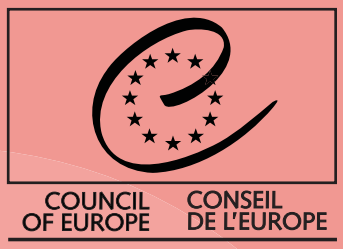

Methodology for monitoring media concentration and media content diversity

Group of Specialists on Media Diversity (MC-S-MD)

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Directorate General of Human Rights and Legal Affairs
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Introduction

Article 10 of the European Convention on Human Rights and the judgments of the European Court of Human Rights are of crucial importance on the question of media diversity, and are conclusive that member states are under the duty to protect, and if need be, to take positive measures to safeguard and promote media pluralism. Although no express mention is made to freedom of the media or to media plurality and diversity, the need to guarantee media pluralism in the context of Article 10 of the Convention has been underlined by the European Court of Human Rights in a number of judgments. In its case-law, the Court referred to the media's important role in a democratic society and the related need for pluralism, tolerance and openness.

Freedom of information implies that citizens will have the possibility to access a variety of information, primarily different opinions and ideas, but in a wider context also a variety of cultural aspects and expressions. Uniformity in the media strengthens the tendency to conformity and weakens the ability to assess other perspectives and alternative opinions. The diversity of media sources is very important for the functioning of democratic societies and for avoiding dominant positions and media uniformity.

The theme of media diversity and media concentration has been explored by the Council of Europe for a number of years. In this respect, one can refer to the two Council of Europe recommendations (Rec (99) 1 on measures to promote media pluralism, and Rec (2007) 2 on media pluralism and diversity of media content); the two reports prepared by the Advisory panel on media concentrations, pluralism and diversity questions (AP-MD), respectively on "Media diversity in Europe" (2002) and on "Transnational media concentrations in Europe" (2004), the Final report on the study commissioned to Mr D. Ward by the MC-S-MD on "the assessment of content diversity in newspapers and television in the context of increasing trends towards concentration of media markets", etc.

This topic flows directly from item 9 of the Action Plan adopted at the 7th European Ministerial Conference on Mass Media Policy (Kyiv, March 2005), incorporated as an integral part into the Action Plan of the Third Summit of Heads of State and Government of the Council of Europe.

According to its terms of reference, adopted by the Steering Committee on the media and new communication services (CDMC), the group of specialists on media diversity (MC-S-MD) was instructed, for the period 2007-2008, to "elaborate a detailed proposal for a methodology for the monitoring of media concentration and, if possible, for measuring the impact of media concentration on media pluralism and content diversity".

A working group composed of the representatives of Croatia, Russia and Switzerland, assisted by the Secretariat, was created with the task to prepare a draft document summarising a number of methods for monitoring media concentration in various member states. In order to obtain information on the methodology adopted by different countries for monitoring concentration and its possible impact on media diversity, a questionnaire was sent to member states of the Council of Europe in April 2007 (see Appendix, page 13). It was agreed that the ad hoc working group would use the compilation as a source of information in the process of preparing the draft document on the matter.

Beyond the Council of Europe, the issue of media pluralism and diversity is studied by various organisations, such as the European Commission, UNESCO and others. The European Commission is currently working on a study on indicators for media pluralism in the EU member states. According to the EC representative to the MC-S-MD, this study should provide a better insight into the various methods employed by the 27 countries to protect media pluralism by using three sets of indicators. The main purpose of the study would be to identify typical risks to media pluralism, but also to examine issues related to sociology, the ability of the public to access a range of media, etc. In March 2008 UNESCO's International Programme for the Development of Communication adopted a framework for assessing media development, which can be used to monitor *inter alia* pluralism and diversity in the media. The document describes the methods employed by the existing international initiatives engaged in evaluating the state of media development. One could refer as well to several bodies undertaking monitoring exercises, such as IREX, Freedom House, Reporters sans frontières, International Federation of Journalists, the World Bank, etc. (see "Conclusions and recommendations on possible future action regarding monitoring of media concentration and media diversity " on page 11 for more details).

This paper reviews the methodology for monitoring media concentration, pluralism and diversity both in terms of measurements, tools and practices in member states. The document contains a number of proposals recommending the future engagement of the Council of Europe in monitoring media concentration and pluralism and diversity of the media at European or member state level.

Given the complexity of the issue and many variables that influence the media diversity (size of the market, size of the audience, media culture, etc.), this paper does not seek to identify common solutions for all member states but rather to recommend certain practices already in use and also suggest possible avenues for future research and policy.

Practices in monitoring media concentration and pluralism in member states

This part has been prepared on the basis of the Compilation of responses to the questionnaire on methodology for the monitoring of media concentration, pluralism and diversity (MC-S-MD (2007) 005 rev). The information provided here is presented in the way it was received in the answers from member states. Some countries have not replied, therefore they have not been included in the overview.

Who monitors?

Table 1. Bodies responsible for monitoring media concentration, pluralism and diversity

State	Bodies responsible for …	
	… monitoring of media concentration	… monitoring of media pluralism and diversity
Austria	Cartel Court, Supreme Cartel Court, Federal Competition Authority, Federal Cartel Prosecutor and for the broadcasting sector the regulatory authority "KommAustria"	The regulatory authority "KommAustria", Österreichische Auflagenkontrolle (OAK), Press Subsidies Commission
Belgium: Flemish Community	The NRA (national regulatory authority) for media in Flanders	No responsible body
Bulgaria	The Commission for the Protection of Competition (CPC)	The CEM (The Council for the Electronic Media) controls the content of the radio and television programmes
Croatia	The Croatian Competition Agency (CCA) and the Council for Electronic Media	The Council for Electronic Media
Cyprus	Cyprus Radio-Television Authority (CRTA)	Cyprus Radio-Television Authority
Czech Republic	The Office for the Protection of Competition of the Czech Republic. The Council for Radio and Television Broadcasting. The Office for the Protection of Competition of the Czech Republic is responsible for all sectors. The Council for Radio and Television Broadcasting supervises the radio a television sector.	The Council for Radio and Television Broadcasting which is in general responsible for the regulation of radio and television broadcasting.
Denmark	No responsible body	No responsible body
Finland	The Finnish Competition Authority	No responsible body
Germany	Kommission zur Ermittlung der Konzentration im Medienbereich (KEK) (German Commission on Concentration in the Media, German abbreviation "KEK"), Bundeskartellamt (Federal Cartel office).	The "Landesmedienanstalten" (German State Media Authorities) grants broadcasting licences for private broadcasters at local, regional, state or national level only if the private broadcaster contributes to pluralism and diversity. The press is not regulated by licences in Germany. Landesmedienanstalten (German State Media Authorities) at the state level of the "Bundesländer", due to lack of federal competence there is no federal authority in Germany.
Greece	The National Council for Radio and Television (NCRTV) is the independent regulatory authority for radio-television issues.	The NCRTV is in charge of media pluralism and diversity monitoring in Greece.
Lithuania	The Ministry of Culture of the Republic of Lithuania the Radio and Television Commission of Lithuania Government in the field of providing information to the public.	Special state officer - Inspector of Journalist Ethics assess compliance with the principles of providing information to the public set forth in Law on Provision of Information to the Public and other laws, submit proposals to state institutions for improving their implementation and draw up and publish every two years an analytical survey intended to establish the guidelines for the development of a democratic culture in the field of provision of information to the public.
Netherlands	Media Authority (Commissariaat voor de Media).	Media Authority (Commissariaat voor de Media).
Poland	There is no specific system to monitor media concentration. However, the National Broadcasting Council of Poland (regulatory authority) has recently published some reports on broadcasting landscape in Poland, which included media concentration issue in the broadcasting field.	The National Council shall safeguard freedom of speech in radio and television broadcasting, protect the independence of broadcasters and public interests, as well as ensure an open and pluralistic nature of radio and television broadcasting.

Table 1. Bodies responsible for monitoring media concentration, pluralism and diversity

State	Bodies responsible for …	
	… monitoring of media concentration	… monitoring of media pluralism and diversity
Portugal	The Media Regulatory Authority (ERC – Entidade Reguladora para a Comunicação Social) and the Fair Trade Authority (Autoridade da Concorrência) are responsible for monitoring media concentration.	ERC is responsible for: Promoting and ensuring cultural pluralism and diversity of expression in the media [Article 7.a]; – Monitoring media concentration in order to safeguard media pluralism and diversity [Article 8.b]; – Guaranteeing freedom of expression and making it possible to compare the various schools of thought, with due regard for the principle of pluralism and the editorial independence of the media.
Russia	The Federal Agency for Press and Mass Communications is a federal executive authority which exercises functions in the sphere of establishing and functioning of mass media and mass communications services.	The Federal Agency for Press and Mass Communications.
Spain	Competition authorities (Anti-monopoly Service and Anti-monopoly Court) generally revise all concentration operations (including media operations) and may act when appointed by a court or at the request of a party against practices which prevent free competition.	The competent body is the SETSI, in the case of national broadcasters, and each Regional Community in the case of local or regional broadcasters.
Sweden	Swedish Competition Authority	No responsible body
Turkey	Turkish Competition Authority and Radio and Television Supreme Council.	Radio and Television Supreme Council
United Kingdom	The media ownership rules are enforced in the United Kingdom by the media regulator Ofcom. Competition laws are a matter for the Office of Fair Trading (OFT) and the Competition Commission.	No responsible body

What is monitored?

Table 2. The criteria for assessing the level of media concentration

State	Criteria for assessing the level of media concentration
Austria, Germany	To hold shares rising to 25% or more and having the concession at the state level is the way to loose the independence and media plurality (especially for the electronic media).
Croatia	The criteria for media concentration are defined in the Electronic Media Act which regulates "an impermissible concentration in the area of media". The Act also protects competition, and the Croatian Competition Authority determines whether any occurred changes in the ownership structure resulted in impermissible concentration. This refers to the following cases: – the broadcaster of an electronic media, who has concession at the state level, and a share exceeding 25% in the capital of another broadcaster who has the same kind of concession or a concession on the regional, county, city or municipality level, and vice versa; – the broadcaster of an electronic media who has concession at the state level and a share exceeding 10% in the capital of another broadcaster who publishes daily newspapers printed in more than 3 000 copies, and vice versa; – the broadcaster of an electronic media who has concession at the state level and a share exceeding 10% of the capital of a legal person who performs the activity of a newspaper agency, and vice versa; – the broadcaster of an electronic media who has concession at the state level and simultaneously publishes daily newspapers printed in more than 3,000 copies; – the broadcaster with a concession at the local or regional level of coverage and shares exceeding 30% in the capital of another such broadcaster with the concession at the local or regional level of coverage in the same area; – the broadcaster who has a concession at the regional or local level coverage and simultaneously publishes daily newspapers of local importance in the same or in the neighbouring area.
Germany	For the broadcaster to have the concession at the state level and a share exceeding 30% in the capital of another such broadcaster with the concession at the local or at the regional level of coverage at the same area – is forbidden.
Croatia	For the broadcaster to have the concession at the local or regional level of coverage and to simultaneously publish daily newspapers of local importance in the same or in the neighbouring area – is forbidden.
Finland	Concentrations exceeding a certain turnover threshold shall be notified to FCA and the acquisition shall not be implemented prior to the FCA's decision on the matter.
Almost all states	Open and varied market structures in the media sectors. Media ownership regulation is identified as the following: limits on capital ownership (press, broadcasting and radio), requirements to report changes in capital, monitoring of company accounts, limits on foreign ownership, limits on the market players, and limitations on media reach, press distribution, market structure, new entrants.

Table 2. The criteria for assessing the level of media concentration

State	Criteria for assessing the level of media concentration
Almost all states	The market structure has to provide sufficient opportunities for individuals and firms to use their rights.
Austria	KommAustria observes the above mentioned criteria regarding shareholding by media enterprises in the process of the licensing and its withdrawal. § 11 PrTV-G forecloses media enterprises producing or editing media with particular high reach in daily or weekly press, radio or wired broadcasting from private TV. The purpose of § 9 PrR-G is similar to § 11 PrTV-G.
Austria	The Austrian Cartel Act (CA), Cartel Court obliges parties of a merger to maintain and provide independent information sources and independent production of media.
Bulgaria, Finland	The presence of leaders may raise serious fears about the possibility of strengthening an existing dominant position.
Bulgaria	The position of enterprises in the respective market before and after the concentration (their economic and financial power, the access they have to market supply and the markets of the relevant goods and services, the legal and other obstacles for entering the market).
Cyprus, Czech Republic, Germany, Latvia	The principle of the transparency of the ownership regime of each media
Almost all states	The laws for market regulations – nowadays ownership requirements have widened so much that markets are generally regulated by competition law.
Latvia	Cross-ownership is forbidden.

Table 3. Criteria and activities to support media pluralism and diversity

State	Criteria
Austria, Denmark	Promoting quality and securing the future of the media industry.
Almost all states	Including pluralism of information within the programmed parameters of the licensed media operators.
Bulgaria	Elections campaign periods are a special time for monitoring how the principles of equality and objectivity are observed.
Bulgaria	The presence of the organisation which considers any request or petition coming from citizens or institution and undertakes concrete steps on the basis of its decisions; the right of reply is a fundamental principle and must be given to the affected persons.
Bulgaria	The diversity of information should be determined by a) themes (specific markets) b) addresses (niche markets).
Bulgaria	The presence of organisations specialised not only in the monitoring some media – TV or radio etc., but the possibility of analysing in-depth the phenomena of the whole convergent media landscape.
Spain	Observance of fulfilment of fundamental human rights (minorities, gender etc.) in the monitoring of media content.
Croatia	The stimulation of producing and publishing programme contents of media at local and regional level, which are of public interest.
Cyprus	The principle of protecting plurality by preventing monopoly or oligopoly.
Czech Republic	An in-depth control once a year to see if the provision on information plurality is fulfilled.
Poland	Some actions might be taken to protect local character of local broadcasters.
Austria	Freedom of speech as a main factor.
Lithuania	Freedom of speech as a main factor.
Germany	PSB is bound to contribute to media pluralism; also a structural approach is implemented in giving licences.
Netherlands	PBS has been given the task of broadcasting news and opinion programmes in a balanced way.
Almost all the states	Special organisations for media monitoring: the correlation between the broadcasting councils, national ministries and public organisations (organisations which consider citizens complaints).

Table 4. Positive measures meant to ensure media pluralism and diversity

State	Measures of support
Austria	Special subsidies to preserve diversity in regional daily newspapers or others; special subsidies granted from the Austrian Television Fund (Fernsehfonds Austria) and the Austrian Digitisation Fund (Digitalisierungsfonds).
Austria	Establishing the organisation which is intended to make a contribution to improving the quality of production and the capacity of the industry to ensure diversity of the cultural landscape.
Austria, Denmark	Special measures for promoting quality and securing the future of the media industry (subsidies towards the costs of training new journalists, for employing foreign correspondents for the reading of newspapers especially at schools, the grant award institute).
Denmark	Distribution of newspapers is supported by direct grants as are cultural and political journals/magazines.
Croatia	Fund for Promotion of Plurality and Diversity of Electronic Media.
Netherlands	Press Fund gives financial support to newspapers and opinion magazines on a temporary basis; there is also limited support for "journalistic products on the Internet" in order to stimulate dissemination of news and opinions.

Summary

Summarising the responses of the member states to the questionnaire on methodology for the monitoring of media concentration, pluralism and diversity (MC-S-MD (2007) 005 rev), it is worth drawing the following conclusions:

Replies reflect different situations in different countries with different visions of media pluralism and media diversity; therefore it is practically impossible to formulate a common unified definition of media pluralism and diversity for all member states.

In almost all countries there are no legal definitions either of media pluralism, or of media diversity.

In many countries where there is an existing system of support for media pluralism and diversity, these concepts are viewed together.

The importance given to concepts of media pluralism and diversity differ within various national contexts. While in some member states there are quite advanced systems of monitoring concentration and also attempts to link the results of the monitoring to the general state of media freedom, pluralism and diversity, in the other states, there are no measures to prevent concentration in the media industry, consequently no processes to monitor results.

Replies mostly reflect the situation in the traditional broadcast media, while print media and new media are still under-analysed.

The most advanced systems of media content monitor analyses the content from several angles – fulfilment of human rights, freedom of speech, reflection of sub-cultural and minority voices, quality of content, presence of local and regional content.

Only few countries have introduced positive measures to support pluralism and diversity in addition to measures to prevent concentration in media sector.

Methodology for monitoring media concentration and media pluralism and diversity: measuring device(s) used in existing monitoring processes or scientific studies

Types of monitoring

We understand the term "monitoring" to mean building awareness about the state of the media system, and observing the changes to that state over time monitoring exercises differ in respect to the type of evidence they use to assess the state of media diversity and pluralism.

There are two groups of evidence: qualitative evidence, including reports, statements, professional opinions and evaluations, and quantitative evidence, i.e. measurements of certain variables expressed in numbers.

Evaluations, indicators, indexes

A recent UNESCO Background Paper "Defining indicators of Media Development" (March 2007) includes 26 different (mainly international or regional) monitoring initiatives in the field of media development and freedom of the media, all of which are based on quantitative or qualitative measurable indicators. Quantitative indicators are based on data, and qualitative on different types of assessment and evaluation. The Background Paper describes the methods employed by the existing international initiatives engaged in evaluating the state of media development, sometimes covering many areas of media development, sometimes stressing only certain areas (like media freedom).

Monitoring exercises are undertaken mainly by international and/or non-governmental organisations, like the IREX Media sustainability index, Freedom House Freedom of the press survey, Danish Monitoring of Indicators for communication and Development, Reporters without borders World press freedom index, International Federation of Journalists Questionnaire on quality in Journalism, the World Bank development indicators, to mention only the most well known.

At least 5 of the summarised monitoring procedures include categories of plurality and transparency of ownership and plurality of news sources: state, private and community balance; and media reflecting diversity of society and promoting minority and social content.

The Media development indicators endorsed by UNESCO International Programme for the development of Communication (IPDC) in March 2008 also include "Plurality and diversity of media, a level playing field and transparency of ownership" among the 5 composite areas in which the indicators of media development are situated. This category includes the following variables: media concentration; a diverse mix of public, private and community media; licensing and spectrum allocation; taxation and business regulation; advertising. The report quotes the 2007 Council of Europe Recommendation on media pluralism and diversity of media content as including a yardstick for measuring national standards.

A second area of the UNESCO indicators is devoted to the diversity and pluralism of content in the category Media as a platform for democratic discourse. This category includes indicators for the degree that Media reflect the diversity of society; the public service broadcasting model; media self-regulation; requirements for fair-

ness, balance and impartiality; levels of public trust and confidence in the media; safety of journalists.

Indicators for media concentration include the existence of positive measures by the state to promote pluralist media both in regulation and its implementation. In addition to reports and statements, the UNESCO report includes as desirable evidence in the area of media diversity and pluralism:

- "content analysis of credible agencies linking editorial content of media to ownership";
- Reports about media concentration and state measures to promote diversity of ownership.

The following is a list of different methods used to monitor the specific area of media system and performance, including media diversity and pluralism:

- Panel of media professionals judge/evaluate the development of different indicators, scale is then averaged (qualitative, validity depending on the selection of panel and indicators quality);
- Self-assessment questionnaire (qualitative) supported by documentation (laws, studies – objective data);
- Questionnaire, no definite source of opinion (qualitative, not very scientifically valid);
- Statistics (quantitative data, official – size and development of the media sector – radio, television, newspapers, telephone, new media, production agencies, market research, etc.);
- In depth interviews (scientific qualitative);
- Focus groups;
- Quantitative data (circulations, audiences, access, etc.);
- Independent studies;
- Composite indicators:

– World Bank – variables from 32 separate data sources worldwide;

– UNDP – communication index - correlating indicators of per capita circulation of daily papers, distributions of radio and TV sets; proportion of population online, weighted distribution of Internet hosts).

Scientific research

Many scientific studies have been undertaken with the view of assessing the state of media concentration at state level. The data needed for this kind of analysis includes the information on the structure of the media landscape. The following data are collected by the European media monitor, co-operative project by the Dutch media authority and corresponding organisations from Germany, Italy and Poland.

Television

- No. free-to-air channels (national, regional/local, general interest-special interest, public- commercial)
- No. pay-tv channels
- No. free-to-air broadcasters
- No. pay-tv broadcasters
- No. of owners
- Total viewing time
- Audience share/channel (view. time)
- Audience share/broadcaster (view. time)

Radio

- No. channels (national-regional/local; public-commercial)
- No. broadcasters
- No. of owners
- Total listening time
- Audience share/channel (view. time)
- Audience share/broadcaster (view. time)

Daily newspapers

- No. newspaper titles (paid newspapers-free sheets, national-regional/local; general-specialised)
- No. publishers
- No. of owners
- Total circulation
- Market share / title (circulation)
- Market share / publisher (circulation)

Weekly newspapers/magazines

- No. newspaper/magazines titles (paid newspapers/magazines vs freesheets, national vs regional/local; general vs specialised)
- No. publishers
- No. of owners
- Total circulation
- Market share/title (circulation)
- Market share/publisher (circulation)

Internet

Considered for a number of years as a secondary media, the Internet is increasingly positioning itself at the same level as the press, radio and television. The impact of the Internet on the public depends on:

- the number of homes connected;
- the types of site visited (entertainment or information);
- the frequency of connections.

Data on ownership is also collected.

Other (fewer) studies have analysed the content of the media – usually television and daily press. The aims of these studies included diversity of formats/genres, diversity and pluralism of ideas (mainly in news programmes), cultural diversity (programme origin, values).

Only a few of the scientific studies have attempted to link diversity or pluralism of content to concentration or competition levels. The outcomes of these studies show that the relationship of concentration-competition level in the media market has a curvilinear relationship to media diversity (van Cuilenberg, 2007). The market shape is not the only influencing variable, as diversity is also influenced by other factors like the size of the media market and media culture. In this area more scientific research is needed.

Measuring media concentration/ competition and media diversity

Measuring is usually performed in scientific studies, sometimes within the monitoring processes (i.e. the Dutch Media Authority Media Monitor).

Concentration/competition

Concentration and competition are parts of the same continuum of the character of the media market – when one is measured so is the other, in an inverse relation. Only horizontal media concentration (same media market and same media type) is measured by empirical means. Diagonal (cross-media) and vertical (whole chain up and down) are not measured. These other types of concentration should also in the future be quantified.

Establishing levels of *concentration* in media markets: C3 = sum of three largest market shares where 0-35: low concentration, 36-55: moderate concentration and 56+: high concentration (and low competition).

This is the simplest type of measurement to use, and the most common in policy monitoring type of studies. Its advantage is that only the market shares (usually audiences, but possibly also advertising) of the strongest competitors are needed, and not the exact data of the total or 100% of the market.

Establishing levels of *competition* in media markets: The Herfindahl-Hirschman index is calculated as the square root of the sum of the squares of market shares of all competitors in the relevant markets.

$HHI = \Sigma m_i$

m_i = market/audience share of entity i

1/n (full competition, an n number of companies of equal size are active in a market) to 1 (monopoly)

$0 \leq HHI < .10$ un-concentrated market (more then 10 equally strong competitors – fierce competition)

$.10 \leq HHI < .18$ moderately concentrated (more than 5 equally strong competitors)

$HHI \geq .18$ highly concentrated (five or less equally strong competitors)

Diversity

Diversity (defined as the "extent to which media content differs according to one or more criteria" – van Cuilenberg and McQuail 1982, 1983) can be measured statistically in several different ways:[1]

Variation coefficient for interval and ratio scales – measurement of the variance of content (van Cuilbenburg 2007)

D (diversity) = σ (standard deviation) / μ (mean)

Entropy index for nominal scales

D (diversity) = $(- \Sigma p_i^2 \log p_i) / \log n$

n = number of content type categories

p = proportion of items of content type category i

i = category

Content diversity: reflective diversity vs. open diversity

Formulas also exists for measuring two types of content diversity (van Cuileberg 2007), reflective diversity which is the measure of the media users preferences and the reflection of that preference in media content, and open diversity, the extent of the equal presence in media content of different ideas. Both of these methods require analysis of content to be made in order to measure the categories for further analysis.

1. Jan van Cuilenberg (2007) describes both concentration/competition measures and diversity measures

Conclusion

The brief overview of the existing monitoring exercises shows that both qualitative and quantitative information is used for the evaluation of indicators, with the majority of information coming from qualitative i.e. opinions, judgments, etc.

Many of the existing monitoring or evaluations are not scientific, i.e. could not be replicated and/or the data collection, type or procedure is not objective. It is, in our opinion, preferable to base the monitoring on objective quantitative data. The "European media monitor" project lead by the Dutch Media Authority is at this time, collecting existing data on the structure of the media markets.

The methodology for evaluating media concentration and pluralism and diversity should be scientific, comprehensive, include structural market diversity indicators as well as indicators on content diversity and pluralism.

Conclusions and recommendations on possible future action regarding monitoring of media concentration and media diversity

- Given that most member states have established specialised authorities responsible for media concentration – but few of them are effectively monitoring media concentration and even less – media diversity and pluralism, member states should set up, if this has not been done yet, specialised bodies for, and establish systems of, monitoring media landscape, with special emphasis on media pluralism and diversity. It is up to the member states to consider and decide which precise body would be in charge of such functions (e.g., state agencies, universities, professional NGOs, etc.)

- Taking into account that all replies received from member states to the MC-S-MD questionnaire mention in one way or another diversity and pluralism but no member state (among those who replied to the questionnaire) has legal definitions of these two concepts, in order to measure/monitor media diversity and pluralism, at least a working definition should be formulated. One possible

approach is to use variance (as a statistical concept) as a proxy indicator. Depending on whether we need to measure diversity or pluralism, we could use as indicators variance of content, of journalistic genres, of a number of media outlets, etc. An in-depth discussion at national and European levels should be held among policy makers and researchers in order to explore whether it is possible to agree on working definitions of diversity and pluralism and, consequently, on ways to measure them.

- Member states should start regular collection of basic data showing the market structure of their media systems, including data on owners. The reason for this is as follows: even though the structure of the market is not the only factor determining the diversity and pluralism of media content output, it is important to be aware of its shape and trends as media are market based institutions and their possibilities of development are related to it.

- The Council of Europe should encourage member states to bring together policy makers and media researchers in order to approach in an informed, meaningful and effective way the challenges posed by dynamically changing media in democracies. Regular meetings of the above categories could be an efficient way of monitoring media diversity and pluralism and, therefore, have an impact on the evolution of legal framework and policy in the area. A longer-term cooperation of policy makers and media researchers would be very useful in trying to identify and implement, without excessive effort and cost, practical methods for monitoring media concentration, diversity and pluralism. Member states should support further development of research and academic concepts of media economics that could be helpful for better understanding issues of media pluralism and diversity.

- As pluralism and diversity of content can be measured only by the analysis of content, member states should, as part of their support measures, agree with academic or research institutions to perform this analysis on a yearly basis. A composite sample of at least one week (two weeks is considered optimal) for one year of broadcasts/publications for the main television and radio news, and major daily newspapers would give a good indication of the state of media pluralism. An analysis of the access and use of the Internet resources, of the number of professional media outlets (newspapers, broadcasters, etc.) present on the Internet, would complement this data. The question of the possibility of measuring the concentration on the Internet could be examined in this connection. The repeating of these exercises over time will show trends in both concentration and competition on the media markets, as well as in their diversity and pluralism.

- When examining the issue of diversity and pluralism, it should be explored whether the "apparent" diversity (lots of existing communication channels) also means "real" diversity. In other words, what proportion of individuals has access to and can afford to pay for these channels. Examine if, in the digital environment, increasing the number of channels leads to an increased variety. Examine as well the question whether in a context of lots of sources one can speak about a real diversity if individuals have to pay.

- To note the rapid changes occurring in media attitudes, in particular those related to participatory media and nomadic/mobile media. In this respect, access to and usage of ICTS, as well as media literacy, are crucial for people to critically consume and create media content.

- To encourage the inclusion, in the journalism curricula, of matters such as codes of journalism ethics, codes of conduct, etc. This might promote better understanding among media professionals of journalism freedom and basic values such as media pluralism and diversity (this could be done through various European organisations of journalism teachers).

- To examine other possible variables for measuring media diversity, in relation to the question of media concentration, for example:

– Existing support for independent productions (in the case of independent productions, it would be enlightening to measure how many different "clients" individual independent producers work for);

– Existing legal, financial and administrative measures supporting community media;

– The degree of competition in a given media market, which can be used as an independent variable instead of concentration of ownership as is most often the case;

– The level of technical access to the media – in particular to new media like mobile phone or Internet – for all sectors of population;

– The presence of politically and socially important content on the mobile phone and the Internet.

When performing content analysis, it would be useful to focus on news and current affairs as the most essential in a democracy.

It would also, be useful to explore the use and creation of media by the audience, which is changing with the new technologies, and examine if it is nowadays enough to offer what has traditionally been considered important information for a democracy.

- The secretariat, with the possible help of external consultants, CDMC and group members, should prepare a reader in media concentration, pluralism and diversity (containing Council of Europe standards and reports). Taking into account the importance of the issues examined, this document should be published on-line for general public information.

Appendix. Questionnaire on methodology for the monitoring of media concentration, pluralism and diversity

1. Monitoring of media concentration

a. What law regulates media concentration in your country? When was it adopted?

b. Is there a system to monitor media concentration in your country? If yes:

i. Please provide the name of the responsible body.

ii. What sectors – press, broadcasting or new media – are included?

iii. How often are monitoring reports on media concentration published?

iv. When was the last monitoring report published?

v. Please describe the method of assessment and the criteria for assessing the level of media concentration.

2. Monitoring of media pluralism and diversity

a. How are media pluralism and diversity defined in your regulation?

b. Is there a system to monitor media pluralism and diversity in your country? If yes:

i. What body is in charge?

ii. How do you measure or evaluate the degree of media pluralism and diversity?

iii. What aspects of pluralism and diversity do you monitor:

– structure (diversity of media companies and outlets, composition of national and local media markets, audiences and regulatory structures, etc.)?

– content (genres, formats, opinions including political, cultural, religious, etc.)?

– sources (news agencies, independent production, etc.)?

iv. Please describe any support measures and monitoring mechanisms that you have put into place in order to encourage media pluralism and diversity.

3. Recent studies in your country

a. Please list any recent studies in your country on:

i. media concentration in general;

ii. impact of concentration on media pluralism of content;

iii. audience satisfaction vis-à-vis media pluralism of content.

b. Are there any available studies (in English or French) that you can send to us?

c. Please list any relevant institutions active in the field of media concentration, pluralism and diversity.

4. Any additional comments?

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