be appreciated together, where cross-media ownership is not prohibited. Percentages close to 100 for both radio and television markets show a control of broadcast service by a maximum of 4 BMOs. When owners of the 4 major radio channels are distinct from 4 major television channels, this results in a value of 0 in either the radio or the television industry-related indicator. Whether this is due to cross-media ownership limitation rules or laws can be verified.</p>	<p>Methodological and definitional issues or operational limitations: This indicator is an initial assessment of media concentration in terms of market share at the BMO level. It could be the case that all of the smaller channels are controlled by a single BMO but this measure cannot inform this specific situation. There is no reference value to which this indicator should be compared, in order to infer control or fair competition among BMOs. The Herfindahl-Hirschman Index (HHI) can be used as complementary indicators. However, the HHI can only be calculated by media type and at the BMO level if audience shares of all BMOs are known or that the BMOs owning the major 4 channels are the biggest in terms of total audience share while the rest of the BMOs would be considered as the 5th BMO of the target market.</p>

Derived indicators	
Market share of BMOs owning the 4 major radio channels	Market share of BMOs owning the 4 major television channels
<p>a) $\sum_{i=1}^4 \sum_{j=1}^{K_{i,r}} M_{ij,r}$</p> <p>b) $\sum_{i=1}^4 \sum_{l=0}^{K_{i,tv}} M_{il,tv}$</p> <p>where <i>i=1 to 4</i> is one of the 4 major radio channels</p> <p><i>K_{i,r}</i> is the total number of radio channels owned by <i>BMO_i</i> <i>M_{ij,r}</i> is the market share of a given radio channel owned by <i>BMO_i</i> <i>K_{i,tv}</i> is the total number of TV channels owned by <i>BMO_i</i> <i>M_{il,tv}</i> is the market share of a given TV channel owned by <i>BMO_i</i> <i>j</i> and <i>l</i> are as previously defined</p>	<p>a) $\sum_{i=1}^4 \sum_{j=1}^{K_{i,tv}} M_{ij,tv}$</p> <p>b) $\sum_{i=1}^4 \sum_{l=0}^{K_{i,r}} M_{il,r}$</p> <p>where <i>i=1 to 4</i> is one of the 4 major television channels</p> <p><i>K_{i,tv}</i> is the total number of television channels owned by <i>BMO_i</i> <i>M_{ij,tv}</i> is the market share of a given television channel owned by <i>BMO_i</i> <i>K_{i,r}</i> is the total number of radio channels owned by <i>BMO_i</i> <i>M_{il,r}</i> is the market share of a given radio channel owned by <i>BMO_i</i> <i>j</i> and <i>l</i> are as previously defined</p>

Herfindahl-Hirschman Index (HHI)	
<p>Definition: The sum of the squares of the market shares across domestic BMOs, per type of media (radio, television).</p>	<p>Purpose: The Herfindahl-Hirschman Index (HHI) is a standard index used for analysing the variation in BMOs' market shares, or the degree of market concentration of a particular industry in a given geographic market.</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Market share of each domestic BMO 	<p>Method of collection: Administrative data collection and audience research companies</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\sum_{i=1}^{N_{bmo,t}} (M_{i,bmo,t})^2$ <p>where $N_{bmo,t}$ is the number of BMOs owning media type t (radio or TV) $M_{i,bmo,t}$ is the market share of the i^{th} BMO owning media type t (radio or TV)</p>	
<p>Analysis and interpretation: The HHI ranges between $1/N_{bmo,t}$ to 10,000. A value of 10,000 means that there is only one domestic BMO in the country, which controls the market. A value of $1/N_{bmo,t}$ indicates equal competition among channels. The HHI is a standard index used by regulatory agencies to make decisions regarding horizontal mergers in a given industry. One needs to compare the HHIs before and post-merger to evaluate the effects of a merger on the level of competition.</p>	<p>Methodological and definitional issues or operational limitations: There are no standard ranges of this indicator. Additional policy criteria may be considered for decisionmaking, particularly for mergers. Generally combined with other criteria, the regulatory agency generally regards markets to be not concentrated when the post-merger HHI is below 1,000; moderately concentrated if it ranges between 1,000 and 1,800; and concentrated if it is above 1,800. While the HHI is used for competitive analysis in some industries, it is inappropriate for use in media industries because one channel is not necessarily a close substitute for another. Analysing competition between differentiated products requires knowing which products are the closest substitutes. For example, if a consumer loses access to a channel carrying sports, they may choose other activities rather than watch a different channel devoted to civic affairs or women's issues.</p>
Derived indicator:	
<p>HHI for radio channels:</p> $HHI_r = \sum_{i=1}^{N_{bmo,r}} (M_{i,bmo,r})^2$	<p>HHI for television channels:</p> $HHI_{tv} = \sum_{i=1}^{N_{bmo,tv}} (M_{i,bmo,tv})^2$

Newspapers

Proportion of daily and non-daily titles	
<p>Definition: Number of titles per frequency of publication daily or non-daily, expressed as percentage of total daily and non-daily titles.</p>	<p>Purpose: To measure the predominance of a given type of newspaper title (daily or non-daily)</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of daily titles ▪ Number of non-daily titles 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\left(\frac{T_f}{T}\right) * 100$ <p>where T_f is the number of titles with publication frequency f daily (d) or non-daily (nd) and $T = T_d + T_{nd}$ is the sum of daily and non-daily titles</p>	
<p>Analysis and interpretation: A percentage of nil indicates that there are no titles with the target publication frequency. A high proportion indicates the predominance of the target publication frequency.</p>	<p>Methodological and definitional issues or operational limitations: There is no benchmark to infer a balanced distribution of titles in both categories. Other parameters should be considered, such as the geographic coverage to capture the newspaper landscape as well as the circulation.</p>
Derived indicators	
<p>Percentage of daily titles:</p> $\left(\frac{T_d}{T}\right) * 100$	<p>Percentage of non-daily titles:</p> $\left(\frac{T_{nd}}{T}\right) * 100$

Proportion of titles per ownership	
<p>Definition: Number of titles per ownership (public, private and community), expressed as a percentage of total daily/non-daily titles.</p>	<p>Purpose: To measure ownership concentration</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of daily titles per ownership ▪ Number of non-daily titles per ownership 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\left(\frac{T_{o,f}}{T_f}\right) * 100$ <p>where: $T_{o,f}$ is the total number of titles available in the country with publication frequency f (daily or non-daily), and ownership o (public, private or community) T_f is the total number of titles available in the country with publication frequency f</p>	
<p>Analysis and interpretation: A proportion of nil indicates that there are no titles with the target ownership. A high proportion indicates the predominance of the target ownership.</p>	<p>Methodological and definitional issues or operational limitations: There is no benchmark to compare ownership proportions. This indicator is not sufficient to measure ownership concentration at the individual or company levels. It should be combined with circulation shares and readership to provide the full weight of a given ownership in the media landscape.</p>
Derived indicators	
<p>Proportion of public dailies:</p> $\left(\frac{T_{pu,d}}{T_d}\right) * 100$	<p>Proportion of public non-dailies:</p> $\left(\frac{T_{pu,nd}}{T_{nd}}\right) * 100$
<p>Proportion of private dailies:</p> $\left(\frac{T_{pr,d}}{T_d}\right) * 100$	<p>Proportion of private non-dailies:</p> $\left(\frac{T_{pr,nd}}{T_{nd}}\right) * 100$
<p>Proportion of community dailies:</p> $\left(\frac{T_{c,d}}{T_d}\right) * 100$	<p>Proportion of community non-dailies:</p> $\left(\frac{T_{c,nd}}{T_{nd}}\right) * 100$

Proportion of titles per publication format and frequency of publication	
<p>Definition: Number of titles, which are either print-only or both print and online, expressed as a percentage of total number of titles of a given publication frequency.</p>	<p>Purpose: To measure ICT penetration in the newspaper industry</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of dailies per publication format ▪ Number of non-dailies per publication format 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{T_{f,p}}{\sum_{p=1}^2 T_{f,p}} * 100$ <p>where $T_{f,p}$ is the title per frequency of edition and publication format f is the frequency: daily (d) or non-daily (nd) p is the publication format: print only (1), both print and online (2)</p>	
<p>Analysis and interpretation: To monitor the evolution of ICT penetration, one needs to consider time series data. Combined with the absolute number of titles, a low and decreasing proportion in time of print-only titles demonstrates a gradual ICT penetration. Otherwise there is stagnation or a decreasing trend, and some explanation may be found in the ICT profile of the country in terms of ICT infrastructure availability, Internet users, etc. A positive correlation with the ICT penetration is expected.</p>	<p>Methodological and definitional issues or operational limitations: There are technical issues in collecting online-only media and, for operational reasons, this category is not included in our current survey. In the same way, it is not always certain if the online version of print titles covers the issues developed in the print version. The content of the online versions compared to the print versions needs to be evaluated.</p>
Derived indicators	
<p>Proportion of daily titles that are both print and online:</p> $\frac{T_{d,2}}{\sum_{p=1}^2 T_{d,p}} * 100$	<p>Proportion of daily titles that are print only:</p> $100 - \left(\frac{T_{d,2}}{\sum_{p=1}^2 T_{d,p}} * 100 \right) = \frac{T_{d,1}}{\sum_{p=1}^2 T_{d,p}} * 100$
<p>Proportion of non-daily titles that are both print and online:</p> $\frac{T_{nd,2}}{\sum_{p=1}^2 T_{nd,p}} * 100$	<p>Proportion of non-daily titles that are print only:</p> $100 - \left(\frac{T_{nd,2}}{\sum_{p=1}^2 T_{nd,p}} * 100 \right) = \frac{T_{nd,1}}{\sum_{p=1}^2 T_{nd,p}} * 100$

Proportion of titles per frequency of publication and geographic coverage	
<p>Definition: Number of titles (daily or non-daily) of which the geographic coverage is national or sub-national, expressed as a percentage of the total titles of a given-frequency of publication.</p>	<p>Purpose: To measure the predominance of newspaper titles in a specific geographic coverage category</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of daily titles per geographic coverage ▪ Number of non-daily titles per geographic coverage 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\left(\frac{T_{f,cv}}{T_f}\right) * 100 = \left(\frac{T_{f,cv}}{T_{f1} + T_{f2}}\right) * 100$ <p>where $T_{f,cv}$ is the total titles of frequency f with geographic coverage cv (national = 1, sub-national=2)</p>	
<p>Analysis and interpretation: A high proportion of sub-national titles means that most of them mainly cover local or regional information or news. This is the case of community titles. On the other hand, some titles may be facing distribution challenges to cover the national territory, even if their potential audience is the entire country.</p>	<p>Methodological and definitional issues or operational limitations: As an aggregate, this indicator does not evaluate the distribution of titles across the regions of a country. It does not show whether they are concentrated in the main cities or not. Additional investigation is required to identify the regions that are better served.</p>

Number of daily titles per million literate inhabitants	
<p>Definition: The number of daily titles, expressed per million literate inhabitants, aged 15 years or older.</p>	<p>Purpose: To measure the supply of dailies, with respect to the population size</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of daily titles ▪ Total adult population ▪ Adult literacy rate 	<p>Method of collection: Administrative data collection</p>
	<p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\left(\frac{T_d}{P_{15+} * Alr} \right) * 10^6 \text{ where } \begin{cases} T_d = \text{total dailies} \\ Alr = \text{adult literacy rate} \\ P_{15+} = \text{adult population aged 15 years or older} \end{cases}$	
<p>Analysis and interpretation: The size of the population is an explanatory factor of the number of titles available in a country. Comparisons across countries are only feasible if the same denominators are considered. A low ratio can indicate room for emerging new dailies. But the main orientation of existing dailies and non-dailies are important elements to consider for identifying the missing newspaper content to be targeted by publishers.</p>	<p>Methodological and definitional issues or operational limitations: This indicator is an aggregate figure which does not consider the distribution of dailies within a country, by assuming that any adult literate inhabitant has access to all available dailies. One needs to consider circulation and readership figures as complementary indicators. Also, this indicator can be calculated at the regional level.</p>

Note:

The United Nations Population Division considers the population aged 15 years or more as adult population. The UNESCO Institute for Statistics (UIS) collects data on adult literacy rates. These data are based on population censuses and sample surveys. According to the UNESCO Resolution of 1958, literacy is defined as the ability to both read and write, with understanding, a simple statement related to one's everyday life. In addition, the UIS is working with a growing number of countries to produce data on literacy skills through the Literacy Assessment and Monitoring Programme (LAMP).

Proportion of titles per business model	
<p>Definition: Number of titles per business model (paid only, free only, both free and paid) expressed as a percentage of total titles (dailies or non-dailies).</p>	<p>Purpose: Initial assessment of the viability of newspaper titles; to assess the dominance of a given business model</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of dailies per business model ▪ Number of non-dailies per business model 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> <p>Proportion of titles per business model (b): $\left(\frac{T_{f,b}}{T_f}\right) * 100$ where $b = \begin{cases} 1 = \text{paid only} \\ 2 = \text{free only} \\ 3 = \text{both free and paid} \end{cases}$</p> <p>and $f = \begin{cases} d = \text{daily} \\ nd = \text{non-daily} \end{cases}$</p>	
<p>Analysis and interpretation: In order to capture all emerging trends, both dailies and non-dailies should be considered together. For example, one conclusion that can be reached is that most dailies are paid only, with light online versions (often only a summary of their contents) that are free, while the free-only titles are mainly non-dailies.</p>	<p>Methodological and definitional issues or operational limitations: It is common that print versions are paid while online versions are free, but the online content should be compared to the print version to validate the model.</p>

Average circulation per publication format and frequency of edition	
<p>Definition: Ratio of total circulation per print only or both print and online daily or non-daily titles to the total number of print only, or both print and online daily titles.</p>	<p>Purpose: To evaluate over time the impact of new technologies on the circulation of print versions of newspaper titles</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of daily titles per publication format ▪ Number of non-daily titles per publication format ▪ Circulation of dailies per publication format ▪ Circulation of non-dailies per publication format 	<p>Method of collection: Administrative data collection and audit bureau of circulation</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{\sum_{i=1}^{T_p} C_{i,p}}{T_p}$ <p>where T_p is the total number of titles with publication format $p= 1$ for print only, and 2 for both print and online. C_i is the circulation per issue of title i</p>	
<p>Analysis and interpretation: Indicators related to print only and print and online titles should be considered together in order to identify any trend. An optional analysis of time series is also recommended. A high circulation per print-only title compared to both print and online shows that even in the presence of ICT the print versions still dominate.</p>	<p>Methodological and definitional issues or operational limitations: Data on circulation need to be audited by an independent body. Without this certification, the figures provided generally refer to printed copies, not those sold. The difference between these data can be significant, implying an important bias in this indicator.</p>

Share of circulation per issue of the 4 major titles	
<p>Definition: Ratio from the total circulation of dailies, of the sum of circulation per issue across the four major dailies, expressed as a percentage.</p>	<p>Purpose: To measure the weight of the four major dailies compared to the other daily titles</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Circulation per issue of the 4 major dailies ▪ Total circulation per issue of all dailies 	<p>Method of collection: Administrative data collection and audit bureau of circulation</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\frac{\sum_{i=1}^4 C_{i,d}}{\sum_{j=1}^{T_d} C_{j,d}}$ <p>where i is the i^{th} major daily. $C_{i,d}$ average circulations per issue of the i^{th} daily title $\sum_{j=1}^{T_d} C_{j,d}$ is the total sum of average circulation per issue across all the daily titles (T_d)</p>	
<p>Analysis and interpretation: A share close to 100 shows that the 4 major dailies dominate the newspaper industry. A share which is low shows that there are many other dailies. It may signal a competitive newspaper market and diversity of information sources.</p>	<p>Methodological and definitional issues or operational limitations: Data on circulation need to be audited by an independent body. Without this certification, the figures generally provided refer to printed copies, not those sold. The difference between these data can be significant, implying an important bias in this indicator. If all or most newspapers are subnational a low number may not represent competition. It may be the case that in each subnational market there is only one newspaper but because there are many subnational markets this number is small.</p>

Replacement ratio of titles	
<p>Definition: The ratio of newly established titles to those that ceased operations, per frequency of publication.</p>	<p>Purpose: To assess the viability of titles by ownership. This ratio indicates a net increase or decrease in the supply of titles, per ownership.</p>
<p>Data requirement:</p> <ul style="list-style-type: none"> ▪ Number of newly established titles ▪ Number of titles that ceased operations 	<p>Method of collection: Administrative data collection</p> <p>Data source(s): Ministry in charge of media, regulatory authorities, national statistical office</p>
<p>Formula:</p> $\left(\frac{T_{nw,f}}{T_{cl,f}} \right)$ <p>where $T_{nw,f}$ is the number of newly established titles with frequency of publication f</p> <p>$T_{cl,f} > 0$ is the number of closed titles with frequency of publication f</p>	
<p>Analysis and interpretation: A ratio less than 1 indicates that more titles ceased operations than were newly established. It is translated into an absolute decrease of the supply of titles related to a given ownership. For example, a ratio of 0.5 indicates that newly established titles are half of the number of titles that ceased operations. A ratio of 1 indicates that, for a reference year, the newly established titles were the same in number as those that ceased operations. A ratio above 1 indicates an absolute increase in the supply of titles.</p>	<p>Methodological and definitional issues or operational limitations: Replacement is evaluated just at the quantity level. This ratio needs to be calculated based on each business model category and geographic coverage, for each ownership type. This measure misses out on the dynamics of an industry that may be useful. Alternative measures should also be considered such as the growth rates, the failure or exit rates, and the entry rates. These will allow distinguishing between markets that have similar growth rates but one is relatively static with few new channels and few failed channels and one which has many failures but also many new channels being developed to replace the failed channels.</p>

Appendix II. Questionnaire on the legal framework for media



UIS/CI/L/2012

Montreal, July 2012

QUESTIONNAIRE ON THE LEGAL FRAMEWORK FOR MEDIA

Country: _____

Calendar year ending 2011 or latest year available

The objective of the annual Questionnaire on Legal and Regulatory Framework for Media is to collect policy-relevant and internationally comparable statistics on recent trends in key areas of the media industry across all countries in the world. The data will be published in the UNESCO Institute for Statistics (UIS) Data Centre at <http://stats.uis.unesco.org> and major international reports.

Please return the completed questionnaire before 30 September 2012, by email to:

uis.stsurvey@unesco.org

Questionnaires completed using the printed forms should be sent to:

UNESCO Institute for Statistics
P.O. Box 6128, Succursale Centre-Ville
Montreal, Quebec H3C 3J7
Canada

For any queries concerning the questionnaire, please contact:

Mr. Georges Boadé by email: g.boade@unesco.org

Mr. Ibrahim Selmane by email: i.selmane@unesco.org

Fax : +1 (514) 343-6872 or Telephone: +1 (514) 343-7845

Please refer to the Instruction Manual before completing the questionnaire.

Data reported in this questionnaire should cover all Media organizations in your country. If this is not the case, please provide a detailed explanation in the metadata space.

Please do not leave any cell blank. The following codes should be used wherever figures are not available:

a = category not applicable

m = data missing (or not available)

n = quantity nil

x = data included in another category (please specify where using a comment or footnote)

Estimated or provisional data should be marked with an asterisk (*), and partial data with (p).

RESPONDENT INFORMATION

Please provide details below of the person responsible for completing this questionnaire.

Family name:..... First name:..... Female Male

Job title (or position):.....

Department, division or sector (if any):.....

Organization:

Mailing address:.....

City:..... Postal code:.....

Country:..... Fax:.....

Telephone: Email:.....

Mobile hone:..... Institutionalwebsite:.....

If the respondent is the same as for the **Questionnaire on Broadcast Statistics**, please tick this box:

If the respondent is the same as for the **Newspaper Statistics**, please tick this box:

REFERENCE YEAR FOR THE DATA SUBMITTED IN THE QUESTIONNAIRE

This questionnaire seeks data for the 2011 reference year. If data are not available for the requested year, please report the most recent year available. Please indicate the reference year for the data reported in this questionnaire:

Reference year : _____

LF1. In your country, is there a Regulatory Authority dealing with broadcast?

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide the name(s)		
If yes, please provide the web link		

LF2. In your country, is there a self-regulatory body for broadcast?

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide the name(s)		
If yes, please provide the web link		

LF3. In your country, which institution* is responsible for awarding the following forms of entitlement to operate a broadcast channel?

NB. * Please insert the following codes that apply in the cells:

A = Regulatory Authority

B = Executive Head (President or Prime Minister)

C = Line Ministry

D = Legislative Body

E = Executive Cabinet

F = Other

Forms of entitlement		Television			Radio
		Terrestrial	Cable	Satellite	
Licence	Institution code				
	Institution name				
Registration	Institution code				
	Institution name				
Authorisation	Institution code				
	Institution name				
Other, specify _____	Institution code				
	Institution name				

LF4. In your country, if there is a Regulatory Authority for broadcast, please tick which of the following responsibilities are part of its mandate:

List of responsibilities	Yes	Mandate shared with another entity	No, mandate with a different entity	No, no mandate in this country
License/authorization for broadcast channels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spectrum frequency management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring of competition and concentration rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring time allocation for advertisements on broadcast media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring legal provisions on content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment and/or resolution of citizens' complaints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring a Code of Conduct for broadcast media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regulating advertising	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proposing policies and regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensuring fair and equal access to media during election periods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

LF5. In your country, to which authorities are Public Broadcasters formally accountable in the following domains at the national level?

Authority	Domains		
	Editorial line	Appointment of members	Finance
Government	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regulatory Authority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Legislative body	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Its own Governing or Executive Board	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not applicable (no authority)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related reference of the law (or link):			

LF6. Please provide below the prescribed quotas* (broadcast time) channels for domestically-produced media content, **excluding advertising** in public and private Radio and Television

Broadcast media	Public (%)	Private (%)
Radio channels		
Television channels		
Please provide the related references of the laws (or links):		

*If these quotas include advertising, please put a note in the metadata space below

--

LF7. Does your country have legal provisions defining community broadcast?

	Community radio broadcast		Community television broadcast	
	Yes	No	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related references of the laws (or links):				

LF8. Does your country have a timeframe defined by law for the switch-off from analogue to digital for terrestrial television broadcast?

Note. In the case the switch-off has already taken place, indicate the year it occurred.

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
If yes, what is the deadline (or year it occurred)?		
Please provide the related references of the laws (or links):		

LF9. In your country, is there a Regulatory Authority dealing with newspapers?

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide the name(s)		
If yes, please provide the web link		

LF10. In your country, is there a self-regulatory body for newspapers?

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
If yes, please provide the name(s)		
If yes, please provide the web link		

LF11. In your country, which institution* is responsible for awarding the following forms of entitlement to operate a newspaper?

NB. * Please insert the following codes that apply in the cells:

A = Regulatory Authority

B = Executive Head (President or Prime Minister)

C = Line Ministry

D = Legislative Body

E = Executive Cabinet

F = Other

Forms of entitlement	Newspaper	
Licence	Institution code	
	Institution name	
Registration	Institution code	
	Institution name	
Authorisation	Institution code	
	Institution name	
Other, specify _____	Institution code	
	Institution name	

LF12. In your country, if there is a Regulatory Authority for newspapers, please tick which of the following responsibilities are part of its mandate:

List of responsibilities	Yes	Mandate shared with another entity	No, mandate with a different entity	No, no mandate in this country
Entitlement to operate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring of competition and concentration rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring advertising for newspapers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring legal provisions on content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment and/or resolution of citizens' complaints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monitoring a Code of Conduct for newspapers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proposing policies and regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

LF13. Are there legal guarantees in place to assure the confidentiality of journalists' sources?

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related references of the laws (or links):		

LF14. Are there qualifications required by law/regulation for an individual to practice as a journalist?

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related references of the laws (or links):		

LF15. Does your country have anti-concentration/anti-trust rules or laws on media ownership* for?

	Yes	No
Domestic private companies?	<input type="checkbox"/>	<input type="checkbox"/>
Foreign companies?	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related references of the laws (or links):		

**If the rules or laws apply to specific types of media only, please put a note in the metadata space.*

LF16. Does your country have regulations regarding cross-media ownership limitations for?

	Yes	No
<i>Domestic private companies</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Foreign companies</i>	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related references of the laws (or links):		

LF17. Is there a legal provision for access to information held by the State?

	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related references of the laws (or links):		

LF18. Is there a constitutional provision for access to information held by the State?

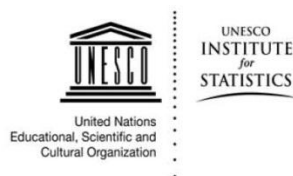
	Yes	No
	<input type="checkbox"/>	<input type="checkbox"/>
Please provide the related references of the laws (or links):		

Metadata

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in any part of this questionnaire.

Please also cite any reference manual, publication or website that is relevant.

Appendix III. Questionnaire on broadcast statistics



UIS/CI/B/2012

Montreal, July 2012

QUESTIONNAIRE ON BROADCAST STATISTICS

Country: _____

Calendar year ending 2011 or latest year available

The objective of the annual Questionnaire on Broadcast Statistics is to collect policy-relevant and internationally comparable statistics on recent trends in key areas of the media industry with the aim of building a global database. The data will be published in the UNESCO Institute for Statistics (UIS) Data Centre at <http://stats.uis.unesco.org> and major international reports.

Please return the completed questionnaire before 30 September 2012, by email to:

uis.stsurvey@unesco.org

Questionnaires completed using the printed forms should be sent to:

UNESCO Institute for Statistics
P.O. Box 6128, Succursale Centre-Ville
Montreal, Quebec H3C 3J7
Canada

For any queries concerning the questionnaire, please contact:

Mr. Georges Boadé by email: g.boade@unesco.org

Mr. Ibrahim Selmane by email: i.selmane@unesco.org

Fax : +1 (514) 343-6872 or Telephone: +1 (514) 343-7845

Please refer to the Instruction Manual before completing the questionnaire.

Data reported in this questionnaire should cover all Media organizations in your country. If this is not the case, please provide a detailed explanation in the metadata space.

Please do not leave any cell blank. The following codes should be used wherever figures are not available:

a = category not applicable

m = data missing (or not available)

n = quantity nil

x = data included in another category (please specify where using a comment or footnote)

Estimated or provisional data should be marked with an asterisk (*), and partial data with (p).

RESPONDENT INFORMATION

Please provide details below of the person responsible for completing this questionnaire.

Family name:.....First name:..... Female Male
Job title (or position):.....
Department, division or sector (if any):.....
Organization:

Mailing address:.....
City:.....Postal code:.....
Country:.....Fax:.....
Telephone:Email:.....
Mobile hone:.....Institutionalwebsite:.....

If the respondent is the same as for the **Questionnaire on Newspaper Statistics**, please tick this box:

If the respondent is the same as for the **Questionnaire on Legal and Regulatory Framework for Media**, please tick this box:

REFERENCE YEAR FOR THE DATA SUBMITTED IN THE QUESTIONNAIRE

This questionnaire seeks data for the 2011 reference year. If data are not available for the requested year, please report the most recent year available. Please indicate the reference year for the data reported in this questionnaire:

Reference year : _____

Domestic broadcast media organizations by ownership

B1. Please provide the number of domestic broadcast media organizations legally authorized to provide radio or television channels or both, by ownership.

Note. Please refer to the Instruction Manual for the definition of domestic broadcasting media organizations.

Ownership	Number of domestic broadcasting media organizations providing			
	Radio channels only	Television channels only	Both radio and television channels	TOTAL
Public				
Private				
Community				
Not specified				
TOTAL				
Of which : Number of media organizations also owning domestic newspaper title(s).				

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Radio and television broadcasting channels by ownership and technical penetration

B2. Please provide the total number of domestic radio and television channels by technical penetration.

Note. Please note that the high definition (HD) version of a channel does not count as a separate channel

Technical penetration	Number of radio channels					Number of television channels				
	Ownership				TOTAL	Ownership				TOTAL
	Public	Private	Community	Not specified		Public	Private	Community	Not specified	
Above 75% of households										
Between 25% and 75% of households										
Below 25% of households										
Not specified										
TOTAL										

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Transmission signal of radio and television channels

B3. Please provide the number of domestic radio and television channels reported in Table **B2**, by type of transmission signal.

Type of transmission signal	Number of radio channels	Number of television channels
Analogue only		
Digital only		
Both analogue and digital		
Not specified		
TOTAL		

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Technical transmission platforms of radio and television channels

B4. Please provide the number of domestic radio and television channels reported in table **B2** that operate in your country on the following technical transmission platforms.

Technical transmission platform	Number of radio channels	Number of television channels
Terrestrial only		
Cable only		
Satellite only		
Combined		
Not specified		
TOTAL		

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

B5. Please provide the technical transmission platforms of the **digital only** radio and television channels reported in Table B3.

Technical transmission platform	Number of radio channels	Number of television channels
Terrestrial only		
Cable only		
Satellite only		
Combined		
Not specified		
TOTAL		

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Community radio and television channels by type of community Organization

B6. Please provide the total number of community radio or television channels reported in Table **B2**, by type of community organization.

Type of community organization	Number of community radio channels	Number of community television channels
Community associations		
Educational institutions		
Religious institutions		
Other		
TOTAL		

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Viability of radio and television channels

B7. Please provide the number of all radio and television channels by ownership that were newly established or ceased operations during the reference year (by ownership).

Note. Please consider for this table the newly established channels as licensed channels which are already operating in the reference year.

Status	Number of radio channels					Number of television channels				
	Ownership				Total	Ownership				Total
	Public	Private	Community	Not specified		Public	Private	Community	Not specified	
Newly established										
Of which, due to merger										
Ceased operations										
Of which, due to merger										

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Profile of the 4 major radio and television channels by key characteristics

B8. Please provide details about the following characteristics of major four radio and television channels (in terms of audience share) operating in your country.

Note. In case audience share data is not available, please rank the 4 major channels by Technical Penetration. If both are not available, please base your ranking on your own discretionary evaluation and document the methodology in the metadata field at the end of the section.

Please exclude channels that ONLY transmit content via the Internet and exclude FOREIGN channels that are NOT SPECIFICALLY EDITED FOR DOMESTIC AUDIENCE.

Key characteristics	Radio				Television			
	1 st channel	2 nd channel	3 rd channel	4 th channel	1 st channel	2 nd channel	3 rd channel	4 th channel
Audience share (%)								
Technical penetration (%)								
Ownership of the channel - (public, private, community)								
Type of access - (paid, free)								
Technical transmission platform - (terrestrial only, cable only, satellite only, combined, not specified)								
Type of transmission signal - (analog only, digital only, both analog and digital)								
Some content specifically created or edited for mobile phones (Yes, No)								
Online simulcast - (Yes, No)								
Some content online (podcasting or on-demand) - (Yes, No)								
Broadcast content originated domestically (%)								
Main orientation of programme content (generalist, thematic)								
Thematic channel programmes orientation (advertising, entertainment, children, film or series, information, music, religion, sport, other)								
Main language of broadcast (Multilingual, English, French, Spanish, Arabic etc.)								
Second language of broadcast (English, French, Spanish, Arabic etc.)								
Identification code of the media organization owning the channel - (A,B,C,D,E,F,G,H)								

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

B9. Please provide details about the following characteristics of broadcasting media organizations that own at least one of the four major radio or TV channels

Key characteristics	Radio				Television			
	1 st channel	2 nd channel	3 rd channel	4 th channel	1 st channel	2 nd channel	3 rd channel	4 th channel
Origin of the media organization owning the channel - (national, foreign)								
Market share of the media organization owning the channel, by type of media (%)								
Total audience share of the media organization owning the channel, by type of media (%)								
Total number of domestic <u>radio</u> channels provided by the media organization (including the one(s) ranked)								
Total number of domestic <u>TV</u> channels provided by the media organization (including the one(s) ranked)								
Total number of domestic <u>daily newspaper title(s)</u> owned by the media organization								

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

B10. Please provide percentage of revenue sources of the broadcast media organizations that own at least one major 4 radio or television channels

Key characteristics	Radio				Television			
	1 st channel	2 nd channel	3 rd channel	4 th channel	1 st channel	2 nd channel	3 rd channel	4 th channel
Percentage (%) of revenue from public grants or public subsidies								
Percentage (%) of revenue from licence fee								
Percentage (%) of revenue from advertising								
Percentage (%) of revenue from subscription								
Percentage (%) of revenue from donation or private subsidies								
Percentage (%) from other revenue sources								
Total Percentages								
Total revenue in national currency								

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Sources

B11. Please provide below the name(s) and contact details of the relevant public or governmental institution(s) that systematically collect data on the broadcasting industries

Institution's name	Data is centralized		Frequency of data collection		
	Yes	No	Annual	Biennial	Other, please specify:
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Metadata

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in any part of this questionnaire.

Please also cite any reference manual, publication or website that is relevant.

Appendix IV. Questionnaire on newspaper statistics



UIS/CI/N/2012

Montreal, July 2012

QUESTIONNAIRE ON NEWSPAPER STATISTICS – Print and Electronic Newspapers

Country: _____

Calendar year ending 2011 or latest year available

The objective of the annual Questionnaire on Newspaper Statistics is to collect policy-relevant and internationally comparable statistics on recent trends in key areas of the media with the aim of building a global database. The data will be published in the UNESCO Institute for Statistics (UIS) Data Centre at <http://stats.uis.unesco.org> and major international reports.

Please return the completed questionnaire before 30 September 2012, by email to:
uis.stsurvey@unesco.org

Questionnaires completed using the printed forms should be sent to:
UNESCO Institute for Statistics
P.O. Box 6128, Succursale Centre-Ville

Montreal, Quebec H3C 3J7
Canada

For any queries concerning the questionnaire, please contact:
Mr. Georges Boadé by email: g.boade@unesco.org
Mr. Ibrahim Selmane by email: i.selmane@unesco.org
Fax : +1 (514) 343-6872 or Telephone: +1 (514) 343-7845

Please refer to the Instruction Manual before completing the questionnaire.

Data reported in this questionnaire should cover all Media organizations in your country. If this is not the case, please provide a detailed explanation in the metadata space.

Please do not leave any cell blank. The following codes should be used wherever figures are not available:

a = category not applicable

m = data missing (or not available)

n = quantity nil

x = data included in another category (please specify where using a comment or footnote)

Estimated or provisional data should be marked with an asterisk (*), and partial data with (p).

RESPONDENT INFORMATION

Please provide details below of the person responsible for completing this questionnaire.

Family name:..... First name:..... Female Male

Job title (or position):.....

Department, division or sector (if any):.....

Organization:

Mailing address:.....

City:..... Postal code:.....

Country:..... Fax:.....

Telephone: Email:.....

Mobile hone:..... Institutionalwebsite:.....

If the respondent is the same as for the **Questionnaire on Broadcast Statistics**, please tick this box:

If the respondent is the same as for the **Questionnaire on Legal and Regulatory Framework for Media**, please tick this box:

REFERENCE YEAR FOR THE DATA SUBMITTED IN THE QUESTIONNAIRE

This questionnaire seeks data for the 2011 reference year. If data are not available for the requested year, please report the most recent year available. Please indicate the reference year for the data reported in this questionnaire:

Reference year : _____

Daily and non-daily newspapers

N1. Please provide the number of daily and non-daily newspaper titles with the corresponding Total sum of average circulation per issue of all titles.

Publishing format	Daily newspapers		Non-daily newspapers	
	Number of titles	Total sum of average circulation per issue	Number of titles	Total sum of average circulation per issue
Print only				
Free only				
Paid only				
Both free and paid				
Both print and online*				
Free only				
Paid only				
Both free and paid				
TOTAL				

* Please insert circulation of print versions only

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Daily and non-daily newspapers by ownership and geographic coverage

N2. Please provide the number of daily and non-daily newspaper titles (print only and both print and online) by type of ownership and geographic coverage.

Geographic coverage	Number of daily newspapers					Number of non-daily newspapers				
	Ownership				Total	Ownership				Total
	Public	Private	Community	Not specified		Public	Private	Community	Not specified	
National										
Sub-national										
Not specified										
TOTAL										

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Community newspapers titles by major funding source

N3. Please provide the number of community newspaper titles in table N2 by major funding source.

Major funding source	Number of community newspaper titles
Government	
Non-government	
Not specified	
TOTAL	

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Viability of print newspaper titles

N4. Please provide the number of daily newspaper titles by type of ownership that was newly-established, merged or ceased operations within the same reference year (by type of ownership).

Status	Number of daily newspaper titles				TOTAL
	Ownership				
	Public	Private	Community	Not specified	
Newly established					
Of which, due to merger					
Ceased operations					
Of which, due to merger					

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

Key features of the 4 major print daily newspaper titles by the highest daily average circulation

N5. Please provide details about the following characteristics of the major four daily newspaper titles (titles with the highest daily average circulation per issue) published in your country.

Key characteristics	Four major daily newspaper titles			
	1st Newspaper title	2nd Newspaper title	3rd Newspaper title	4th Newspaper title
Average circulation per issue - (for the print version only)				
Readership (in absolute figures) (%)				
Geographic coverage (National, Sub-national)				
Ownership - (public, private, community)				
Main language of publication - (English, French, Spanish, Arabic, multilingual etc.)				
Main distribution model - (Paid, Free, Both, Not specified)				
Distribution format - (print only, both print and online)				
Media organization owning the newspaper title* - (A, B, C, D)				
Origin of main owner - (National, Foreign)				

* Please put the letter (A, B, C, D) to designate the owners in a decreasing order of daily average circulation. Where the owner is the same for more titles, please use the same letter.

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

N6. Please provide the owner's origin and the revenue sources (in percentage %) of the Media organization owning at least one of four major daily newspaper titles listed in Table **N5**.

Key characteristics	Four major daily newspaper titles			
	1st Newspaper title	2nd Newspaper title	3rd Newspaper title	4th Newspaper title
Percentage (%) of revenue from public grants or public subsidies				
Percentage (%) of revenue from advertising				
Percentage (%) of revenue from subscription				
Percentage (%) of revenue from donation or private subsidies				
Percentage (%) from other revenue sources				
Total Percentages				
Total revenue in national currency				

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in this table.

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Sources

N7. Please provide below the name(s) and contact details of the relevant public or governmental institution(s) that systematically collect data on the broadcasting industries

Institution's name	Data is centralized		Frequency of data collection		
	Yes	No	Annual	Biennial	Other, please specify:
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Metadata

Please provide any specific explanations or clarifications which will help with the interpretation of data requested in any part of this questionnaire.

Please also cite any reference manual, publication or website that is relevant.

While UNESCO promotes the freedom of expression and development of community media, it is a complex domain to measure quantitatively. Some countries continuously tap into the latest technological tools while others rely on traditional media for the transmission of information. In this technical paper, the UNESCO Institute for Statistics (UIS) outlines a core set of cross-nationally comparable indicators that can be used to monitor and evaluate the development of broadcast and print media.

Building on results gathered through UIS pilot surveys on media statistics, this report presents a range of indicators, with concise explanations of their definitions, formulae, purpose, analysis and operational limitations. While not an exhaustive list, these indicators can be easily calculated based on readily available administrative data in countries.

By addressing key issues underlying the current lack of cross-nationally comparable data in this field, this report is a valuable tool for media professionals, policymakers and researchers. With time, the guidebook will be adapted to reflect revisions made to the UIS media questionnaire in an effort to better capture data in different contexts. In addition, country profiles presenting standardised data on media regulations, as well as print and broadcast media, can be consulted on the UIS website.



United Nations
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