

MAPPING DIGITAL MEDIA

JOURNALISM, DEMOCRACY AND VALUES

- a project of the Open Society Media Program and
the Open Society Information Program -

Research Template

INTRODUCTION

The horizons are shifting. No portion of the media landscape is spared the turbulence of the radical change brought about by digitization; newspapers are even more exposed to unprecedented challenges than television and radio; traditional business models are in crisis, and new sources of revenue are elusive.

There is no end in sight to the technical innovations that caused this turbulence, or to their applications in all aspects of communication. Therefore, it is impossible to foresee any return to the relative stability that reigned over the media landscape for several decades before the 1990s.

Of course, not everything has changed. The values that characterize and underpin good journalism, the need of citizens for reliable and abundant information, and the importance of such information for a healthy society and a robust democracy: these are perennial, and provide compass-readings for anyone who wants to make sense of the changes.

Over recent years, the Media Program and the Information Program of the Open Society Foundations (OSF) have seen

how these changes affect the media differently in different places, redefining how media outlets can operate sustainably while staying true to their values, what journalists can achieve in different contexts, who consumes their output, and what the wider social effects may be. In its work with media, OSF promotes the very values underlying these concerns – pluralism and diversity, transparency and accountability, editorial independence, freedom of expression and information, public service (public interest), and high professional standards.

This project will assess, in the light of these values, the global opportunities and risks that are being created for media around the world by the following developments:

- the switchover from analog broadcasting to digital broadcasting,
- the emergence and growth of new media platforms, especially on the internet, as sources of news,
- the ever closer convergence of traditional broadcasting with telecommunications.

Opportunities and risks with an impact on the values espoused by OSF appear to include the following:

Opportunities:

- i. Better public access to all kinds of content/services
- ii. Reduced media start-up and distribution costs
- iii. More efficient use of spectrum, multiplying the media outlets that can use the bandwidth
- iv. Collaboration, easier production flow, cheaper equipment, etc., driving down production costs (such as shared media content on various platforms)
- v. Improved listener/audience/reader interaction and participation
- vi. Greater transparency of information (leading to better journalism)
- vii. Social and peer-to-peer networking, enabling prioritization of news sources and topics, and helping to disseminate edited content
- viii. Availability of more spectrum for local and community media
- ix. Existence of increased number of platforms for civil society groups and activists to spread their message

Risks:

- x. Extension/replication of monopolistic positions and controls of political speech on new media platforms
- xi. Dilution of public-interest journalism available free-to-air for a broad public
- xii. Audience fragmentation, undermining business models that have funded quality journalism/media, and also undermining social cohesion by attenuating shared media experiences
- xiii. Difficulties in monetizing new platforms in sustainable ways to support quality production
- xiv. Weakening of lobbying/advocacy efforts by civil society groups due to confusion about the new techno-political nexus
- xv. Potential loss of local programming due to prohibitive costs for both switch-over and maintenance of broadcasting costs for smaller, private (regional) stations
- xvi. Prohibitive costs for the consumer (set-top boxes, pay-per-view, etc.)
- xvii. 'Digital divide' affecting equal access to news

xviii. Social and peer-to-peer networking potentially narrowing the agenda of available

The sheer complexity and unfamiliarity of these issues, and the specialized language in which some of them are discussed, have discouraged civil society activists from engaging with them.

The time is now ripe for the OSF Media and Information Programs to survey the changes, and to examine the opportunities and risks as they occur in different countries. Our aim is to assess the impact of these changes on the core democratic service that any media system should provide, namely the provision of news about political, economic and social affairs. We will present these assessments in jargon-free reports that survey the situation in countries around the world. Cumulatively, these reports – along with overview analyses by the project leaders – will provide a much-needed ‘guide for the perplexed’ on the democratic significance of digital media.

Given its central focus on television services, the present project does not survey digital new media *comprehensively*, or encompass *all* the changes taking place in the newspaper and radio industries.

In order to make the project manageable, we restrict our survey to news output, focusing on the main sources and

information.

providers in each country. This does not imply that other kinds of output (drama, entertainment, feature films, even sport) are not influential in shaping people’s experience of new media. Indeed, these other strands may be considered when they directly influence news consumption and production.

The countries included in this project are diverse. Some are fully ‘networked societies’ which have completed digital switchover, others are part-way through the process, and others again have yet to start. Moreover, the take-up of new media does not necessarily correlate with progress in digitization; large parts of the developing world are ‘leapfrogging’ stages in the industrialized world’s sequence of media technology take-up. This diversity will add to the value of the country reports in two ways: firstly, by isolating the factors that lead to such varied rates of technological take-up around the world; and secondly, by revealing how new media are being adapted for use in different political, economic and cultural contexts.

However, this diversity also raises questions about the possibility of obtaining data that are genuinely commensurable, and that provide a basis for valid comparative analysis. These questions are addressed below.

METHODOLOGY

Our methodology for assessing the global opportunities and risks is to recruit researchers in each country who will provide answers to the questions contained in the research template set out below. These researchers will be assisted where possible by a partner organization. In some cases, this organization may be the OSF national foundation in that country; in other cases, it will be a civil society organization active in media and information issues.

Researchers are expected to carry out research that will answer the questions in the research template. Not all of the questions will require equally full answers in every country.

Researchers should be guided by our list of opportunities and risks, as they collect data and prepare assessments. However, this list is not exhaustive; the researchers themselves know best which risks and opportunities are most relevant in their countries.

Researchers are expected to submit their reports in English, following the research template. They are required to follow the Style Guide that has been prepared for this project. Starting in January 2011, the reports will be published online at www.mediapolicy.org. Some or all may be printed at a later date.

In order to maximize the comparability of findings from different countries, and to limit the subjectivity of the reports, we have separated the questions into three tiers.

- The **red** questions are intended to produce answers that permit the project managers – and, later, our readers – to draw systematic comparisons.
- For **green** questions, researchers must follow the guidelines set forth in the research template. While we cannot always expect comparable data between countries, we specify the sources that reporters should seek to use. (Other sources may also be required.)
- Questions in **blue** are liable to greater subjectivity; for these, we propose that researchers supplement the data from suggested sources with information from other available sources (e.g., expert interviews, published comments, essays, reports in the media), to ensure that we are not just receiving one person's opinion or impression.
- The **Assessments** must not reflect a personal view, but rather convey the range of commentary and opinion – and the main political positions – in your society. Without repeating what has been said in the respective section, or presenting new data and

information, they should highlight the main issues and

draw key conclusions.

In order to test this Research Template, pilot research was conducted during 2010 in the following countries: **Armenia, Italy, Mexico, Morocco, Nigeria, Romania, Serbia and Thailand**. This research produced complete reports from Mexico, Morocco, Romania, Serbia and Thailand, and preliminary drafts from Italy and Armenia. These pilot reports were reviewed by our Editorial Commission.¹ On the basis of this review, and also of discussions with all the country research teams, the Template has been improved and refined, and it is now ready for use in all the 52 countries to be studied in the principal phase of the project. At the same time, the pilot reports will be updated and revised according to this final Template.

In addition, we are commissioning a series of research papers on a range of topics related to digital media and more or less relevant for all countries. Beginning in January 2011, these papers will be published on the mediapolicy.org site as the *Open Society Digital Handbook*.

¹ The Editorial Commission includes six experts with diverse experience of new and old media: Mr Christian Nissen (Copenhagen), Prof. Ying Chan (Hong Kong University), Mr Dušan Reljić (Berlin), Mr Russell Southwood (balancingact-africa.com), Mr Michael Starks (Oxford), and Dr Damian Tambini, (London School of Economics).

GLOSSARY²

Conditional access (CA)

Protection of content by encryption. CA is part of the subscriber management system (SMS) (*see below*) to block usage by non-subscribers. It is used in both analog and digital systems and on all three platforms (cable, satellite and terrestrial).

Digital dividend

Radio-frequency spectrum freed by the digital switchover.

Digital media

Media that communicate audio, video or text information in a digitized (instead of the traditional analog) format. They include traditional analog media outlets that have 'gone digital', e.g., TV and radio stations, or newspaper web portals. Or they may be outlets that only exist on the internet, e.g., news websites, blogging sites, social media.

Digital switchover

The process of upgrading broadcasting transmission infrastructure to carry digital rather than analog signals. For the purposes of this project, digital switchover is considered to

² The Glossary is a work-in-progress. Further entries will be added, in line with the needs of the researchers. The Glossary contains, for the most part, definitions of technology-related terms.

have commenced in *June 2006*,³ when the ITU's Regional Radiocommunications Conference (RRC-06) reached Regional Agreement GE06, establishing frequency plans for terrestrial digital broadcasting in the principal spectrum bands across Europe, Africa, the Middle East and Iran. Switchover is to be completed by 2015. In Africa, the digital switchover is planned to be completed in two phases, by 2020. There is no firmly-agreed deadline for digital switchover in other parts of the world. This process refers to terrestrial infrastructure. In parallel, a process of digital switchover takes place in cable and satellite platforms.

Digital multiplex (MUX)

The technical infrastructure for the terrestrial dissemination and bundling of digital programs and additional services contained in a digital data stream. Access conditions to MUX for content providers, and also the regulation of MUX, vary widely from country to country.

Digital television broadcast standards

Technical specifications for broadcasting in a specific country. These include settings for various processes such as multiplexing, conditional access, audio, video and transmission channel coding, etc. The list of such standards include the DVB family (Europe), the ATSC family (North America), the ISDB family (Japan and parts of South America),

³ Some European countries began the digital switchover in the 1990s.

the DMB family (Korean), and the Chinese digital video broadcasting standard family.

Digitization

The technological, regulatory and market changes that come about with the shift from analogue to digital media, including the internet. This shift takes place in three areas:

- The production of programmes/content where all production equipment (e.g., cameras, recorders, editing suites and archives) becomes digital, i.e. both hardware and software. This leads to a complete restructuring of the working processes of programme makers, e.g. journalists in newsrooms.
- The transmission systems (terrestrial, satellite and cable) delivering content to households. The term “digital switch-over” (DSO) has specifically to do with changing the terrestrial broadcast net from analogue to digital technology.
- The household equipment (radio, television, PCs, mobile devices etc.) used by listeners, viewers and internet users etc.

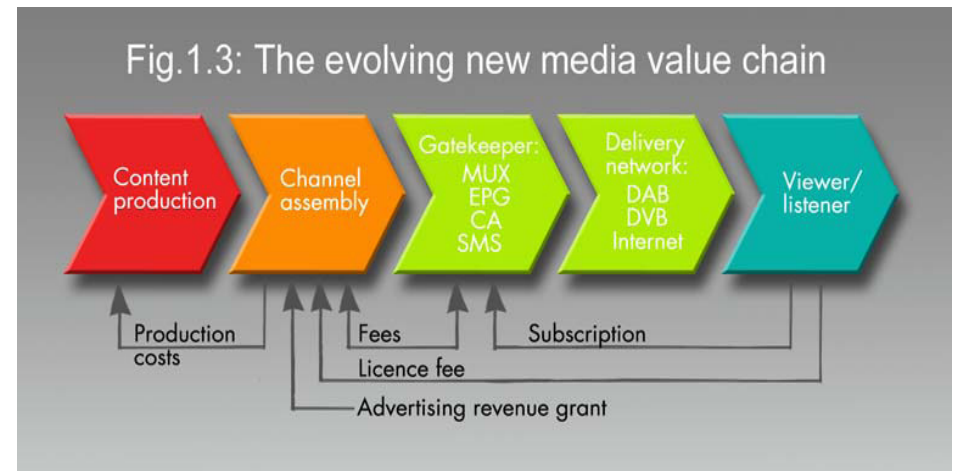
Although digitization is basically a shift from analogue to digital technology, it has huge influence on the whole value chain (see figure under *Gatekeeping*, below), the media market, media policy and regulation, and on the way media are used by citizens.

Electronic programming guide (EPG)

A menu of programs continuously updated to give users information about the programming schedules. It is usually associated with television.

Gatekeeping

Gatekeepers in the digital broadcast chain are those companies/entities in a position to control the ‘admission’ of consumers to specific programming. This important type of control over new functions in the chain (such as digital multiplexes, electronic programming guides, conditional access and subscriber management systems) will also determine the flow of funding. (See figure below.)



Source: Digital Strategy Group of the European Broadcasting Union (EBU)

Internet Protocol television (IPTV)

Television services delivered by broadband internet instead of by traditional terrestrial frequencies, satellite signal or cable television.

Mobile platform

A mobile operating system controlling a mobile device. They are similar to the operating systems used on desktop computers and notebooks. Mobile platforms include iPhone OS, RIM's BlackBerry, Symbian OS, Palm WebOS, etc. This project will not analyze these systems, but it will look at the news content carried by mobile devices.

Mobile device

A handheld computing device with touch input or small keyboard and a display screen. Mobile devices include:

- Communication devices (mobile phones, pagers and cordless phones)
- Mobile computers (smartbooks, tablet PCs, handheld PCs, etc.)
- Media recorders (digital camcorders, cameras and audio recorders)
- Media players (e-book readers, portable DVD players, etc.)
- Personal navigation devices
- Handheld game consoles

In this report, we will focus on devices that are able to receive and transmit news output, chiefly communication devices.

New media

Electronic communication enabled by computer technology that is characterized by non-linearity (interactivity). These include websites, audio- and video-streaming, email, 'social media' (information-sharing, interactive/participatory websites, including blogs and wikis).

Platform

A platform is a system that delivers media contents. The main media platforms are: broadcasting, internet, mobile telephony. In television, 'platform' is used to describe the means of transmission (e.g., cable, satellite, terrestrial).

Subscription management system (SMS)

A combination of software and hardware aimed at organizing and operating the operator's business. The system contains all relevant information about clients, and keeps track of orders, credits, invoicing and payments.

User-generated content (UGC)

Various sorts of media content produced by users. UGC includes blogs, wikis, social networking sites, trip planners, customer review sites, photo and video sharing websites, discussion boards, etc.

White spaces

The unused electromagnetic spectrum between frequencies, usually used as protection bands against interference.

REPORT STRUCTURE

Context

- **Fill in the two sets of indicators below and write a short country background based on these indicators**

Social composition indicators

Population (number of inhabitants)

Number of households

Rural/urban breakdown (in % of total population)

Ethnic, linguistic and religious composition (% of total population)

Economic indicators

	2005	2006	2007	2008	2009	2010	2011	2012
GDP (current prices), total in US\$								
GDP (current prices), per capita in US\$								
Average monthly net income								
Unemployment (% of total labour force)								
Inflation (average annual rate in % against previous year)								

1. Media Consumption: the Digital Factor (6 pages)

What difference are digital media making to consumer choices and preferences in news? Who is providing the product that people have to choose from? Have the new opportunities for news dissemination improved the overall diversity of the news offer? This chapter surveys and summarizes the available data to reveal these trends.

1.1 Digital Take-up (1 page)

1.1.1 Are households prepared to access content provided by digital media? Which of these devices or platforms are used most often to access news?

- Fill in the table below using data from national statistical offices, and write an analysis based on these indicators. Add information relevant to the analysis (e.g., internet usage patterns, place of internet usage) from available media consumption surveys.

Households owning equipment (OSF to provide data from ITU that would serve as a basis for calculation of these figures)

	2005		2006		2007		2008		2009		2010	
	No of HH ⁴	% of THH ⁵	No of HH	% of THH	No of HH	% of THH	No of HH	% of THH	No of HH	% of THH	No of HH	% of THH
TV set												
Radio set												
PC												

⁴ Total number of households owning the equipment.

⁵ Percentage of total number of households in the country.

1.1.2 What is the take-up of platforms that carry news?

- Fill in the tables below using information from national statistical databases and write an analysis based on these indicators. Pirated access to broadcast platforms, where this represents a major trend, should be mentioned in this section.

Platform for the main TV reception and digital take-up⁶

	2005		2006		2007		2008		2009		2010	
	No of HH ⁷	% of TVHH ⁸	No of HH	% of TVHH	No of HH	% of TVHH	No of HH	% of TVHH	No of HH	% of TVHH	No of HH	% of TVHH
Terrestrial reception												
- of which digital												
Cable reception												
- of which digital												
Satellite reception												
- of which digital												
IPTV												
Total												
- of which digital												

⁶ The figures refer to the main TV set in the households for multi-TV households.

⁷ Total number of households owning the equipment.

⁸ Percentage of total number of TV households (TVHH) in the country.

Internet penetration rate (total internet subscriptions as % of the total population) and mobile penetration rate (total active SIM cards as % of total population) (OSF to provide data from ITU that will serve as a basis for calculation of these figures)

	2005	2006	2007	2008	2009	2010
Internet						
- of which broadband						
Mobile telephony						
- of which 3G						

1.2 Media Preferences (2 pages)

1.2.1 What have been the main changes in news consumption, particularly those which may be linked to digital migration (i.e., audience transferring to digital broadcasters and the internet)?

- **Analyze the patterns of media consumption based on data on aggregate viewership/readership/listenership/online visitorship (2005-2010). Where consumer surveys are available, give the reasons behind consumer choice.**

1.2.2 Have these changes affected the availability of a diverse range of news over the past five years? If yes, how and to what extent?

- **Using data from 1.2.1, analyze news content consumption, with a focus on the diversity of available news sources.**

1.3 News Providers (2 pages)

1.3.1 What are the most widely-used news providers? How has the ranking of the five most popular sources of news changed over the past five years?

- **Analyze the performance of print and online media over the past five years, based on the following criteria: paid circulation for print media, website visitorship data for online media, audience share for radio and TV broadcasters. The ranking should include up to five news providers. It should be followed by a short description of the media outlets listed, with a focus on how commercially-oriented in terms both of *content* and of *style* (“framing”) these outlets are.⁹ The section should thus consist of four main rankings with a five-year table of audience data as indicated.**

Sources: 1.1: Local statistics offices or ITU (OSF to obtain)
1.2: Audience surveys;
1.3: Audience surveys

⁹ Commercially-oriented news focuses on sensational political and crime stories, gossip columns, the personal lives of celebrities and sports stars, etc. Another categorization of the two types of news providers is mass-market vs. quality news providers.

1.3.2 What have been the most popular news bulletins in the country on analog television over the past five years? Have they lost audiences during this period? If yes, how much, and can these losses be attributed to digital migration?

- **Collect annual average ratings for the main primetime newscasts on the largest commercial and non-commercial TV channels (up to a total of five for both) and write an analysis of the audience dynamics over the period. Where multilingualism and language diversity are significant issues for public policy, including media policy (see also 4.3.1), describe TV news consumption by language.**

1.3.3 Have digital media (both new digital channels and new media) contributed to the quality of news? If yes, how and to what extent?

- **Based on 1.3.1 and 1.3.2, analyze the trends in the news offering focusing on the impact of digital broadcasters and the internet. The analysis should also describe trends in the mass-market versus quality news production.**

1.4 Assessments (1 page)

1.4.1 What has been the impact of digitisation on the news offer and choice?

2. Digital Media and Public or State-Administered Broadcasters (3 pages)¹⁰

Digitized and new media can bring benefits to democratic society, in terms of inclusiveness and dialog. At the same time, their rise may weaken the existing media institutions that are dedicated to serving the public interest – albeit in many cases with inadequate results. However, the challenge of digital innovation also presents public service media with an opportunity for their own renewal.

¹⁰ Public or public service broadcasters should be independent from both the state and the market, with a mandate to serve society by – in the classic formulation – informing, educating and entertaining. They are usually required to address the whole of society (universal access) with a range of diverse, high-quality content. They should be protected from direct political interference by ‘arm’s length mechanisms’, which may or may not be effective in practice. They are typically funded by a combination of license fee revenue (levied on owners of devices that can receive TV signals), government budget allocation, and advertising. State-administered media operate explicitly under government control. Many nominal public service broadcasters are, in reality, covert state broadcasters. In principle, a broadcaster may be state-administered but still operate as a public service outlet; in practice, however, this does not happen. Other types of non-commercial, not-for-profit broadcasters that are required by law or pledge through their own statute to fulfill a public service mission should be covered in this chapter. They can include, but are not restricted to, community radio broadcasters or outlets operated by non-governmental organizations, including churches.

2.1 Public Service and State Institutions (1.5 pages)

2.1.1 What kind of public service or state media exist, how much news and current affairs content do they produce and distribute, and to what size of audience/user base?

- **Write an analysis based on data on the output of news and current affairs (as a percentage of total programming) and on audience share data. Where qualitative content analyses are available, use them to describe the type of news and current affairs content produced by public service or state media. Trends (such as improvement as a result of commercial competition) should be noted and analyzed.**

2.1.2 Has the process of digitization led the public service or state media to alter the number of services they provide?

- Describe the changes in the services offered by the public service or state media. Refer to services such as specialized channels, websites, etc.

2.1.3 Has there been state-level support for the digitization of public service media (through regulation, legislation, financial and/or political support)? If yes, has this support affected their independence and/or the diversity of their output?

- Using reports in the media, interviews with media experts and observers, information from independent assessments (where available), and/or inside information from the broadcaster(s), write an outline of financial and investment incentives, legal advantages offered to these media, privileged access to digital spectrum, privileged coverage of political or other events, etc.

2.1.4 Has the process of digitizing terrestrial platforms helped or hindered public service or state media to increase their reach and influence, and to engage with their audience?

- Write an account of the consequences of digitization for these media's territorial coverage, audience reach (including their reach to Diaspora populations, production budgets, etc.

2.2. Public Service Provision (1.5 pages)

2.2.1 How is public service provision by the media regarded and understood by the public, politicians and journalists?

- Using reports, surveys and debates on the role of public service media, describe how the public service mission in the media is seen in society, referring, for example, to perceptions of 'public' or 'public service' media as 'state'. Refer too, if appropriate, to rates of payment/non-payment of the license fee as an indicator of public respect for the public service broadcaster.

2.2.2 Are any specific obligations imposed on, or incentives provided to, commercially-funded media to produce and/or disseminate public service content? Have these changed over the past five years? If yes, have reasons for this change been given, and are these reasons related to digitization?

- Describe public service provisions on commercial media. Refer to arguments that the end of spectrum scarcity, the emergence of new platforms, and the migration of ad-spend remove any justification for special obligations on commercial broadcasters, etc.

2.3 Assessments

2.3.1 What have been the gains and losses of public service or state media caused by the digital switchover of terrestrial platforms and the rise of new media?

2.3.2 Have public service provisions become more or less significant in recent years, or have they not changed?

Sources:

- Annual reports of public service media (where they exist)
- Parliament reports on public service media and spending
- Media reports
- Interviews with media observers/experts

3. Digital Media and Society (5 pages)

This chapter considers, firstly, the rise of user-generated content, with a view to assessing the popularity and, where possible, level of trust in user-generated news vis-à-vis established media. The distinction between ‘independent’ and ‘media-embedded’ sites refers to economic or corporate status, not to editorial policy. User numbers should refer to unique visitors. Secondly, this chapter looks at ‘digital activism’: if, what, where, and how effective it is.

3.1 User-Generated Content (UGC) (2 pages)

3.1.1 What are the most popular types of UGC and the most popular UGC websites in the country, by number of unique visitors? To what extent have websites of established media included UGC?

- **Take the top (up to 10) most popular websites in the country and analyze those websites that qualify as UGC websites. (These may include consumer, campaigning, personal or special interest sites – do not restrict your selection to hard news sites.) Analyze how many of these are run by established media. Based on your own analysis and on available consumer surveys, describe the types of UGC on the most popular websites in the country: online forum/comments on established media websites, independent or media-embedded blogs, wikis, social networks, video and photo sharing websites.**

3.1.2 What are the ten most used social networks? (Refer to international - Facebook, Twitter, etc. - and national, according to the data.)

- **Write an analysis of the popularity of social networks based on the number of active users, as a share of registered users.**

3.1.3 How much of the usage of social networks and blogs, in particular, involves news consumption, and how much personal or other communication?

- **Using available internet consumer surveys, analyze the trends in usage of social networks, i.e., for personal reasons or for news consumption. (Twitter may be included as a social network.)**

3.2 Digital Activism (2 pages)

3.2.1 Are any of the digital platforms used for civil society activism?

- Give a critical account of several recent examples of mobilization involving (a) individuals and (b) groups (e.g., activists cooperating with media via UGC, activists using social networks, political parties/groupings and civil society organizations using digital platforms, etc.) Key indicators of activism's significance may include breakthrough to mainstream media, and impact on official attitudes or public policy. If you are unable to provide examples, please explain why.

3.2.2 Are these digital mobilizations only interesting to a small minority or are they relevant to mainstream society?

- Analysis of achievements of such efforts/initiatives; refer to the scale of such mobilizations, actual impact, etc.

3.3 Assessments (1 page)

3.3.1 How has digitization contributed to the overall news offer?

3.3.2 Are citizens taking the opportunities offered by new media for civil and political activism?

Sources:

3.1

- Online audience surveys (Alexa.com; whenever possible, local online audience surveys should be used)
- Consumer surveys on online usage

3.2

- Media reports
- Interviews with civil society organizations/groups

4. Digital Media and Journalism (9 pages)

This chapter analyzes the effects of digitization on journalists' activity: their workload, payment, responsibilities, and the ethical dimension of their work. To what extent can new and digitized media actually deliver quality journalism? Are the opportunities created by new technology being swamped by pressure to produce ever greater volumes of news output at the same time that traditional business models are threatening to disintegrate, as advertising shrinks and migrates? In particular, what is happening to investigative journalism, a high-cost activity, essential to journalism's watchdog democratic role, which has suffered from the collapse of traditional business models? Finally, this chapter examines the impact of new media on core issues of social and cultural diversity, to discover whether coverage of these issues has improved.

4.1 Impact on Journalists and Newsrooms (2 pages)

4.1.1 What are the main changes in the work of journalists over the past five years, and which factors produced these changes? To what extent are these factors digital-related?

- **Analyze the changes in the ratio of original to aggregated news content in major outlets; newsroom convergence; possible increases in unverified information; increase in the number of voices/sources in stories**

4.1.2 Has digitization had any consequences for the ethical behavior of journalists? If yes, what are they?

- **Write an account of any changes in practical respect for ethical standards, as well as in their letter or implementation, breaches of privacy, data theft, etc.**

4.2 Investigative Journalism¹¹ (2 pages)

4.2.1 Has digitization helped investigative journalists to improve their work?

- **Write an account of the means and tools made available by digitization to improve the work of journalists.**

4.2.2 Has digitization affected or created threats to the work carried out by investigative journalists? If yes, how?

- **Write an account of issues such as data theft, blocked content and other forms of censorship, including self-censorship as a result of political pressure or security threats. Give examples and an indication of whether it is possible for investigative journalism to be carried out.**

4.2.3 What sort of, and how much, investigative journalism is done through blogs and other new entrants?

- **Identify the most prominent blogs that publish investigative content and write an analysis of journalistic content in the new media.**

4.2.4 Has digitization helped to improve the dissemination and impact of investigative journalism?

- **Write an analysis of the opportunities to disseminate investigative reporting content created by digitization. Refer to number of platforms, changes at policy level, etc.**

¹¹ In this report, 'investigative journalism' is understood as a form of journalism that investigates in-depth a topic of public interest. It is characterized by lengthy research and preparation, involving primary sources (legal documents, tax records, government and regulatory reports), analysis of social and legal issues, and a significant number of interviews on and off the record. Key areas for investigative journalism include crime, corporate wrongdoing, political corruption, and public policy of all kinds.

4.3 Social and Cultural Diversity (2 pages)

4.3.1 What are the most sensitive issues in terms of social and cultural diversity?

- **Write an account of such issues at the societal level, referring to ethnic, linguistic, or religious minorities, migrants, sexual minorities, etc.**

4.3.2 Is coverage of such issues regulated? How have these issues been reported and discussed in the media? (In particular, how have inter-ethnic tension and conflict - where these occur - impacted on this coverage of these issues by the media?)

- **Describe the existing standards on minority coverage in the media, such as quotas for minority programming or any other requirements on minority coverage. Analyze how these standards have been implemented.**

4.3.3 Have digital media affected (reduced, enlarged or improved) the space for public expression of the groups mentioned at 4.3.1, and the content that targets these groups?

- **Based on available content analyses and interviews with journalists, analyze the role that digital media play in the coverage of minorities.**

4.4 Political Diversity (2 pages)

4.4.1 Has digitization triggered any changes in the regulation of media coverage of elections and politics in general? If yes, have these changes affected the overall diversity of political communication?

- **List changes in provisions on media coverage of elections and politics in general over the past five years, and establish which of these were prompted by digitization. List examples of news providers moving from traditional media to new platforms that are less regulated (such as the internet) and describe the main trends in coverage of political issues, with a focus on political diversity.**

4.4.2 What has been the impact of digital media on political communication and on the diversity of voices in political life?

- **Analyze how digital media have affected the diversity of voices in political life, drawing on such factors as (a) new patterns of communication employed by political parties, (b) changing numbers and kinds of actors in the political space, and (c) interest generated in politics through digital media.**

4.5 Assessments (1 page)

4.5.1 Has digitization affected the work of journalists and the quality and accuracy of their reporting? If yes, how?

4.5.2 Has digitization affected coverage of elections and of marginalized groups, and investigative journalism? If yes, how?

Sources:

This chapter may be commissioned to local media observers/experts who have followed journalism closely. Available content analysis studies should be used for subsections 4.2 and 4.3. The chapter should be written based on (between 5 and 10) interviews with journalists and editors and answers to questionnaires submitted by country authors to journalists, editors and media activists.

5. Digital Media and Technology (5 pages)

With technological innovation forcing ceaseless change on the media, it has never been more important for civil society activists to understand the nexus between technology and policy. Yet new media technology is unfamiliar to most of us, and sometimes dauntingly complex; nor is its policy significance at all obvious. This chapter will focus on three technical aspects of digitization with salience for policy, in order to examine who wins and who loses from digital switchover (terrestrial platforms), and the emergence of important new 'gatekeepers'.

5.1 Broadcasting Spectrum (2 pages)¹²

5.1.1 Are any categories of users/groups/institutions favored by broadcasting spectrum allocation policy? If yes, how?

- Describe who is responsible for allocating broadcasting spectrum and what the basis or principle of the allocation of digital spectrum is. Refer to broadcasters that are disadvantaged vis-à-vis other businesses, low spectrum usage fees, privileges in broadcast licensing, distribution of white spaces and digital dividend. Include a description of the allocation of spectrum for telecom and other services if this process is relevant to the allocation of spectrum for broadcasting.

5.1.2 Is spectrum awarded in a transparent, non-biased way?

- Refer to public tenders on the basis of calculated costs or benefits, selective application of legal provisions in the award of spectrum, etc. Examples should be given.

5.1.3 Have operators tried to reduce broadcasting spectrum availability for potential rivals?

- Refer to efforts to obtain control and management of digital multiplexes, etc. Also refer to any self-interested lobbying by commercial operators for certain technical standards over others (e.g. MPEG-2 over MPEG-4).

¹² By 'broadcasting spectrum', we refer to the radio frequencies or waves in the electromagnetic spectrum, which carry radio (including mobile phone), television and radar signals.

5.2 Digital Gatekeeping (1 page)

5.2.1 Are there any debates in public or the media about the adoption of technical standards for platforms that carry news? If yes, have these debates highlighted any problems that the adoption of such standards poses for media reception and consumption?

- Describe the process of adoption of technical standards for digital broadcasting.¹³ Specify whether independent experts have indicated any ways in which this process (which is and has to be commercially driven), and also the resulting decisions on standards, fail to take due account of the public interest.

¹³ They are broadcast standards (such as DVB, ATSC, ISDB, Chinese, DMB) and to codecs such as MPEG-2, MPEG-4.

5.2.2 Have been there any problems related to the gatekeepers in digital broadcasting?¹⁴

- Write an account of access-related problems posed by gatekeepers, such as companies bundling a large number of TV channels and running subscription management systems (SMS), exclusion of channels from EPGs, digital multiplexes charging prohibitive fees for channels, etc. Focus on the main changes in analog broadcast arrangements.

5.2.3 Have transmission network operators intervened in any way in the distribution of spectrum resources? If yes, how?

- Analyze cases of spectrum allocation, identifying any instances where the transmission network administrators have intervened to privilege particular groups, companies or individuals.

¹⁴ We look in this report at the main gatekeepers in the digital chain, such as multiplex operators (MUX), Electronic Programming Guides (EPGs), Conditional Access (CA) and Subscription Management Systems (SMS).

5.3. Telecoms (2 pages)

5.3.1 What role, if any, do cable and telecom companies (including mobile operators) play in the distribution of media content, and in particular of news, over recent years?

- **Write a short summary of the existing state of affairs on the telecom and cable market in your country. Then, analyze how trends such as increasing offers of bundled services, IPTV deployment, criteria on program packaging, among telecom and cable companies etc., have influenced the availability of news services. Refer, where applicable, to must-carry and must-allow rules.**

5.3.2 Have there been any cases where cable and telecom operators (including mobile operators) have exerted pressure on news providers?

- **Give an account of any cases where such companies have put pressure on news providers through, for example, restrictions of access to services, imposition of high fees, etc. At the same time, examples of such companies offering incentives to news providers should be looked at. Evidence about the purpose of their moves should be provided. Issues affecting net neutrality may be mentioned.**

5.4 Assessments (1 page)

- 5.4.1 Is the spectrum allocation process politicized? If yes, how and to what extent? Does the regulator take account of the needs of all society when allocating spectrum?
- 5.4.2 Is spectrum regulation appropriate for the country? (Refer to whether/how it secures a healthy level of competition, accessibility of services, the digital divide, etc.)

- 5.4.3 What role has public interest played in the allocation and regulation of white spaces and digital dividend? (For example, do laws and policy documents mention the public interest? If yes, do they define it? Have civil society organizations addressed this question with reference to the public interest?)

Sources:

5.1

- Reports of the technical regulatory authority
- Interviews with policy-makers in telecommunications and spectrum allocation
- Independent assessments and reports

5.2

- Reports of the technical regulatory authority
- Interviews with policy-makers in telecommunications and spectrum allocation

5.3

- Telecom annual reports
- Independent assessments
- Interviews with IT&C experts
- Media reports

6. Digital Business (6 pages)

The erosion of traditional business models poses a threat to commercially-funded media around the world. What exactly has happened to media revenue and media ownership over the past five years? Can these trends be correlated with quality of news output? Can expensive services that are central to the media's democratic function be preserved in the teeth of unprecedented economic pressures?

6.1 Ownership (2 pages)

6.1.1 Have there been any legal developments on news media ownership over the past five years? If yes, how have these developments affected diversity of ownership?

- **Analyze changes in legislation that affect media ownership over the past five years, and explain which of these are related to digitization. Relevant changes can include relaxation of ceilings on ownership concentration, introduction of cross-ownership rules between online outlets and broadcasters, rules on foreign ownership in the media, etc. Analyze the impact of such changes on the diversity of owners in the media.**

6.1.2 Who are the new entrants in the news market over the past five years?

- **Write an account of the major owners of media companies that started operations in the country over the past five years. These could be foreign owners, intergovernmental organizations, domestic commercial news providers, not-for-profit organizations, etc.**

6.1.3 Among horizontal/vertical mergers and consolidations of ownership, which have been (a) the most helpful and (b) the most detrimental to pluralism and diversity?

- **Write an analysis of how consolidation of ownership has affected and is affecting the pluralism of media and diversity of voices, based on interviews with journalists and independent media experts. This subsection should include cases of publishers putting pressure on their journalists not to cover certain topics because of the owners' interests, limits on access of various politicians or businessmen to media outlets because of pressures from owners, cases of media that are purchased to be used for gaining political influence, etc.**

6.1.4 What, over the past five years, have been the most significant business involvements of the telecom industry in the media sector that have influenced the independent performance of the media?

- **Write an account of mergers and acquisitions in, or affecting, the media sector, with a focus on telecoms. Refer to telecoms' purchases of media outlets, takeovers of digital multiplexes, etc. If there is information available on the rationale behind these deals, it should be explained here.**

6.1.5 Is media ownership transparent?

- **Write an account of (a) the requirements (legal or otherwise binding) on media organizations or media owners to report ownership information to a media authority or other public body, (b) the level of public access to this information and (c) the level of implementation of requirements on transparency where they exist. Assess whether citizens are able to know, though publicly available information, who controls the media.**

6.2 Funding (2 pages)

6.2.1 How have private and public funding developed over the last five years? How are these trends projected to evolve in the near future?

- Gather data on public (or state) spending: this includes state budget allocations, license fees, state advertising, etc. Gather data on private funding: this includes advertising spend,¹⁵ sponsorship by private companies, financial sources, etc. On the basis of this data, analyze how public and private spending in the media has evolved over the past five years, and the reasons for this evolution. Based on interviews with media experts and on your own judgment, describe which of these developments are seen as (a) the most helpful and (b) the most detrimental to the financial independence and sustainability of the media?

¹⁵ Collect advertising data in net figures. Where data are not available, estimate the advertising spend based on ratecards. (Ratecards are defined in the advertising industry as a list of tariffs for advertising provided by media outlets to interested advertisers.)

6.2.2 What other sources of funding have emerged in the media?

- Write an account of other sources of funding, public or private, that have appeared in the media. These may include new forms of advertising, subscriptions, Diaspora funding,¹⁶ etc. Hybrid forms of funding such as PPP (public-private partnerships) if such have emerged in the media, should also be mentioned. If there is evidence of how such sources contribute to improving the financial sustainability of news media, provide this information here.

6.3 Business Models (1 page)

6.3.1 Have digitization and (where applicable) the economic crisis prompted any changes to media business models?

- Based on extensive interviews with CFOs and CEOs of media companies, analyze the changes in cost-expenditure balance, sources of revenues, marketing budgets, etc. over the past five years. Reference to business plans and financial projections released by companies should be made where these are available and are not covered by confidentiality agreements.

¹⁶ Funding from abroad.

6.4 Assessments (1 page)

- 6.4.1 Has digitization affected monopolies and dominant positions in the media market and media ownership by politicians? Has transparency of ownership increased in the past five years?
- 6.4.2 Has the impact of ownership on the performance and independence of the media changed under digitization? If yes, how?
- 6.4.3 What are the most sustainable financing models for the production of publicly-relevant news content? Which sources of funding are seen as (a) the most *helpful* and (b) the most *detrimental* for media diversity, pluralism and independence? Have any changes to media business models had a positive or negative impact on journalistic output and quality?

Sources:

6.1

- Media reports
- Market reports and assessments (independent consultancies such as PricewaterhouseCoopers, KPMG, or industry organizations such as WAN-IFRA)
- Annual reports of media companies
- Interviews with media experts/observers

6.2

- Media reports
- Market reports and assessments (independent consultancies such as PricewaterhouseCoopers, KPMG, or industry organizations such as WAN-IFRA)
- Annual reports of media companies
- Interviews with media experts/observers

6.3

- Interviews with editors and media managers

7. Policies, Laws and Regulators (10 pages)

Some digital media can be launched without a framework of policy, law and regulation. Full-blown switchover, on the other hand, is a process managed by governments. This chapter examines the implications of this framework for media values. Regulation is in flux, retreating from some traditional tasks while grappling with new challenges. Is internet censorship a problem?

7.1 Policies and Laws

7.1.1 Digital Switchover of Terrestrial Transmission (2 pages)

7.1.1.1 Are there public provisions that govern access by citizens and provide for affordability? If yes, are they implemented?

- Give an account of the legal and political commitments on access of citizens to programs on digital platforms and of the affordability requirements that must be met before analog signals can be switched off. Describe whether these provisions are fair (as between minority or ethnic groups and the majority, as between the economically disadvantaged and the advantaged, and so forth) and whether they have been, or are being, implemented.

7.1.1.2 Is there a scheme that provides for the payment of subsidies to those who cannot afford set-top boxes or digital TV sets? If yes, how adequate is this scheme?

- Describe any schemes that are provided by law or government decree to subsidize digital reception equipment.

7.1.1.3 Does the legal framework ensure that the digital switchover of terrestrial platforms serves the public interest? If yes, how? Also, if yes, are there transparent criteria to ensure that the public interest is, in fact, served?

- Refer to provisions regarding public interest in policy documents and laws concerning switchover, describing if and how public interest is defined, and what mechanisms are in place to ensure that it is served. Refer also to the transparency (or not) of funding for digital switchover, etc.

7.1.2 Internet (2 pages)

7.1.2.1 Is news delivery regulated on the internet and mobile platforms? If yes, how?

- Give an account of the most important requirements for content distribution on internet and mobile phones. These include provisions on news aggregation, content regulation, legal relations between various parties on the internet, etc. Explain whether these provisions are implemented.

7.1.1.4 Have citizens/civil society groups been consulted, or have they been otherwise involved, in decision-making with respect to the policies or provisions you have mentioned in 7.1.1.1?

- Give a critical account of any public consultations, feedback from civil society groups and citizens and their impact on the decision-making process. If there have been no such activities, comment on any relevant proposals or initiatives and assess whether civil society groups are up to speed on these issues.

7.1.2.2 What legal liability exists for internet content? How does that liability affect the performance and independence of news media?

- Describe whether legal liability for internet content rests with the author/poster, the site, or the server. Write an analysis, based on existing cases, of how these provisions affect the independent performance of the media.

7.2 Regulators (3 pages)

7.2.1 Has the structure of media content regulators changed over the past five years? If yes, how?

- Give a short account of the regulatory framework in the analog era, and then describe what structures have taken over (or have been created to take over) regulation of digital broadcasting and the internet. Describe the main changes in content regulation, and analyze whether traditional 'linear' content regulation has been weakening and internet regulation has been increasing.¹⁷

7.2.2 Are there mechanisms for ensuring the independence from government and political parties of those regulating the digital environment (including the internet)? If yes, do these mechanisms deliver independence in practice? And have they altered during the past five years?

- Write an analysis of these mechanisms, which include criteria for appointing and dismissing members of the regulator, funding mechanisms, etc. Summarize the state of regulatory independence in the analog era, and then describe the situation in the regulators that took over (or were created to take over) regulation of digital broadcasting and the internet. Cases where regulators become dependent on state-owned companies, particularly telecoms, should also be discussed here.

¹⁷ 'Linear content' refers to scheduled media content that progresses without any control from the viewers, such as broadcast, scheduled programs. 'Non-linear content' refers to content, such as internet content, that allows for user interactivity.

7.2.3 Is the system of licensing fair?

- **Analyze the mechanisms in place to ensure that every application for a license (analog or digital) will be considered independently of the applicant's political or religious or ethnic affiliation. Write a description of the state of licensing in the analog era and then analyze the process of licensing digital broadcasters, referring to specific cases of unfairness, lack of transparency, etc.¹⁸**

7.2.4 Are there mechanisms of self-regulation? If yes, do they have any influence in the digitized environment?

- **Write an account of the existing self-regulatory mechanisms in your country, including press councils, complaint mechanisms, ombudsmen, ethical committees in journalists association. Assess which of these mechanisms (self-regulatory mechanisms of online media, new ethical codes covering online media, etc.) disappeared or emerged as a result of digitization. Where there is no digitized environment, write about other relevant self-regulatory mechanisms.**

¹⁸ The content of this section differs from *5.1 Spectrum*. While in this section we ask you to analyze the system of digital licensing by the content regulators, in *5.1 Spectrum*, we ask you to identify the groups that have been or are being advantaged by the general policy spectrum.

7.3 Interference by State Authorities (2 pages)

7.3.1 Are there any cases of interference by state authorities that distorts the media market?

- This sub-section analyses indirect interference with the media by the state authorities. Summarize any such cases and trends in the pre-digital media market, and then assess whether this pressure has increased or decreased in the digital market. Refer to cases of state authorities awarding preferential state funding in the form of subsidies or advertising to media outlets, cases of governmental decisions to adopt new levies on the media aimed at hurting the financial independence of particular outlets, etc. Establish the link between such moves and their goals.

7.3.2 Are there any cases of digital regulators abusing their powers?

- This sub-section analyzes interference with the media by state authorities through regulatory bodies. Summarize any such cases and trends in the pre-digital media market, and then describe whether this pressure has changed (increased or decreased) in the digital market. Refer to, e.g., cases of licensing media outlets, orders given by regulators for inspections on compliance with tax and other legal provisions.

7.3.3 Are there any cases where the state authorities have exerted extra-legal pressure on digital media?

- This sub-section analyzes the level of overt interference of the state authorities with the media. Summarize any such cases and trends in the pre-digital media market, and then describe whether this pressure has changed (increased or decreased) in the digital market. Refer to direct pressures or threats against editors and owners regarding content, editorial orientation and personnel.

7.4 Assessments (1 page)

- 7.4.1 Is the overall framework of policy, law and regulation responsive to the challenges of digitization? (Refer to mechanisms to ensure transparent licensing process, economic competition, guarantees for free and independent news production and dissemination, etc.) If not, where are the shortcomings? What has been done well?
- 7.4.2 Have the nature and degree of interference by state authorities changed over the past five years? If yes, can the changes be attributed to digitization?

- 7.4.3 Has there been a relative increase in public consultation (in terms of debate and participation) with respect to new media technologies, in comparison with the amount of such consultation in the analog context?
- 7.4.4 Which policies and legal provisions relating to digitization have had an impact, direct or indirect, on pluralism and diversity in digital broadcasting?

Sources:

7.1

- Legislation and policy documents
- Legal analysis and legal impact assessments
- Regulatory impact assessments
- Media reports
- Interviews with legal activists and journalists defense groups

7.2

- Legal analysis
- Regulatory impact assessments
- Media reports

7.3

- Media reports
- Interviews with editors/regulators

8. Conclusions (1 page)

8.1 Media Today

Which developments, over the past five years, have most enhanced, and which have threatened or diminished:

- (a) the *independence* of news media
- (b) the *diversity* of news media and news media content
- (c) the *pluralism* of voices across the news media?

Which of these developments are attributable to the process and results of digitization, and which are attributable to other causes?

8.2 Media Tomorrow

Over the next five years, what do you expect to be the principal areas of development in your country's media, in the light of digitization?

- **Note that your answers should emerge naturally from the analyses which you have carried out in the preceding chapters. If you find that your answers do not refer to anything you have already mentioned in the report, there is a problem!**

9. Recommendations (1 page)

9.1 Short subtitle: summing up the recommendation

9.1.1 Problem (short description: what the problem is in one or two sentences)

9.1.2 Recommendation (e.g., “A certain institution/entity SHOULD DO X TO ACHIEVE Y.”)

- **Note that these recommendations should be practical and achievable, in large part if not entirely. They should emerge from the analyses that you have already carried out in the report. Choose carefully among the potential issues that could be selected for recommendations. Do not choose problems for which no viable solution exists, because there is no actor or agent to take the required action. These recommendations will be the foundation for advocacy in your country.**