



Media Trends in the Nordic Countries

Newsletter from NORDICOM

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The Media Market

Top 25 Nordic Media Companies in 2014

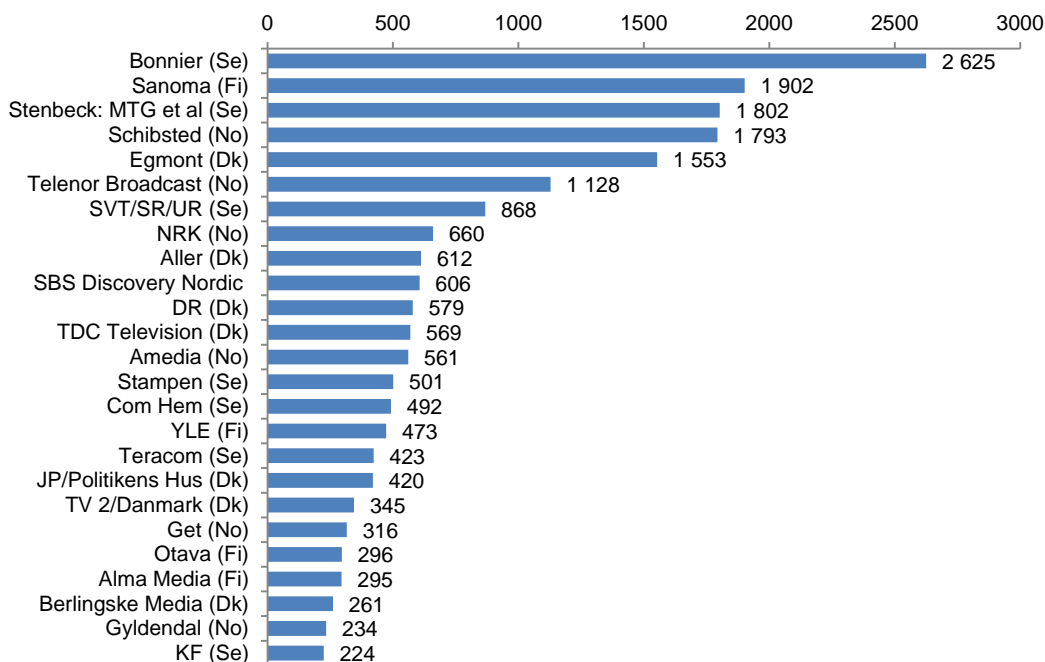
Media Companies | Nordic December 2015 | JO

Five Nordic media companies are significantly larger than the other players on the market, with Swedish media group Bonnier remaining the largest media company in the region. The distance down to Finnish Sanoma, in second place, is nonetheless smaller than before. The most profitable media company among the 25 largest Nordic media groups is the Swedish telecom company Com Hem.

A majority of the 25 largest media companies in the Nordic region reported stagnated or even declining revenues in 2014. New accounting standards complicate direct comparisons with 2013, however. Most companies on the top list continued to report profits in 2014 as well.

The most profitable companies on the list are the two Swedish TV distributors Com Hem, with a gross margin of +29%, and Teracom, with a gross margin of +14%. For the second straight year, Swedish newspaper group Stampen reported the largest loss among the 25 companies on the list, with a gross margin of -9%.

The 25 largest media companies in the Nordic countries 2014 (million Euro)



Source: Nordicom (based on companies' annual reports and web sites).

[Full table including revenues, results and profit margins](#) (Excel)

The five largest companies

The five largest Nordic media companies – Bonnier, Sanoma, MTG with its sister companies in the Stenbeck sphere, Schibsted Media Group, and Egmont – are those that have the greatest breadth in their business operations and geographical spread. This group has kept its position at the top of the list from year to year, although the ranking between them has shifted. Other companies are active on fewer markets, either geographically or in terms of activity.

Programme companies, TV distribution and print

All major Nordic television companies are included in the list, either as subsidiaries of large groups (Bonnier's TV4 in Sweden and MTV Finland, Sanoma's Nelonen in Finland, the Stenbeck sphere's channels in the Nordic countries, and Egmont's TV2 in Norway) or as their own units, such as Discovery Communications with operations in all Nordic countries except Iceland, and TV2 Denmark (partly public service TV), owned by the Danish state. The Nordic public service companies are also on the list, with the exception of RÚV in Iceland.

Five distribution companies are among the top 25, and include cable, satellite, broadband and terrestrial operators. Norwegian Telenor, which distributes TV in the Nordic countries (Canal Digital), and Danish TDC are both parts of major telecom corporations, but are ranked here based on their TV-related activities. Com Hem is active in Sweden, while Teracom (owned by the Swedish state) owns and operates the terrestrial networks in Sweden and Denmark, and stands behind Boxer TV. Get is active in Norway. In addition, MTG is also a significant player on the Nordic TV distribution market.

Another group is a number of companies with core businesses in the print media. The largest is Aller from Denmark, followed by Amedia, Stampen, JP/Politikens Hus, Otava, Alma Media, Berlingske Media, Gyldendal and KF.

Nordic ownership

The Nordic media market is also Nordic concerning ownership structure: only five of the 25 largest companies have owners outside the region. The three distribution companies Com Hem, TDC television (which includes Denmark's largest distributor, YouSee) and Get are all owned by foreign private equity firms. Get was acquired by TDC in October 2014. The fourth is the media group comprising the Nordic subsidiaries of US-based Discovery Communications. The last is the Danish newspaper group Berlingske Media, which was sold by the UK Mecom group to the Belgian media company de Persgroep at the beginning of 2015.

Discovery Communications has also been involved in structural affairs that have affected the Nordic media markets in 2015. While the group has sold its Nordic radio networks to the German media company Bauer Media, it has instead increased its ownership in the Eurosport network to 100%.

Download tables from Nordicom's table database (Excel):

[The 25 largest media companies in the Nordic countries 2014](#)

[The 25 largest media companies in the Nordic countries 2014 \(graph\)](#)

[The 25 largest media companies in the Nordic countries 2014: Revenues 2004-2014 \(Euro\)](#)

[Archive statistics, including top lists for previous years](#)

Reading tips, previously published by Nordicom:



The Nordic Media Market 2015 analyzes current trends in Nordic media development against previous characterizations of the Nordic media landscape. It focuses particularly on the development of the Nordic newspaper industries, Nordic media policy and the market position of the Nordic public service companies. Author: Jonas Ohlsson. (Published in March, 2015)

[Read more](#)

The Finnish Media Market 2014

Media Economy | Finland December 2015

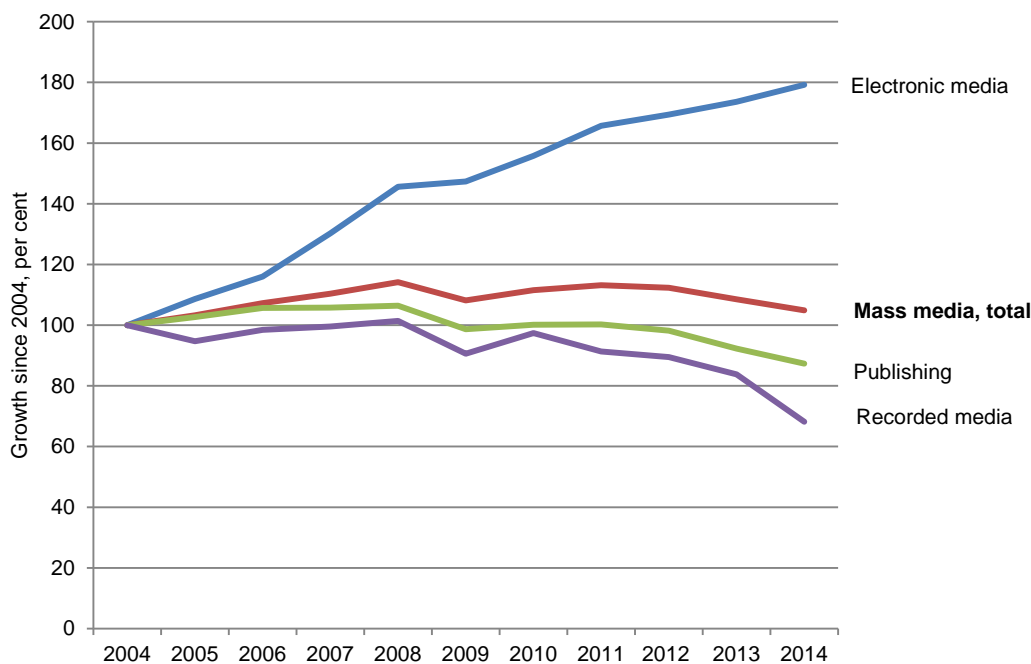
The value of the mass media market decreased further to slightly under EUR four billion in 2014. It was around EUR 140 million or three per cent less than in the year before, according to annual data on the mass media market by Statistics Finland.

Nearly one-fifth of the value of recording markets vanished. The video recording markets declined by around one-third and sound recording sales decreased by 14 per cent. The collapse in the sales of video recordings is probably explained by video on-demand services, like Netflix, rapidly becoming more common.

Electronic media grew by three per cent. The highest relative growth was observed in web advertising, which grew by 11 per cent. The share of electronic media in mass media markets has doubled during this millennium from under one-fifth (18%) to over one-third (36%). Publishing activities went down by five per cent from the year before.

The value of the electronic media market has nearly doubled over the past ten years. The value of publishing activities and of recording markets, in particular, has been declining clearly for several years.

The development of mass media market, 2004=100



Source: Mass media and cultural statistics. Statistics Finland

[Read more](#)

About the statistics: The calculations presented here describe the mass media market at end user level: for example, the figure on the newspaper market is comprised of retail priced subscription and single copy sales of newspapers, and their revenue from advertising. The figures cover domestic production and imports but not exports. There is some overlap between Internet advertising and other media groups.

Norwegian Media Economy 2014

Media Economy | Norway November 2015

The Norwegian Media Authority has published its annual report on Norwegian media economy. It shows that commercial broadcasting has increased its revenues, but that the development of the media industry as a whole is marked by the decline in the newspaper economy.



The Media Economy Report 2014 analyses the economics of newspapers, online newspapers, and radio and TV. These media's total revenues amounted to almost 26 billion NOK in 2014, which is a decrease of 300 million NOK from 2013.

Greater revenues for broadcasting

For the first time, this year's report provides a picture of the broadcasting companies' operating revenues in Norway. The authority estimates their 2014 revenues to 16.5 billion NOK, representing an increase of 37 per cent over five years. From 2013-2014, the increase was almost 9 per cent. Behind the growth are the commercial players, particularly in the TV sector.

Decreasing profitability for newspapers

Most Norwegian newspapers are still profitable, but the profitability is affected by the sharp decline in print ads. Increasing digital revenue from Internet advertising and digital circulation do not compensate for the fall in print revenue. Despite a sharp increase for digital circulation revenues – up 146 per cent from 2013 to 2014 – they represent just 5.5 per cent of the publishing houses' overall circulation revenue.

International pressure on the Norwegian media market

Advertising revenues accruing to international companies like Google and Facebook are a challenge for the domestic media industry. The report notes that it is difficult to find accurate figures on their revenues in Norway, but estimates Google's and Facebook's 2014 revenues on the Norwegian market to just under 1.9 billion NOK and around 800 million NOK, respectively. International streaming companies like HBO and Netflix now also have solid positions in the Norwegian market. Based on user data from TNS Gallup, their combined turnover in Norway is estimated to approximately 700 million NOK in 2014.

[Økonomi in Norwegian medievirksomheter 2010-2014 \(PDF\), in Norwegian](#)

[Web pages about media economics in Norway, in Norwegian](#)

[About the Norwegian Media Authority, in English](#)

About the report: The Norwegian Media Authority publishes annual reports on the Norwegian media industry's economics. The information is based on own data collection and other available sources. For companies where data are not available, the report is based on estimates.

Swedish Newspaper Economy 2014

Media Economy | Sweden September 2015

After the 2013 downturn of the Swedish newspaper industry's profit level, 2014 turned up again. But with a continuing fall in circulation and ad revenues, the industry is facing major challenges, according to a report analysing the 2014 Swedish newspaper economy.



The development of the average profit levels has pointed downwards more or less continuously since 2006; but this seems to have stalled, at least temporarily. After the negative result in 2013, the industry average in 2014 showed positive figures again. But the improved profitability was primarily attributable to cost savings. Newspaper revenues continue to decline, and both advertising and audience market have been affected by the transition to a digital media market.

The largest circulation drop so far

The longtime decline in circulation continued in 2014, corresponding to a drop of 5 per cent from 2013. This is the largest relative decrease ever recorded for a single year. The decline affected all newspaper categories, but was greater for daily newspapers than for non-dailies. Despite the fall in total circulation the revenue remained largely unchanged, however, due to higher subscription prices.

Increase in digital advertising

Revenue from printed ads continues to decline at a rapid pace. In 2014, advertising revenues fell by more than 9 per cent. At the same time, the newspaper companies' revenues from digital advertising continued to increase. The online ads do not yet outweigh the decline in printed ads, but according to the report, the time is approaching when the ad shortfall for print can be compensated for by a more significant share of digital advertising.

Two newspaper groups account for nearly half of the revenues

The concentration of ownership increased somewhat during 2014 in terms of financial turnover. Sweden's two largest newspaper groups, Bonnier's newspaper division and Stampen Media Group, together account for 48 per cent of revenues (45 per cent in 2013). The four largest, including Schibsted and Norrköpings Tidningar Media, account for 72 per cent of revenues (69 per cent in 2013).

[Download Dagspressens ekonomi 2014 \(PDF\)](#) - incl. summary in English

[Read more on the Authority's website](#) - in Swedish

About the report: Dagspressens ekonomi 2014 [The Newspapers' Economy 2014], the 39th report in the series, presents an annual analysis of the economic performance of the Swedish newspaper industry, in Swedish with a summary in English. The Press Subsidies Council published the report for the period 1976-2014, but in 2015 the Council's tasks were transferred to the Swedish Broadcasting Authority, which stands behind the release of this year's report. The report's author is Jonas Ohlsson, media researcher at NORDICOM.

Media Development in Denmark 2015

Media Development | Denmark October 2015 | MVK

It costs Danish homes to keep up with media developments. Twenty years ago a household used about 5.5 per cent of its budget on media-related consumption items, while today the figure has risen to over 11 per cent; the increase has particularly taken off since 2004. The largest's share is spent on telephones (purchases, subscriptions, call charges), TVs, PCs, etc. Also, mobile data traffic is increasing at great speed.



In the last two years, daily viewing of traditional TV for people aged 12-18 years has fallen by 46 minutes. For the oldest group (aged 70+), it is radio listening that has been hit: since 2008, this group's radio listening has fallen by around 43 minutes. In turn, the older generation is increasingly using their mobile phone to access the Internet. These and many other results can be found in the Danish Agency for Culture's online report on media development in Denmark, published in June. A newly published English summary presents the most important conclusions from the report.

[Download the summary \(PDF\)](#)

[Read the full report online \(in Danish\)](#)

[About the Danish Agency for Culture](#)

About the report: This is the second edition of the Danish Agency for Culture's "Media Development in Denmark Report". This year's report is divided into a number of sections for TV, radio, newspapers, web, etc., with detailed analyses of the use of the relevant platforms. Industry sections cover a review of major media companies in Denmark and an analysis of Danish household media-related consumption.

Finnish TV Output 2014

Television | Finland 2015 | MJ

In Finland, the programme supply of the nationwide free-to-air channels has risen by six hours per day. Reality television and foreign fiction continue to be the largest programme categories in Finnish television, while news continues to decrease. This is shown in a report on Finnish TV programming by the Ministry of Transport and Communications, which also indicates continuities of trends rather than any major changes compared to the previous year.

The report on Finnish television output provides an annual overview of the Finnish free-to-air nationwide television channels' programming in 2014. The report's goal is to serve communication policy by measuring the selection and diversity of genres as well as the programmes' country of origin.

The report covers four public broadcasting channels (Yle TV1, Yle TV2, Yle Fem, Yle Teema) and ten commercial channels (MTV3, Sub, AVA, Nelonen, JIM, Liv, Hero, TV5, Kutonen, FOX). For the first time it also describes online and on-demand services, since at the beginning of 2015 the TV-viewing and radio-listening measurement company Finnpanel started gathering [weekly data on web television viewing](#).

The programme supply in 2014 totalled an average of 1,469 hours per week, or 210 hours per day. Compared to 2013, the total programme supply of the channels rose by six hours per day, despite an increase in the supply of online and on-demand services.

Three fewer hours news per week

As in previous years, the two largest programme categories on nationwide TV were reality television (26%) and foreign fiction (20%), which also occupied a major share of prime time. Compared to the previous year, no significant changes were observed in other genres either: entertainment and popular music (11%), factual programmes (10%), feature films (9%), lifestyle programmes (9%), children's programmes (4%), current affairs programmes (3%), domestic fiction (2%), cultural programmes (2%), news (2%), and sports (2%). The average programme supply of news continues to decrease – compared to the previous year, it had decreased by about three hours per week, or no more than half an hour per day.

Public service (YLE) and commercial TV programme supply according to different programme categories in 2014 (%)

	Total supply		Prime time	
	Public service	Commercial	Public service	Commercial
News	6	2	8	2
Current affairs	9	1	4	–
Factual	23	6	22	2
Cultural	7	0	10	1
Lifestyle	5	10	4	6
Sports	5	1	4	2
Domestic fiction	3	1	4	2
Foreign fiction	17	21	20	20
Feature films	7	10	11	22
Children's	9	3	5	–
Entertainment	4	13	5	7
Reality	4	33	3	36
Total	100	100	100	100
Total hours/week	352	1132	137	332

Source: Finnish television programming 2014-report (table 4.1.1)

Yle Fem, MTV3 and Yle TV2 the most diverse

In terms of diversity of programme categories, the most diverse channels were Yle Fem, MTV3, and Yle TV2. The least diverse of all channels was the newly launched free channel Hero, which started in November and is owned by Nelonen Media, showing a profile with a focus on American fiction (84%) and film (15%).

North-American and domestic programmes dominate

The programme's country of origin remained the same compared to the previous year. Most programmes were either North-American (45%) or domestic (32%). The highest share of domestic programmes was on the public service channels (Yle), while Hero, TV5 and FOX had the highest share of North-American programmes in their supply. The shares of programmes produced in other Nordic countries (5%), or elsewhere in Europe (15%) or in the rest of the world (3%), were significantly lower.

The report is published in Finnish, including English and Swedish summaries.

Download: [Suomalainen televisiotarjonta - Finnish television programming 2014](#) (Publications of the Ministry of Transport and Communications 10/2015)

A selection of tables incl. time series: [Statistics Finland's table service](#) (English, Finnish)

About the survey: The analysis on television channels in the terrestrial digital network is mainly based on data gathered from five sample weeks (weeks 9, 16, 32, 42 and 51) from people-meter data provided by television companies for the TV-viewing and radio-listening measurement company [Finnpanel Oy](#). The survey was conducted by the Communication Research Centre (CRC) at the University of Helsinki.

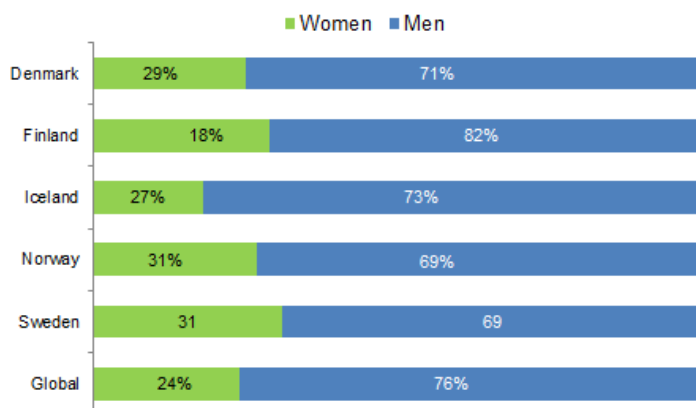
Men in Large Majority in the News

Gender & Media | Nordic, Global November 2015 | KP

The fifth global news report, the Global Media Monitoring Project 2015, shows that men are still in a large majority in the news.

The International Global Media Monitoring Project (GMMP), carried out every five years, examines how women and men are depicted in the news during the course of a day. This year 114 countries participated in GMMP, making it the most comprehensive study since its start in 1995. Reports discussing national findings were compiled for some of the 114 participating countries. All Nordic country reports are listed below. Some Nordic results are also presented in the global and Swedish reports.

Women and men as news subjects in the Nordic countries 2015



Note: Data refer to news subjects, i.e. people who speak out or people who are subjects of the news. Included media are newspapers, radio and television in the Nordic region in 2015. Number of people appearing in each country's news media: Denmark 357, Finland 391, Iceland 103, Norway 270, Sweden 620. Source: www.whomakesthenews.org (graph from the [Swedish report, page 39](#))

Read more about national and global findings:

[Denmark National report](#). Authors Hanne Jørndrup and Martine Bentsen (PDF, English)

[Finland: National report](#). Author: Jonita Siivonen (PDF, English)

[Iceland: National report](#). Author: Valgerður Anna Jóhannsdóttir - forthcoming

[Norway: About the survey on Kilden kjønnsforskning.no](#) (Norwegian)

[Sweden: Räkna med kvinnor](#). Authors: Maria Edström and Josefine Jacobsson (PDF, Swedish)

[About the global study and other country reports](#)

More reading: [Making Change. Nordic Examples of Working Towards Gender Equality in the Media](#) (eds. Maria Edström, Ragnhild Mølster), open access on Nordicom's website.

About the Global Media Monitoring Project: GMMP is a research and advocacy initiative that pursues gender equality in and through the news media. It is hosted by [Who Makes the News \(WMTN\)](#), a knowledge, information and resource portal on gender and the media, run by [WACC](#), a non-governmental organisation that builds on communication rights in order to promote social justice.

New Nordic database on gender equality indicators

Since November, statistics on the progress of gender equality in the Nordic region are available in one place online. An open-access website, launched by the Nordic Council of Ministers, offers sex-disaggregated statistics on demographics, health, education, income and power in the five Nordic countries and Åland, the Faroe Islands and Greenland.

The statistics are presented in order of topic and in graph format with explanatory text. This allows trends to be monitored over time, and highlights the differences and similarities between the countries. Data are compiled by the Nordic statistical offices. Some of the indicators compare the Nordic countries to an EU average.

[More information](#)

[Website Nordic gender equality indicators](#)

[More facts and statistics about the Nordic Region and the Nordic countries](#)

Newsletter about Media Development in Norway

Media Development | Norway Autumn 2015

On medianorway's website you can find facts and figures about media in Norway, in English and Norwegian. It is now also possible to subscribe to information updates (in Norwegian) from medianorway.

medienorge
FAKTA OM NORSKE MEDIER

Several times a month you can receive a newsletter by e-mail with recent statistics updates and media news. Moreover, medianorway publishes a thematic newsletter on media developments in Norway and internationally. Previous themes are media use, ownership, technology, media economics and media policy (newsletters in Norwegian can be downloaded from the website).

[medianorway's website providing statistics, links and more](#) (in English)

[More about subscription and the newsletters](#) (in Norwegian)

About: medianorway's objective is to document media trends and development in Norway. The centre compiles Norwegian media statistics from a number of different sources and publishes the data online. It is a public information centre located at the University of Bergen, and is financed by the Ministry of Culture.

Media Policy and Law

Current Media Inquiries in the Nordic Countries

Media Policy | Nordic November 2015

In the Nordic countries a number of media-related inquiries are underway. In focus are the media market and the conditions for its operators, public service media's role and financing, as well as how media policies should be developed to support media diversity, freedom of expression, and democracy in the future.

Denmark

In December 2014 the Danish Minister of Culture, as part of the Media Political Agreement of 2015-2018, assigned an expert committee to prepare a basis for reflection on public service media in the media reality in the coming years.

Public Service Committee

The Committee (*public service-udvalget*) will, among other issues, establish some potential scenarios for what the Danish public service can/should be in the future society, and in an individualised and fragmented media world. The Committee will submit interim reports, but not suggest options.

In addition, the Committee will hold biannual thematic meetings with relevant stakeholders, spokespeople for the parties behind the media agreement, etc., for the purpose of reporting and dialogue within the various subject areas. The Committee's first thematic meeting, "The rationale for public service in the 21st century", was held in September 2015. The Committee's work extends over two years, and is to be completed on Jan. 1, 2017. [About the Committee](#) (in Danish)

Finland

Since August, the Ministry of Transport and Communications has initiated a review of the situation in the media sector in Finland and an assessment of the conditions for the Finnish Broadcasting Company.

Review of the Finnish media market

In August, a working group was appointed to review and assess the operating conditions of the media industry as well as the barriers and competitive situation on the Finnish market. The group is to determine the impacts of media regulation and how public service, competition from the international media, and differences in taxation between the digital and legacy media affect the media market. The members of the group are representatives of the business and media sectors, and the work is scheduled to be completed by the end of 2015. [Ministry of Transport and Communications, press release 03/08/2015](#)

The future of the Finnish Broadcasting Company Yle

In November, a parliamentary working group was appointed to review the public service duty and funding of Yle. The group's task is to examine the public service duty of Yle - its extent, implementation and funding level. A further task is to assess the role and meaning of Yle on the Finnish media market as well as its importance in terms of democracy, freedom of expression, and diversity and independence of communications.

[Ministry of Transport and Communications, press release 02/11/2015](#)

Norway

In connection with the presentation of a [white paper \(Stortingsmelding\)](#) on public service and media pluralism in June 2015, the Norwegian government initiated two inquiries into media pluralism and NRK's financing.

Committee for Media Diversity

The Committee (*Mediemangfoldsutvalget*) was appointed to assess how economic instruments in the media sector should be arranged to encourage media diversity and a broad public debate in the digital media society of the future. The Committee will submit its report in the form of an Official Norwegian Report (NOU) to the Ministry of Culture before March 1, 2017.

[Government press release 09/18/2015 \(in Norwegian\)](#)

Alternatives for public funding of NRK

An expert committee will review alternatives for public funding of NRK, the Norwegian public service company. The expert group will assess how the ongoing media development can affect the efficiency of today's system of licensing fees. The group's mandate is also to assess various alternative future models for public funding of NRK, and the degree to which the different models safeguard NRK's need for editorial independence, legitimacy among the population, and financial stability over time. The group will deliver its report on July 1, 2016.

[Government press release 02/10/2015 \(in Norwegian\)](#)

Sweden

In March this year, the Ministry of Culture and Democracy initiated an inquiry into "A media policy for the future", which delivered its first report in November. In September the Swedish Broadcasting Authority published a report giving accounts of two government assignments: regarding public service.

A media policy for the future

A special investigator was appointed to lead an inquiry, aiming to analyse the need for new media policy tools when press subsidies in their current form cease. The inquiry's proposals will aim to promote opportunities for the public to access journalism that is characterised by diversity, objective news, quality and depth.



In early November, the inquiry presented an [analysis of the Swedish media landscape from a citizen's perspective](#) (SOU 2015:94). The final report with proposals for new media policy tools is to be submitted by April 30, 2016. It has been announced that the media inquiry should also draft a memorandum on public service media as a basis for a future revision of public media.

[About the Media Inquiry \(in Swedish\)](#)

Public service media's impact on the media market & public value tests



The report of the Swedish Broadcasting Authority gives an account of two government assignments. Regarding the first, an analysis on how the operations run by public service media affect the media market, the Authority's assessment is that public service broadcasters cannot be seen as acting in a way that obviously prevents competing actors from establishing, operating and developing their media activities. Instead, the greatest influence on the media market can be attributed to the ongoing digitalisation and globalisation.

As for the other assignment – examining the system of public value tests – the Authority suggests that other stakeholders than public service broadcasters should be able to request an examination of whether a service should be subject to a test. After the report's publication a number of representatives from the industry established [a commission](#) in order to analyse the public service media's operations and present proposals for the future.

[The report, including a summary in English \(PDF\)](#)

Report on RÚV Creates Debate in Iceland

Media Policy | Iceland November 2015 | FPG

In Iceland, a [report on RÚV](#), the Icelandic National Broadcasting Service, has been followed by a heated political debate. Both the opposition in Parliament (Althingi) and individuals within the media community have criticized the report as politically biased and methodically unfair. The report, presented in October, is expected to serve as input in the ongoing discussions concerning a new service contract between RÚV and the State.

In 2007, RÚV changed its organizational form from an official institute to a public company (Ltd). At the time, RÚV's organization had been disputed for many years, and it usually operated at a large deficit. The change was thought to offer a better operational foundation and more solid structure, as well as separating the finances of RÚV and the State.

In the spring of this year, the Minister for Education and Culture for the right-centre government (Conservatives), Illugi Gunnarsson, established a committee to analyse the development of the activities of RÚV. Its point of departure was to measure whether the goal of the reorganization in 2007 had been achieved.

The committee wants changes for RÚV

The three-member committee – consisting of a chairman (a political ally of the Minister), an expert from the Ministry of Financial and Economic Affairs (led by the Conservatives), and an expert from a private company – has compared the finances of RÚV to those of Iceland's largest private media company, 365 ehf. The report argues that RÚV has higher operational costs than 365, but while 365 is making a profit, RÚV's revenues end up in the red.

The comparison between RÚV and 365 ehf has been greatly criticized for being unfair – with assertions that financial statistics have been chosen and stacked in favour of the private company, e.g., leaving out 365's costly sports channels and programmes.

The bottom line the committee came to was that without changes – e.g. higher fees, the sale of some assets, a new service contract with the State – the operation of RÚV will be unsustainable. The committee raised questions as to the “Ltd” form, whether RÚV should partake in the advertising market, and whether it is the organization best suited for achieving the objectives of the State regarding culture, language, democratic debate, etc.

Renewal of contract between RÚV and the State in 2016

RÚV and the State have an [ongoing service contract](#) – with the current one running out this coming December 31, and discussions underway regarding its renewal. The new report is considered to be

fodder for these discussions – politically motivated fodder, according to critics. It is not the policy of the current Government to shut RÚV down – to take the State out of the media market – but rather to limit its scope, and in 2013 a law was passed limiting the amount of advertisements in RÚV’s daily programmes.

[Download the report \(PDF\), in Icelandic](#)

About RÚV’s financing form: From 2009 onwards, RUV’s public funding consists of revenues from a special fee, a tax levied on individuals and legal entities (previously a licensing fee). The fee has not gone to RÚV in its entirety since the company started, but will do so beginning January 1, 2016, according to government policy. RÚV also receives revenues from advertising and the proportion of tax it includes – advertising revenues comprise about 2/3 from tax and 1/3 from advertisers. See overview of the [public funding systems in the Nordic countries](#) (Excel file, from [Nordicom’s table database](#)).

Almost a Century of Swedish Media Inquiries

Media Policy | Sweden December 2015 | UF

Nordicom has made a compilation of political inquiries regarding the media industry conducted since the early 1920’s, and found that newspapers, public service and advertising are areas often examined.

The Swedish media inquiry ‘A media policy for the future’ has recently published [its first report](#). But political inquiries in the media field are far from new: government investigations into various topics have been conducted and published within the series Swedish Governmental Official Reports (SOU) for almost a century, starting in 1922.

The first Governmental Official Report (SOU) covering some kind of media, published in 1924, addressed literature in education. Five years later, the first SOU on copyright was published. During the 1930s specific media, as we know them today, such as film/cinema, newspapers and broadcasting, were investigated. In particular, newspapers and broadcasting (radio/TV) have been dealt with in connection to inquiries into freedom of speech, public access, propaganda and censorship.

In focus: newspapers, public service and advertising



The newspaper industry and its economic conditions were first examined in 1965. From that point on, inquiries into the conditions for the newspaper industry, as well as state support to the industry, have been conducted on a regular basis. Along with public service and advertising, these areas have been in the focus of reports at least 20 times each.

During the 21st century, SOU’s focusing on the newspaper industry have been more scarce. This does not mean the industry has been ignored, but instead that smaller inquiries have been published within another series, the Ministry Publications Series (Ds).

[The complete list linking to Swedish SOU’s on the media is available here](#) (in Swedish).

About Nordicom’s list: The list has been made possible through a digitalization project at the National Library, which has made available all published Governmental Official Reports (since 1922, all areas). They can be downloaded in PDF form on [a special website](#). Word search in the reports is possible through a service available [at Linköping University](#). These services are published in Swedish only.

New Open Access Resources on Media Law in Europe

Media Policy | Europe November 2015

The implementation of the Audiovisual Media Service Directive and the public service media remit are the subjects of two open access resources, recently launched by the European Audiovisual Observatory.

Database on the Audiovisual Media Service Directive



The Observatory has launched the free AVMSDatabase, which shows how each EU country has transposed the various rules contained within the AVMS Directive (the principal legal text regulating audiovisual media services in

Europe) into national legislation.

The database makes it possible to research:

- how a certain article of the directive is implemented in a specific country,
- how countries A, B and C have implemented a specific article (comparative approach),
- how certain articles of the directive have been implemented in countries A, B and C (multi layered research).

[Read more](#)

[AVMSDatabase](#)

The public service media remit in 40 European countries. Intended as a free working tool to also accompany the reading of the IRIS Special on [Public service activities online: remit and financing](#), the Observatory provides an overview of the definition of the public service remit in the 40 countries that



are members of the Observatory, and indicates:

- the adopting bodies,
- the concerned broadcasters,
- the legal sources defining the remit, with mention of the specific articles,
- the links to the texts in their original language and in English translation where available.

[IRIS Bonus 2015-3, read more](#)

[Download PDF directly](#)

About: The Observatory is a European public service body comprised of 40 member states and the European Union, represented by the European Commission. Among its major activities are the publication of a yearbook, newsletters and reports plus online databases, e.g. the free accessible [IRIS Merlin database on legal information](#) relevant to the audiovisual sector in Europe and [MAVISE database on TV and on-demand](#) audiovisual services and companies in Europe.

Online Activities of Public Service Media: Remit and Financing

Media Policy | Europe, Denmark September 2015

The European Audiovisual Observatory has published a report on the subject of online activities of public service media: remit and financing. Together with Germany and Hungary, Denmark is included as a country example.



The difficulty in deciding which online services will receive public funding due to a public service remit is one of the major issues currently being tackled by EU governments. This IRIS Special publication provides background reading on the subject, dealing with issues such as the definition of public service media, current funding models for broadcasting, and the pertinence and practicability of a public value test for new media services of public service media.

In order to show concrete examples of public service performances in the online environment, a special section focuses on three countries, among them Denmark, which is presented under the heading “Licence fee reform and online remit in Danish public service media”.

[Read more](#)

Note: The publication is for purchase only.

UNESCO Study: Principles for Governing the Internet

Internet | International September 2015

UNESCO has launched a new study called “Principles for governing the Internet”. This reviews and analyses more than 50 Internet-specific declarations and frameworks relevant to Internet principles.



The study encompasses both quantitative and qualitative assessments of more than 50 declarations, guidelines, and frameworks. The issues contained in these documents are assessed in the context of UNESCO’s interested areas such as access, freedom of expression, privacy, ethics, Priority Gender Equality, Priority Africa, and sustainable development, etc.

As a background database to illustrate this study and an online web source for policy makers and other stakeholders, UNESCO has launched a webpage collecting and updating various international and regional instruments, as well as declarations of various meetings that relate to the areas of access, freedom of expression, privacy and ethics.

[UNESCO press release 22.09.2015](#)

[Download: Principles for governing the Internet. A comparative analysis \(PDF\)](#)

[Web source listing international and regional instruments, etc](#)

About the report: This is the sixth edition in the UNESCO Internet Freedom Series. UNESCO has started in 2009 to commission this series publications of Internet Freedom, aiming to explore the changing legal and policy issues of Internet and provide its Member States and other stakeholders with policy recommendations aiming to foster a conducive environment to freedom of expression on the net. See previous titles in [UNESCO Series on Internet Freedom](#).

Media Use

Media Use in the EU countries

Media Use | Nordic countries and Europe

In a European comparison, the people of the Nordic countries are fairly avid radio listeners and readers of written press, but watch traditional TV at an EU average level or slightly less. As for Internet-related activities such as watching TV via the Internet, using online social networks or the Internet on the whole, the Nordics are at the top, according to the Eurobarometer surveys.



International comparisons of media use are difficult, as ratings systems differ. However, the Eurobarometer points at some patterns in Europeans' media use. As data refer to EU members only, Nordic data are available for Denmark, Finland and Sweden (data on media trust include Iceland as well).

Data on daily TV viewing do not indicate any great differences between countries. In most countries, eight or nine of ten watch TV on a daily/almost daily basis. A rough interpretation is that countries in southern Europe watch TV above the EU average and in northern Europe below – with exceptions in both categories. Internet-added TV viewing is 1 to 7 per cent, with the Nordic countries, especially Sweden, at the higher end of the scale.

Daily radio listening shows greater differences between countries, ranging from three of ten to eight of ten daily listeners. The pattern is opposite to that of television: countries in northern Europe listen more, southern countries less. The category of written press shows as great differences as radio and approximately the same pattern for northern and southern Europe.

Internet use is highest in the Nordic countries and other northern Europe, with the Netherlands, Denmark and Sweden being the most avid users (86-88 per cent), followed by Finland in fourth place (74 per cent). The Danish and Swedish populations are the most avid social network users of the EU countries, with over half of their populations using a social network on a daily/almost daily basis.

Read more: [Standard Eurobarometer 82, November 2014, Annex \(PDF\)](#)

Tables in [Nordicom's table database](#), based on the Standard Eurobarometer 82 (Excel files):

[Media use - press, radio, TV, Internet, social media – in the European Union 2014](#)

[Television viewing via TV set and/or the Internet in the European Union 2014](#)

[Trust in written press, radio, TV, Internet and social media in the European Union 2014](#)

About the Eurobarometer: Surveys by the Public Opinion Analysis sector of the European Commission, which address topics concerning European citizenship: enlargement, social situation, culture, information technology, environment, etc. Data on media use and trust are normally included in the [Standard Eurobarometer's](#) autumn surveys; see Annex. [Special Eurobarometers](#) can also be media-related, e.g. Special Eurobarometer 414 "E-Communications and Telecom Single Market Household Survey".

The Swedes and the Internet 2015

Media Use | Sweden November 2015

Over 90 per cent of the Swedish population has access to the Internet, and on average they use the Internet three hours a day. Almost eight in ten use social media, more and more watch movies and TV on the web, and more pay for streaming services. These are some of the results reported in "The Swedes and the Internet 2015", by the Internet Foundation in Sweden (IIS).



According to the survey, the time we spend online is increasing in all age groups except for the elderly. The greatest increase is among the youngest, partly explained by the increased use of smartphones and tablets.

But even among the elderly, both access to and use of smartphones and tablets are increasing. Almost half of the 66-75-year-olds have a smartphone and just over a third have a tablet; in both cases, this means an increase of ten percentage points since last year.

Social media continues to grow

In five years, the number of visitors on social networks has increased from 53 per cent of Internet users (in 2010) to 77 per cent (in 2015). Facebook is the social network that dominates, with 70 per cent of Internet users using this site. Instagram is used by 40 per cent of Internet users, up from 28 per cent in 2014. Just above 20 per cent use Twitter, and just as many use LinkedIn and Snapchat, respectively.

Sharp increase for film viewing online

Listening to music increased a great deal last year, and this year film watching has increased. Some 45 per cent of Internet users watch film and video online every week, up from 30 per cent in 2014, while 70 per cent watch film and video on the web occasionally. The most commonly used service is YouTube, followed by the TV channels' play services. Some 60 per cent of Internet users listen to music on the web each week (57 per cent in 2014), and 77 per cent listen occasionally. Spotify is popular, with almost a third of Internet users using the service daily.

More people pay for streaming services

The willingness to pay for music, film and TV on the Internet has grown. Over half of those who listen to music on the Internet in 2015 pay for a subscription to a music service, and four in ten who watch films online pay for this. At the same time, file sharing decreased for the second year in a row.

Traditional media stronger than their online versions

The usage time of traditional media has declined slightly from year to year, while time spent with online media increases slightly. The change is slow, and is driven primarily by young people spending much more time on the Internet than the population in general. The largest change compared to 2014 is the increased time spent on TV viewing online, a growth from an average of 2.1 to 2.4 hours in the whole population.

Comparing media in their traditional forms with their online versions, the traditional forms dominate when it comes to radio, television and books. For newspapers there is a large difference between morning and evening papers. While more than 70 per cent of the reading time for morning newspapers

is spent on the print version, it is the opposite for evening papers, where paper reading accounts for one fifth of the reading time.

Still many non-users

Despite the widespread use of the Internet, there are still about 840,000 people (around 10 per cent) in Sweden who do not use it. The most common reasons given by non-users are lack of interest (63 per cent) and complicated technology (26 per cent).

[Read an English summary of the report](#)

[Read the full report in Swedish](#)

About the survey: The Swedes and the Internet is an annual individual survey on Internet use, and was conducted the first time in the year 2000. This year's survey lasted from February to April. The principal for the study is [the Internet Foundation in Sweden \(IIS\)](#). Swedes and the Internet is the Swedish part of [the World Internet Project](#), an international research project that follows the Internet's spread and use around the world.

The State of Broadband 2015

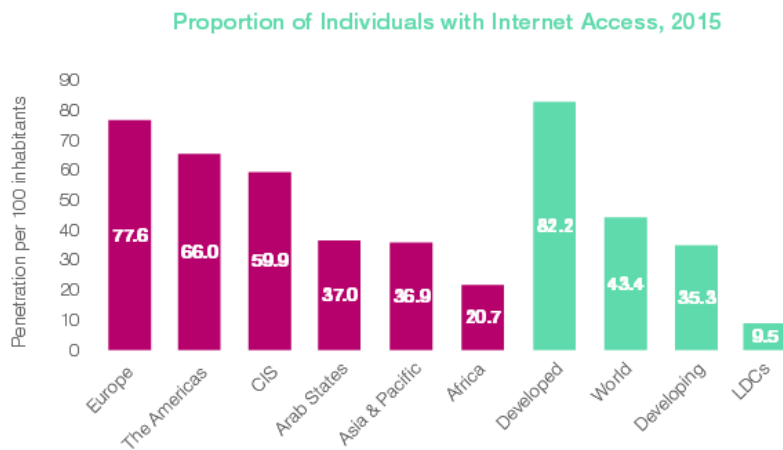
ICT | International October 2015

While Internet access is approaching saturation in the developed world, it is only accessible to a third of the people in developing countries. The State of Broadband Report 2015 points at inequalities in ICT access and use worldwide.

Produced annually by the ITU/UNESCO Broadband Commission, the State of Broadband report explores progress in broadband connectivity on a global scale, offering country-by-country data on ICT access and use, broadband affordability and national broadband policies for over 160 economies.

Over half of the world's population is offline

The report shows that 43% of the global population is connected, which means that 57% still do not have regular Internet access. While in the developed world Internet access is close to saturation, the result for the developing world is poorer. Among regions, Europe accounts for the largest proportion of individuals with Internet access, and Africa the lowest.



Source: [The State of the Broadband report 2015 \(p. 43\)](#), full PDF

The top ten countries for Internet use are all located in Europe, including the five Nordic countries. Iceland has the highest percentage of individuals using the Internet (98%), just ahead of Norway (96%) and Denmark (96%).

[Read more and download the report at the Broadband Commission's website](#)

About the Commission: The Broadband Commission for Digital Development was established by ITU and UNESCO in 2010, in response to the UN's call to step up efforts to meet the Millennium Development Goals (MDGs). The Broadband Commission embraces a range of different perspectives in a multi-stakeholder approach to promoting the roll-out and use of broadband for development. To date, the Commission has published a number of high-level policy reports, best practices and case studies.

Books, Libraries and Cultural Habits

Find Facts and Figures about Nordic Books and Libraries

Did you know that book reading in the Nordic countries is rather stable? Methodological differences in the national surveys mean that data between countries are not completely comparable, but some trends are clear.

The paper book, for example, is the most common way to read a book, according to national Media Barometer surveys in Sweden and Norway. A third of the Swedish population aged 9-79 read a printed book on an average day (total reading), and a quarter of Norwegians aged 9-79 years do the same (occupational and school-related reading not included); daily reading of e-books is 1-2 per cent and listening to audio books 4-5 per cent in both countries. Access to e-book readers in Norway is 17 per cent of the population, compared with around 8 per cent in Denmark and Sweden, respectively.

The statistics above and other data related to books can be found via the national and Nordic sources below.

National statistics in the Nordic countries

Book and library statistics are presented by the national libraries, publishers' associations, national statistical services and other statistical producers. Below are links to some of the organisations/databases::

[Statistics Denmark: Statbank Denmark](#)

Report on the Danish book market – forthcoming (see presentation in the notice below)

[Statistics Finland: Cultural Statistics Table Service](#) (see presentation in the notice below)

[Statistics Iceland's database](#) (choose Society statistics / Media and Culture)

[Medianorway's database](#) (in Norwegian)

[Nordicom-Sweden](#) (choose Sweden – Books; the tables are in Swedish)

Nordicom's link database lists more national, Nordic, European and international sources of book statistics and other media facts. Choose Books from [the list on the website](#).

Nordic statistics

[Nordicom's table database](#) provides data on book reading plus access to e-book readers in some Nordic countries. Note that the data on book reading are not strictly comparable between countries or over time. There are also basic tables of library stock volumes of books and other media, as well as library loans. Tables link to national sources available online. (Choose Nordic – Books)

Report on the Danish Book Market

Books and libraries | Denmark September 2015 | MVK, HBBJ

The Book and Literature Panel in Denmark has published its first report, a mapping – not previously been done to the same extent – of the existing statistics on the book market in Denmark. In addition, the report presents new interdisciplinary statistics in the field. Moreover, it offers a number of recommendations for the improvement of existing statistics.



The Panel has expanded the study area compared to previous studies of the Danish book market; for example, the report looks at the libraries as an integrated part of the market. It also looks beyond the borders of Denmark, with a global chapter. Finally, for this first report the Panel has commissioned a survey of self-publishers on the Danish book market.

The Panel's chairman, Professor Stig Hjarvard, University of Copenhagen, says: "Digitalisation, liberalisation and globalisation are three main trends that have an impact on the book market and thus the current state of literature. It is important for cultural policy to get an overview of trends in the book market in the light of the ongoing changes. This report is a first step towards creating a nationwide statistics and annual reporting on the book and literature situation in Denmark."

The report is published in Danish. A report in English will be published in late 2015. When the English report is available, [a link will be provided here](#).

[Download the report "Bogen og litteraturens villkår 2015" \(PDF\)](#), in Danish
[Read about the Book and Literature Panel](#), in Danish

Find Finnish Cultural Statistics Online

Cultural Statistics | Finland 2015

Statistics Finland's online cultural statistics service offers data about books, libraries, cultural magazines, music, films, private and public support of culture, culture in the national economy, and more.



Moreover, Statistics Finland's biannual publication *Cultural Statistics / Kulttuuritilasto* is available for download in PDF format. The tables in the publication are presented in Finnish and English, and the book provides a summary in both English and Swedish. Other texts are in Finnish. The tables are presented in English and Finnish and are downloadable in Excel format.

[Finnish Cultural Statistics' table service / Kulttuuritilaston taulukkopalvelu](#)
[Cultural Statistics homepage](#)

Five Trends Affecting Future Cultural Habits

Cultural Habits | Sweden October 2015



In a recent report, the Swedish Agency for Cultural Policy Analysis addresses a number of trends in society that may have an important impact on the cultural habits of young and elderly people, as well as cultural policy in the future.

Using research, reports by authorities, journal articles, etc., the Agency identifies five trends that may conceivably affect the cultural habits of young and older people in various ways. The trends are:

- an increasingly heterogeneous society, where e.g. urbanisation and growing income gaps provide different conditions for cultural habits,
- a more participant-controlled culture, which makes it easier for citizens to themselves create, be involved in and shape culture,
- a society of images, where the ability to interpret images will be a necessary skill,
- large amounts of data on people's cultural habits being used to adapt (at present commercial) culture to demand, and
- the cultural offering online increasingly being adapted to the individual, posing a risk of people getting caught in so-called filter bubbles.

Furthermore, the report discusses consequences for cultural policy, whereby collaboration between different areas of policy and more knowledge may be required. It will entail counteracting blank spots on the map where there is no or little culture offering, promoting broadband access for everyone, enhancing older people's access to culture, creating conditions for greater cultural diversity, and increasing media literacy to counter the negative effect of filter bubbles.

[Download the report in Swedish, including an English summary \(PDF\)](#)

[About the Authority's publications](#) (in English)

About: [The Swedish Agency for Cultural Policy Analysis](#) is assigned by the Government to evaluate, analyse and present the effects of proposals and steps taken in the cultural arena, based on the cultural policy objectives. The Agency carries out studies and evaluations to analyse the cultural area, and works to monitor and initiate research in the cultural field and develop and spread knowledge and experience from our own activities and those of others.

Research Journals, Open Access

Research Journals from Nordicom

Media Research | Nordic November 2015

Nordicom publishes two journals, both issued twice a year. *Nordicom Review* is a traditional scientific journal in English, applying double-blind peer review. *Nordicom-Information* is popular scientific and thematic, mainly in the Scandinavian languages.

The two journals published by Nordicom started in 1979 and 1980, respectively. *Nordicom Review* has always been research-oriented, and became a peer-reviewed journal in the early 1990s. It has long been an important channel for Nordic researchers to make their research known in an international context. *Nordicom-Information* was redesigned in the autumn of 2015 to have a popular-scientific approach, with an ambition to create a meeting place for academia, media and politics when it comes to writers and content as well as readers.



Nordicom Review 2/2015

[The whole publication](#)

Some reading tips:

[The Emergence of Metropolitan News. Shifting Concepts of Localism in Norwegian Regional Newspapers](#) [Helle Sjøvaag]

[Patterns of Media Use and Reflections among young Danes](#) [Stinne Gunder Strø Krogager, Karen Klitgaard Povlsen, Hans-Peter Degn]

[Nordic Openness in Practice. Loose Coupling of Government Communication and Policy-making in Finland](#) [Juho Vesa]



Nordicom-Information 3-4/2015

Tema: Hets och hat online [Theme: Harassment and hatred online]

How journalism and freedom of expression are challenged in the Nordic countries

The digital revolution has created enormous opportunities to spread messages, communicate, and form public opinion; but there is also a downside. The focus of the current issue of *Nordicom-Information* is on journalists and their vulnerability, but it also discusses bloggers, researchers and the public perception of and vulnerability to harassment and hatred.

[The whole publication](#) (Scandinavian languages. Some articles in English)

National Research Journals in the Nordic countries

Media Research | Nordic November 2015

Social Media and Political Communication, Social Media and Audience Participation, Bourdieu and the Media, and Journalism as an Industry are topics covered in the latest editions of some national scientific journals in the Nordic region.

In Norway, Finland and Denmark, the national research organizations in the media and communications field each stand behind a national research journal: *Norsk medietidskrift* in Norway, *Media & viestintä* in Finland and *MedieKultur* in Denmark. Another title in Denmark, *Journalistica*, is supported by a number of university departments. All titles are open access. For information on more media-related scientific journals in the Nordic countries, see [Nordicom's link list online](#).



Norsk medietidskrift

Norsk medietidskrift is a peer-reviewed scientific journal that publishes articles by Norwegian, Nordic and international media scholars. The journal, published four times a year, presents articles mainly in Norwegian, but also in Swedish, Danish and English. Since 2015, it is a digital-only open-access journal.

The journal's latest issue, no. 3/2015, covers the theme of social media and political communication. It contains articles dealing with issues related to Norwegian politicians' use of social media as a new form of political communication in the period around the 2013 parliamentary elections

[Read the latest issue](#)

[About Norsk medietidskrift](#) (in Norwegian)



Media & viestintä

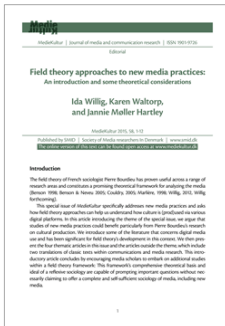
Media & viestintä (until 2008, *Tiedotustutkimus*) is a peer-reviewed scientific journal for Finnish media, communication and journalism research, published by the Finnish Association for Media and Communication Studies (Mevi). The content is in Finnish, with English abstracts for the reviewed articles. It is published four times a year, and from 2014 is an open-access journal.

The latest issue, no. 3/2015, includes articles dealing with social media and audience participation. The three peer-reviewed articles analyse the discussion surrounding the purchase of #Nokia on Twitter in light of the theory of symbolic convergence, Facebook users' and non-users' attitudes about Facebook use, and the results of a survey of Finnish Internet users' self-perceptions as active participants.

[Read the latest issue](#)

[The journal archive](#)

[Finnish Association for Media and Communication Studies \(Mevi\)](#) (in English)



MedieKultur: Journal of media and communication research

MedieKultur is a peer-reviewed scientific journal with the objective of contributing to critical reflection and the development of theories and methods in media and communication research. It is issued twice a year, with content in Danish, Swedish, Norwegian and English. The format is open access, with older issues digitized and available online.

The latest issue of *MedieKultur* has the theme "Bourdieu and The Media". The articles deal with new media practices and ask how approaches to Bourdieu's field theory can help us understand how culture is produced and used by various digital platforms.

[Read the latest issue](#) (mainly in English)

[About MedieKultur](#) (in English)



Journalistica

Journalistica is a peer-reviewed scientific journal dealing with research which has journalism as a research topic. *Journalistica* publishes articles in Danish, Swedish, Norwegian and English, and is a digital open-access journal.

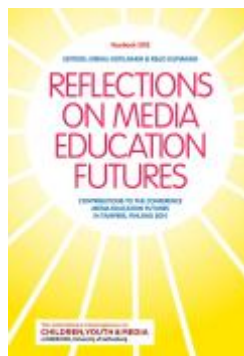
The latest issue is from 2013. Under the heading "Journalism as an Industry", it focuses on how news production is affected by the news industry's new economic conditions and is increasingly becoming part of an industry.

[Read the latest issue](#)

[About Journalistica](#) (in Danish)

Anthologies from Nordicom

The International Clearinghouse for Children & Media



Reflections on Media Education Futures Contributions to the Conference Media Education Futures in Tampere, Finland 2014

The Clearinghouse Yearbook of 2015 reflects research and practice of media education from multiple perspectives, with articles by experts and scholars in the field, practical papers and case studies. The content is based on contributions to the international conference 'Media Education Futures' 2014 in Finland. Editors are Sirkkku Kotilainen and Reijo Kupiainen

[Read more](#)

[All publications in the Clearinghouse Yearbook series](#)

Media Trends in the Nordic Countries

Editor: [Eva Harrie](#)

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Nordicom is an institution within the Nordic Council of Ministers.

Nordicom follows the Nordic media development with the aim to document and spread knowledge about media trends within, and about, the Nordic region within a European and global perspective. The newsletter *Media Trends in the Nordic Countries* covers issues such as media consumption, structure and policy, and reports on the latest developments and current research in the field.

The newsletter is scheduled to come out three times a year.

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