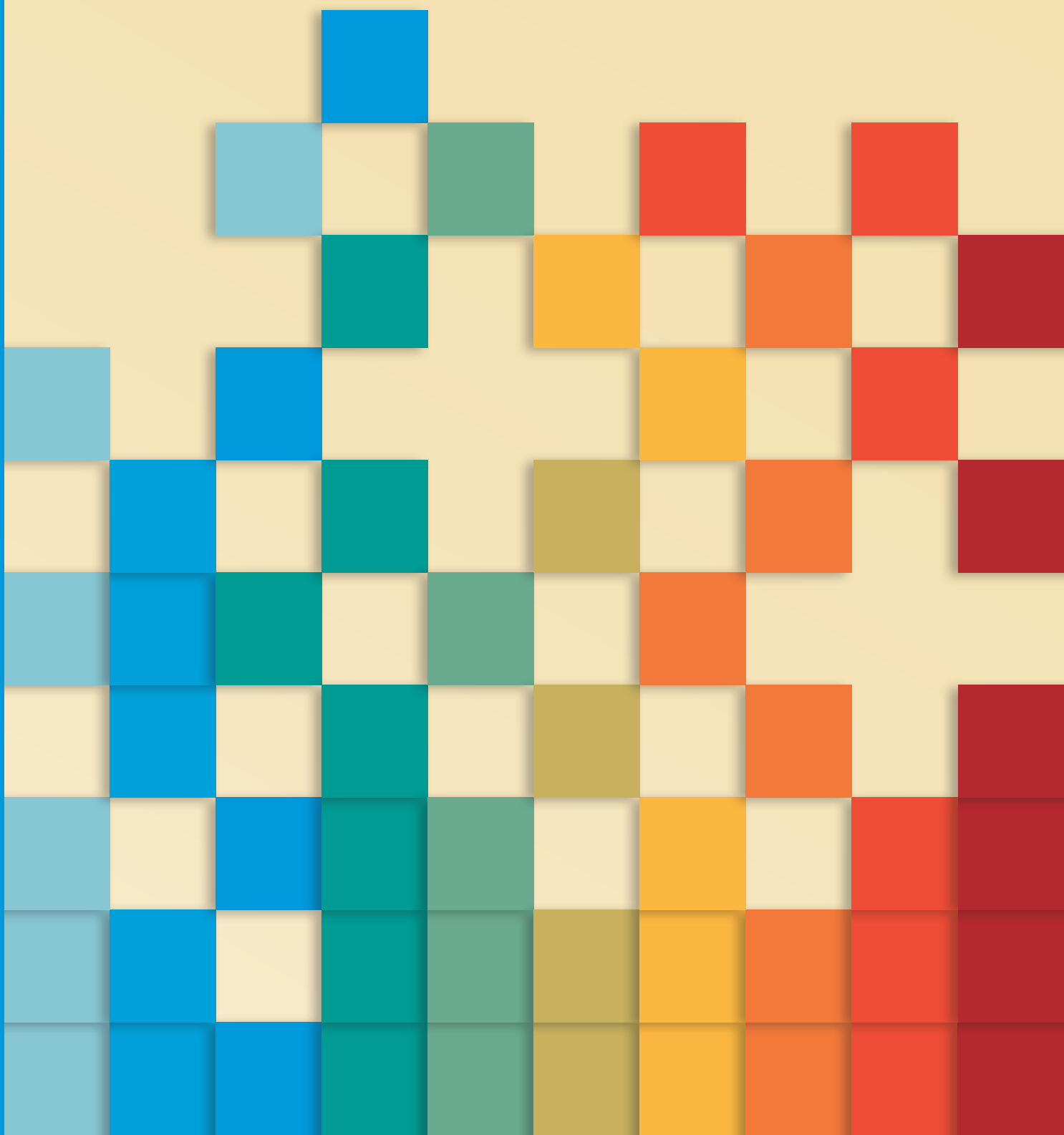


A Nordic Public Service Media Map

Compiled by Eva Harrie

DENMARK • FINLAND • ICELAND • NORWAY • SWEDEN



NORDICOM's activities are based on broad and extensive network of contacts and collaboration with members of the research community, media companies, politicians, regulators, teachers, librarians, and so forth, around the world. The activities at Nordicom are characterized by three main working areas.

- **Media and Communication Research Findings in the Nordic Countries**

Nordicom publishes a Nordic journal, Nordicom Information, and an English language journal, Nordicom Review (refereed), as well as anthologies and other reports in both Nordic and English languages. Different research databases concerning, among other things, scientific literature and ongoing research are updated continuously and are available on the Internet. Nordicom has the character of a hub of Nordic cooperation in media research. Making Nordic research in the field of mass communication and media studies known to colleagues and others outside the region, and weaving and supporting networks of collaboration between the Nordic research communities and colleagues abroad are two prime facets of the Nordicom work.

The documentation services are based on work performed in national documentation centres attached to the universities in Aarhus, Denmark; Tampere, Finland; Reykjavik, Iceland; Bergen, Norway; and Göteborg, Sweden.

- **Trends and Developments in the Media Sectors in the Nordic Countries**

Nordicom compiles and collates media statistics for the whole of the Nordic region. The statistics, together with qualified analyses, are published in the series, Nordic Media Trends, and on the homepage. Besides statistics on output and consumption, the statistics provide data on media ownership and the structure of the industries as well as national regulatory legislation. Today, the Nordic region constitutes a common market in the media sector, and there is a widespread need for impartial, comparable basic data. These services are based on a Nordic network of contributing institutions.

Nordicom gives the Nordic countries a common voice in European and international networks and institutions that inform media and cultural policy. At the same time, Nordicom keeps Nordic users abreast of developments in the sector outside the region, particularly developments in the European Union and the Council of Europe.

- **Research on Children, Youth and the Media Worldwide**

At the request of UNESCO, Nordicom started the International Clearinghouse on Children, Youth and Media in 1997. The work of the Clearinghouse aims at increasing our knowledge of children, youth and media and, thereby, at providing the basis for relevant decision-making, at contributing to constructive public debate and at promoting children's and young people's media literacy. It is also hoped that the work of the Clearinghouse will stimulate additional research on children, youth and media. The Clearinghouse's activities have as their basis a global network of 1000 or so participants in more than 125 countries, representing not only the academia, but also, e.g., the media industries, politics and a broad spectrum of voluntary organizations.

In yearbooks, newsletters and survey articles the Clearinghouse has an ambition to broaden and contextualize knowledge about children, young people and media literacy. The Clearinghouse seeks to bring together and make available insights concerning children's and young people's relations with mass media from a variety of perspectives.

A Nordic Public Service Media Map

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Eva Harrie

NORDICOM

Nordic Public Service Media Map 3

A Nordic Public Service Media Map

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The Nordic Ministers of Culture have made globalization as one of their top priorities, unified in the strategy: "Creativity – the Nordic response to globalization". The aim is to create *a more visible Nordic Region, a more knowledge-based Nordic Region and a more prosperous Nordic Region*. This publication is part of "Creativity – the Nordic response to globalization".

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Foreword

The Nordic countries have a tradition of strong support for their public service media and have also developed public service models that are characterized by their relatively small size and small populations. Moreover, they have many years' experience of collaboration between their respective public service companies – particularly with regard to coproduction of programs.

On the contemporary international arena, within organizations such as the UN and UNESCO, there exists a fundamental belief in the notion that public service media – which are neither commercial nor state owned and which are free from political influence – foster well-informed and enlightened citizens and therefore constitute a cornerstone of democratic development.

When models of public service media are discussed, it is often the British BBC that comes to the forefront, but there are few countries today that can look to the BBC as a realistic model for development of their own public service media. Instead, well-tested models from “small” countries are sought. For this reason, the public service media in the Nordic countries are interesting from a global perspective. Given this interest, Nordicom has carried out extensive work in the area of public service media organization, content and audiences in the Nordic countries. The results of these efforts include recent research findings and statistical overviews – all within the frame of what we have chosen to call A Nordic Public Service Media Map.

Our aim is to delineate a framework for public service in the Nordic region – one that illustrates how the concept of public service media is operationalized in terms of the growth of democracy, the public space, media pluralism, cultural diversity and social tolerance.

It is our hope that the outcome of the project A Nordic Public Service Media Map will make a meaningful contribution to the work being done on the role the media play in democratic societies around the world. At the same time, Nordic media, too, are involved in a learning process, evolving – as always – in response to the changing environments in which they operate.

The present publication is the third and final one from this Nordicom project. It is a map of public service media in the Nordic region – Denmark, Finland, Norway, Iceland and Sweden. The contents in the earlier publications from the project, Public Service Media in the Nordic Countries: Facts & Figures and the research anthology Public Service Media from a Nordic Horizon. Politics, Markets, Programming and Users, form the basis for this Nordic Public Service Media Map.

This volume presents work carried out by Eva Harrie, coordinator of Nordicom's documentation of Nordic trends and developments in the media sector. Any attempt to integrate multinational data inevitably runs up against problems of incomparability, and the work to bring data from all five Nordic countries into alignment in a single model poses numerous challenges. I am greatly indebted to Eva Harrie for the painstaking care she has devoted to the project and to all those who have assisted in the effort. I am particularly grateful for the hand lent by Margareta Cronholm, whose long experience of analyzing public service media has been invaluable. Finally, I hope the book will prove to be of value to all those around the world who have public service media on their agenda.

Göteborg in February 2013

Ulla Carlsson
Director
Nordicom

Introduction

Eva Harrie

“What’s so special about Nordic public service media?” So reads the introductory title of volume 2 in the Nordicom book series Nordic Public Service Media Map, of which this publication is the final volume. It is a question to which this series seeks answers.

In the article referred to above, C. S. Nissen (2013) argues that there is a unique form of public service broadcasting in the five Nordic countries, a ‘Nordic media model’ with certain key ingredients, which could also serve as inspiration to others: “Given the diminutive size of the Nordic countries as well as their social and political stability and high level of economic welfare, the Nordic public broadcasting system has also been an enticing source of inspiration for many smaller, less-developed countries on other continents trying to establish their own national media systems.”

The aim of this publication is to present an overview of the Nordic public service broadcasting system, in an attempt to map a Nordic public service model. Being the last in a series, this publication also benefits from the two first volumes, since a great deal of data derive from the statistical report while the research anthology has conveyed knowledge to all parts of the book.

In focus are the domestic public service broadcasters in the five Nordic countries – DR in Denmark, YLE in Finland, RÚV in Iceland, NRK in Norway, and in Sweden the three companies SVT, SR and UR – all with long traditions in their respective countries. It is important to note, however, that Denmark and Norway have a mixed approach to public service, with systems also including other companies with mandated public service obligations. They are presented on a basic level, but the focus of the report lies on the original public service companies, whose primary source of revenue is public funding – that is, publicly owned organisations financed by their audiences.

The Nordic public service broadcasters all have rights and obligations through legislation and accompanying regulations or agreements. They are an integrated part of the Nordic democracy model, with a role of ensuring citizens a variety of information on society and public debate, thereby contributing to everyone’s opportunity to participate in democratic processes. The rules stipulate that their broadcasts be impartial and that there be objective and extensive freedom of expression and information. Moreover, special emphasis is put on domestic programming (to serve national culture and language), children and youth, programming for minority language groups and other small groups, etc. In practice, the regulatory frameworks vary somewhat from country to country – public service laws, public service contracts, broadcasting licences or other agreements – but they communicate the same values.

DR, YLE, RÚV, NRK and SR/SVT/UR have also experienced similar development trends over the years. They started with radio transmissions in the 1920s/1930s and television in the 1950/60s, and moved onto the web in the mid-1990s. In the wake of the introduction of commercial radio and television in the late 1980s/early 1990s and the digitalisation of the last decade, they have faced the same challenges in the form of an increasing number of radio and TV channels and competing digital platforms. Still, after some 25 years in a competitive situation, they can all enjoy a position in which a large share of the audience regularly uses their services and meets them with high trust.

This publication seeks to map the Nordic public service role and position from different angles and in different contexts, through five report sections. The first section offers key facts on the Nordic public service media by introducing the companies, current regulations and audience figures. Section 2 places the public service companies in the Nordic media landscape, picturing their situation related to the private and commercial media on the Nordic media market, today as well as over the years. Section 3, the main section, is a current overview of the public service media landscape: its financing, its output in the form of TV and radio channels plus web sites, and not least the special case of Nordic cooperation. It also highlights key public service features

such as news, domestic production, children's and youth programming, services in minority languages, etc.

However, a Nordic model cannot stand by itself; therefore, Section 4 places Nordic media in general, or public service in particular, in a European or global context. Lastly, the facts and figures about the Nordic region presented in Section 5 place the Nordic societies in an international context. This provides a picture of small countries – sparsely populated, but with important economies in relation to their size – which rank high on global indexes.

With the ambition to cover public service TV and radio on an equal basis, as well as to provide a comparable picture including all countries, we have had to conclude that more comparable data are available for TV than for radio. Data availability between countries also differs. Ideally, tables and figures present the situation in all five countries (countrywise or as Nordic averages), but some features have needed to be illustrated through examples from only one or a few countries. We have sought to provide an overall picture of how public service media work in a region characterised by consensus and cooperation, but it should be noted that any attempt at drawing a map is sometimes at the expense of details.

Finally, the data presented here are greatly based on those in the first volume of this series, *Public Service Media in the Nordic Countries. Facts & Figures*, which were collected and collated in a joint effort by the Danish Agency for Culture, Statistics Finland, Statistics Iceland, medianorway and Nordicom-Sweden. Members of the team have since provided invaluable help in answering questions and supplying additional information for this publication as well, and we are grateful for having been able to benefit from their expertise. Other researchers, experts and people in the industry have also contributed knowledge, and we would like to express our sincere thanks to all of you who have in any way been involved in this publication.

This said, it is our hope that this publication, together with the whole series, fulfils its aim to provide a good summary and understanding of public service media in the whole Nordic region – i.e., fills its function as a Nordic public service media map.

Explanation of Symbols

- Magnitude zero
- 0 Magnitude less than half of unit employed
- .. Data not available
- * Category not applicable

Explanation of Headings

- | | |
|-----------------|--|
| Nordic | Data include the whole Nordic region or are Nordic averages. |
| In each country | Data include Denmark, Finland, Iceland, Norway and Sweden. |
| By country | Data are presented countrywise, but do not include all five countries (due to lack of data or because the situation is not applicable in all countries). |

Reference Years

Statistical data cover 2010 or 2011 (if nothing is stated, data refer to 2010).
Structural overviews are as updated as possible (2012 or early 2013).

1. Nordic Public Service Media: Framework

Nordic public service media companies

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Nordic public service media companies

1. Companies, activities and year of establishment

Denmark

Danmarks Radio (DR)

The Danish Broadcasting Corporation

Radio, TV, web

Radio established in 1925

TV established in 1951

Web established in 1996

Finland

Yleisradio Oy (YLE)

The Finnish Broadcasting Company

Radio, TV, web

Radio established in 1926

TV established in 1958

Web established in 1995

Iceland

Ríkisútvarpið ohf. (RÚV)

The National Broadcasting Corporation in Iceland

Radio, TV, web

Radio established in 1930

TV established in 1966

Web established in 1996

Norway

Norsk Rikskringkasting AS (NRK)

The Norwegian Broadcasting Corporation

Radio, TV, web

Radio established in 1933

TV established in 1960

Web established in 1995

Sweden

Sveriges Radio AB (SR)

Swedish Radio

Radio, web

Radio established in 1925

Web established in 1995

Sveriges Television AB (SVT)

TV, web

TV established in 1957

Web established in 1995

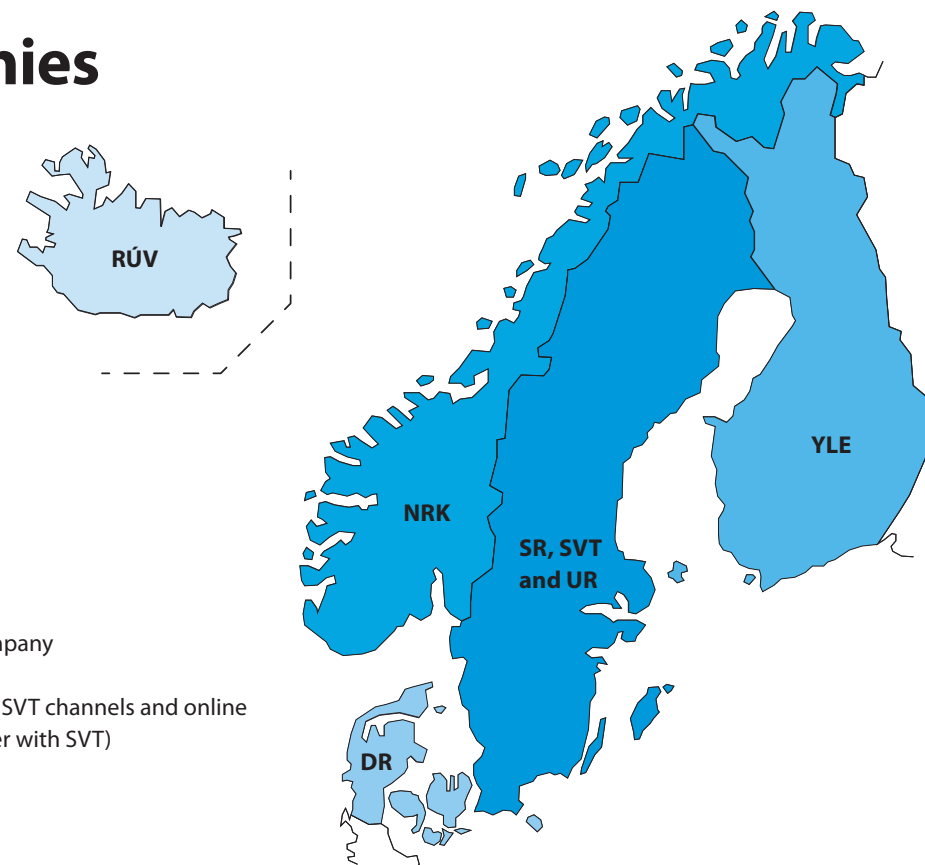
Sveriges Utbildningsradio AB (UR)

The Swedish Educational Broadcasting Company

Radio, TV, web

Educational programs broadcast on SR and SVT channels and online TV channel Kunskapskanalen 2004 (together with SVT)

Web established in 1995



The Nordic public service media companies offer their audiences a wide range of content through radio channels, TV channels and web sites, on both a nationwide and a regional or local level. As in many other European countries, radio services were established in the 1920s-30s, with TV following suit in the 1950s-60s and web services in the mid-1990s.

In each country, radio, TV and web activities are organised within one company – except for Sweden, where public service is organised in three separate companies (though under the same ownership): SR for radio, SVT for television, and UR, which produces educational programmes – for classroom and extramural use – for distribution via SR and SVT channels. All three companies run their own web sites.

Governance and financing

2. The public service funding systems in each country

	Denmark	Finland	Iceland	Norway	Sweden
Organisation	DR	YLE	RÚV	NRK	SR, SVT and UR
Funding system	Licence fee	Licence fee (from 2013: Special tax)	Special tax	Licence fee	Licence fee
Organisations receiving licence fee money	- DR (radio & TV) - TV 2 regions (regional TV) - Local radio & TV - Radio24syv (FM4) - Public service fund - Other media related purposes	YLE (radio & TV)	RÚV (radio & TV)	NRK (radio & TV)	- SR (radio) - SVT (TV) - UR (radio & TV programmes, broadcast in SR and SVT)
Organisation deciding the licence fee size	In political media agreements	The Finnish Government	*	The Norwegian Parliament	The Swedish Parliament
Organisation collecting the licence fees	DR (DR Licens)	Finnish Communications Regulatory Authority (FICORA)	*	NRK (NRK Lisensavdeling)	Radiotjänst i Kiruna AB (RIKAB), a company owned by SVT, SR and UR
How licence money is distributed to programme companies	Money is distributed according to current political media agreements. Any surplus is deposited at the Ministry of Culture.	Distribution via the State Television and Radio Fund. The government makes an annual determination of the allocation of the Fund's capital for various purposes.	Distribution according to Parliament decision (State Finance Bill). In 2011 75% goes to RÚV, in 2012 80%.	The licence fees are collected by NRK who distributes it within the units of the organisation.	Distribution via "Rundradiokontot", a special account administered by the Swedish National Debt Office. The government makes an annual determination of appropriation terms for each programme company.
Advertisements	Not allowed	Not allowed	Allowed ¹	Not allowed	Not allowed

¹ Advertisements are not allowed in news programmes or on the web site.

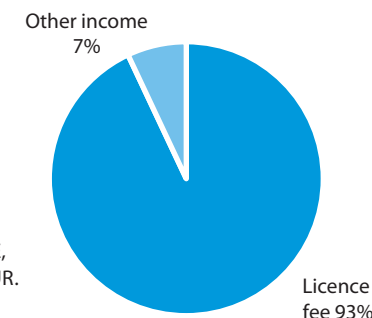
Sources: Danish media political agreement 2012–2014 (www.kum.dk), DR, FICORA/Statistics Finland, RÚV/Statistics Iceland, NRK, Radiotjänst i Kiruna AB.

The Nordic public service model includes publicly owned bodies, with public funding determined by Parliament or Government. These structural cornerstones are the same in all countries, though with some variations within the systems.

Formal organisation varies from self-governing public institution (DR) to state-owned limited companies (YLE, RÚV, NRK) or limited companies owned by a foundation (SR, SVT, UR). Public funding has traditionally been based on households' licence fees connected to the ownership of a TV set, but with the recent technical development that allows TV reception via numerous technical platforms, questions have been raised as to whether the licence fee model has become obsolete. In 2009 and 2013, respectively, Iceland and Finland, chose other models: Iceland an annual individual media fee (fixed rate) and Finland an income-based tax. In all cases, the collected money is earmarked for the countries' public service media. In Denmark with its mixed public service system, the lion's share goes to DR but licence fee money is also allocated for other public service purposes.

By regulation, public funding is the overall source of revenue for the Nordic public service broadcasters. Advertising is not allowed (except in the case of RÚV due to Iceland's small population) and sponsoring is heavily restricted.

3. Nordic public service media companies' sources of revenue



Note: Nordic average on basis of DR, YLE, NRK, SVT, SR and UR.

Sources: Company annual reports 2010.

4. Public service programming regulations and policies in each Nordic country

	Denmark	Finland	Iceland	Norway	Sweden	Comment
Overarching values						
Support democracy	X	X	X	X	X	Ensure the population access to a variety of information on society and debate, and contribute to everyone's opportunity to participate in democratic processes.
Quality and diversity	X	X	X	X	X	
Objectivity and impartiality	X	X	X	X	X	
Programming						
Wide selection of genres and programmes	X	X	X	X	X	No harmful content at hours when children watch TV.
News service	X	X	X	X	X	
Educational programming	X	X	–	X	X	
Children's & youth programming	X	X	X	X	X	
<i>Protection for children</i>	X	X	X	X	X	
Domestic culture	X	X	X	X	X	Own production (e.g. drama and music) and cooperation with other cultural institutions in the society.
Emphasis on programming in domestic language/s/	X	X	X	X	X	
Programming in official minority languages	*	X	*	X	X	
Programming for minority and special groups	X	X	–	X	X	For example news and/or other programming for immigrants and refugees.
Accessibility for people with disabilities	X	X	X	X	X	Subtitling, sign language, audio-description.
Reflect the diversity of society	X	X	X	X	X	
Regional/local programming	X	–	X	X	X	
Nordic programming /languages	X	X	X	X	X	
<i>European programmes</i>	X	X	X	X	X	50% of transmission time reserved for European works. ¹
<i>Support independent producers</i>	X	X	X	X	X	10% of transmission time (or 10% of programme budget) reserved for European works created by independent producers (a major share should be less than five years old). ¹

* Not applicable.

Italics: Included in general broadcasting acts and are obligatory for all domestic broadcasters.

¹ Quotas based on hours excluding time allocated for news, sports and games.

Sources: According to existing laws and regulations as valid in beginning of the year 2013.

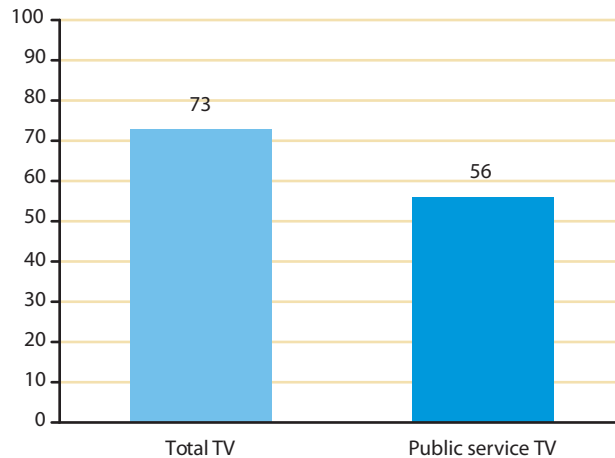
In all Nordic countries, broadcast legislation as well as complementary regulation and agreements provide a framework of public service obligations including promoting democratic values, national culture and language, through a wide range of programmes by way of national coverage channels: programmes created under full editorial freedom (Flisen 2006). Attention should be given to children, minorities and special groups in society. Objectivity, impartiality and quality are overarching watchwords.

A cornerstone in public service governance is the “arm’s length principle”, i.e. regulation provides objectives and structures, under which the companies enjoy autonomy with responsibilities. Supervision occurs on a strict ex-post basis, of which one part is the companies’ obligation to report in annual public service audits on how they carry out their commission. Also, separate programmes can be reviewed, on a post-broadcast basis only, if viewers or listeners complain to the media authorities.

Nordic public service audience

5. Nordic TV daily reach

Share of population (%)

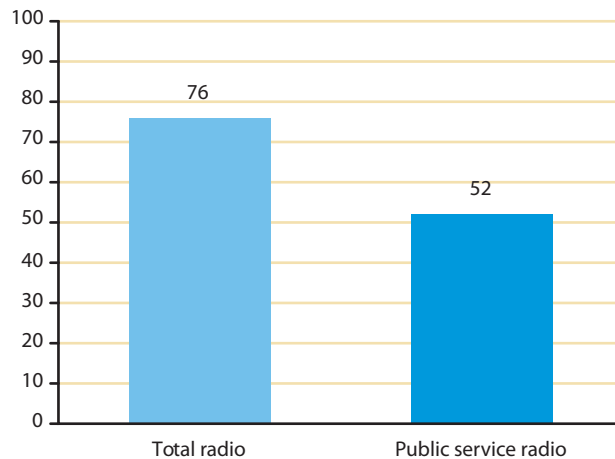


Nordic public service media companies are obliged to offer services for the whole population, and surveys show that the Nordic populations largely consume the programming. In Norway, almost nine of ten Norwegians make use of NRK services via TV, radio and/or web during the course of an average day (Forbruker & Media, TNS Gallup Norway).

As a Nordic average, domestic public service TV reaches more than half of the population on an average day, and radio reaches a similar number. Among TV viewers, almost eight of ten consume public service TV content on a daily basis, and among listeners almost seven of ten tune in to public service radio.

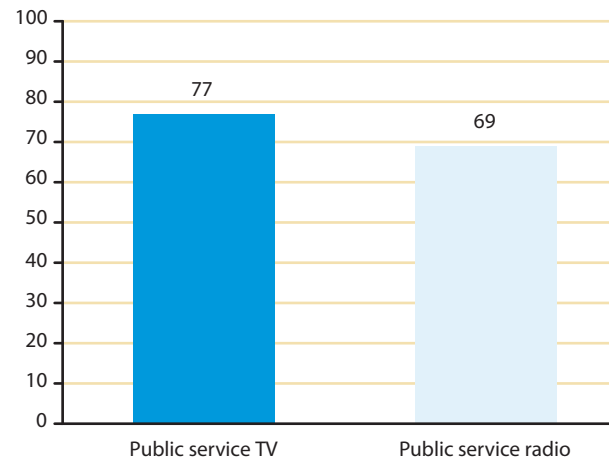
6. Nordic radio daily reach

Share of population (%)



7. Nordic public service TV and radio share of daily reach

Share of viewers and listeners (%)

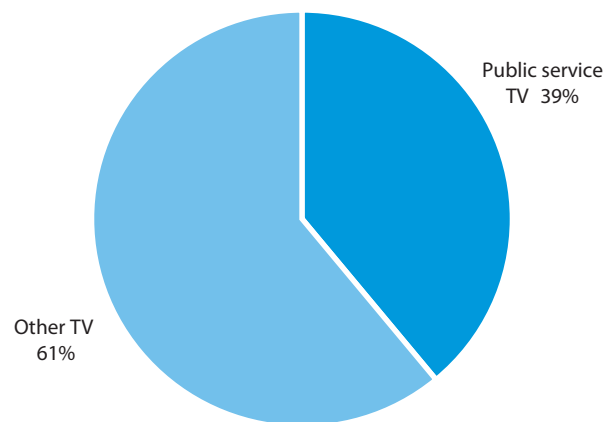


Note: Iceland not included due to lack of data.

Sources: TNS Gallup Denmark, Finnpanel and YLE Audience Research, NRK and TNS Gallup Norway, MMS, TNS Sifo.

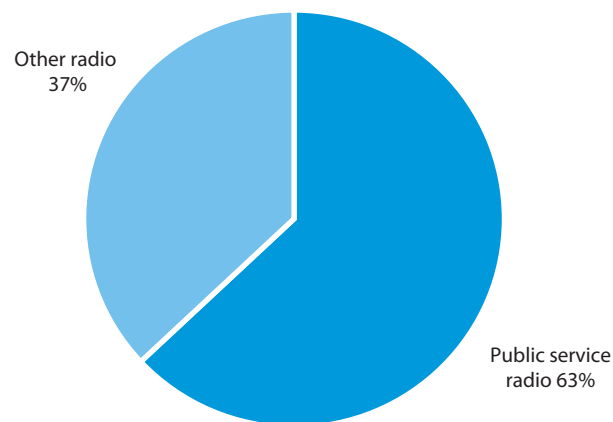
8. Nordic TV audience shares

Share of viewing time (%)



9. Nordic radio audience shares

Share of listening time (%)



Note: TV 2 Denmark is not included; if included the Nordic public service TV share would amount to 45 per cent.

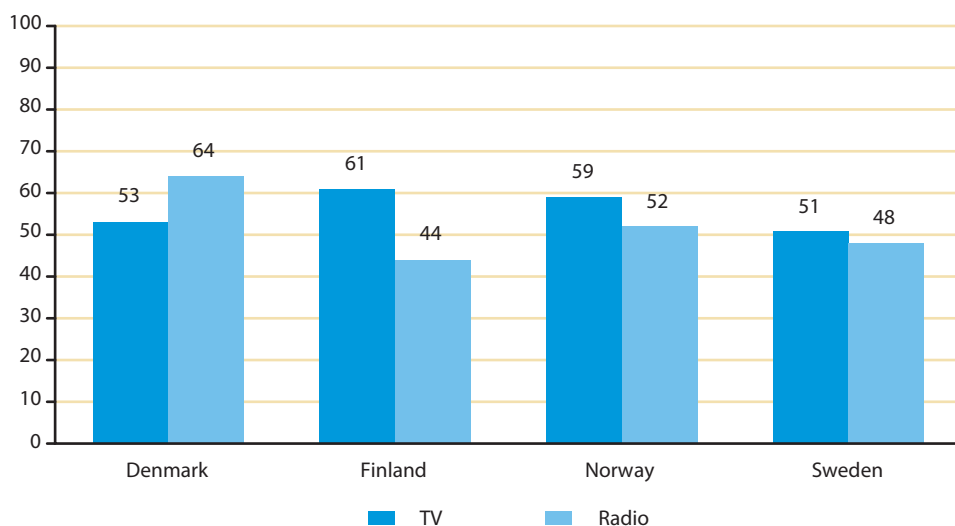
Sources: TNS Gallup Denmark, Finnpanel and YLE Audience Research, NRK and TNS Gallup Norway, MMS, TNS Sifo.

Measured in audience shares, Nordic public service radio has more than 60 per cent of the listening time and TV about 40 per cent of the viewing time.

Looking at audience by country, it should be pointed out that data for Denmark refer to DR. If TV 2 (the commercially financed public service channel) were included, both public service TV reach and audience share would be higher.

10. Public service TV and radio daily reach by country

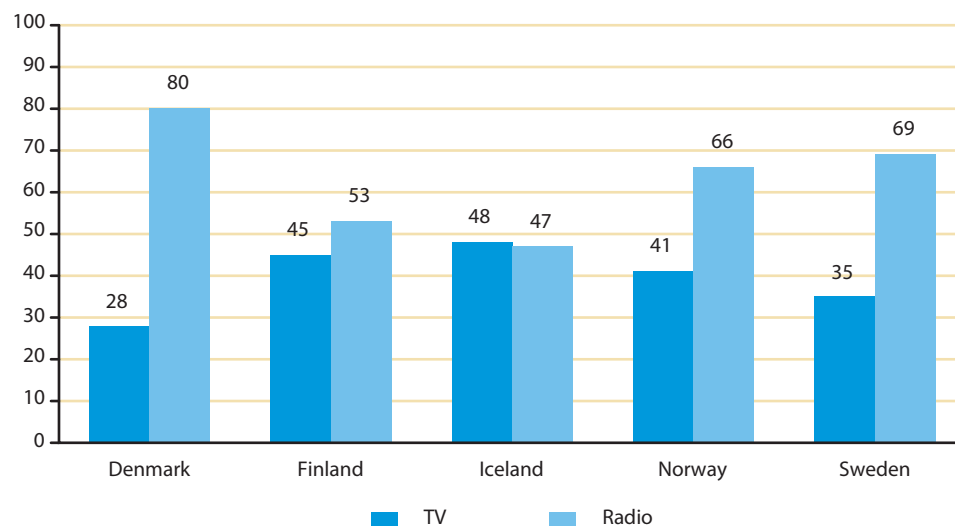
Share of population (%)



Sources: TNS Gallup Denmark, Finnpanel, YLE Audience Research, NRK, TNS Gallup Norway, MMS, TNS Sifo.

11. Public service TV and radio audience shares in each country

Share of viewing or listening time (%)



Note: If TV 2 Denmark were included, the Danish public service TV share would amount to 55 per cent.

Sources: TNS Gallup Denmark, Finnpanel, YLE Audience Research, NRK, TNS Gallup Norway, MMS, TNS Sifo.

12. Public service media web sites' ranking among other web sites in each country

Company	Main web site	Ranking among audited	
		media sites	all sites
DR	dr.dk	2	3
YLE	yle.fi	4	4
RÚV	ruv.is	5	7
NRK	nrk.no	3	4
SVT	svt.se	5	11
SVT	svtplay.se	7	14
SR	sr.se	9	19

Note: Ranking 2011, week 11 (March).

Sources: FDIM Foreningen av Danske Interaktive Medier, TNS Gallup Finland, Modernus Web Measure (Iceland), TNS Gallup Norway, KIA Index (Sweden).

All Nordic countries have high levels of Internet penetration and use. As for the Nordic public service media web services, they are frequently used in their respective countries. Data show that their main web sites rank among the most visited, among both media-related and total sites.

2. Public Service in the Nordic Media Landscape

The largest media companies

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Media company revenues

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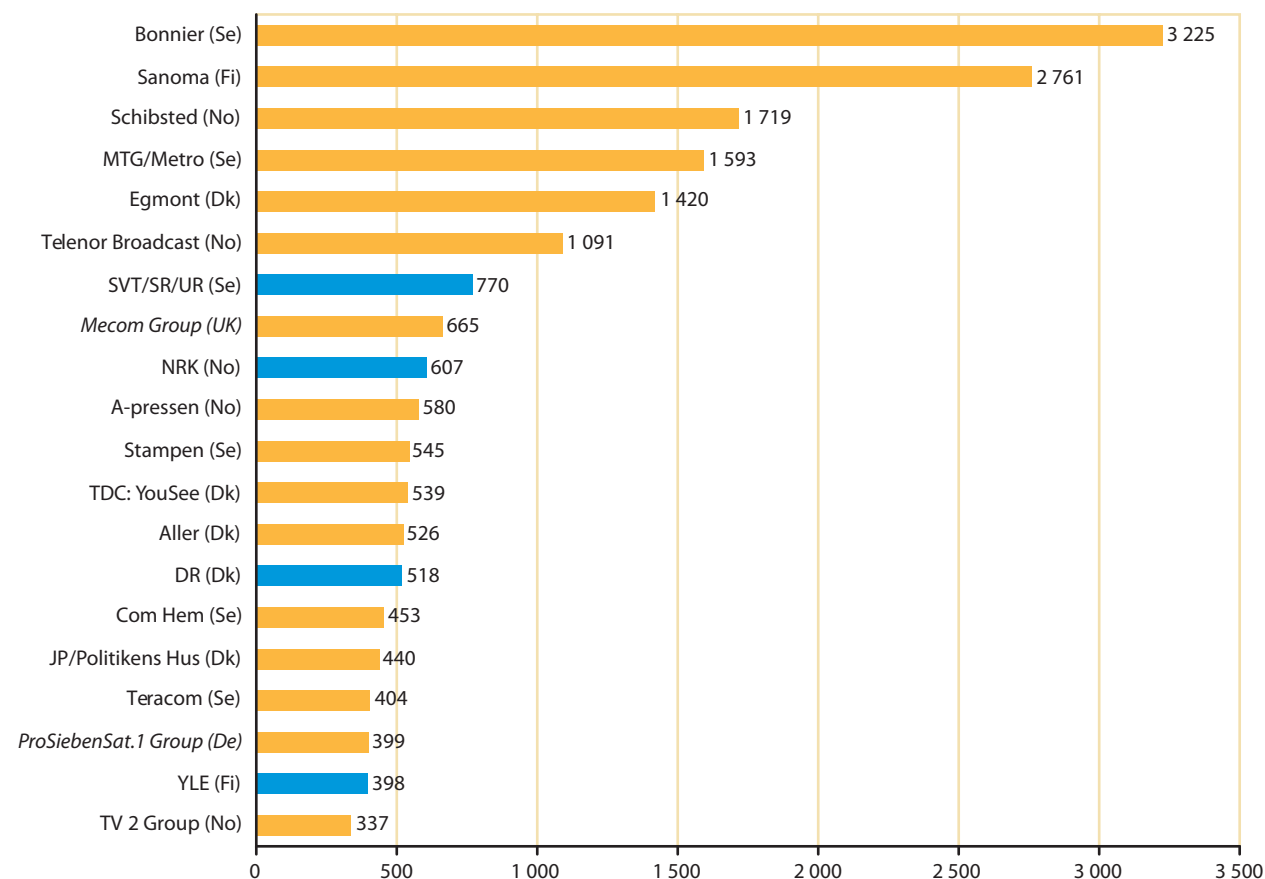
The media day

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The largest media companies

1. The 20 largest media companies in the Nordic countries

Revenue in million Euro 2010



Public service companies shown in blue colour.

Italics: Companies with domicile outside the Nordic countries. Included due to substantial revenue and activities on the Nordic market (data cover their Nordic operations only).

Sources: Company annual reports and web sites (processed).

2. Nordic and domestic share of revenue for the 20 largest media companies in the Nordic countries

	Media company	Domicile	Share of revenue		
			Revenue 2010 (Euro mills)	Nordic share (incl. domestic if Nordic) (%)	Domestic share (%)
1	Bonnier	Sweden	3 225	83	54
2	Sanoma	Finland	2 761	52	51
3	Schibsted	Norway	1 719	83	53
4	MTG/Metro	Sweden	1 593	70	32
5	Egmont	Denmark	1 420	82	..
6	Telenor Broadcast	Norway	1 091	100	57
7	SVT/SR/UR	Sweden	770	100	100
8	Mecom Group	UK	665	100	..
9	NRK	Norway	607	100	100
10	A-pressen	Norway	580	92	92
11	Stampen	Sweden	545	100	100
12	TDC: YouSee	Denmark	539	100	85
13	Aller ⁹	Denmark	526	100	35
14	DR	Denmark	518	100	100
15	Com Hem	Sweden	453	100	100
16	JP/Politikens Hus	Denmark	440	100	96
17	Teracom Group	Sweden	404	100	77
18	ProSiebenSat.1 Group (SBS)	Germany	399	100	..
19	YLE	Finland	398	100	100
20	TV 2 Group	Norway	337	100	100

Public service companies shown in blue colour.

Italics: Companies with domicile outside the Nordic countries. Included due to substantial revenue and activities on the Nordic market (data cover their Nordic operations only).

Sources: Company annual reports and web sites (processed).

The introduction of commercial radio and television in the late 1980s/early 1990s opened up for a new audiovisual – as well as a more integrated – Nordic media market. Some features of the Nordic media market today are worth pointing out. Firstly, the media are generally in the hands of Nordic owners. Although a number of companies are under non-Nordic ownership, it is striking how strong a position Nordic-owned companies maintain in the region's media markets (Sundin 2009). Secondly, many companies have crossed borders into neighbouring Nordic countries. In fact, most of today's largest media companies are active throughout the region – and in a variety of media sectors, including activities in broadcasting. Thirdly, the public service companies – prime examples of actors having a specifically national focus – are, after some 25 years in a competitive situation, still relatively strong players in their respective markets.

Please note that the Icelandic market is too small to contribute companies to these lists.

3. Large media companies on the commercial Nordic television and radio market

MTG / Viasat	
<i>Television</i>	
Denmark	TV3, 3+, 3 PULS
Norway	TV3, Viasat 4
Sweden	TV3, TV6, TV8, TV10
All	TV1000 & Viasat pay-TV channels
<i>Radio</i>	
Norway	P4
Sweden	RIX, Lugna favoriter

SBS Nordic¹	
<i>Television</i>	
Denmark	Kanal 4, Kanal 5, 6'er'en, The Voice
Finland	The Voice, TV Viisi
Norway	TVNorge, FEM, Max
Sweden	Kanal 5, Kanal 9
<i>Radio</i>	
Denmark	NOVA FM, Voice
Finland	Iskelmäradiot, Voice
Norway	RadioNorge, Radio1, Voice
Sweden	Mix Megapol, Rockklassiker, Voice



Egmont	
Norway	TV2 channel family

Sanoma	
<i>Television</i>	
Finland	Nelonen channel family
<i>Radio</i>	
Finland	Radio Rock, Radio Aalto

Bonnier	
<i>Television</i>	
Sweden	TV4 channel family
Finland	MTV3 channel family
Denmark	Canal 9
Norway	Canal 9
All	C More pay-TV channels
<i>Radio</i>	
Finland	Radio Nova

The Nordic public service companies operate in a rather concentrated broadcasting market, where most nationwide TV and radio stations or networks are owned by major media groups. Moreover, several of these media companies are important players in the radio and TV field on both national and Nordic levels.

Two of the largest – MTG and SBS Nordic – started off with a pan-Nordic (in the beginning pan-Scandinavian) strategy, launching cable and satellite TV channels and acquiring licences for commercial radio on both a national and local basis in several countries. Today, both the Swedish MTG (Modern Times Group) and SBS Nordic (with changing ownership over the years) maintain a strong presence in the Nordic area, offering a number of TV channels and national radio stations or radio networks.

Others, like Bonnier, Sanoma and Egmont, have a long history as publishing companies (printing establishments, books, magazines and/or newspapers) with roots going back to the 19th century. Today, they are transnational media companies with diverse activities. Their main TV channels are among the largest domestic channels in each country, all having established their positions as sole commercial channels in the terrestrial nets alongside public service television. TV 2 in Norway and TV4 in Sweden started broadcasting in the early 1990s, and Nelonen in Finland in 1997. MTV3, whose predecessor had been on the air since 1957 and aired in a window on YLE, became a terrestrially distributed channel in its own right in 1993.

¹ SBS Nordic was sold by ProSiebenSat.1 Group to Discovery Communications in December 2012.

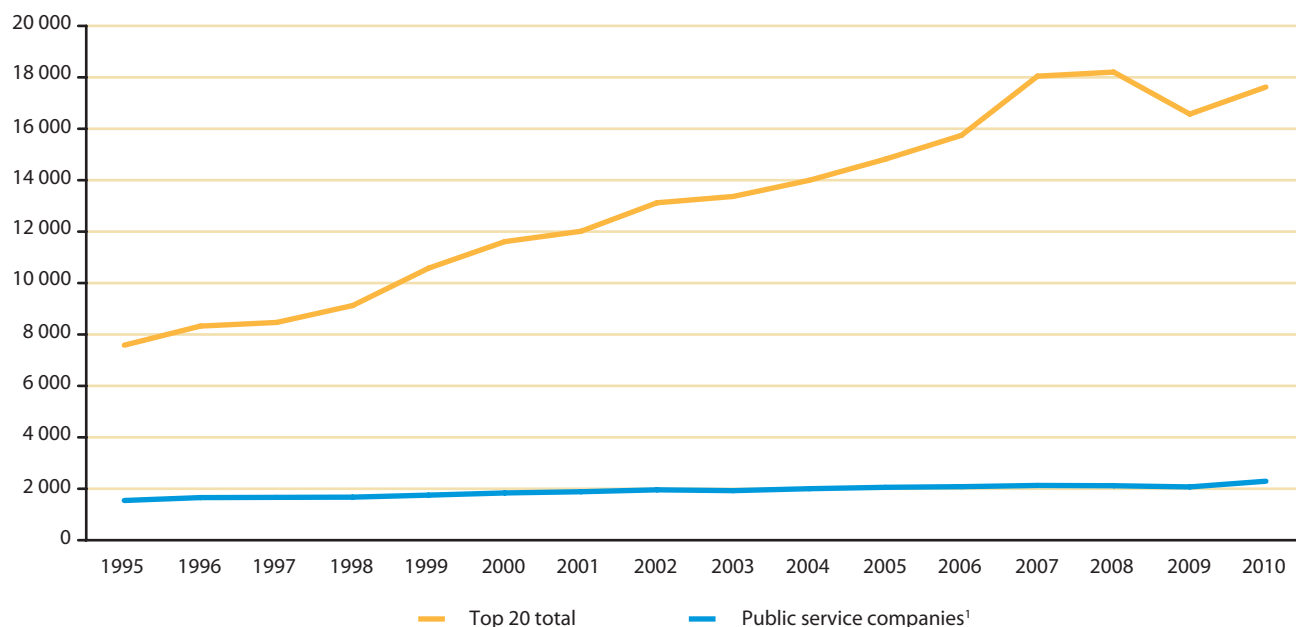
Note: No presence on the Icelandic media market.

Source: Company annual reports and web sites.

Media company revenues

4. Total revenue of the 20 largest Nordic media companies and public service companies' share 1995–2010

Million Euro



Since the late 1980s/early 1990s, dramatic changes have taken place in the Nordic media markets. Many of the major Nordic media companies have grown through mergers and acquisitions, several by acquiring companies in neighbouring Nordic companies (or establishing new ones) – either within their core media or by expanding into other media sectors. The long-term trend for the media industry has also meant increased revenues from the advertising market. The other major revenue stream for media companies, i.e. from households, also increased through households gaining faster Internet, mobile broadband subscriptions and major pay-TV offerings, etc. (IRM 2010).

	Revenue (million Euro)															
	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Top 20 total	7 583	8 326	8 467	9 125	10 580	11 611	12 013	13 122	13 367	13 995	14 818	15 744	18 046	18 204	16 570	17 623
Public service companies¹	1 544	1 656	1 665	1 674	1 752	1 837	1 884	1 958	1 926	2 002	2 056	2 081	2 129	2 118	2 072	2 293
Public service share of all (%)	20	20	20	18	17	16	16	15	14	14	14	13	12	12	13	13

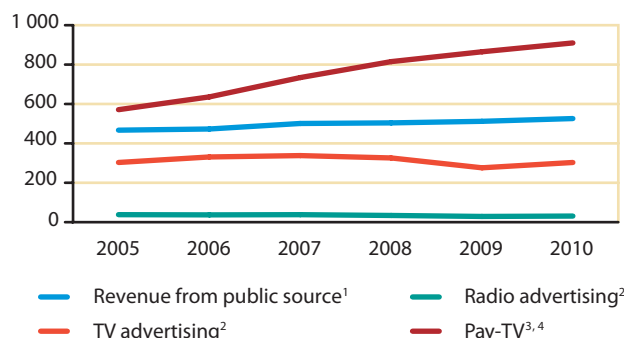
¹ DR, YLE, NRK and SVT/SR/UR (all of which are also included in top 20 total). Not including TV 2 / Danmark.

Note: TV distribution companies are not included. Data for 2005 and 2007 include some estimates.

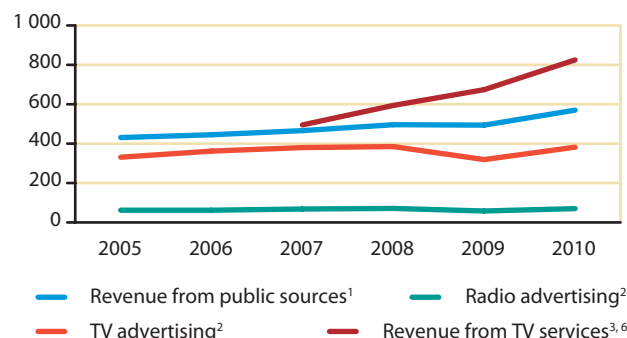
Sources: Company annual reports, Nordicom.

5. Trends in TV and radio revenue by country 2005–2010 Million Euro

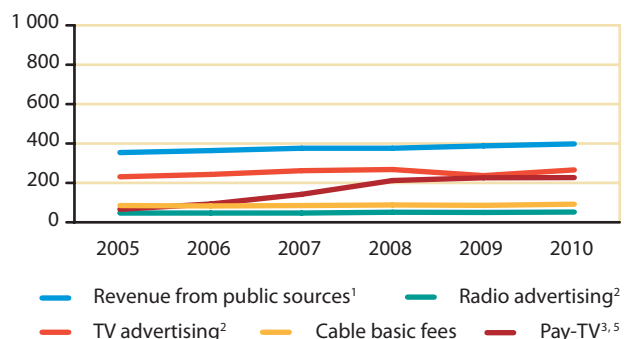
Denmark



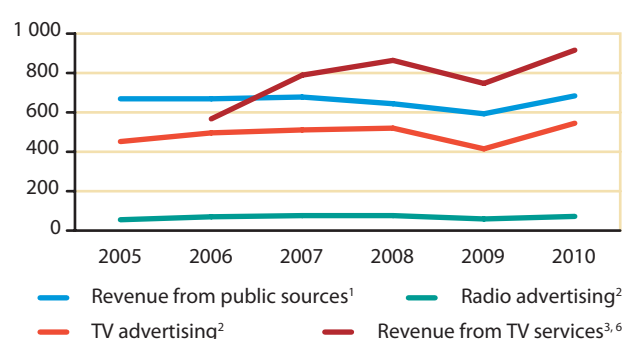
Norway



Finland



Sweden



1 Public service broadcasters' net licence fee revenues. Broadcasters concerned are DR and the TV 2 regions in Denmark, YLE in Finland, NRK in Norway and SVT, SR and UR in Sweden.

2 Net advertising revenue.

3 Different methods in collecting pay-TV revenue data have been used, which impairs comparability between countries.

4 Satellite, cable TV, DTT and IPTV consumers' spending, according to *EAO Statistical Yearbook 2011 (Volume 1)*.

5 Pay-TV figures are estimates, based on data from FiCom, Ficora, Finnpanel, TNS Gallup and company reports. VAT included.

6 Distributors' revenue from basic and premium TV packages and related services (excl. VAT). Data from the national Post and Telecom agencies.

Note: Data should be taken as indicators of the trend of revenue streams in the TV and radio sector. They should not be interpreted as total TV/radio market revenue. Data include effects by currency rates.

Sources: DR annual reports, Danish media political agreements, Danish Agency for Culture, *EAO Statistical Yearbook 2011 (Volume 1)*, YLE, Finnish Advertising Council / TNS Gallup Finland, Statistics Finland/Media Statistics, NRK, Norwegian Post and Telecommunication Authority, SVT, SR and UR, Swedish Post and Telecom Authority PTS, IRM Institute for Advertising and Media Statistics.

Revenues in the television and radio sector emanate mainly from advertising, pay-TV and public funding.

In commercial radio, stations receive most of their revenue from advertising. Radio advertising income maintains a rather constant level; however, radio claims no more than 2–3 per cent of total advertising expenditures. TV advertising is a more flourishing market. Revenues have increased considerably over the years: around 25 per cent over the past decade, a bit less in the past five years. TV attracts around 15–17 per cent of total advertising revenues in all Nordic countries.

At the same time, advertising is vulnerable, both due to recession – exemplified by the dip in 2009 – and since advertising might move to new platforms. Many TV channels are therefore striving to reduce their reliance on advertising revenues and increase their revenues from distribution. Companies' moves to launch several pay-TV channels of narrow appeal alongside their principal channel may be seen as one way of supplementing revenue from a competitive advertising market with subscription fees and distribution revenues. Consequently, the commercial TV companies of today show increased income from both advertisers and households (Harrie 2009, IRM 2010).

6. Total licence fee revenue by public service company 2000–2010

Million Euro

	Denmark			Finland		Iceland		Norway	Sweden
	DR	TV 2/ Danmark ¹	TV 2- regions ¹	YLE		RÚV		NRK	SVT, SR and UR
2000	358	63		284		24	*	360	652
2001	359	73		299		22	*	382	608
2002	372	76		302		24	*	427	646
2003	388	20	50	305		24	*	387	659
2004	401	9	50	333		27	*	395	663
2005	415	–	52	354		32	*	431	669
2006	421	–	52	364		29	*	445	669
2007	446	–	55	376		31	*	466	678
2008	448	–	56	376		23	Special fee ²	496	644
2009	455	–	57	388		*	21	494	593
2010	469	–	57	398		*	20	570	684

1 Before 2003, transfers of licence fee money to the regional TV 2 stations were made via TV 2 / Danmark, but since then the regional stations receive their part of licence fee revenue directly from the licence office.

2 The licence fee system was abolished in Iceland at the end of 2008/beginning of 2009 and replaced by a tax. *Note:* Net revenue for YLE, RÚV and SVT/SR/UR, while DR and NRK revenues include costs and administration for collecting licence fees. VAT not included.

Sources: DR annual reports, Danish Media political agreements, Danish Agency for Culture, Finnish Communications Regulatory Authority FICORA, RÚV/Statistics Iceland, NRK, Radiotjänst i Kiruna AB.

The public service media systems in the Nordic countries are funded by their audiences. By laws and contracts, the public service companies' activities are stipulated to be financed through public sources. Public funding has provided the Nordic public service companies with good financial stability, allowing them to plan their operations, programmes, and investments (Engblom 2013).

Even though there is political consensus about keeping a publicly funded public service media, the model is under discussion. In recent years, two countries have replaced the household-based fee with other solutions: in 2009 Iceland introduced a special tax intended for RÚV, and in 2013 Finland followed suite with a mandatory income-based media fee to fund YLE. In Sweden a government commission on public service has proposed a similar change, but discussion of the issue has been postponed.

It should be noted that there are differences in practice between how the licence fee collection is organised in the various Nordic countries, which affects the comparison between the revenues in this table.

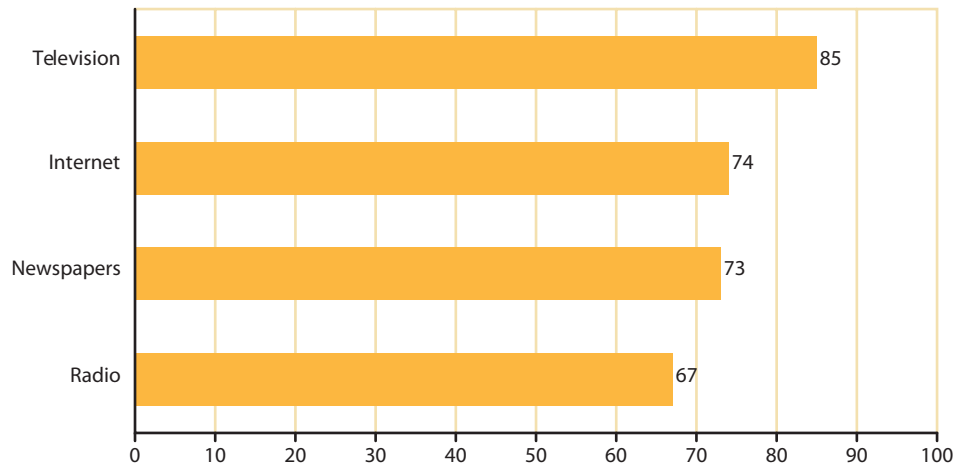
The media day

7. Daily media reach by country

	Share of population (%)		
	Finland (Age: 15–69)	Norway (Age: 9–79)	Sweden (Age: 9–79)
Television	83	81	85
Internet	82	80	74
Newspapers total	..	79	73
Newspapers print	45	63	66
Newspapers online	22	48	18
Radio	59	55	67

8. Daily media reach in Sweden

Share of population (%)



Note: Daily media only. Including use on all platforms if not stated otherwise.

Sources: TNS Atlas Intermedia 2011/TNS Gallup Group, Statistics Norway (*Norsk Mediebarometer 2011*), Nordicom-Sweden (*Nordicom-Sveriges Mediebarometer 2011*).

The high reach of radio and TV makes them, together with newspapers, important daily sources of news and facts as well as entertainment. Internet, with its high reach in the Nordic countries, is naturally also an important source of information and amusement. It should be noted that data on radio, TV and newspapers include use on all platforms. Online TV and radio use, however, is still at just a few per cent, though it is increasing, especially among young people.

9. Media audience shares the average day by country

	Media audience shares (%)		
	Finland (Age: 15–69)	Norway (Age: 9–79)	Sweden (Age: 9–79)
Television	30	37	27
Internet	25	20	26
Radio	20	20	22
Newspapers ¹	5	6	6
Magazines/periodicals ¹	4	2	3
Books	7	4	5
CD/MP3	7	8	8
Video/DVD	2	3	2
Total (per cent)	100	100	100
Average daily time spent with media, minutes			
	503	426	367

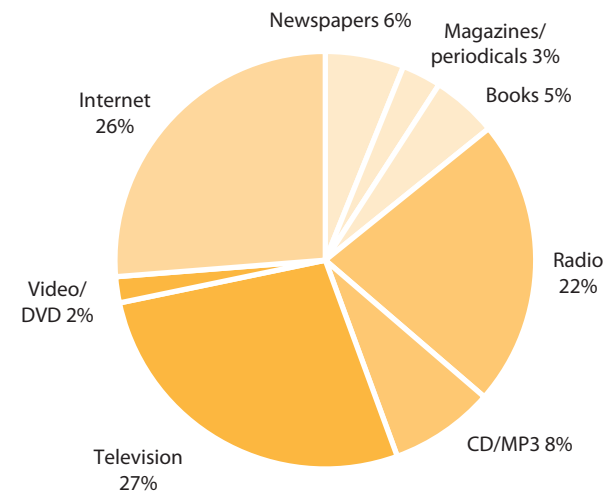
1 Reading of paper version.

Note: Table shows share of gross time spent with the media on an average day 2011.

Sources: TNS Atlas Intermedia 2011/TNS Gallup Group, Statistics Norway (*Norsk Mediebarometer 2011*), Nordicom-Sweden (*Nordicom-Sveriges Mediebarometer 2011*).

10. Media audience shares in Sweden

Share of daily media time (%)



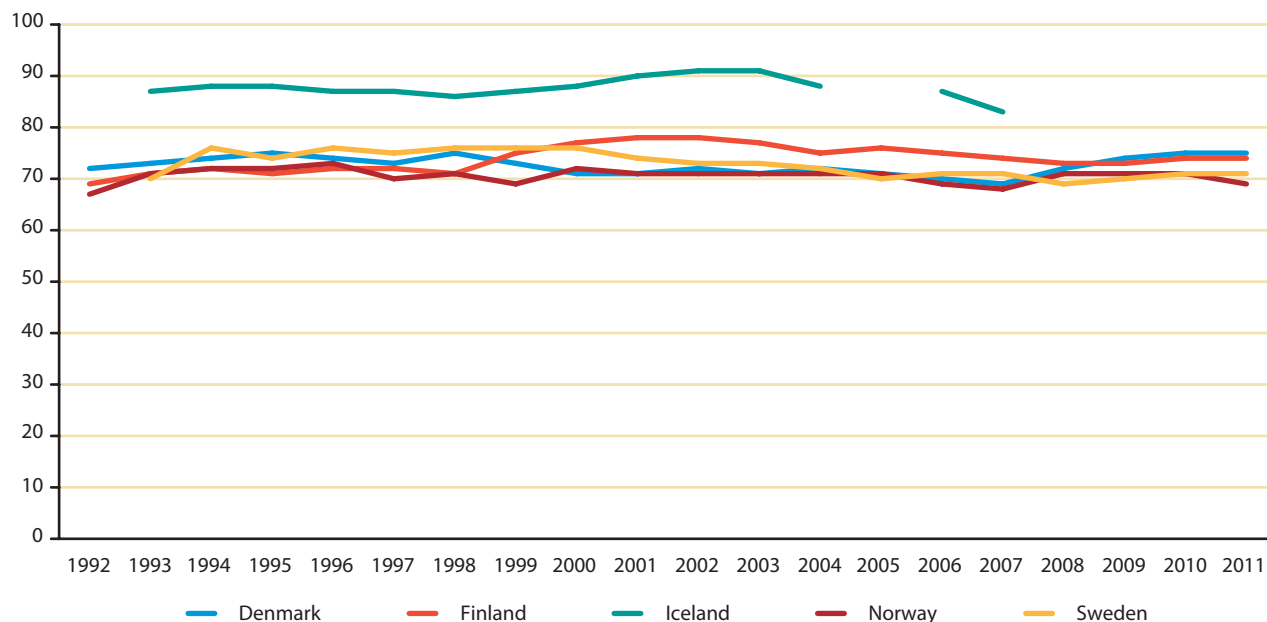
Media audience shares are based on gross time. Daily time spent on media differs from just over six hours in Sweden to more than eight hours in Finland, but most of this difference can probably be referred to methodological differences. TV and Internet, closely followed by radio, dominate the time spent on media.

Note that data are based on people's own estimates and are therefore not comparable to data based on electronic measurements on the following pages (Figures 11–18).

TV audience

11. Television daily reach in each country 1992–2010

Share of population (%)



The Nordic television landscape has seen fundamental changes since the late 1980s. With the end of the monopoly era and the introduction of commercial and privately owned television, the number of channels on offer increased considerably. Moreover, the past decade of digitalisation has contributed to even more channels. (Since the end of 2009, terrestrial distribution has been converted to digital distribution in all countries except Iceland.)

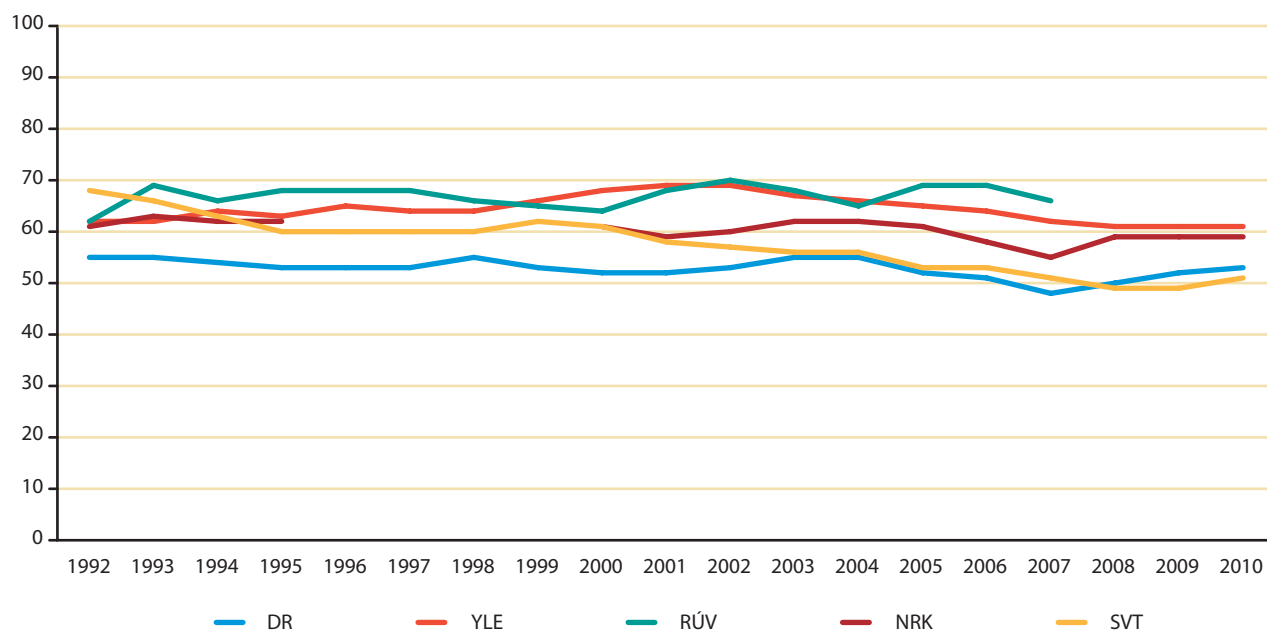
Despite this development, television viewing in terms of daily reach has remained fairly stable. In 2010 the average daily reach in the Nordic countries was between 71 and 75 per cent. Viewing time has increased, on the other hand, but considering the expansion of the number of TV channels it has been rather limited.

	Share of population (%)																			
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	
Denmark	72	73	74	75	74	73	75	73	71	71	72	71	72	71	70	69	72	74	75	
Finland	69	71	72	71	72	72	71	75	77	78	78	77	75	76	75	74	73	73	74	
Iceland	..	87	88	88	87	87	86	87	88	90	91	91	88	..	87	83	..	..	..	
Norway	67	71	72	72	73	70	71	69	72	71	71	71	71	71	69	68	71	71	71	
Sweden	..	70	76	74	76	75	76	76	76	74	73	73	72	70	71	71	69	70	71	

Sources: DR, TNS Gallup Denmark, Finnpanel and YLE Audience Research, Social Science Institute at the University of Iceland (1993–1998), Capacent (1999–2007), TNS Gallup Norway, MMS.

12. Public service TV daily reach in each country 1992–2010

Share of population (%)



The opening up for commercial television from the late 1980s onwards brought about a new competitive situation for public service TV in the Nordic countries. Since then, their channels' audience reach and shares have diminished.

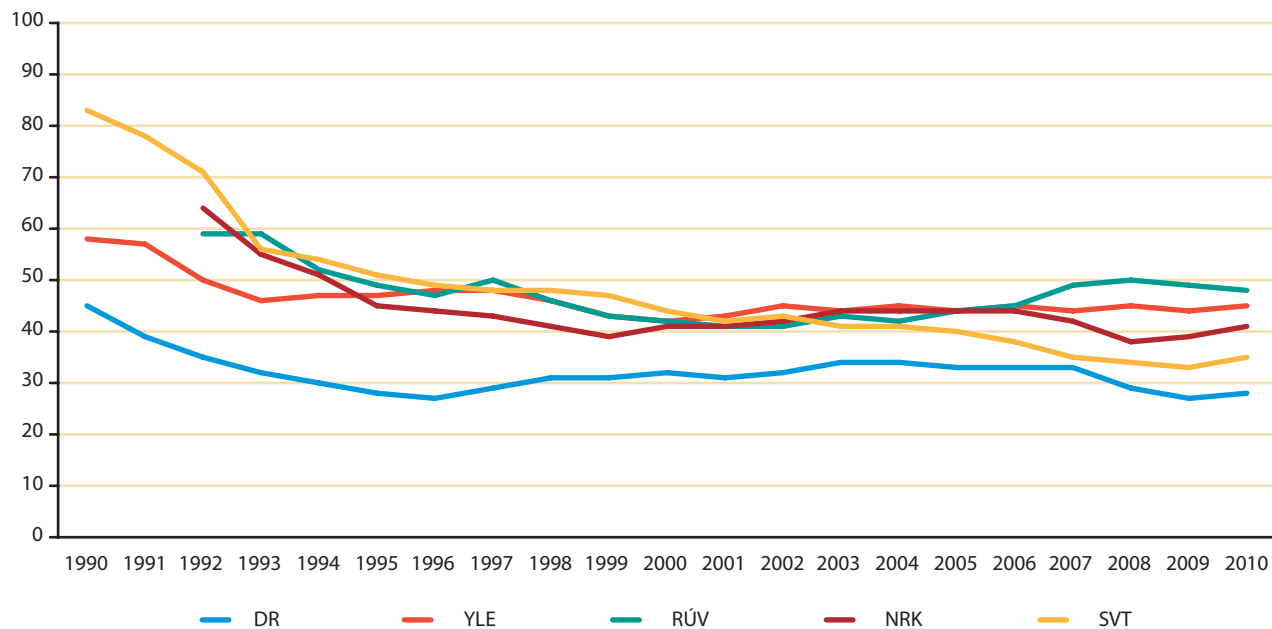
Yet, one could discuss how the development of reach (Figure 12) and shares (Figure 13) for the Nordic public service channels should be interpreted in terms of audience appreciation. On the one hand it is obvious that, over the years, public service television has lost audience shares, and the Nordic average is now down to below 40 per cent. On the other hand the reach is relatively high, meaning that most of the audience uses public service regularly (Hujanen et al. 2013). And, after some 25 years in a competitive situation, they are still relatively strong players.

	Share of population (%)																			
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	
DR	55	55	54	53	53	53	55	53	52	52	53	55	55	52	51	48	50	52	53	
YLE	62	62	64	63	65	64	64	66	68	69	69	67	66	65	64	62	61	61	61	
RÚV	62	69	66	68	68	68	66	65	64	68	70	68	65	69	69	66	..	..	..	
NRK	61	63	62	62	..	..	..	..	61	59	60	62	62	61	58	55	59	59	59	
SVT	68	66	63	60	60	60	60	62	61	58	57	56	56	53	53	51	49	49	51	

Sources: DR, TNS Gallup Denmark, Finnpanel and YLE Audience Research, Social Science Institute at University of Iceland (1990–1998), Capacent (1999–2007), RÚV, MMI Norway (–1999), TNS Gallup Norway (2000–), SVT database on public service.

13. Public service TV audience shares in each country 1990–2010

Share of viewing time (%)

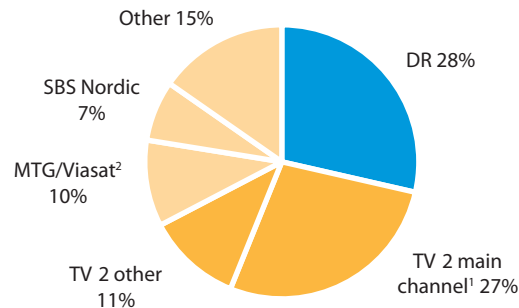


	Share of viewing time (%)																				Total TV viewing time	
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2010
DR	45	39	35	32	30	28	27	29	31	31	32	31	32	34	34	33	33	33	29	27	28	201
YLE	58	57	50	46	47	47	48	48	46	43	42	43	45	44	45	44	45	44	45	44	45	178
RÚV	61	..	59	59	52	49	47	50	46	43	42	41	41	43	42	44	45	49	50	49	48	141
NRK	..	..	64	55	51	45	44	43	41	39	41	41	42	44	44	44	44	42	38	39	41	183
SVT	83	78	71	56	54	51	49	48	48	47	44	42	43	41	41	40	38	35	34	33	35	166

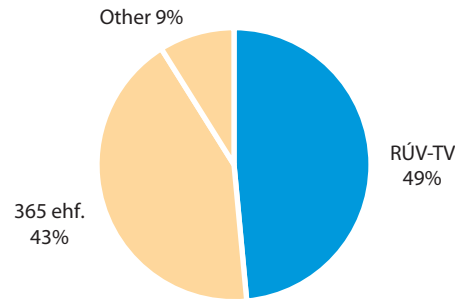
Sources: DR, TNS Gallup Denmark, Finnpanel and YLE Audience Research, Social Science Institute at University of Iceland (1990–1998), Capacent (1999–), RÚV, MMI Norway (–1999), TNS Gallup Norway (2000–), SVT, MMS.

14. TV companies' audience shares in each country

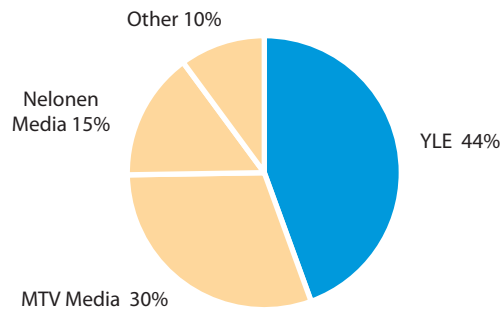
Denmark



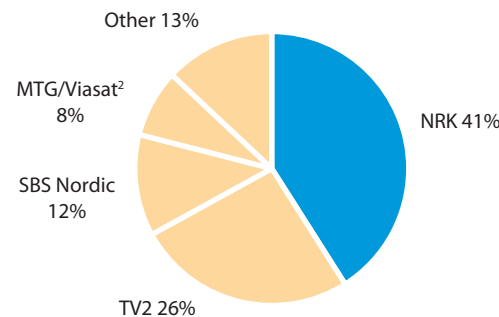
Iceland



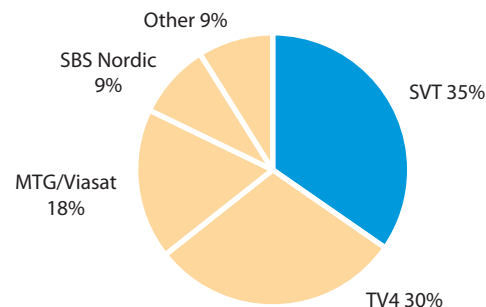
Finland



Norway



Sweden



1 TV 2 Danmark's main channel TV 2 has public service obligations.

2 MTG's pay-TV channels TV1000 and other Viasat channels are not included.

Note: Electronic measurement, timeshift within 7 days included in Finland, Norway and Sweden. For Iceland, catch-up-channel viewing is included.

Public service TV shown in colour. Data for 2011.

Sources: TNS Gallup Denmark, Danish Agency for Culture, Finnpanel and YLE Audience Research, Ministry of Transport and Communications (Finland), Capacent (Iceland), TNS Gallup Norway, medianorway, MMS, Nordicom-Sweden.

New means of distribution, a plethora of channels and broader access to more channels have led to a fragmentation of the television market – and to changes in viewing patterns. Viewing has become more splintered, in the sense that the large generalist channels have lost market shares to a number of narrower niche channels. But, by establishing several channels – in many cases pay-TV niche channels – the companies behind the major commercial channels have retained their market shares overall.

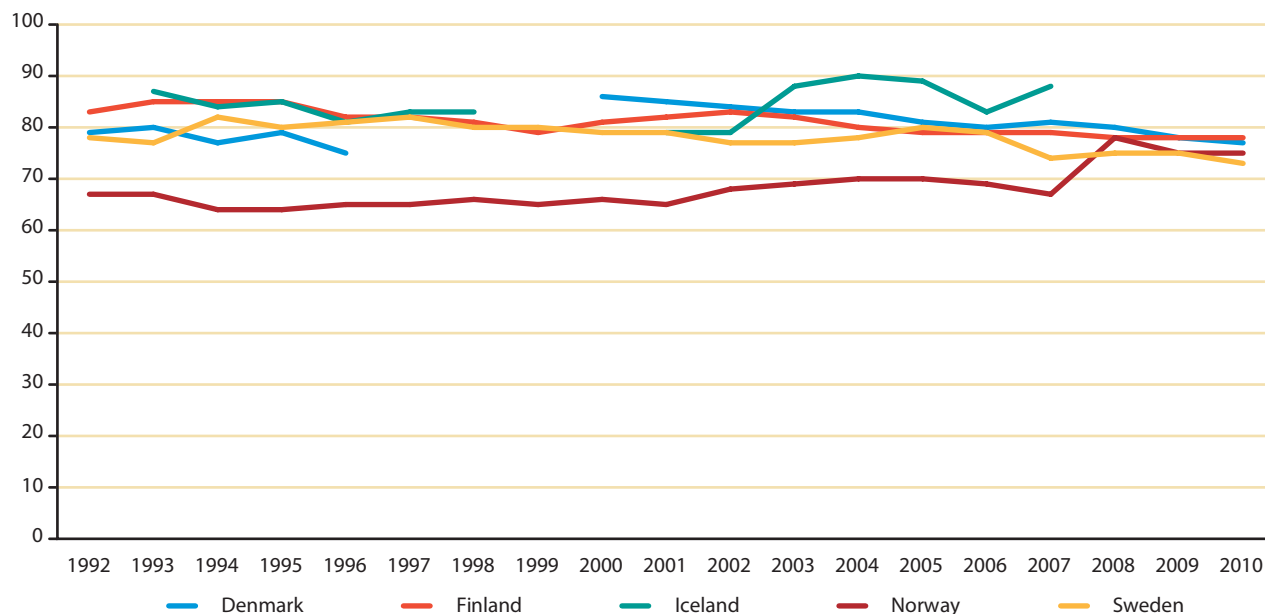
The public service companies have also maintained a stable viewing share over time with the help of new niche channels – and are the largest in their respective markets. In a Nordic comparison, DR has the smallest share with 28 per cent, but if TV 2's main channel (which is part of the Danish public service sphere) is included, Danish public service channels account for more than half of the viewing time. RÚV, which still has only one channel, has the largest share with 49 per cent.

It is worth noting that it is a very Nordic market, dominated by media companies based in any of the Nordic countries and under Nordic ownership. SBS Nordic, with different foreign ownership over the years, is an exception. Naturally, international players like Viacom, Disney and Time Warner also distribute a number of channels in each country, but they have a small audience share to split between themselves. For Discovery Communications the situation is different, since they acquired SBS Nordic and its TV and radio channels from the German ProSiebenSat.1 Media in late 2012, and thereby became the first global player ranking among the largest TV players on the Nordic TV scene.

Radio audience

15. Radio daily reach in each country 1992–2010

Share of population (%)



In the Nordic countries, the past 25 years have seen a considerable increase in radio output, due to deregulation and digitalisation. “Radio” in all Nordic countries was long synonymous with public service broadcasting. In the 1980s, however, broadcasting legislation was amended to allow for privately owned local stations, and both commercial and non-commercial stations were started. Today commercial radio operates on local, near-national and national levels, while non-commercial radio outside the public service organisations is mainly local. Since the mid-1990s digital technology has brought a larger number of channels and stations, and a wider accessibility of the output via multiple platforms such as the Internet, DAB/DVB, etc. But to date, the principal form of distribution is still analogue (see further page 55).

Data on daily radio reach and listening time – though differences in methods over the years and between countries make comparison difficult – show rather stable radio consumption. Radio reach in the Nordic countries is high on average, even though the past few years show a downward trend. In 2010, the average daily reach in the Nordic countries was 73–78 per cent, which can be said to confirm the continuous relevance of the radio medium (Hujanen et al. 2013).

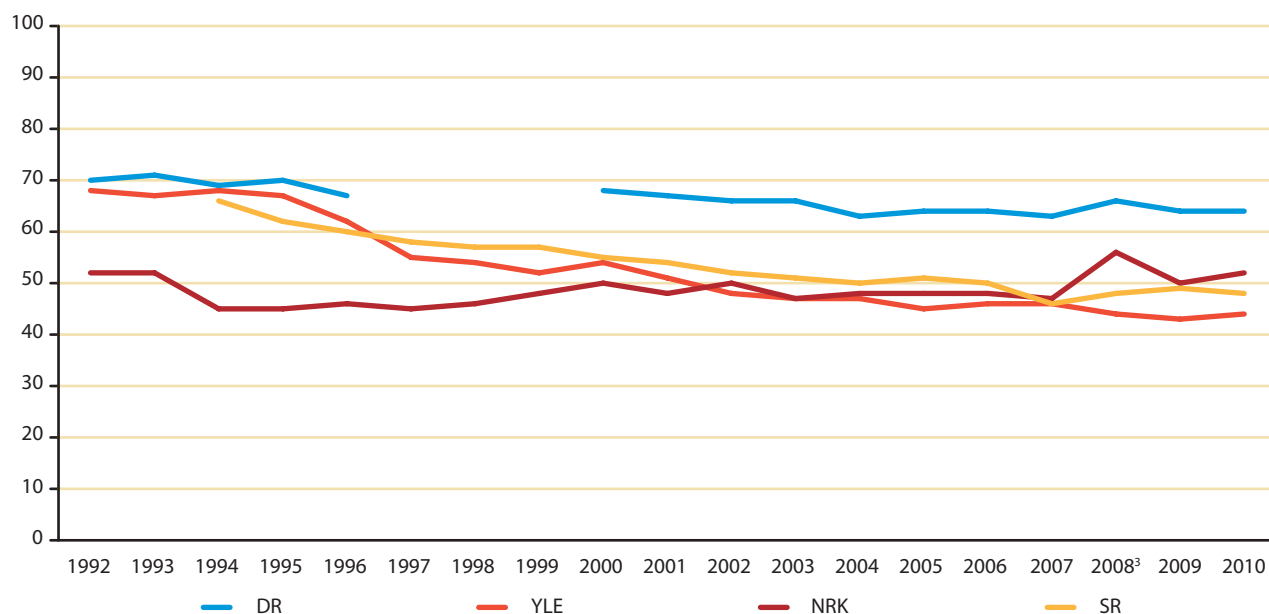
	Share of population (%)																			
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	
Denmark	79	80	77	79	75	..	..	..	86	85	84	83	83	81	80	81	80	78	77	
Finland	83	85	85	85	82	82	81	79	81	82	83	82	80	79	79	79	78	78	78	
Iceland	..	87	84	85	81	83	83	..	..	79	79	88	90	89	83	88	..	..	..	
Norway	67	67	64	64	65	65	66	65	66	65	68	69	70	70	69	67	78	75	75	
Sweden	78	77	82	80	81	82	80	80	79	79	77	77	78	80	79	74	75	75	73	

Note: Different methods have been used, which impairs comparability between countries and years. Data should be taken as indicators of the trend and level of listening. Data include listening to radio, irrespective of platform.

Sources: DR, TNS Gallup Denmark, Finnpanel and YLE Audience Research, Social Science Institute at the University of Iceland (1992–1998), RÚV, Capacent (1999–2007), NRK/TNS Gallup Norway, TNS Sifo (previously RUAB/Sifo Media).

16. Public service radio daily reach by country 1992–2010

Share of population (%)



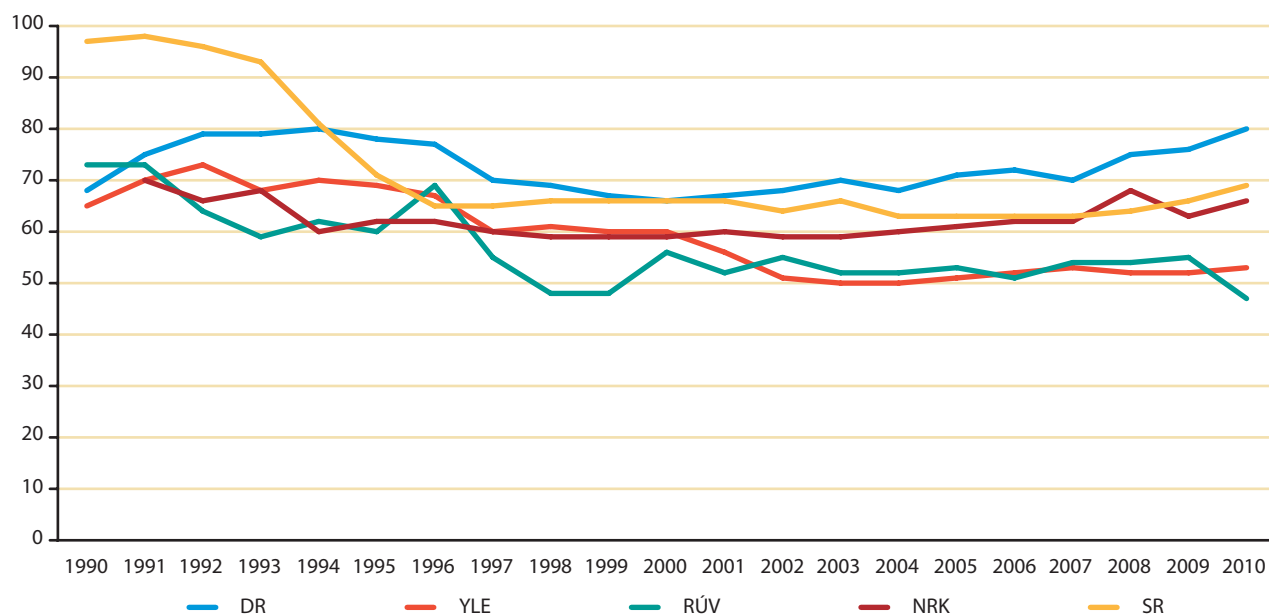
With the advent of commercial radio in the Nordic countries, public service channels' reach and shares of listening shrank. To meet this challenge, public service broadcasters introduced new nationwide channels and/or revised the formats of existing channels, particularly with a view to attracting young listeners. Since then, public service radio has managed to maintain a strong position in the radio market. Daily reaches in 2010 were 44–64 per cent, and shares of listening time were 53–80 per cent (Figure 17).

	Share of population (%)																		
	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
DR	70	71	69	70	67	..	..	..	68	67	66	66	63	64	64	63	66	64	64
YLE	68	67	68	67	62	55	54	52	54	51	48	47	47	45	46	46	44	43	44
NRK	52	52	45	45	46	45	46	48	50	48	50	47	48	48	48	47	56	50	52
SR	..	..	66	62	60	58	57	57	55	54	52	51	50	51	50	46	48	49	48

Sources: DR, TNS Gallup Denmark, Finnpanel & YLE Audience Research, NRK/ TNS Gallup Norway, TNS Sifo (previously RUAB/Sifo Media).

17. Public service radio audience shares in each country 1990–2010

Share of listening time (%)



	Share of listening time (%)																				Total radio listening time	
	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008 ²	2009	2010	2010
DR ¹	68	75	79	79	80	78	77	70	69	67	66	67	68	70	68	71	72	70	75	76	80	121
YLE	65	70	73	68	70	69	67	60	61	60	60	56	51	50	50	51	52	53	52	52	53	188
RÚV	73	73	64	59	62	60	69	55	48	48	56	52	55	52	52	53	51	54	54	55	47	115
NRK	..	70	66	68	60	62	62	60	59	59	59	60	59	59	60	61	62	62	68	63	66	99
SR	97	98	96	93	81	71	65	65	66	66	66	66	64	66	63	63	63	63	64	66	69	136

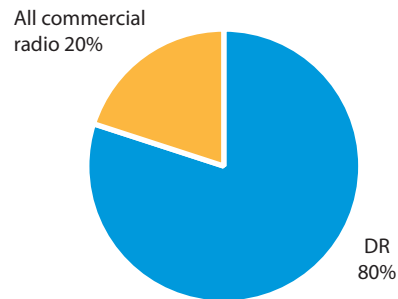
1 New methods in 1997 and 2008, which impairs comparability.

2 Denmark, Iceland and Norway: new method from 2008 forward (electronic measurement, ppm). Data are not comparable to previous years.

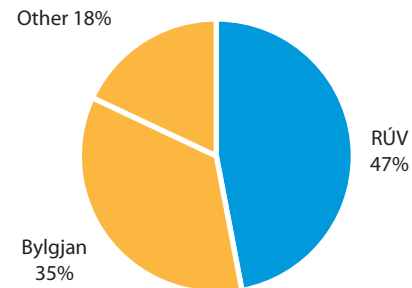
Sources: DR, TNS Gallup Denmark, Finnpanel & YLE Audience Research, Social Science Institute at University of Iceland (1990–1998), Capacent (1999–), RÚV/Statistics Iceland, NRK/ TNS Gallup Norway, TNS Sifo (previously RUAB/Sifo Media).

18. Radio companies' audience shares in each country

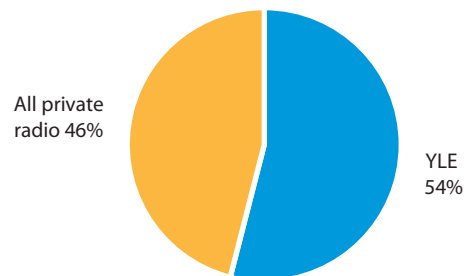
Denmark



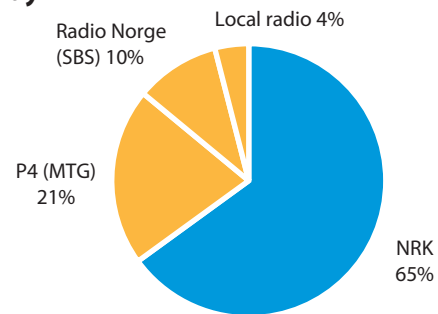
Iceland



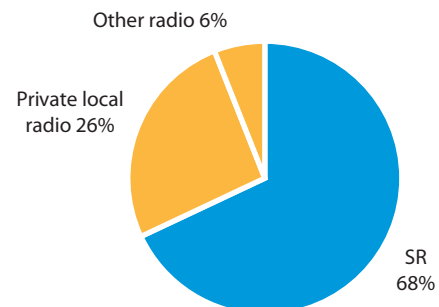
Finland



Norway



Sweden



Note: Average daily listening Monday–Sunday 2010. Data include listening to radio, irrespective of platform. Public service radio marked with colour.

Sources: TNS Gallup Denmark, Finnpanel, Capacent, NRK/TNS Gallup Norway, SR and TNS Sifo.

The introduction of privately owned radio throughout the 1980s meant a fundamental change in the situation of public service radio in the Nordic countries. Public service companies' market shares have diminished since then, but have retained their importance in all five countries in relation to other radio companies. As for the commercial radio sector, it has experienced considerable concentration over the years. All nationwide radio stations and all the major networks are owned by major media groups, among which SBS Nordic¹ – with its strong presence in all countries except Iceland – stands out. Among Nordic-owned media groups, MTG (with a large share of the radio audiences in Norway and Sweden) and Bonnier and Sanoma (which both operate in Finland) have the strongest presence on the market. (Harrie 2012).

¹ Discovery Communications (USA) acquired SBS Nordic from the German ProSiebenSat.1 Media Group in late 2012.

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The public service media landscape

1. Public service companies and range of services in each country

	Denmark ¹	Finland	Iceland	Norway	Sweden
Organisation	DR	YLE	RÚV	NRK	SR, SVT, UR
TV channels					SVT
Generalist	2	3	1	2	2
Children's channel	1	–	–	1	1 ¹
Culture channel	1	1	–	–	1
News channel	1	–	–	–	1 ¹
Regional windows	–	8	–	12	11
HD channel	Yes	Yes	–	Yes	Yes
Radio					SR
Nationwide channels	4	6	2	4	4
Regional windows	11	25	–	16	25
Local channels	–	–	–	–	2
DAB or DVB channels	Yes (DAB)	Yes (DVB)	Yes (DAB)	Yes (DAB)	Yes (DAB)
Web services					
Main web address	dr.dk	yle.fi	ruv.is	nrk.no	sverigesradio.se, svt.se, ur.se
Other organisations with public service obligations					
Nationwide TV	TV 2 main channel			TV 2	
Regional TV	TV 2 eight regions				
Nationwide radio	Radio24syv			P4, Radio Norge	
Other purposes	Public service fund				

¹ SVTB (children channel) shares channel with SVT24 (news programming at nights, otherwise a channel for repeats).

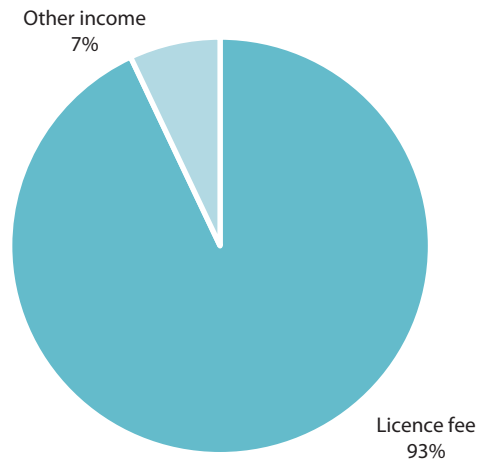
Sources: DR, Danish media political agreement 2012–2014 (www.kum.dk), FICORA/Statistics Finland, RÚV/Statistics Iceland, NRK, Norwegian Media Authority, SR, SVT and UR.

This publication focuses on the traditional Nordic public service companies – DR, YLE, RÚV, NRK, SVT, SR and UR – all of which are publicly owned and financed by their audiences, and have a range of policies concerning the programming's contribution to society. Their channels and programmes are to be made accessible to the entire population and are available on TV and radio as well as online. In each country the output is a blend of both broad generalist and target group/theme-oriented channels, and of nationwide and regional/local programming. Audiences can choose to watch/listen to programming directly and/or catch up via web archives (podcasting, play functions, etc.)

In this context it must be pointed out that in Denmark and Norway public service media also include other organisations and arrangements. Besides DR, Denmark has a public service mix consisting of publicly owned TV 2 (commercially financed), the TV 2 regions which are independent legal persons (licence fee-funded), and since late 2011 also the privately owned radio station Radio24syv (licence fee-funded). The public service function can also be connected to a specific programme, since any broadcaster can apply for licence-fee financing for certain productions (drama, documentaries) via a public service fund. In Norway, three commercial broadcasters – TV 2 and the nationwide radio channels Radio P4 and Radio Norge – have mandated public service obligations, including the provision of daily news, regular programming for children and youth, current affairs, etc.

Public service revenue

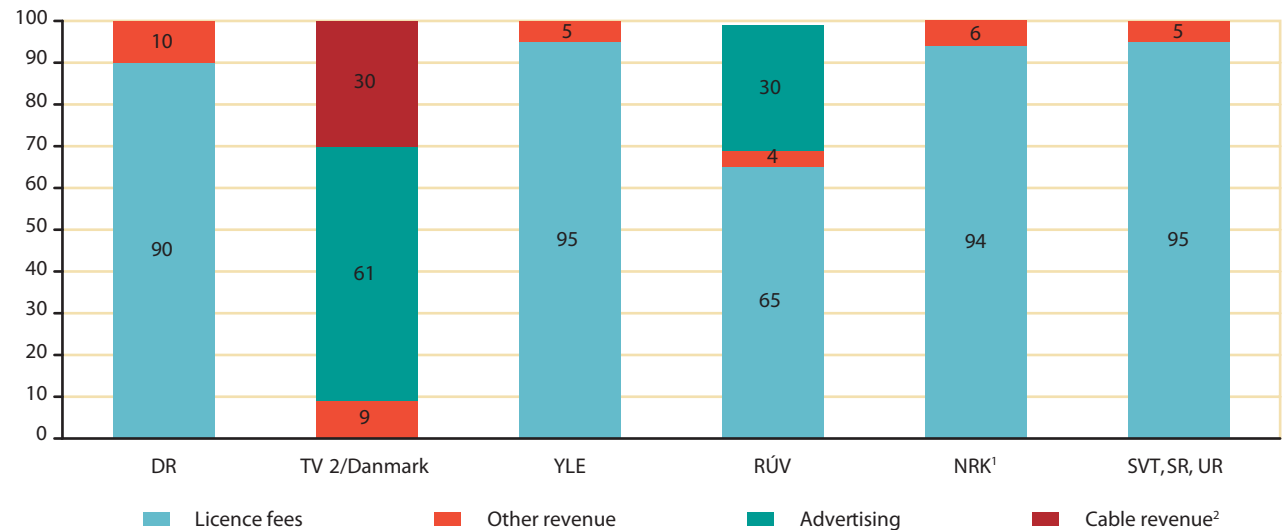
2. Nordic public service companies' revenue by source



Note: Nordic average on basis of DR, YLE, NRK, SVT, SR and UR.

Sources: DR, YLE, NRK, SVT, SR and UR annual reports 2010.

3. Public service companies' revenue by source in each country



1 Figures refer to the NRK Group, which means that NRK's subsidiary NRK Aktivum is included. NRK Aktivum handles all commercial activities within NRK, e.g. royalties and sale of production resources, sales of archive material and programmes, etc.

2 Revenue from TV 2's pay-TV-channels TV 2/NEWS, TV 2/ZULU, TV 2/CHARLIE, TV 2/SPORT and TV 2/FILM.

Sources: Annual reports from DR, TV 2/Danmark, YLE, NRK, SVT, SR and UR, plus RÚV Annual Accounts and unpublished information.

DR, YLE, NRK and SVT/SR/UR main financing is from public funding. They are not allowed to carry advertising, and sponsoring is restricted or forbidden. The few percentages of revenue deriving from other sources come from broadcasting rights, royalties, technical services and sponsoring. For RÚV advertising is allowed, but not in news programmes or on the web site. RÚV's share from advertising and sponsoring is normally around a third of the total revenue, while the rest comes from public sources.

Public service TV channels

4. TV channels, year of establishment and profile in each country

Country	Channel ¹	Year established	Content profile
Denmark²	DR1	1951	Generalist
	DR2	1996	Generalist
	DR Update	2008	News
	DR Ramasjang	2009	Children
	DR K	2009	Culture
	DR HD	2009	Generalist/Youth
Finland	YLE TV1	1958	Generalist
	YLE TV2	1956/1965	Generalist
	YLE Teema	2001	Culture
	YLE Fem (prev. FST5)	2001	Generalist (in Swedish)
Iceland	RÚV	1966	Generalist
Norway	NRK1	1960	Generalist
	NRK2	1996	Generalist
	NRK3/Super	2007	Children/Youth
Sweden	SVT1	1957	Generalist
	SVT2	1969	Generalist
	SVTB ³	2002	Children
	SVT24 ³	1999/2002	Reruns and news
	Kunskapskanalen (SVT/UR)	2004	Culture, science

¹ Simulcast only HD-channels not included (YLE HD, NRK HD, SVT HD).

² TV 2's main channel (established 1988) and the TV 2 regions (established 1989–1991) have public service status but are not included here.

³ SVTB (06h00–20h00) shares channel with SVT24 (20h00–06h00).

Note: Table shows nationwide output. Regional news are broadcasted in windows in YLE TV2, NRK1/NRK2 and SVT1/SVT2.

Sources: DR, YLE, Statistics Iceland, NRK, SVT, Nordicom-Sweden.

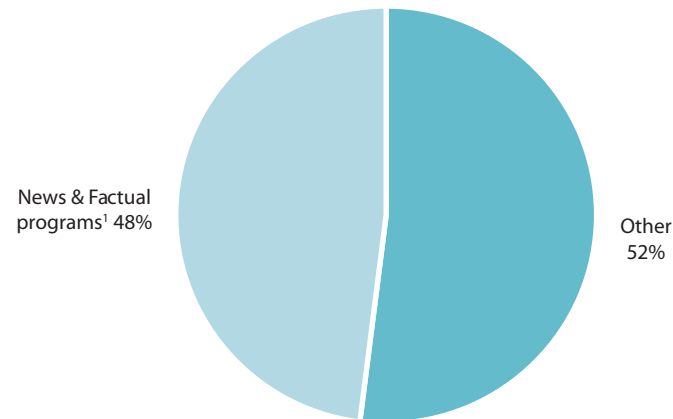
The Nordic public service companies offer a range of channels with nationwide penetration. Their first television services were introduced in the 1950s and 1960s. In Finland and Sweden, respectively, YLE and SVT started a second channel after a relatively short period of time (1965 and 1969), whereas NRK and DR operated with a single channel until 1996. Later, the creation of digital terrestrial networks made it possible for the companies to apply for and start several new channels to attract more viewers. Finnish YLE and Swedish SVT were the first to start new niche channels in the first years of the century. The conversion to digital terrestrial distribution started later in Denmark and Norway, but they followed suit with new channels in 2007–2009. RÚV offers one generalist channel.

Each company's channel portfolio includes one to three channels of a generalist character, offering a broad spectrum of programmes. In Finland with its two official languages, YLE offers generalist channels in both Finnish and Swedish. The companies' more recent channels are theme- and target group-oriented, offering programmes on culture and science or for children and youth. YLE, NRK and SVT provide regional programming in windows. Denmark's regional TV programming is run by the TV 2 regions (windows in TV 2).

In Denmark, DR will change its channel offerings in 2013. DR Update and DR HD will close down and make way for two new channels: DR Ultra, a new children's channel for older children, and DR3, targeting 15–39-year-olds. At the same time, DR2 will be strengthened in news and current affairs.

Programming profiles

5. Share of news and factual programs in Nordic major public service TV channels



1 Combined share of programme categories News, Factual/Information, Education, Science and Arts.

Note: Channels included are DR1, DR2, YLE TV1, YLE TV2, YLE FST5 (now: Yle Fem), RÚV TV, NRK1, NRK2, SVT1 and SVT2.

Source: Data from EBU members database at EBU Strategic Information Service cleared by the providers in the Nordic region (processed).

The public service charters state that special programme tasks crucial to the public service mission should be fulfilled. Providing news and information on society and debate – and thereby supporting democracy – is one of these. Educational programming, an important ingredient also from the start, is another. Culture, domestic drama and children's programmes are other key public service content categories.

The dramatic increase in the number of TV channels, following the changes on the media market in the past decades, has meant tough competition for the national public service TV channels – and has required strategic decisions on how to develop a public service profile and the nature of the content. According to Hujanen et al. (2013) the development of Nordic public service television reveals a very professional approach to the increasing competition. All of the Nordic public service companies have focused on offering broad public service programming that balances current affairs, information, culture and other non-fiction with fiction and entertainment.

The balance can be observed both within (Figure 5, Table 6) and between the public service channels (Table 4). According to a Nordic average, the public service main channels' output is 50/50 between factual programming – including news and a broad range of factual programmes – and other programmes. In the country-by-country tables, we can read that fiction – including drama and children's fiction – constitutes a large share of other programming.

6. Programming profiles of the major public service TV channels in each country

Denmark

	DR 1	DR 2
News	5	11
Factual / Information incl Education, Science and Arts	37	53
Music	8	2
Religion	1	1
Fiction	37	28
Entertainment	3	0
Sports	4	2
Other incl. promotion etc.	5	3
Total	100	100
Total hours	7 200	4 307
Share: target Children & Youth ¹	19	0
Share: format Animation	13	0
Share: format Documentaries	5	17

Finland

	YLE TV1	YLE TV2	YLE FST5 ³
News	7	7	7
Factual / Information incl Education, Science and Arts	54	20	55
Music	0	3	1
Religion	1	0	1
Fiction	34	45	24
Entertainment	2	6	2
Sports	1	17	7
Other incl. promotion etc.	0	2	2
Total	100	100	100
Total hours	6 169	6 416	3 421
Share: target Children & Youth ¹	0	19	13
Share: format Animation	0	12	4
Share: format Documentaries	21	7	25

Norway

	NRK1	NRK2
News	18	43
Factual / Information incl Education, Science and Arts	15	26
Music	3	3
Religion	0	1
Fiction	18	8
Entertainment	14	6
Sports	15	9
Other incl. promotion etc.	18	5
Total	100	100
Total hours	8 533	6 625
Share: target Children & Youth ¹	1	0
Share: format Animation	1	0
Share: format Documentaries	13	26

Iceland

	RÚV TV
News	8
Factual / Information incl Education, Science and Arts	15
Music	2
Religion	0
Fiction	38
Entertainment	9
Sports	17
Other incl. promotion etc.	11
Total	100
Total hours	4 465
Share: target Children & Youth ¹	12
Share: format Animation	12
Share: format Documentaries	9

Sweden

	SVT1 ²	SVT2 ²
News	9	8
Factual / Information incl Science and Arts	40	46
Music	1	5
Religion	0	2
Fiction	20	17
Entertainment	15	13
Sports	14	9
Other incl. promotion etc.	0	0
Total	100	100
Total hours	7 918	4 169
Share: target Children & Youth ¹	1	3
Share: format Animation	0	3
Share: format Documentaries	16	20

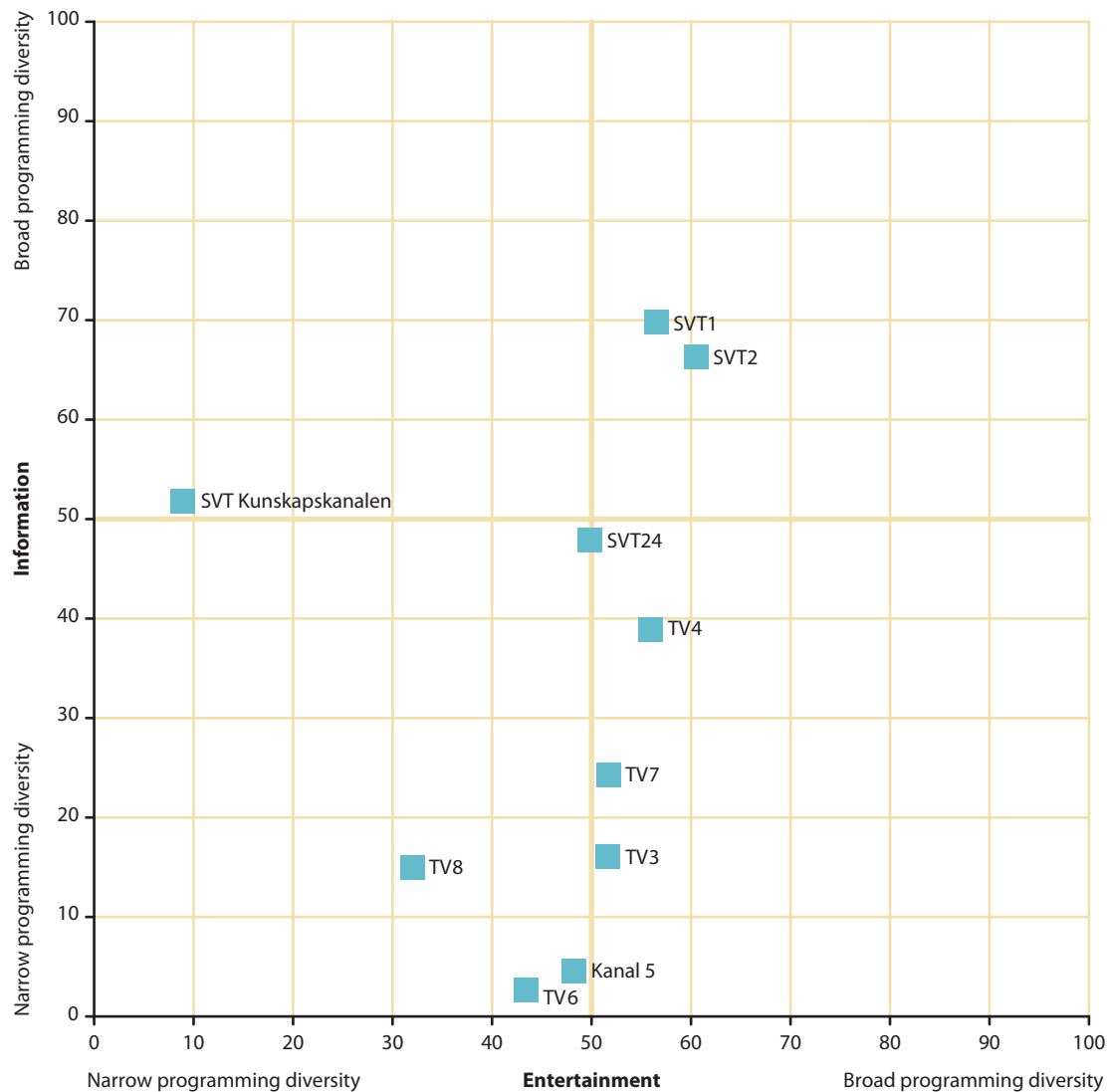
1 DR, NRK and SVT have special channels targeted to children and youth. YLE and RÚV have instead main channels partially targeted to children and youth audiences.

2 Educational programmes (UR, Utbildningsradion) not included.

3 Full-service channel in Swedish. The channel changed names in 2012 to Yle Fem.

Source: Data from EBU members database at EBU Strategic Information Service cleared by the providers in the Nordic region.

7. Programming diversity in Swedish TV channels



Source: *Svenskt TV-utbud 2011* (2011) The Swedish Broadcasting Authority.

The public service generalist channels are diverse in their programming, when it comes to both information and entertainment – which is exemplified by SVT’s main channels, SVT1 and SVT2. Data are taken from a survey by the Swedish Radio and TV authority, which indexes Swedish television channels on an annual basis according to how information-oriented versus entertainment-oriented their content is.

SVT’s theme channel Kunskapskanalen (culture and science, in cooperation with UR) can be characterised as a relatively broad facts channel without entertainment. SVT24, which broadcasts news and repeats, is in the middle range when it comes to both information- and entertainment-oriented content. According to the survey, commercial TV4 – also a large generalist channel – can be characterised as a relatively broad entertainment channel, but with limited width in its information-oriented output (Swedish Broadcasting Authority 2012).

News at prime time

8. News programmes at prime time hours on weekdays by country

Time	Public service television ¹				Commercial television					Time
	Denmark DR and TV 2 regions ²	Finland YLE	Norway NRK	Sweden SVT	Denmark TV 2 ³	Finland MTV3	Norway Nelonen	Sweden TV 2	TV 4	
16.50		Signs								4.50 PM
17.00										5.00 PM
17.10										5.10 PM
17.20				Signs						5.20 PM
17.30				Sami						5.30 PM
17.40			Sami	Finnish						5.40 PM
17.50			Signs	Sport						5.50 PM
18.00										6.00 PM
18.10	Regional			Regional						6.10 PM
18.20										6.20 PM
18.30										6.30 PM
18.40			Regional							6.40 PM
18.50								Sport		6.50 PM
19.00				Culture						7.00 PM
19.10		Regional		Regional						7.10 PM
19.20										7.20 PM
19.30										7.30 PM
19.40										7.40 PM
19.50										7.50 PM
20.00										8.00 PM
20.10										8.10 PM
20.20										8.20 PM
20.30										8.30 PM
20.40										8.40 PM
20.50		Sport	Regional							8.50 PM
21.00										9.00 PM
21.10										9.10 PM
21.20										9.20 PM
21.30								Sport		9.30 PM
21.40				Culture						9.40 PM
21.50				Regional						9.50 PM
22.00				Sport						10.00 PM
22.10										10.10 PM
22.20	Sport	Regional								10.20 PM
22.30									Local	10.30 PM
22.40									Sport	10.40 PM
22.50										10.50 PM

- News magazines. Can include sport and weather forecasts.
- Regional or local news
- News in official minority languages
- News in sign language
- Separate sport news
- Separate culture news

1 Channels included: DR1, DR2 and TV2 regions (note 2); YLE TV1, YLE TV2 and YLE Fem; NRK1 and NRK2; SVT1 and SVT2.

2 Regional programming refers to transmissions from the TV 2 regions, which have public service obligations and are financed by licence fees. The TV 2 regions are independent legal persons, transmitting regional news in windows on TV 2 (and a separate multiplex since 2012).

3 TV 2 Danmark's main channel has public service obligations, but is commercially financed.

Sources: Channel programme overviews (weekdays, September 2012).

News is a basic and important ingredient in public service programming and is, naturally, connected to the policies on contributing to a democratic society by ensuring the availability of information to both large and small groups of citizens. Plurality in news selection, versatile information for citizens, objectivity and impartiality are watchwords.

Each public service company offers two main news programmes as well as additional special news programmes – regional news plus news in official minority languages and sign language – during prime time. RÚV, which is not included in the matrix, offers two main news programmes at 19:00 and 22:00. That is, daily news is prioritised content at hours when a majority of the audience watch TV.

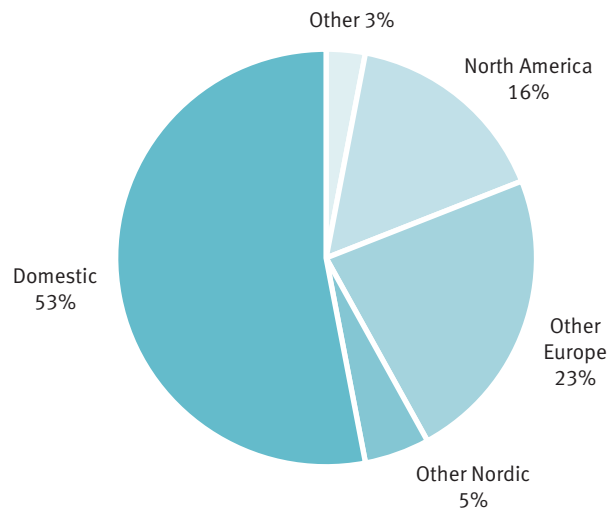
Regional public service television news in Denmark is run by the TV 2 regions. The matrix places them together with DR as licence fee-financed public service.

The public service news flora in each country is complemented with general news programmes at prime time on the largest commercially financed channels – including TV 2 Denmark, whose public service obligations prescribe a large news offering – and special news channels from both public service and commercial TV companies.

(YLE also offers Sámi language TV news, but outside prime time).

Domestic production and programming

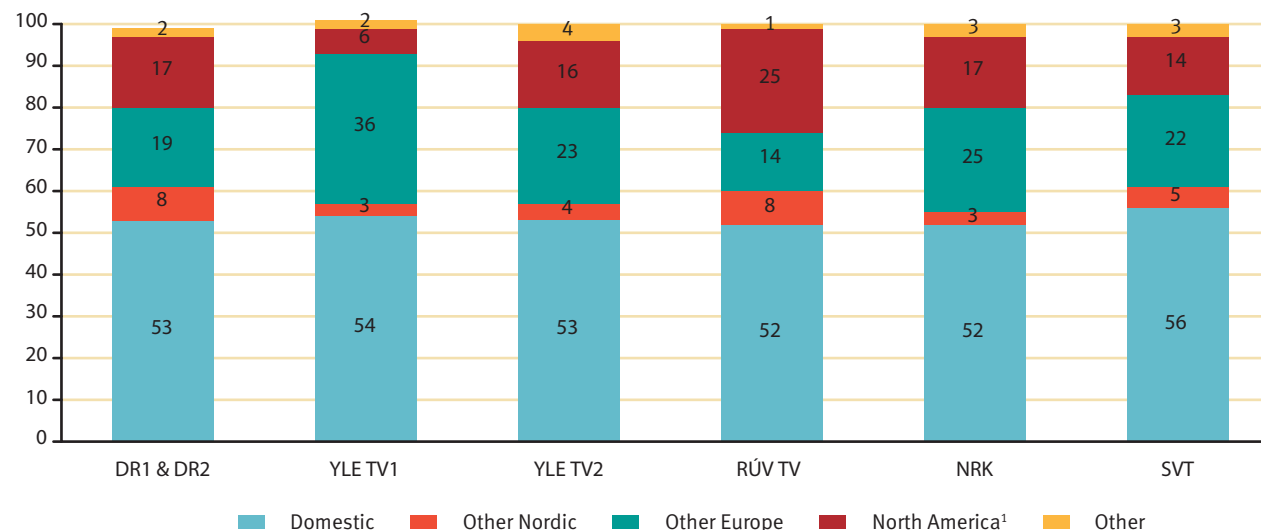
9. Nordic public service TV programming by origin



Note: Based on transmission time for DR1, DR2, YLE TV1, YLE TV2, RÚV (advertising excluded) plus total NRK and SVT (nationwide programming).

Sources: TNS Gallup Denmark, YLE, Finnpanel, Statistics Iceland, NRK (processed), SVT (processed).

10. Public service TV programming by origin in each country



¹ Category represents USA for DR; North America for YLE, RÚV, NRK and SVT.

Note: YLE data based on four to seven sample weeks. RÚV is transmission time less advertising.

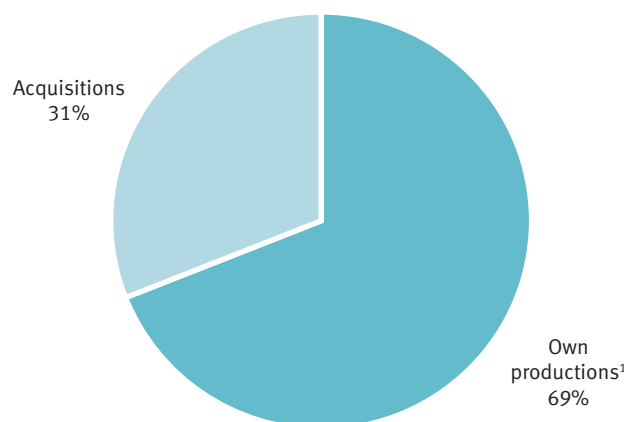
Sources: TNS Gallup Denmark, YLE, Finnpanel, Statistics Iceland, NRK (processed), SVT (processed).

The Nordic public service companies have a high share of domestic programmes. More than half of their transmission time is devoted to national programming, which goes hand in hand with their responsibilities to provide information on society, mirror the whole country, produce and provide domestic culture, etc. The public service charters also encourage the companies a special responsibility to strengthen the domestic language.

Special requirements do not only refer to domestic programming. National legislation demands that broadcasters devote more than half of their transmission time to programmes produced in Europe. This quota has its origins in EU audiovisual policy – the Audiovisual Media Services Directive, AVMS – which is incorporated into Member States' legislation (including non-member states Iceland and Norway, in line with the Agreement on the European Economic Area). The Nordic public service companies' European share, including domestic and Nordic, is on average around 80 per cent.

Foreign programmes are normally broadcast with subtitles. There is no language dubbing except in children's programmes.

11. Own and acquired production in Nordic public service companies' first channels

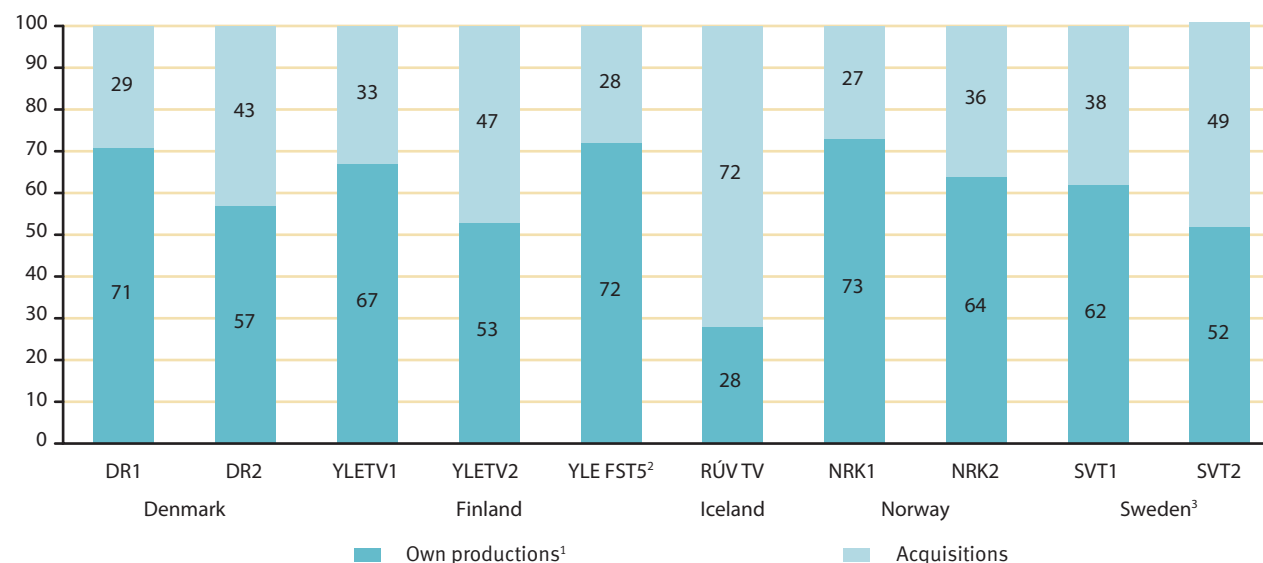


1 Including in-house productions, co-productions and commissioned productions.

Note: Data based on first transmission in DR1, YLE1, NRK1 and SVT1 (UR educational programmes not included).

Source: Data from EBU members database at EBU Strategic Information Service cleared by the providers in the Nordic region.

12. Own and acquired production per main public service TV channel in each country



1 Including in-house productions, co-productions and commissioned productions.

2 Full-service channel in Swedish. The channel changed names in 2012 to Yle Fem.

3 SVT: Educational programmes (UR, Utbildningsradion) not included.

Source: Data from EBU members database at EBU Strategic Information Service cleared by the providers in the Nordic region.

The national perspective (Figures 9–10) is also visible in terms of production. In most Nordic countries, the majority of public service programming, public affairs as well as drama, consists of domestic productions (Hujanen et al. 2013).

The output is characterised not only by domestically produced programmes, but also by an extensive share of public service companies' own productions. The balance between the companies' own productions and acquisitions is exemplified by the content of DR1, YLE TV1, NRK1 and SVT1 (the Nordic public service channels with the highest viewing share in each country). These channels' own production accounts for an average of more than two-thirds of the first transmissions. Less than a third is acquired programming.

When studying channel by channel in the Nordic countries one finds some variations in the picture but most of the public service channels show less than 40 per cent dependence on acquisition to build their schedules.

In-house production comprises the lion's share of the public service channels' own productions. But not only should the public service companies have their own strong production environment; they are also entrusted with the role of supporting an external and independent production market through co-productions, commissioned productions or acquisitions – of which co-productions and commissioned productions are counted as their own productions in the EBU data. The main part of acquired programming, however, is from a foreign market (Harrie 2012: 80–81).

Producing domestic drama and children's programmes is costly, and often too costly for the commercial market. For public service these are key content categories, and here it is worth noting the tradition within the Nordic public service broadcasting organisations to support each other financially within as well as outside the frame of Nordvision, which has resulted in a healthy drama production line in all of the Nordic countries (Hujanen et al. 2013).

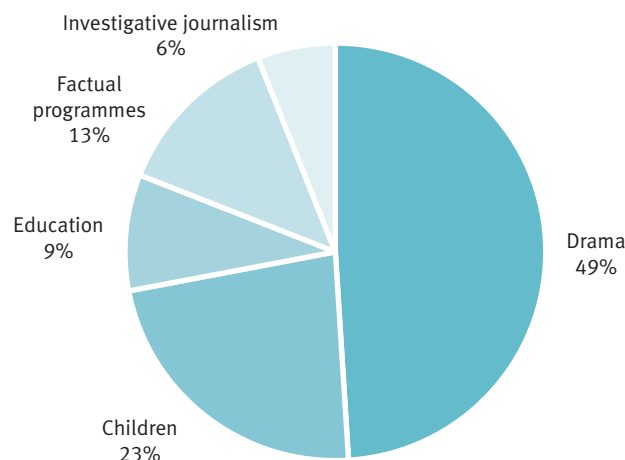
Nordic programme cooperation within Nordvision

13. Number of TV programmes and hours generated by co-production and programme exchange

Type of cooperation	Programmes	Hours
Co-production	1 210	497
Exchange	2 781	1 306

Source: Nordvision annual report 2010.

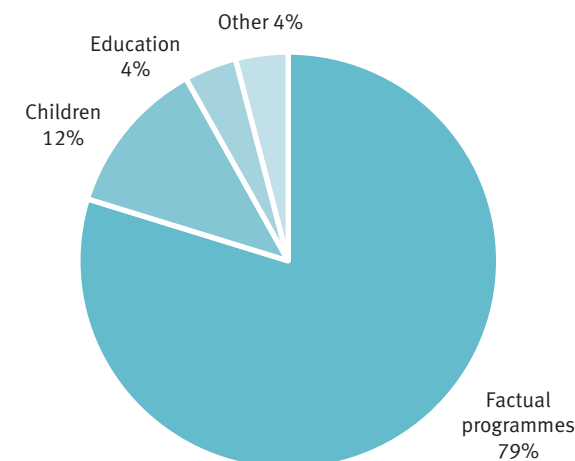
14. TV programme hours generated by co-production, by genre



Based on total 497 television programme hours 2010.

Source: Nordvision annual report 2010.

15. Number of TV programmes generated by programme exchange, by genre



Based on total 2 781 TV programmes 2010.

Source: Nordvision annual report 2010.

For small broadcasters operating on small markets, TV production is expensive. One way to strengthen production is through collaboration, which has enjoyed a long tradition among the Nordic public service broadcasters. Through Nordvision, established in 1959, they co-operate on co-production and programme exchanges, and share knowledge and experience. Co-productions are especially important in producing children's programmes and drama. Factual programming is the largest genre among exchanged programmes. (Figures above refer to cooperation and exchange in total among DR, YLE, RÚV, NRK, SVT and UR.)

Nordisk Film & TV Fond (the Nordic film & TV fund), established in 1990, is another important institution for Nordic collaboration. The aim of the fund is to promote Nordic film and TV productions by providing financial support for project development and the production of feature films, TV fiction/series and documentaries. The partners in the fund are the Nordic Council of Ministers, the Nordic film institutes and the Nordic public service broadcasters together with some of the largest Nordic commercial TV broadcasters.

There is also other collaboration across borders, for example the bilateral agreement

between Finland and Sweden to exchange television services. TV Finland, the channel for expatriate Finns with programming from YLE and commercial MTV3, is transmitted in areas of Sweden with a strong Finnish-speaking minority population. SVT World, SVT's equivalent channel, is transmitted on the YLE Fem channel, i.e. the Swedish-language service which was previously called FST5 and which covers about 80 per cent of the population. SVT World broadcasts during the day and late evenings when YLE Fem is not broadcasting its own programming. Another collaboration is between YLE, NRK and SVT/SR on television and radio productions for the Sámi-speaking population.

It should be mentioned that the purpose of Nordic cooperation is twofold. One purpose is to manage qualitative TV and film productions with limited resources, while the other is political and cultural, to create understanding over language and culture borders. In public service programme policies, this is expressed as supporting a Nordic cultural identity or promoting knowledge about the Nordic region or the Nordic languages.

Read more at www.nordvision.org and www.nordiskfilmogtvfond.com.

Minority language programming

16. Public service television broadcasting in official minority languages by country

YLE	Hours/year	NRK	Hours/year	SVT	Hours/year
Swedish	3 420	Sámi	223	Finnish	239
Sámi	122			Sámi	90
				Tornedal-Finnish/Meänkieli	11
				Romani chib	8

Sources: YLE, NRK Sápmi, SVT public service report 2010.

The public service companies should acknowledge the needs of linguistic minorities and special groups. News and other services should be provided in official minority languages, i.e. those officially recognised as indigenous to a country, as well as languages common among immigrants and refugees. Immigrant languages are mainly provided for via radio, the web and teletext (see further radio Table 25).

In Finland, Swedish is one of two official languages, on equal terms with Finnish. This means that Swedish is not a minority language per se, even though only a minority (approx. 5% of the Finnish population) speak it as their mother tongue. YLE offers full-service channels in Swedish on both TV and radio. In Sweden, SVT and SR offer broadcasts in standard Finnish, and in Meänkieli or Tornedal Finnish (spoken in northern Sweden).

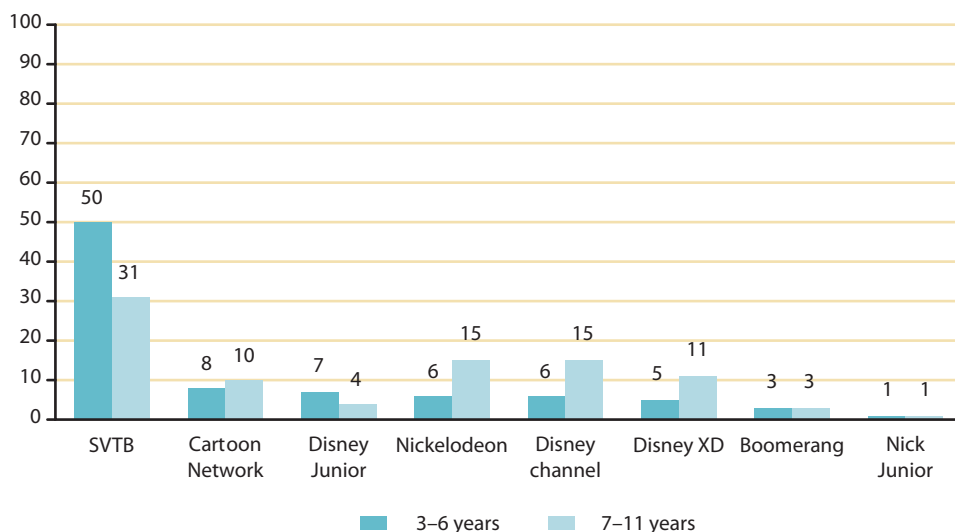
The Sami are an indigenous people in northern Norway, Sweden and Finland. Services in Sámi are offered by NRK, SVT and YLE, which also cooperate closely on both TV and radio in this area.

Sign language and other services for the hearing-impaired should also be mentioned in this context. All companies offer services like specific sign language news and sign language interpretation of regular news transmissions (live) or of children's TV. There is also a large share of programming texted for the hearing-impaired. (The extent of the services and the platforms via which they are performed vary from country to country, which makes it difficult to present country-comparable data.)

Read more about the languages in the Nordic region at: www.norden.org/en/the-nordic-region/language

Channels for children

17. Children's TV channels daily reach among children in Sweden



Note: Data for 2011.

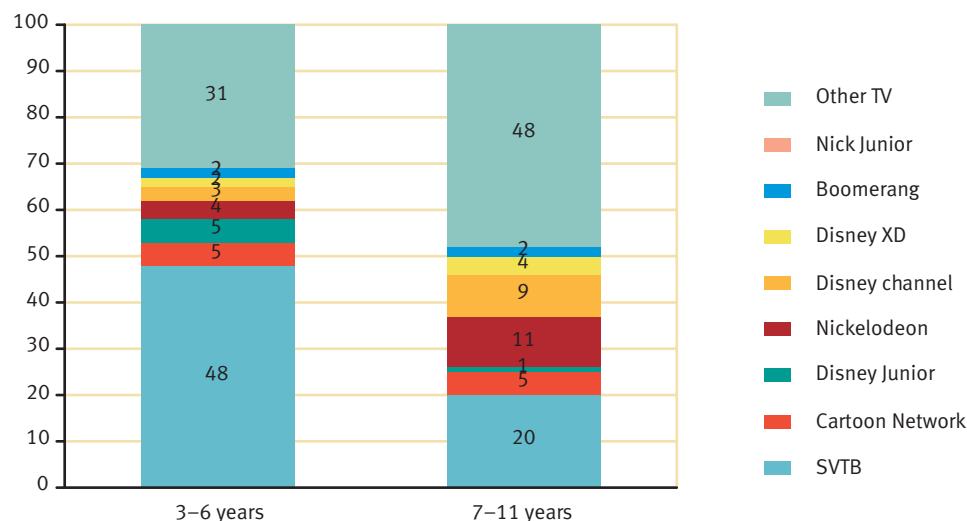
Sources: MMS and SVT.

In the remits of the Nordic public service companies, special attention to children is a prime task. Children should be provided with a varied offer of programming, including the channels' own productions, with the aim to educate, inform and entertain.

DR, NRK and SVT provide children's programming on special children's channels, while YLE and RÚV have programme blocs targeted at children and youth on their generalist channels. Regardless of how the public service children's output is organised, it faces an increasingly competitive market as large global players such as Disney, Time Warner (Cartoon Network, Boomerang) and Viacom (Nickelodeon, Nick Jr.) all offer children's programming dubbed in the national languages.

It is in this connection that the importance of the Nordic collaboration through Nordvision and its long tradition within the area of children's programming comes in. The Nordic cultures have similar approaches to children and childhood per se, and linguistic and cultural affinities are an important competitive advantage over international products. For the Nordic countries with small populations and small languages, production is expensive, but

18. Children's TV channels audience shares among children in Sweden



Note: Data for 2011.

Sources: MMS and SVT.

through cooperation – and programme exchange – they can manage to deliver content that both attracts large audiences and represents an alternative to global niche channels (Hartmann 2013, Enli and Staksrud 2013).

Swedish data show that the public service concept works well among small children. Fifty per cent of three- to six-year-olds watch SVTB on a daily basis. As for their viewing time, almost 50 per cent is devoted to SVTB. Older children (7–11-year-olds) have more fragmented viewing and are more difficult to reach. They spend more time than the younger age group on international children's channels, and furthermore, around half their viewing time goes to other channels than those specifically for children. All the same, SVTB is the largest children's channel for the 7–11-year-olds as well, albeit with a lower daily reach (31%) and share of viewing time (20%) than for the younger children.

Looking at the public service output altogether, small children spend 60 per cent of their viewing time on SVT channels, and the older group 32 per cent (Table 19).

19. Children's audience shares: Public service TV and other channels by country

Finland	Audience shares (%)	
	04–09 yrs	10–14 yrs
YLE TV2 ¹	34	15
Other YLE channels	7	9
YLE total	42	24
Other channels	58	76
Total	100	100
Total minutes per day	78	79

Norway	02–06 yrs	07–11 yrs
NRK 3/Super	46	22
Other NRK channels	11	13
NRK total	56	34
Other channels	44	66
Total	100	100
Total minutes per day	94	102

Sweden	3–6 yrs	7–11 yrs
SVTB	48	20
Other SVT channels	10	13
SVT total	58	32
Other channels	42	68
Total	100	100
Total minutes per day	103	107

¹ YLE has no separate channel for children / youth. Instead, YLE TV2 is partially targeted to children and youth audiences.

Note: Share of viewing time, per cent. Data for 2011.

Sources: Finnpanel and YLE Audience Research, TNS Gallup Norway/medianorway's database, MMS

Domestic and foreign channels' audience

20. Audience shares of domestic and foreign TV channels among total population by country

	Share of total viewing time (%)			
	Denmark	Finland	Norway	Sweden
	Age 3+	Age 10+	Age 12+	Age 3+
Domestic	87	93	87	88
Foreign	13	7	13	12
Total	100	100	100	100

21. Audience shares of domestic and foreign TV channels among children by country

	Share of children's viewing time (%)		
	Denmark	Norway	Sweden
	03–11 years	02–11 years	3–14 yrs
Domestic	64	66	68
Foreign	37	34	32
Total	100	100	100

Note: Data for 2011. Channels of pan-Nordic, pan-European or global formats are classified as foreign, even if they broadcast in national languages.

Sources: Nissen (2012:55), TNS Gallup Denmark, Finnpanel (processed), TNS Gallup Norway/medianorway's database, MMS annual report (processed).

Enlarged network capacity due to digitalisation has meant more room not only for the Nordic TV companies' new channels, but also for global television concepts. On all platforms, including terrestrial distribution, a large number of pan-European or global theme channels are available in the Nordic countries. Among these are Discovery, Eurosport and MTV, and children's channels like the various Disney ones and Nickelodeon, and many more. A great number of channels are available in national language versions.

As shown earlier (see previous section/Table 14), the large Nordic broadcasting companies, helped by their launching of new niche channels, have managed to keep their audience shares – with only a small share left for other players. These tables further underline the difficulties global concepts have in reaching audiences on a larger scale. Only a few international channels reach around a one per cent viewing share; many hover around 0.1–0.2 per cent. Children watch foreign channels (dubbed into national languages) to a larger extent than adults do.

Public service radio channels

22. FM channels in each country: Year of establishment, content profile and main target groups

	Channel ¹	Year established	Content profile	Main target groups ²
Denmark³	DR/P1	1925	Talk radio with news, current affairs, talk shows	
	DR/P2	1951/2001 ⁴	Classical music, jazz and culture	
	DR/P3	1963	Entertainment	Young people
	DR/P4 (incl. 11 regional channels)	1960–1982	Mix of national and regional programming	An older (40–60 years) audience
Finland	Yle Radio 1	1926/1990	The arts, science, culture and talk	
	YleX	1990	Popular music, popular culture, new music	Young people
	Yle Radio Suomi (incl. 21 regional windows ⁵)	1965/1990	News, current affairs, regional programming, sport and popular music	Mature audiences
	Yle Puhe	2003	Talk radio featuring a collection of talk content and sport events coverage from YLE channels	
	Yle Radio Vega (incl. 5 regional windows ⁵)	1961/1997	News, current affairs, culture and music	Swedish-language channel for mature audiences
	Yle Radio X3M	1997	News, current affairs, entertainment, popular music	Swedish-language channel for young people
Iceland	RÚV/Rás 1	1930	Generalist	All age groups
	RÚV/Rás 2	1983	Current affairs/popular culture/pop music	Young adults – middle-aged
Norway	NRK/P1 (incl. 16 regional windows)	1933 (regions from 1957)	Regional reports, news, current affairs, music	
	NRK/P2	1984	Cultural radio station with news, debate programmes, analyses, social commentary	
	NRK/P3	1993	Music, comedy/entertainment, news	Young people (15–30 years)
Sweden	SR/P1	1925	Talk radio with news, current affairs and debate. Forum for drama, documentaries, arts, science	20–79 years
	SR/P2	1955	Classical and contemporary music, educational programmes, immigrant and national minority language programmes	20–79 years
	SR/P3	1964	Popular music, news, cultural and social programmes, entertainment	13–35 years
	SR/P4 (incl. 25 regional channels ⁶)	1993 (regions 1987–1989)	News, sports, regional programming, music	30–79 years

1 Principally analogue channels (via FM nets); most are also transmitted digitally (online, DAB, DVB), and some via cable and satellite.

2 Target groups if and as stated in companies' channel descriptions.

3 In November 2011 a new nationwide radio channel with public service status, *Radio24syv*, started airing on the fourth FM network (FM4), which was previously used by DR P2. Radio24syv is privately owned and has licence fee financing.

4 DR acquired a fourth nationwide radio frequency, FM4, in 2001 (the former P2-channel shared a frequency with P4). From 1 Nov 2011 P2 shares FM-frequency with P1 (note 2). P1 broadcasts mornings and during the day, and P2 evenings and nights. Both P1 and P2 are full channels, i.e. with broadcasts 24/7, on DAB and Internet.

5 YLE transmits regional programming in three languages: 20 windows in Finnish in Yle Radio Suomi, five in Swedish in Radio Vega plus regional broadcasts in Sámi in parts of Lapland (Yle Sámi radio).

6 SR also broadcasts two local channels in Stockholm (SR Metropoli) and Malmö (Din Gata 100.6) established in 2007 and 2006, respectively. Mainly targeted at young people.

Sources: DR, YLE, Statistics Iceland, NRK, SR.

The Nordic public service companies were founded in the interval between 1925 and 1933, and for many years had a single national channel. DR, YLE and SR introduced second and third channels in the 1950s and 1960s; RÚV in Iceland and NRK in Norway followed suit as recently as the 1980s. Today the companies provide a broad spectrum of nationwide, regional and digital services, of both a general and more targeted character.

They all transmit a number of nationwide channels on FM frequencies. Most of these can be characterised as rather broad channels with varied content, but all the same clearly differentiated as to content and target groups. At least one channel in each country is targeted at young people. YLE broadcasts channels for both the Finnish-speaking and the Swedish-speaking population.

Moreover, they have extensive regional networks, airing in windows on channels of mixed national and regional programming, channels which are also the most listened to. RÚV, however, used to broadcast a maximum of four re-

gional services at a time, but has closed them all down due to more stringent finances (the last regional service ceased in early 2010).

The web sites offer streamed services, including parallel transmissions of FM channels and digital-only channels, plus the availability of single programmes via archives and podcasts. A number of channels are also transmitted via DAB (in Finland DVB), both simulcast and digital-only. But in contrast to television, radio's main form of distribution is still analogue. There are political decisions in Norway and Denmark to close down the FM networks and move to DAB platforms (2017 and 2019, respectively), provided digital listening and network penetration are high.

It is notable that since late 2011, Denmark has a mixed public service model on the radio side as well. Besides DR, the private channel Radio24syv now also has a concession to broadcast public service radio with full financing from licence-fee money.

Programming profiles

23. Programming profiles of the two largest public service radio channels per company

	Largest channel (audience share %)	Share of time (%) ¹	Second channel (audience share %)	Share of time (%) ¹
DR	DR P4 (44)		DR P3 (20)	
	News/current affairs/service magazines	40	Music programmes	46
	Music magazine programmes	30	Magazine programmes	41
	Entertainment	30	Sport	8
	Other	–	Other (incl. news)	5
	Total	100	Total	100
YLE	YLE Radio Suomi (27)		YLE Radio1 (7)	
	Music entertainment	29	Classical music	58
	News and current affairs	27	News and current affairs	12
	Other entertainment	19	Culture	10
	Other	25	Other	20
	Total	100	Total	100
RÚV	Rás 2 (32)		Rás 1 (16)	
	Music	62	Music	48
	News and current affairs	29	Arts, literature, theatre	21
	Advertising	6	News and current affairs	24
	Other	3	Other	7
	Total	100	Total	100

	Largest channel (audience share %)	Share of time (%) ¹	Second channel (audience share %)	Share of time (%) ¹
NRK	P1 (54)		P3 (6)	
	Music	29	Music	60
	Entertainment	24	Entertainment	23
	News and current affairs	19	News and current affairs	9
	Other (incl. regional transmissions)	28	Other	8
	Total	100	Total	100
SR	P4 total (46)		P1 (11)	
	Music	54	News and current affairs	59
	News and current affairs	26	Culture	21
	Entertainment	5	Lifestyle	8
	Other	15	Other	12
	Total	100	Total	100

¹ Share of transmission or programming time.

Sources: DR annual reports, YLE annual reports, RÚV annual reports and unpublished information/Statistics Iceland, NRK/medianorway, SR.

The overall content of public service channels is clearly more talk- and information-oriented than is the case on the commercial channels. Nonetheless, music is also a large content category on public service channels. Regarding the non-music content, news and current affairs, complemented with public debate, are the main dimensions (Hujanen et al. 2013).

The most listened-to radio channel in each country is a mix of national and regional programming. These are channels of broad character, offering music, news, current affairs and entertainment, and, with the exception of DR1, sports. The regional offices stand for a large part of the output, including regional news (RÚV excepted).

Looking at the total output – all channels – there is a wide range of programming on offer, in line with the public service mission to serve the whole population. Besides news and current affairs as mentioned above, categories like drama, culture and entertainment are important. There is also a music variation ranging from classic to popular, children's programmes, sport, etc.

Minority language programming

24. Public service radio broadcasting in official minority languages by country

YLE ¹	Hours/year	NRK ²	Hours/year	SR ³	Hours/year
Swedish	14 442	Sámi – FM	1 635	Finnish	8 111
Sámi	1 664	Sámi – DAB	6 528	Sámi	9 651
				Tornedal-Finnish/Meänkieli	642
				Romani chib	365

1 FM broadcasting hours in 2010.

2 Nationwide and regional transmissions in 2010.

3 All platforms, but only the original broadcast on each platform is reported. For Sámi approximately 700 hours were broadcasted on FM during 2010.

Sources: YLE, NRK Sápmi, SR public service report.

The public service charters require the companies to acknowledge the needs of linguistic minorities and special groups. This concerns official minority languages, i.e. languages officially recognised as indigenous to a country, in particular. Swedish is one of Finland's two national languages, together with Finnish, even though approximately only 5 per cent of the population has it as their mother tongue. YLE offers two radio channels in Swedish. In Sweden, which has a large Finnish-speaking population, SR offers services in Finnish as well as in Tornedal Finnish or Meänkieli, which is spoken in the northern part of the country.

The Sami are an indigenous people with traditional settlements in the north, and services in Sámi languages (three languages) are provided by NRK, SR and YLE, whose editorial staffs collaborate extensively. Part of the programming is simulcast in the three countries.

Minority language programming is also offered online (Figure 28).

Read more about the languages in the Nordic region at: <http://www.norden.org/en/the-nordic-region/language>

25. Public service radio broadcasting in immigrant languages in Sweden

SR broadcasting in	Hours/year
Arabic	391
Kurdish	283
Persian	192
English	150
Serbian, Croatian, Bosnian	124
Somali	121
Albanian	81
Assyrian	27
Total immigrant languages	1 370

Note: Only the original broadcast on each platform is reported.

Source: SR public service report 2010.

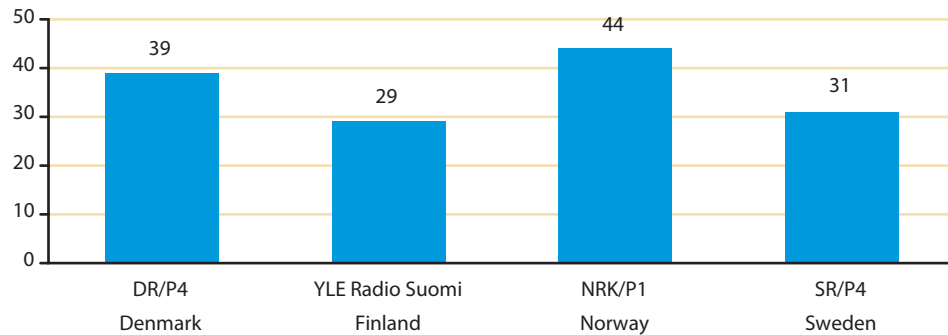
The public service companies should also see to the needs of other language groups in their countries, for example through services in languages common among immigrants and refugees. This is mainly done via radio and/or web or teletext, depending on country. The extent of services and languages provided for varies between countries.

The example from SR shows programming in immigrant languages during 2010. The transmissions and related web services are primarily addressed to immigrants, with a content of mainly news and current affairs, including orientation about Swedish society. The languages offered vary according to contemporary needs and resources. DR has a similar news service online and on teletext. The other countries also have services in foreign languages. News in simplified domestic language is also provided.

The issue of supporting small groups can also be seen from a larger perspective, as reflecting and supporting diversity in society. Rydin (2013) writes about the issue of cultural diversity and says that today's most common strategy is to proceed with an inclusive policy in terms of the recruitment of journalists, presenters of programmes etc. The article refers to SVT and YLE policy documents, which share the same goal of recruiting more people from different ethnic and language groups, and state that minority programming should be an integrated part of normal programme planning rather than a separate minority strategy.

Radio audience

26. The largest radio channel by daily reach and country



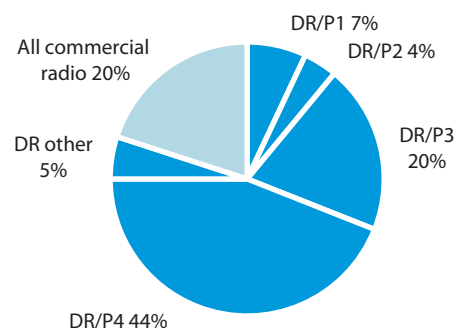
Note: Different methods have been used, which impairs comparability between countries.

Sources: TNS Gallup Denmark, Finnpanel, NRK/TNS Gallup Norway, TNS Sifo.

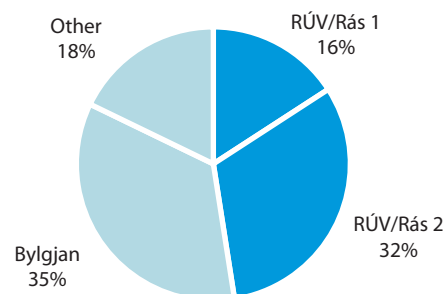
The most popular radio channel in each country is a generalist channel with a mix of regional and national programming. The schedule is made up of music, news, current affairs, entertainment, and sports (excluding DR1). These channels target broad segments of the listeners, and normally address an adult or mature audience (see Tables 22–23). They have a daily reach of 31–44 per cent of the population in each country. Their share of listening time is also high (see Table 27).

27. Radio channel audience shares in each country

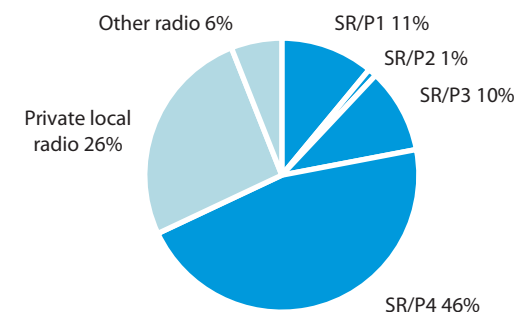
Denmark



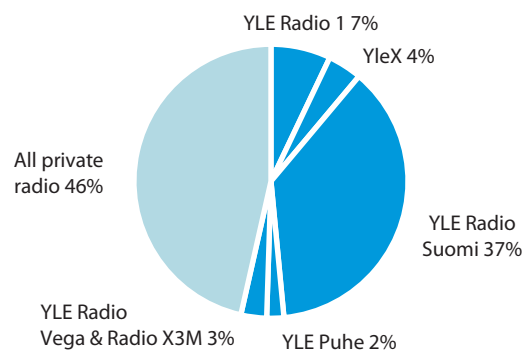
Iceland



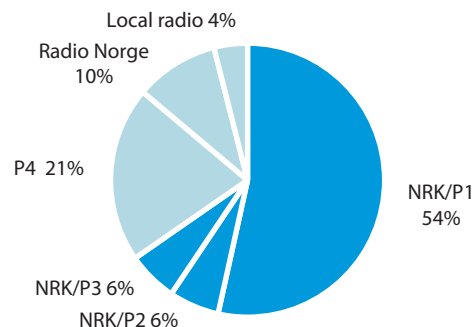
Sweden



Finland



Norway



Note: Average daily listening Monday–Sunday 2010. Data include listening to radio, irrespective of platform. Public service radio marked with dark blue colour.

Sources: TNS Gallup Denmark, Finnpanel, Capacent, NRK/TNS Gallup Norway, SR and TNS Sifo.

Here again we see a dominant position for the largest channel of each public service company – DR P1, YLE Radio Suomi, NRK P1 and SR P4 – with audience shares of 37–54 per cent in each country. RÚV 2 also shows an important audience share of 32 per cent, but it has a strong competitor in Bylgjan, Iceland's nationwide commercial radio station.

Nationwide commercial radio stations have considerably less audience than the largest public service channel. In Finland, Radio Nova has 11 per cent of the listening time, while the two nationwide commercial radio stations

in Norway, P4 and Radio Norge, have 21 and 10 per cent of listening time, respectively. Denmark's nationwide channels have around 5 per cent share each. (Harrie 2012).

The other public service channels, which are less broad in profile or target groups than the largest ones, have audience shares from 2 per cent (SR P2 with classical music and YLE Puhe with talk radio) to 11 per cent (SR P1 with news, current affairs, culture). And all in all, people in the Nordic countries spend a majority of their listening time on the public service radio offering.

Public service on the web

28. Nordic public service companies on the web: Services and content

Public service company	Denmark DR	Finland YLE	Iceland RÚV	Norway NRK	SR	Sweden SVT	UR
Radio and/or TV services	Radio/TV	Radio/TV	Radio/TV	Radio/TV	Radio	TV	Radio/TV ¹
Website established	1996	1995	1996	1995	1995	1995	1995
Access							
Web radio (real time)	x	x	x	x	x	–	–
Web TV (real time)	x	x	x	x	–	x	(x) ²
Mobile content/apps	x	x	x	x	x	x	–
Web archive (play function, pod casting)	x	x	x	x	x	x	x
Programme output							
Regional/local programming	x	x	x	x	x	x	–
Children/youth	x	x	x	x	x	x	x
In sign language	x	x	–	x	*	x	x
In official minority languages	*	x	*	x	x	x	x
In other languages	x	x	x	– ³	x	–	x
Web-only radio channels	x	–	–	x	x	–	–
Web-only TV channels	x	–	–	–	–	–	–
Sales/advertising							
Webshop	x	x	x	x	x	x	x
Advertising on the web	–	–	–	–	–	–	–
Other channels/social media							
RSS	x	x	x	x	x	x	x
Youtube channel	–	x	–	x	x	x	x
Twitter	x	x	x	x	x	x	–
Facebook	x	x	–	x	x	x	–
Blogs	x	x	–	x	x	x	–

Since the mid-1990s, the Nordic public service companies have increased their range of services from TV and radio to also include the Internet. According to their mandates and policies, the companies should make their content available on various platforms in such a way that as many people as possible can benefit from their programmes and services. Today's public service online services offer – via main or specially targeted pages – content on equal footing with radio and TV platforms, including news updates, regional programming, special children's sections, services for small language groups etc. Content is offered both as streamed real-time radio or TV and as on-demand services.

* Not applicable

– No occurrence

1 UR produces educational radio and TV programmes for transmissions on SR and SVT.

2 UR streams programmes on networks for folk colleges and adult education associations.

3 NRK's teletext service online offers English news from BBC.

Sources: Company web sites (Spring, 2011).

29. Top ten media web sites, ranked by number of unique visitors per week and country

	Web site	Operations	Unique visitors	Sessions/user	Publisher	Ranking in top list
Denmark	ekstrabladet.dk	Newspaper	1 106 000	8.0	JP/Politikens Hus	2
	dr.dk	Public television and radio	1 095 062	4.9	DR	3
	tv2.dk	Television (public service) ¹	1 026 908	5.9	TV2 NET	4
	bt.dk	Newspaper	755 834	7.1	Berlingske Media	7
	politiken.dk	Newspaper	504 304	6.4	JP/Politikens Hus	10
	jp.dk	Newspaper	473 803	6.6	JP/Politikens Hus	12
	berlingske.dk	Newspaper	296 595	4.9	Berlingske Media	16
	epn.dk	Online business news	288 295	3.8	JP/Politikens Hus	17
	borsen.dk	Business newspaper	201 653	7.0	Dagbladet Børsen A/S	26
	business.dk	Business news	179 553	2.6	Berlingske Media	30
Finland	Ilta-lehti	Newspaper	2 446 946	5.5	Alma Media	1
	Ilta-Sanomat	Newspaper	2 173 637	4.8	Sanoma	2
	MTV3	Television	1 902 803	4.3	MTV Media/Bonnier	3
	YLE	Public television and radio	1 692 764	3.8	Yleisradio	4
	Helsingin Sanomat	Newspaper	1 475 058	4.1	Sanoma	5
	Taloussanomat	Online-only business newspaper	648 213	2.4	Sanoma	10
	Kauppalehti.fi	Business newspaper	645 422	3.3	Alma Media	11
	Nelonen	Television	397 105	2.1	Sanoma	21
	Uusi Suomi	Online-only newspaper	339 525	2.5	Kustannusosakeyhtiö Uusi Suomi	22
	Stara.fi	Online-only magazine	..	2.2	Stara Media	23
Iceland	mbl.is/...	Newspaper	388 989	6.5	Árvakur hf.	1
	visir.is/...	Newspaper, radio, television	299 987	5.5	365 miðlar ehf.	2
	pressan.is	Online news, social media	180 497	4.3	Vefpressan ehf	3
	dv.is	Newspaper, magazines	179 561	5.1	DV ehf.	4
	ruv.is	Public television and radio	113 657	3.3	RÚV ohf.	7
	eyjan.is	Online news	73 907	4.2	Eyjan Media ehf.	10
	vb.is	Business newspaper	18 893	2.6	Myllusetur ehf.	22
	vf.is/...	Regional newspaper	17 685	3.3	Víkurfrettir ehf.	23
	bb.is	Regional newspaper	14 881	4.0	Guttó ehf.	27

	Web site	Operations	Unique visitors	Sessions/user	Publisher	Ranking in top list
Norway	VG Nett	Newspaper	3 825 008	4.7	VG (Schibsted)	1
	dagbladet.no	Newspaper	2 446 786	4.3	Dagbladet (Berner Group)	3
	nrk.no	Public television and radio	2 435 379	3.4	NRK	4
	aftenposten.no	Newspaper	1 309 363	3.3	Aftenposten (Schibsted)	9
	tv2.no	Television	1 207 609	2.9	TV 2 (A-pressen/Egmont)	11
	kjendis.no	Newspaper	846 369	2.0	Dagbladet (Berner Group)	15
	klikk.no	Magazines	737 234	1.9	Egmont Hjemmet Mortensen	16
	bt.no	Regional newspaper	472 607	3.4	Bergens Tidende (Schibsted)	21
	seher.no	Celebrity Gossip magazine	455 162	2.9	Se og Hør (Aller Media)	22
	adressa.no	Regional newspaper	424 798	3.6	Adresseavisen (Polaris Media)	23
Sweden²	Aftonbladet	Newspaper	6 123 658	5.0	Aftonbladet (Schibsted / LO)	1
	Expressen	Newspaper	2 716 919	3.7	Expressen (Bonnier)	7
	Aftonbladet WebbTV	Web TV	1 861 077	1.9	Aftonbladet (Schibsted / LO)	9
	Dagens Nyheter	Newspaper	1 855 239	2.9	Dagens Nyheter (Bonnier)	10
	svt.se	Public television	1 680 724	2.6	SVT	11
	svd.se	Newspaper	1 310 972	2.2	Svenska Dagbladet (Schibsted)	13
	svtplay.se	Public television (Web TV)	1 304 956	2.5	SVT	14
	di.se	Business newspaper	1 047 516	3.8	Dagens industri (Bonnier)	16
	sverigesradio.se	Public radio	978 486	2.1	SR	19
	Tv4.se	Television	805 343	1.8	TV4 (Bonnier)	21

1 TV 2 Danmarks' main channel TV 2 is public service. There are no public service obligations for other platforms. Hence, the web site TV2.dk is not part of TV 2's compliance with the public service license.

2 Networks not included.

Note: Web sites of traditional media only. Measures in March 2011 (week 11). Different methods have been used, which impairs comparability between countries. Public service shown in blue colour.

Sources: FDIM Foreningen av Danske Interaktive Medier, TNS Gallup Finland, Modernus Web Measure (Iceland), TNS Gallup Norway, KIA Index (Sweden).

Measured in the number of unique visitors, the Nordic public service web sites rank among the ten most visited national web sites (total sites). This is true for all except for Swedish public service, where the separate web sites of SVT, SR and UR splinter the audience. However, ranking by media-related sites, all the public service companies find their position within the top ten. Most popular are newspaper web sites, normally one or two popular tabloids, except for Iceland, where the highest ranking is held by the largest daily morning newspaper.

High media trust

30. Trust in radio, TV and web pages in Sweden

	High trust	
	among the general public (%)	among users (%)
Television		
Public service SVT	78	83
Commercial channel TV4	57	60
Commercial channel TV3	19	23
Radio		
Public service SR	73	82
Commercial network Mix Megapol	12	20
Commercial network RIX FM	14	23
Web sites		
Public service SVT	44	68
Public service SR	42	69
Commercial TV4	30	48

Note: The results are based on answers on a five-point-scale from 'very high confidence' to 'very low confidence'. The percentages for the general public also include the alternative 'no opinion'. The sample consists of 3 000 randomly selected persons living in Sweden aged 15–85. Response rate was 57%.

Source: The annual SOM survey 2011.

According to a Swedish survey on trust in the main media, public service channels enjoy a higher level of trust than commercial channels. SVT is considered trustworthy by nearly 80 per cent of the total population, while corresponding data for the largest commercial channel TV4 (generalist channel) is 57 per cent, and for TV3 (entertainment) less than 20 per cent. The pattern is the same for radio. Surveys in Finland and Denmark show similar tendencies for national public service media. Of the Finnish population, 74 per cent say they have a strong trust in YLE; in Denmark, 88 per cent of the population considers the existence of DR as a public service broadcaster to be very important to society (Hujanen et al. 2013).

Trust in a medium – or a specific channel – means that it offers content you can rely on. Research shows that earning trust is closely related to the reporting of news and current affairs. Trust reflects the perceived importance of media institutions as sources for reliable news coverage. Channels with a clear news and current affairs profile are generally more trusted. This seems to be one important reason for the strong position of public service – radio as well as television – even among less regular users. Local newspapers are also met with strong trust – in 2008, 70 per cent of the population evaluated them as very trustworthy, whereas tabloid papers are ranked very low (Hujanen et al. 2013, Weibull 2009).

According to a Eurobarometer survey, Nordic citizens' general trust in radio and TV is high, with rankings among the highest on the European scale (see further next section, Table 12).

4. Nordic Media in the Global Landscape

The largest media companies

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Public service funding

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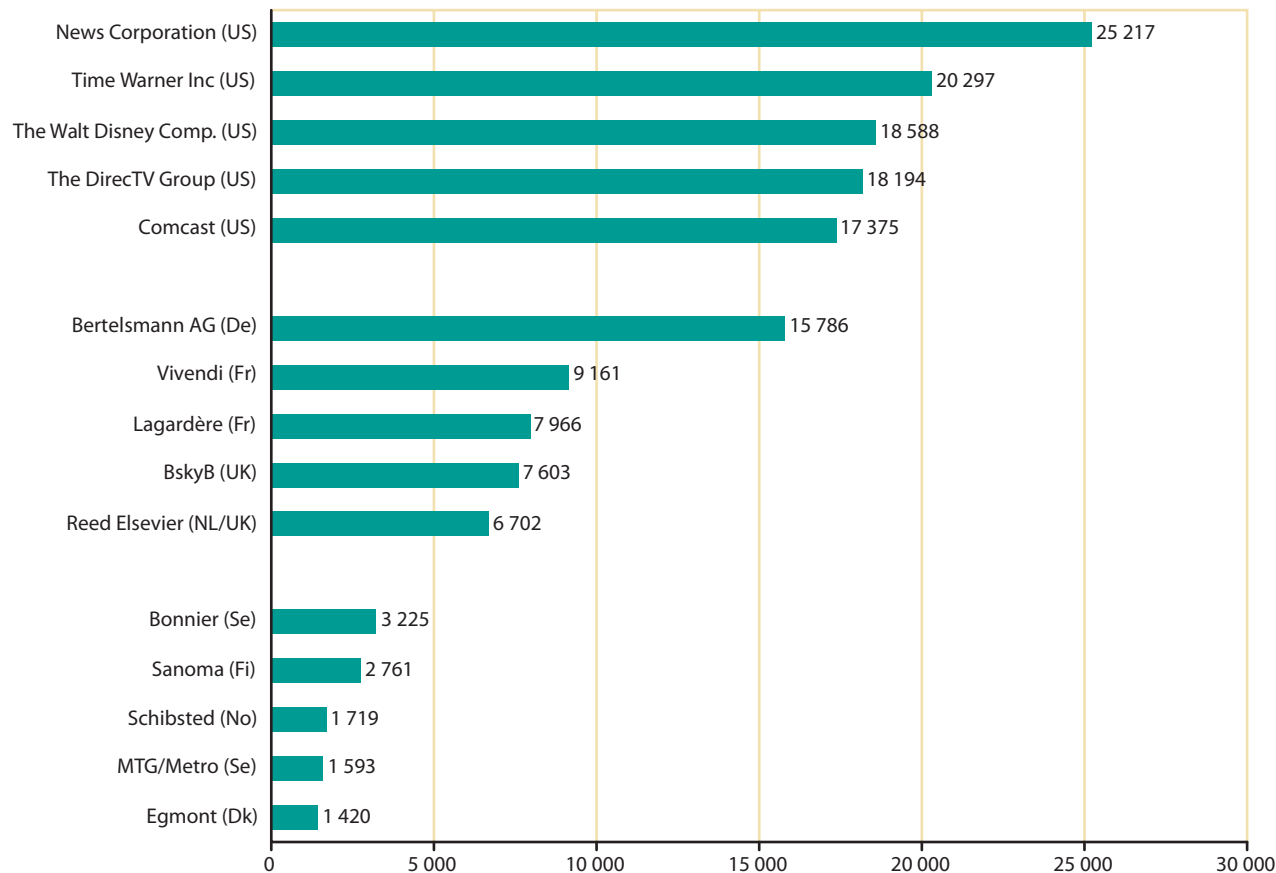
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The largest media companies

1. The five largest global, European and Nordic media companies

Revenue in million Euro 2010



Sources: Company annual reports, company web sites, Institut für Medien- und Kommunikationspolitik (www.mediadb.eu).

The five largest media corporations in the world are based in the US. Continuing the list, German Bertelsmann ranks sixth (and as first on the European list). The American companies benefit from a large home market, many deriving as much as 75 per cent or more of their volume from the domestic market. Foreign receipts are not generated by production overseas to any greater extent, but mainly through the export of entertainment products like cinema film, television series and music, to other countries. European companies dominate European media markets almost entirely (Sundin 2009). The same is true for the largest Nordic companies, which dominate the Nordic markets. As to revenues, they derive roughly 70–80 per cent from the Nordic region, including approximately half from their respective national markets (Section 2/Table 2).

In most cases, the media revenue is the same as total company revenue; though for some companies media is one among other activities. In the table, this concerns the Walt Disney Company (media share constitutes 65% of total revenue), Comcast (61%) and Vivendi (32%). Swedish MTG/Metro is noted as a full media company in the table, but if it is seen as part of a larger ownership sphere (Stenbeck), media represents 16 per cent of total revenue.

2. Media activities of the five largest global, European and Nordic media companies

	Company	Domicile	Media revenue (EUR mills)	Activities						
				Newspapers	Magazines & periodicals	Books	Radio	TV	Film	Music
GLOBAL	News Corporation	USA	25 217	x	x	x	x	x	x	
	Time Warner Inc.	USA	20 297		x	x		x	x	
	The Walt Disney Company	USA	18 588		x	x	x	x	x	x
	The DirecTV Group	USA	18 194					x		
	Comcast	USA	17 375					x		
EUROPEAN	Bertelsmann AG	Germany	15 786	x	x	x	x	x	x	x
	Vivendi	France	9 161		x	x		x		x
	Lagardère	France	7 966	x	x	x	x	x		
	BSkyB	United Kingdom	7 603					x		
	Reed Elsevier	The Netherlands/ United Kingdom	6 702		x	x				
NORDIC	Bonnier	Sweden	3 225	x	x	x	x	x	x	
	Sanoma	Finland	2 761	x	x	x	x	x	x	
	Schibsted Media Group	Norway	1 719	x	x	x			x	
	MTG/Metro	Sweden	1 593	x			x	x		
	Egmont	Denmark	1 420		x	x		x	x	

Sources: Company annual reports 2010, company web sites, Institut für Medien- und Kommunikationspolitik (www.mediadb.eu).

Most of the large media companies are active in a good number of media. Among the largest American companies only one, News Corporation, has interests in newspapers, but all are active in television. As stated above, these companies play their largest role in their home market and not as much in the Nordic countries, or in Europe at large. Nevertheless, their brands are present and well known all over, including in the Nordic countries. In the context of television there are Disney's children's channels, Time Warner's CNN International and Cartoon Network, Viacom's MTV and Nickelodeon, News Corporation's Fox channels, and more. Talking about American presence on the Nordic market, we should mention Dis-

covery Communications, also a large American company (though a good bit smaller than the top five), which has long transmitted a number of global Discovery channels in the Nordic countries. In late 2012 Discovery acquired SBS Nordic from the German ProSieben.1 Group, thereby acquiring TV and radio channels in all Nordic countries except Iceland.

The European and Nordic companies are active in both newspaper and audiovisual markets to a somewhat greater extent. Among the Nordic companies are some of the largest newspaper publishers – as well as commercial radio and TV broadcasters – on the Nordic scene.

Public service funding

3. European public service companies' main sources of funding

Country	Organisation	Main funding share of revenue (%)
Licence fees		
Sweden	SR	97.5
Norway	NRK	95.8
Finland	YLE	94.8
Sweden	SVT	93.6
Denmark	DR	90.5
Czech Republic	Cro	89.5
Israel	IBA	87.2
Greece	ERT	85.4
France	Radio France	87.0
Germany	ZDF	84.2
Germany	ARD	83.5
Czech Republic	CT	80.4
Croatia	HRT	80.1
Slovakia	Sro	76.0
Slovakia	STV	73.9
Switzerland	SRG-SSR	72.4
Serbia	RTS	71.6
United Kingdom	BBC	70.4
Turkey	TRT (2008 data)	68.3
France	France Télévisions	65.3
Slovenia	RTV SLO	65.9
Austria	ORF	59.7
Italy	RAI	59.7
Poland	PR	57.6
Roumania	TVR (2009 data)	56.3
Ireland	RTÉ	52.7

Country	Organisation	Main funding share of revenue (%)
Public funds		
Vatican	Radio Vatican	99.6
Bulgaria	BNR	96.5
Spain	RTVE	96.5
Estonia	ERR	86.9
Cyprus	CyBC	86.4
Latvia	Latvian Radio	82.6
Hungary	MR	80.6
Hungary	MTV	77.0
Ukraine	NRCU	75.0
Belgium	French RTBF	71.9
Latvia	Latvian TV	67.9
Belgium	Flemish VRT	66.9
The Netherlands	NPO ¹	65.1
Iceland	RÚV	62.8
Lithuania	LRT	59.2
Roumania	ROR ²	48.8
Portugal	RTP ²	39.2

1 Estimated share 2010.

2 The programme company was financed by about the same percentage licence fees as public funds.

Note: Original source is the report *Funding of Public Service Media 2011*, published by EBU (European Broadcasting Union). Data refer to EBU members.

Source: SOU 2012:59 *Nya villkor för public service* (Swedish Government Official Report).

The table shows how the member organisations of the European Broadcasting Union, EBU, are financed – via licence fees or other public funds – and to what extent they are publicly funded (data for 2010). Licence-fee funding connected to the possession of particular technical equipment is the most common way of funding public service in Europe. Many public service broadcasters in Europe also have some form of mixed financing, i.e. combining for example licence financing with the possibility to bring in advertising revenue and sponsorship.

The Nordic countries are among those with the largest share of public funding altogether. As to proportion of licence-fee financing, Sweden, Norway, Finland and Denmark are on top. In 2013 Finland changed the form of public funding to a special public service tax – it will, however, finance YLE to the same extent as the licence fee. Iceland has a mixed system of public service tax and advertising revenues (SOU 2012:59 pp. 196–199).

4. Media use in the European Union

Use everyday / almost everyday			
Watch television total (%)	Listen to the radio (%)		Read written press (%)
Bulgaria	94	Iceland (c.) 83	Sweden 76
Cyprus (tcc)	94	Ireland 80	Finland 73
Montenegro (c.)	93	Germany 71	Luxembourg 67
Greece	92	Luxembourg 70	Iceland (c.) 66
Ireland	92	Sweden 69	Germany 64
Spain	92	Denmark 68	The Netherlands 59
Portugal	91	Estonia 67	Montenegro (c.) 52
Macedonia (c.)	91	Austria 67	Austria 51
Denmark	90	Belgium 66	Denmark 50
Croatia (c.)	90	Slovenia 65	Cyprus (tcc) 49
Turkey (c.)	90	Slovakia 64	Estonia 43
Cyprus	89	The Netherlands 63	Ireland 43
Malta	89	Cyprus 57	United Kingdom 40
Hungary	88	Latvia 57	Slovenia 38
EU 27	87	Finland 55	Belgium 37
Germany	87	France 55	EU 27 36
France	86	Czech Republic 54	Croatia (c.) 36
Slovakia	86	Lithuania 53	Hungary 31
United Kingdom	86	United Kingdom 53	Lithuania 30
Sweden	86	Poland 52	France 29
Italy	85	EU 27 51	Slovakia 27
The Netherlands	85	Croatia (c.) 50	Spain 26
Poland	85	Malta 48	Italy 25
Belgium	84	Hungary 46	Czech Republic 23
Estonia	84	Spain 40	Malta 22
Czech Republic	84	Montenegro (c.) 37	Cyprus 20
Lithuania	83	Greece 35	Latvia 20
Romania	83	Cyprus (tcc) 34	Macedonia (c.) 20
Slovenia	83	Italy 31	Portugal 19
Austria	83	Romania 28	Bulgaria 15
Latvia	82	Portugal 26	Poland 15
Finland	81	Bulgaria 24	Romania 12
Iceland (c.)	80	Macedonia (c.) 19	Turkey (c.) 11
Luxembourg	77	Turkey (c.) 7	Greece 8

c.= Candidate country, tcc=Turkish Cypriot Community

Note: Iceland and Norway are not members of EU, but Iceland is included in the survey as it is a candidate for membership.

Source: *Standard Eurobarometer 76 (Autumn 2011), Media use report, Annex.*

International comparisons of media use are difficult, as ratings systems differ. However, the Eurobarometer points at some patterns in Europeans' media use.

Data on daily TV viewing do not indicate any great differences between countries. In all 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.

Daily radio listening shows greater differences between countries, ranging from two 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, including newspapers and magazines, shows as large differences as radio and approximately the same pattern as for northern and southern Europe. To conclude, in a European comparison, the people of the Nordic countries are fairly avid radio listeners and readers of written press, but watch TV a bit less.

Note that European data are not always coherent to national surveys. Daily TV and radio use are on approximately the same level in all Nordic countries, with daily TV reach of 71–75 per cent and daily radio reach of 73–78 per cent, including Finland, which in comparison has a very low radio reach in the European survey.

Media use

5. Daily TV viewing time, selected countries

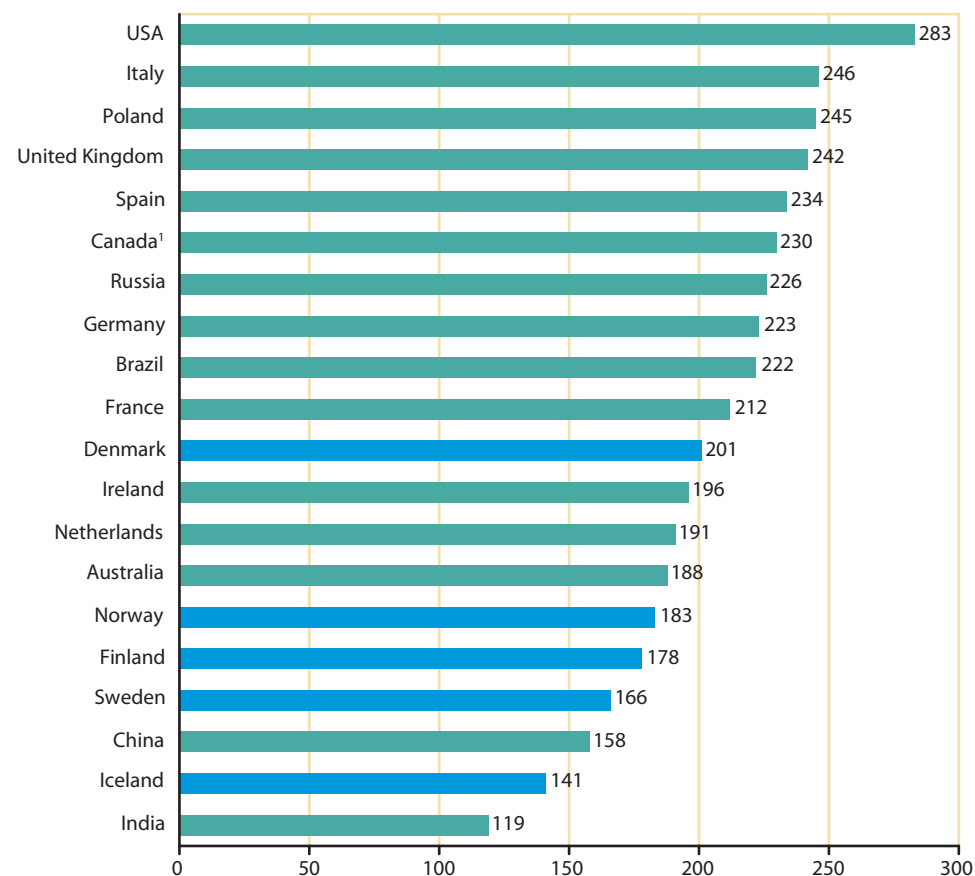
Region	Country	Minutes
Nordic region	Denmark	201
	Finland	178
	Iceland	141
	Norway	183
	Sweden	166
Other Europe	France	212
	Germany	223
	Ireland	196
	Italy	246
	Poland	245
	Russia	226
	Spain	234
	Netherlands	191
	United Kingdom	242
Americas	USA	283
	Canada ¹	230
	Brazil	222
Australia	Australia	188
Asia	China	158
	India	119

¹ The figure for Canada refers to viewing in non-Quebec households.

Sources: Ofcom (*International Communications Market Report 2011*), Nordicom.

Daily viewing time in the Nordic countries in 2010 was on average 141–201 minutes; Iceland with the lowest and Denmark the highest. Generally, viewers in the Nordic countries spend less time watching television than do those in many other countries. Looking abroad, many European countries note viewing times longer than in the Nordic countries. The longest average viewing time is noted in the US, with 283 minutes per day (Ofcom 2011).

Ranking by daily viewing time (minutes)



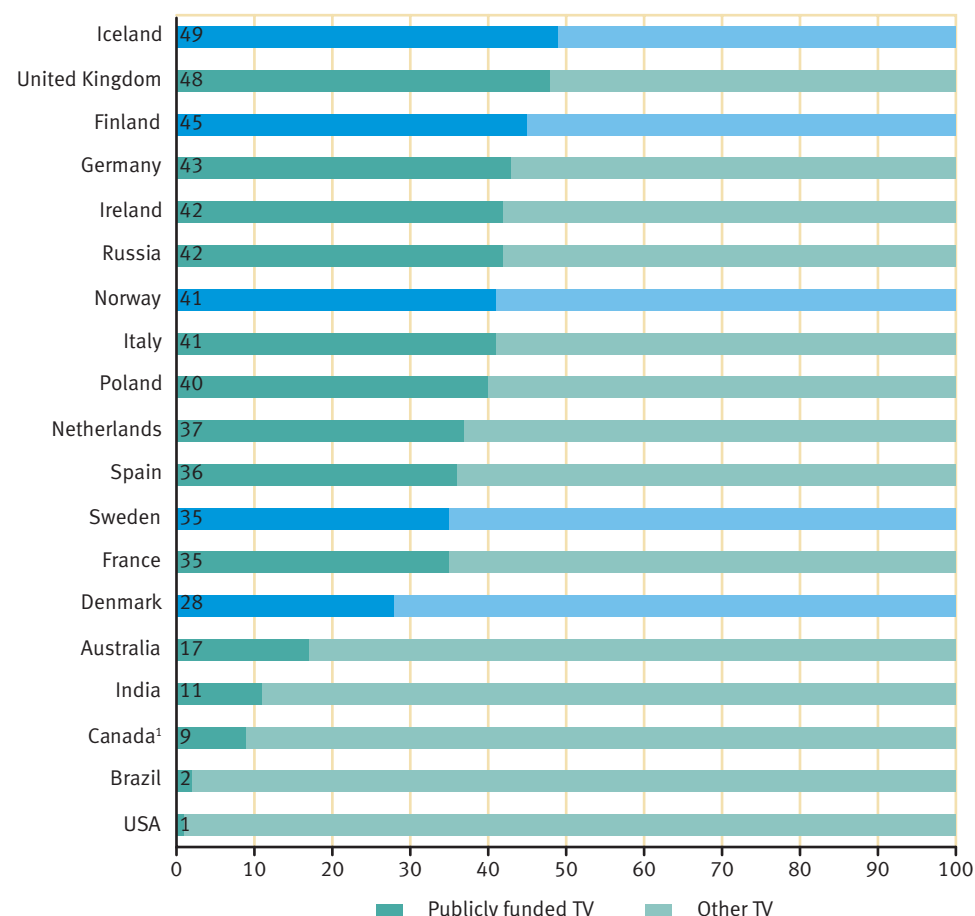
6. Viewing of publicly funded TV channels, selected countries

Region	Country	Share (%)
Nordic region	Denmark	28
	Finland	45
	Iceland	49
	Norway	41
	Sweden	35
Other Europe	France	35
	Germany	43
	Ireland	42
	Italy	41
	Poland	40
	Russia	42
	Spain	36
	Netherlands	37
	United Kingdom	48
Americas	USA	1
	Canada ¹	9
	Brazil	2
Australia	Australia	17
Asia	India	11

¹ The figure for Canada refers to viewing in non-Quebec households.

Sources: Ofcom (*International Communications Market Report 2011*), Nordicom.

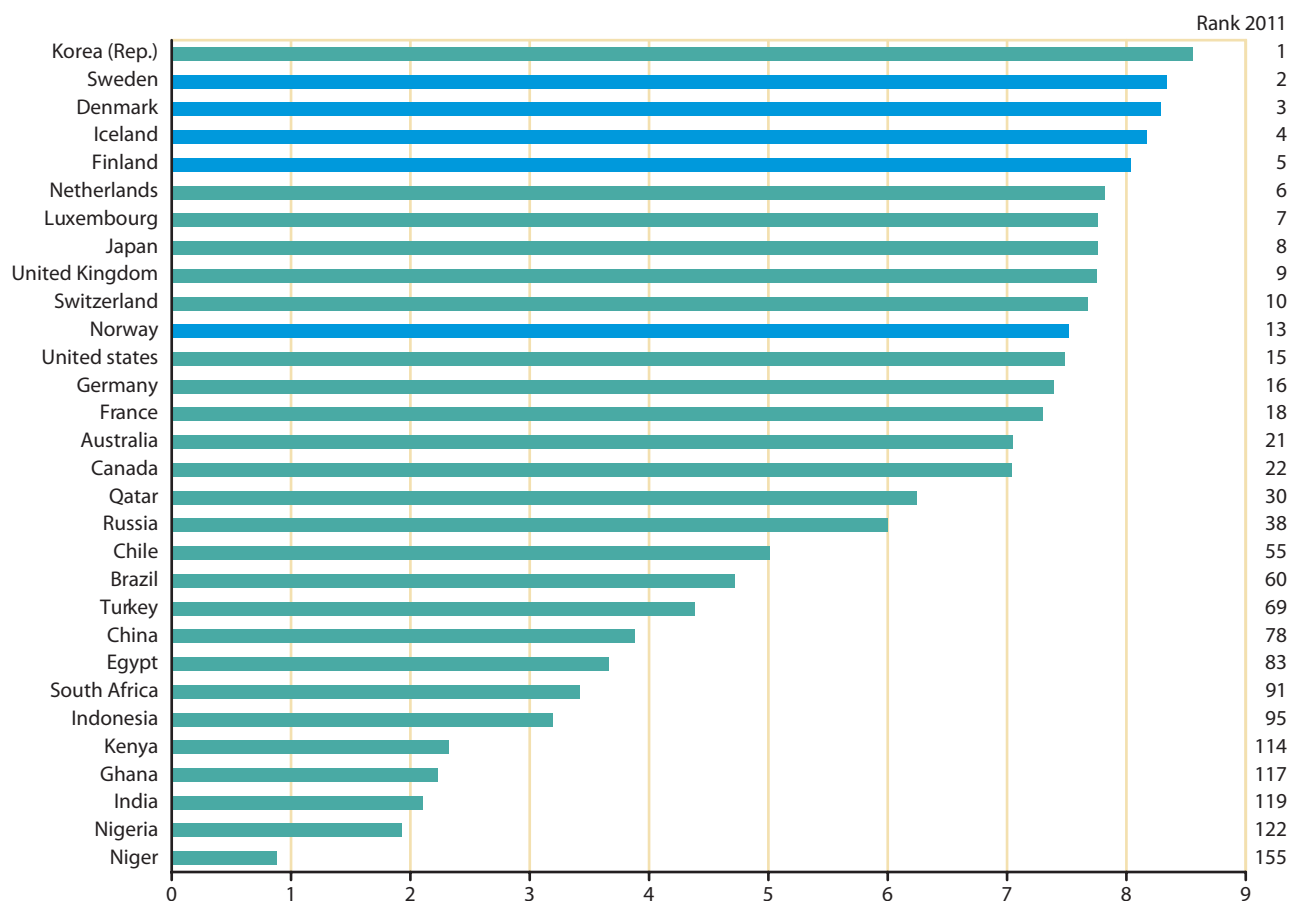
Ranking by audience share for publicly funded TV (%)



RÚV and YLE, together with BBC in the UK, are the publicly funded broadcasting companies with the largest viewing shares. NRK is in mid-range, while SVT and DR seem to have a tougher position. Publicly funded DR has its strongest competitor in TV 2, the state-owned but commercially financed public service channel, so seen to total public service share, independent of financing, Denmark would rank higher. Seen to regions, publicly funded TV has a stronger position in Europe than in other parts of the world (with the reservation that the table includes few countries outside Europe).

Information and communication technologies

7. ICT Development Index, selected countries



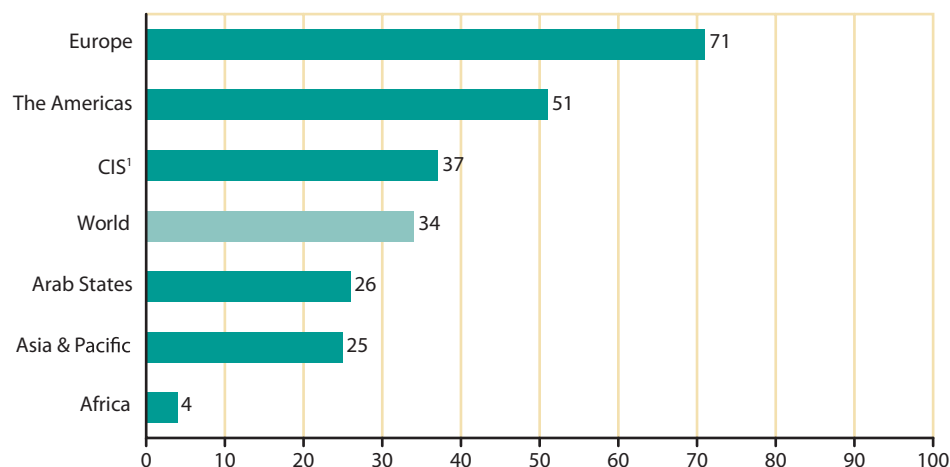
The table shows a selection of countries ranked on the ICT development index (IDI) in 2011. Four Nordic countries are in the top ten of the IDI, together with mainly other European countries. The Republic of Korea tops the list, and among Asian countries Japan is also among the top ten. The top five countries have not changed position between 2010 and 2011, and are thus maintaining the highest ICT levels in the world (ITU 2012: 20–21).

ICT = Information and Communication Technologies

Note: The ICT Development Index (IDI) combines 11 indicators into one single measure to track progress made in ICT access, use and skills, and includes such indicators as the number of fixed- and mobile-broadband Internet subscriptions, households with a computer, and literacy rates. The IDI measures the level of ICT developments in 155 economies worldwide.

Source: ITU International Telecommunication Union, www.itu.int/ITU-D/ict/publications/idi/index.html.

8. Households with Internet access by region

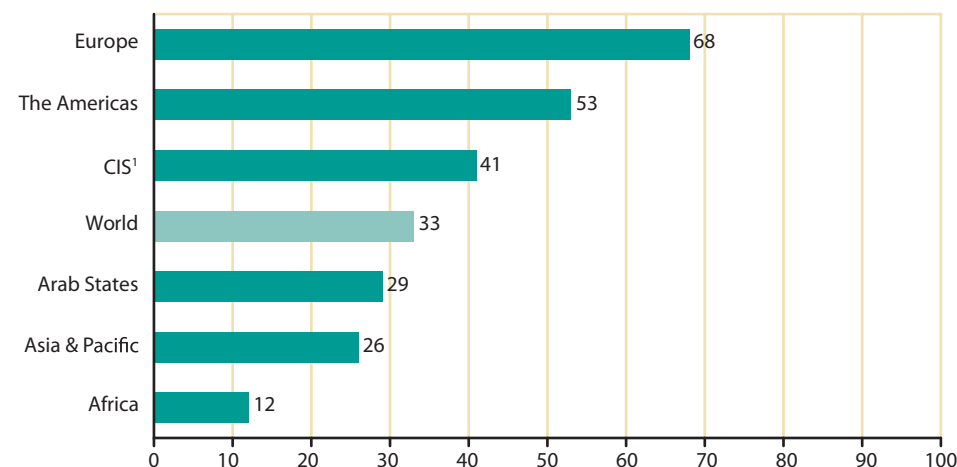


1 Commonwealth of Independent States (regional organisation of former Soviet Republics).

Note: Regions according to <http://www.itu.int/ITU-D/ict/definitions/regions/index.html>.

Source: ITU World Telecommunication/ICT Indicators database, <http://www.itu.int/ict/statistics>.

9. Individuals using the Internet by region



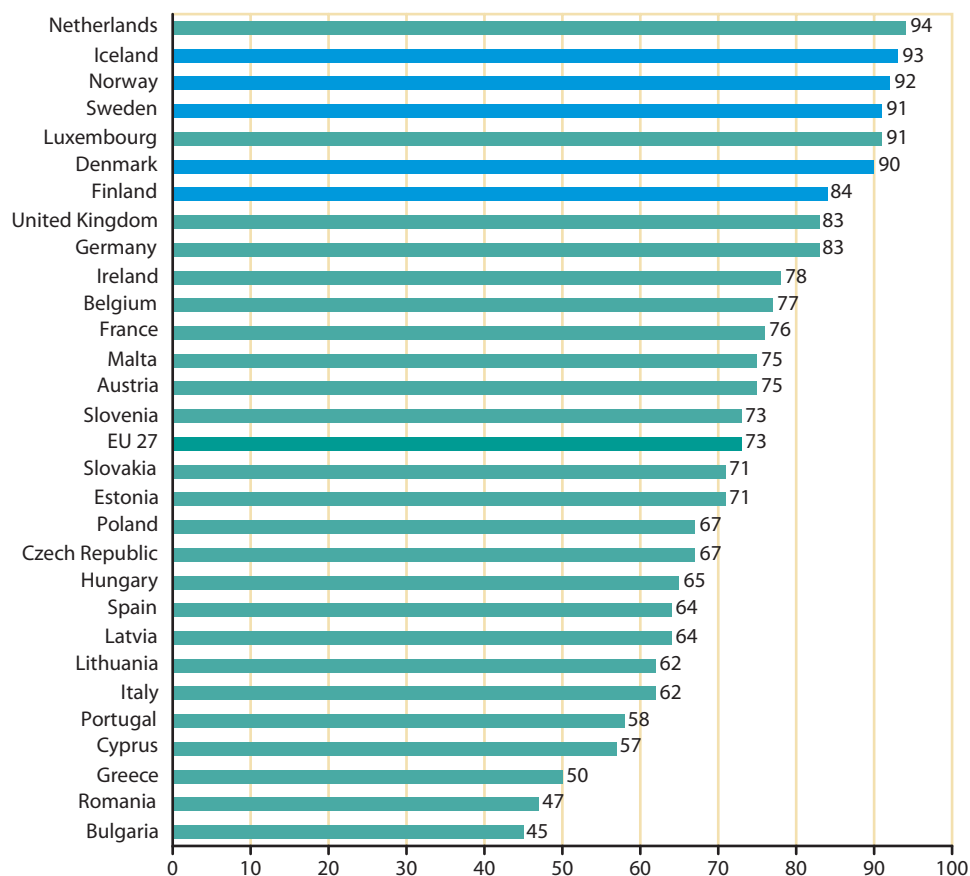
1 Commonwealth of Independent States (regional organisation of former Soviet Republics).

Note: Regions according to <http://www.itu.int/ITU-D/ict/definitions/regions/index.html>.

Source: ITU World Telecommunication/ICT Indicators database, <http://www.itu.int/ict/statistics>.

More and more people have access to the Internet from home, and use is also growing. Between 2010 and 2011 the proportion of households with Internet access grew by 14 per cent, while the number of people using the Internet grew by 11 per cent. By the end of 2011, a third (over 600 million) of households had Internet access. The same proportion is also noted among the population using the Internet: by the end of 2011, more than a third of the population worldwide was online (2.3 billion people). Seen to regions, Europe has the highest access and use, with seven of ten having Internet at home as well as using it (ITU 2012:6-7). Among the European countries, the Nordic ones, together with other countries in northern Europe, have levels of access and use high above the European average (see the results of Eurostat's surveys in the following Figures 10–11).

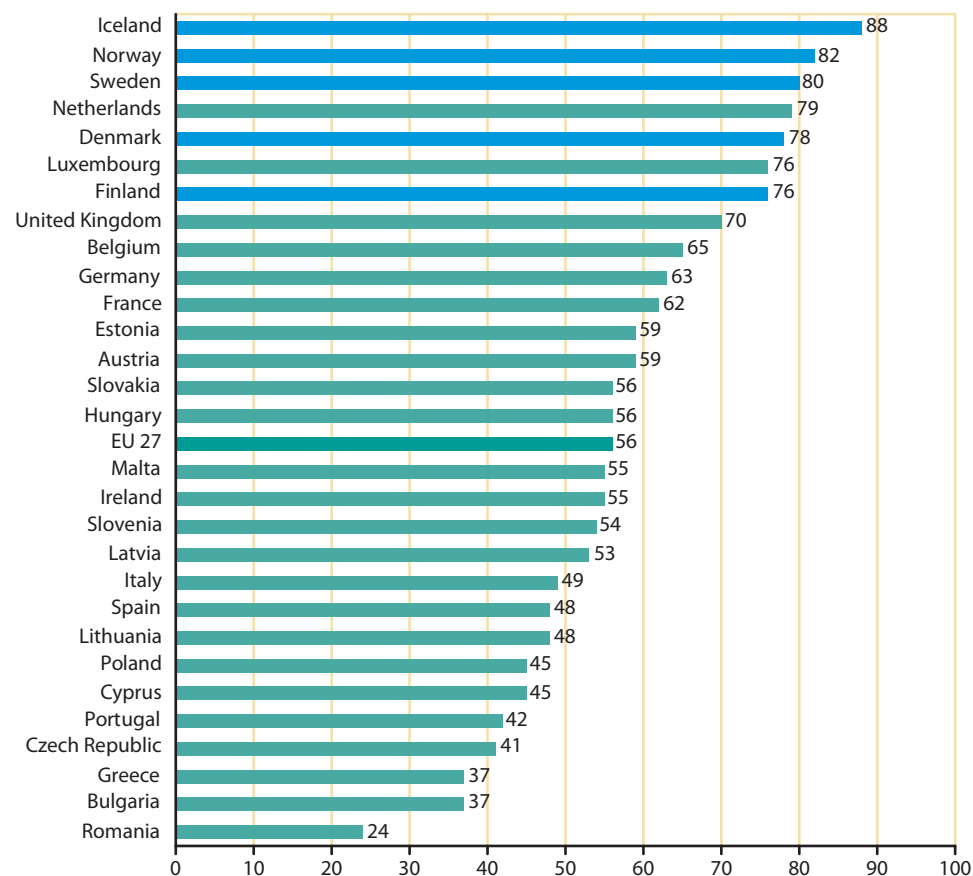
10. Households with Internet access in Europe



Note: Data for 2011. The list includes the EU 27 countries plus Norway and Iceland.

Source: Eurostat database (December 2012), http://epp.eurostat.ec.europa.eu/portal/page/portal/information_society/introduction.

11. Individuals using Internet daily/almost daily in Europe



Note: Data for 2011. The list includes the EU 27 countries plus Norway and Iceland.

Source: Eurostat database (December 2012) http://epp.eurostat.ec.europa.eu/portal/page/portal/information_society/introduction.

12. Europeans' trust in TV, radio, written press and Internet

Share of population who tend to trust 2011 (%)							
Television	%	Radio	%	Written press	%	Internet	%
Iceland (c.)	77	Sweden	80	Finland	64	Czech Republic	61
Finland	76	Iceland (c.)	79	Slovakia	62	Denmark	59
Bulgaria	73	Finland	78	Luxembourg	61	Slovakia	57
Sweden	73	Slovakia	75	Belgium	60	The Netherlands	51
Austria	72	Denmark	73	The Netherlands	60	Montenegro (c.)	51
Belgium	72	Estonia	71	Austria	59	Estonia	49
Estonia	72	Belgium	70	Cyprus (tcc)	59	Finland	49
Czech Republic	71	Czech Republic	70	Montenegro (c.)	58	Poland	46
Slovakia	69	The Netherlands	70	Czech Republic	57	Cyprus (tcc)	45
Denmark	68	Austria	68	Estonia	53	Belgium	44
The Netherlands	66	Germany	66	Iceland (c.)	53	Slovenia	44
Montenegro (c.)	63	Ireland	64	France	51	Austria	43
Cyprus (tcc)	61	Luxembourg	61	Denmark	50	Lithuania	43
Romania	61	Cyprus (tcc)	60	Germany	50	Macedonia (c.)	43
Ireland	60	France	60	Portugal	49	Greece	42
Luxembourg	60	Cyprus	58	Cyprus	47	Latvia	42
Portugal	60	Latvia	58	Romania	46	Hungary	41
Germany	59	EU 27	57	Sweden	45	Bulgaria	40
Latvia	59	Lithuania	57	Poland	44	Iceland (c.)	39
Poland	57	Poland	57	EU 27	43	Ireland	38
Cyprus	56	Romania	57	Ireland	43	EU 27	37
EU 27	53	United Kingdom	54	Bulgaria	42	Italy	37
Lithuania	53	Portugal	52	Lithuania	42	Luxembourg	36
United Kingdom	53	Slovenia	52	Spain	41	Romania	36
Hungary	52	Bulgaria	51	Latvia	40	Cyprus	35
Slovenia	52	Spain	50	Slovenia	39	Malta	35
Macedonia (c.)	52	Montenegro (c.)	50	Hungary	37	Sweden	35
Croatia (c.)	45	Hungary	47	Italy	34	Spain	34
France	42	Croatia (c.)	44	Croatia (c.)	34	United Kingdom	34
Malta	41	Italy	39	Macedonia (c.)	34	France	33
Spain	41	Greece	36	Malta	30	Croatia (c.)	33
Italy	40	Malta	36	Turkey (c.)	30	Portugal	29
Turkey (c.)	35	Macedonia (c.)	31	Greece	28	Germany	27
Greece	22	Turkey (c.)	29	United Kingdom	18	Turkey (c.)	24

c.= Candidate country, tcc=Turkish Cypriot Community

Note: Iceland and Norway are not members of EU, but Iceland is included in the survey as it is a candidate for membership.

Source: Standard Eurobarometer 76 (Autumn 2011), Media use report, Annex.

According to a Eurobarometer survey conducted by the European Commission, Nordic citizens' trust in radio and TV is high, with ranking among the highest on the European scale. Finland is also on top for trust in the written press, which includes both newspapers and magazines. The other countries rank considerably lower, but above EU average. Trust in the Internet is more varied between the countries, from low trust in Sweden with 35 per cent, to high in Denmark with 59 per cent. (Note that Norway is not included in the survey.)

Media trust

5. The Nordic Region: Facts & Figures

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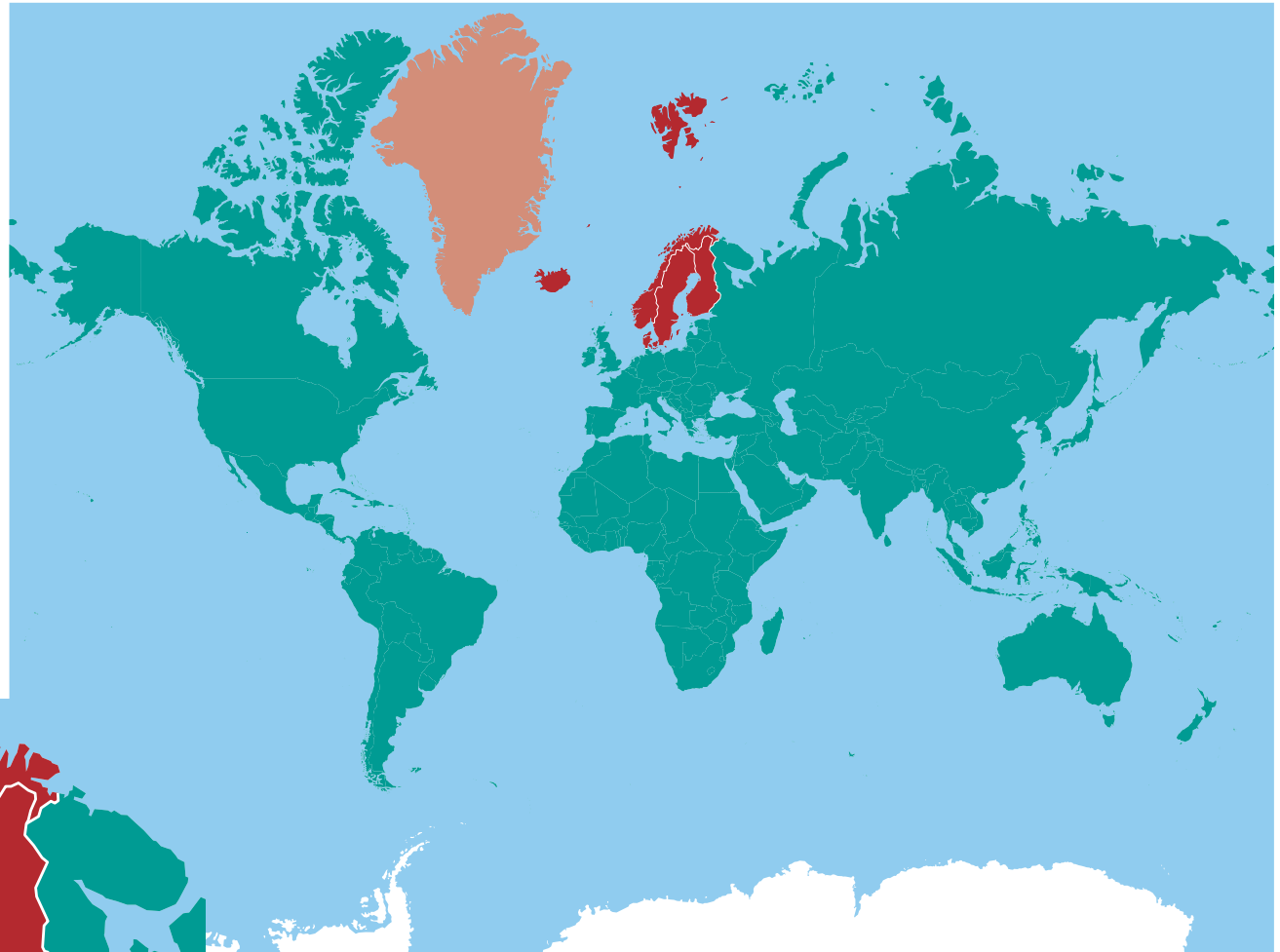
Geography

1. The Nordic countries

The Nordic region includes Denmark, Finland, Iceland, Norway and Sweden (in the colour dark red), which are covered in this publication. Finland includes the Åland Islands (home rule within the Republic of Finland).

The Nordic region's self governing Faroe Islands (home rule within the kingdom of Denmark) and Greenland (self government within the kingdom of Denmark) (in the colour light red) are not covered in this publication.

Source: Geoatlas.



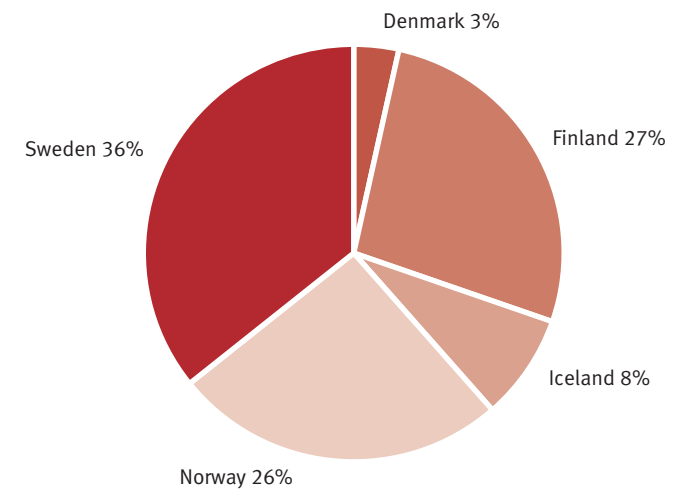
2. Capital and total area in each Nordic country

	Denmark	Finland	Iceland	Norway	Sweden
Capital	Copenhagen	Helsinki	Reykjavík	Oslo	Stockholm
Total area (sq km)	43 560	338 430	103 440	323 790 ¹	450 300
Population per sq km (1 Jan 2012)	130	18	4	17	23

¹ Area excluding Svalbard.

Source: *Nordic Statistical Yearbook 2012* (Nordic Council of Ministers).

3. Total area in the Nordic countries



Source: *Nordic Statistical Yearbook 2012* (Nordic Council of Ministers).

Population

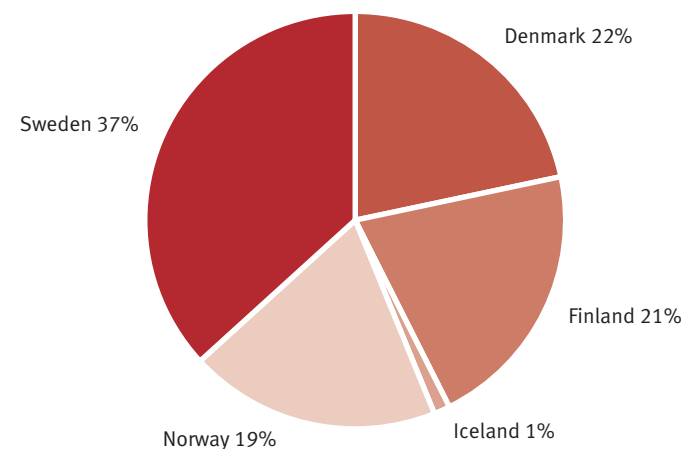
4. Population of and housing in each Nordic country

	Denmark	Finland	Iceland	Norway	Sweden
Population in thousands (1 Jan 2012)	5 581	5 401	320	4 986	9 483
Population per sq km (1 Jan 2012)	130	18	4	17	23
Capital area population, share of total population (%)	22	20	64	23	22
Housing					
Total number of dwellings in thousands (2010) ¹	2 559	2 808	130	2 343	4 508
Per cent					
One- and two family houses	59	54	50	61	44
Apartment blocks	38	44	49	34	56
Other dwellings	3	2	1	5	..

1 Iceland 2009.

Sources: *Nordic Statistical Yearbook 2012* and Nordic Statistical Bank (Nordic Council of Ministers), www.norden.org/sv/fakta-om-norden/siffror-och-statistik (data retrieved January 2013).

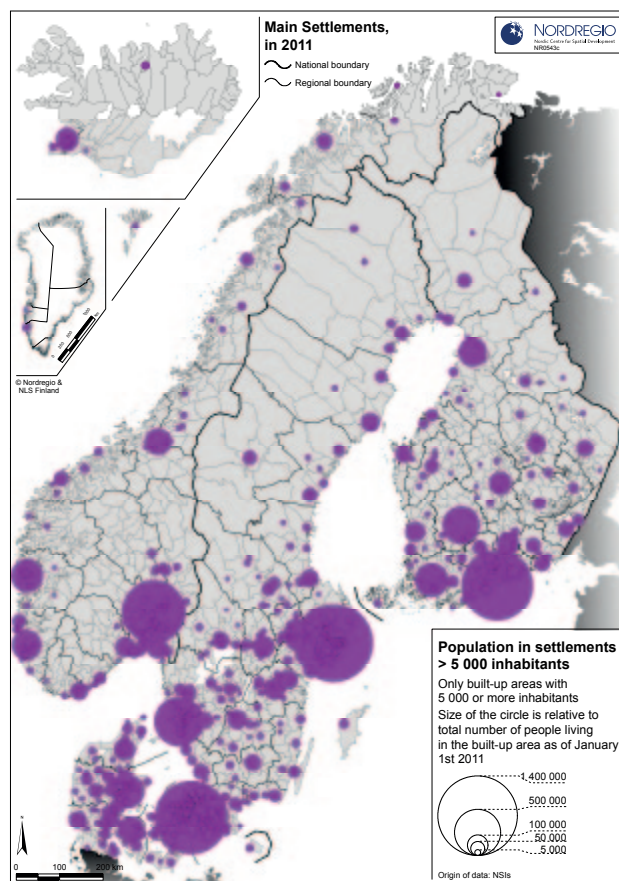
5. Total population in the Nordic countries 2012



Source: *Nordic Statistical Yearbook 2012* (Nordic Council of Ministers).

Currency

6. Main settlements in each Nordic country 2011



Source: Nordregio, www.nordregio.se.

7. Average exchange rate for each Nordic currency 2000–2011

Year	1 Euro in national currency				
	Denmark DKK	Finland FIM/EUR	Iceland ISK	Norway NOK	Sweden SEK
2000	7.45	5.95	72.61	8.11	8.45
2001	7.45	5.95	87.49	8.05	9.25
2002	7.43	*	86.20	7.51	9.16
2003	7.43	*	86.72	8.00	9.13
2004	7.44	*	87.15	8.37	9.13
2005	7.45	*	78.14	8.01	9.28
2006	7.46	*	87.72	8.05	9.25
2007	7.45	*	87.60	8.02	9.25
2008	7.46	*	127.46	8.22	9.61
2009	7.45	*	172.67	8.75	10.63
2010	7.45	*	161.89	8.01	9.56
2011	7.45	*	161.42	7.79	9.03

Note: Euro was adopted as the official currency of Finland in 2002.

Sources: Danmarks Nationalbank, Bank of Finland, Statistics Iceland, Norges Bank, Sveriges Riksbank, www.oanda.com

Politics

8. Governance and elections in each Nordic country

	Denmark	Finland	Iceland	Norway	Sweden
Form of government	Constitutional monarchy	Republic	Republic	Constitutional monarchy	Constitutional monarchy
Parliament	Folketinget (179 seats)	Riksdag (200 seats)	Alþingi (63 seats)	Stortinget (169 seats)	Riksdagen (349 seats)
Proportion of seats held by women in parliament (%) 2011	38	43	43	40	45
Valid votes at the last national election (%)	87	67	82	76	84

Sources: *Nordic Statistical Yearbook 2012* (Nordic Council of Ministers), *Human Development Report 2011* (United Nations), <http://hdr.undp.org/en/reports/> (data retrieved January 2013).

Development indicators

9. Welfare indicators in each Nordic country

	Denmark	Finland	Iceland	Norway	Sweden	World
Well-being: Overall life satisfaction (0, least satisfied, 10, most sat.)	7.8	7.4	6.9	7.6	7.5	5.3
Life expectancy at birth, women, years	82	84	84	84	84	..
Life expectancy at birth, men, years	77	77	80	79	80	..
Total health care expenditure, share of GDP (%)	9	8	9	9	9	..
Taxes and compulsory social security contributions, share of GDP (%)	48	42	36	43	46	..

Note: Data for 2011, except 'Overall life satisfaction' where data refer to the most recent year available during 2006–2010, and total health care expenditure with data for 2008.

Sources: *Nordic Statistical Yearbook 2012* and Nordic Statistical Bank (Nordic Council of Ministers), *Human Development Report 2011* (United Nations) hdr.undp.org/en/statistics/hdi/ (data retrieved January 2013). www.norden.org/sv/fakta-om-norden/siffror-och-statistik (data retrieved January 2013).

10. Labour market indicators in each Nordic country

	Shares (%)				
	Denmark	Finland	Iceland	Norway	Sweden
Activity rate (labour force share of population 15–64 years)	79	74	81	78	80
Men	82	76	83	81	83
Women	76	72	79	76	77
Employment (share of labour force 15–64 years)	92	92	93	97	92
Men	92	91	92	96	92
Women	92	93	94	97	93

Note: Data for 2011.

Source: Nordic Statistical Bank (Nordic Council of Ministers), www.norden.org/sv/fakta-om-norden/siffror-och-statistik (data retrieved January 2013).

11. Research and education indicators in each Nordic country

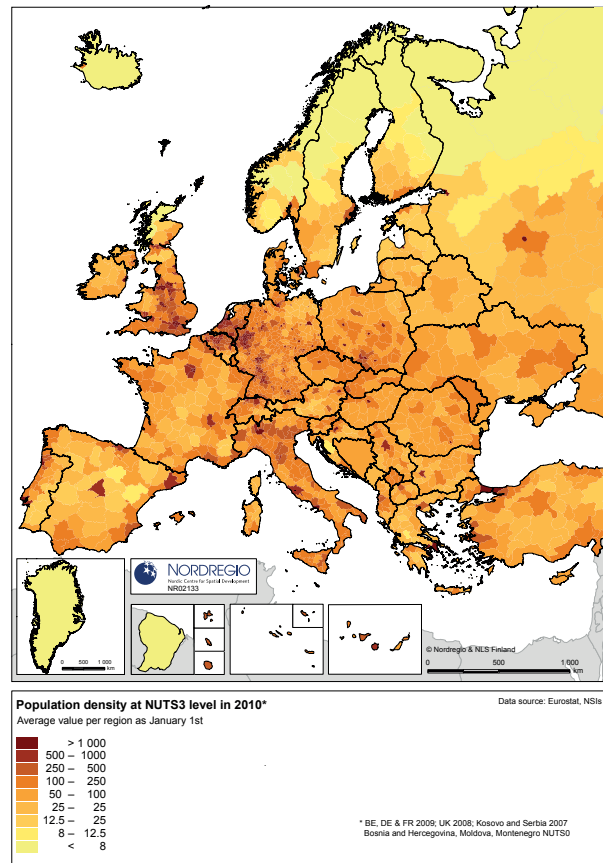
	Shares (%)				
	Denmark	Finland	Iceland	Norway	Sweden
R&D expenditure, share of GDP	3	4	3	2	4
Tertiary education achieved, share of population 15–74 years	25	29	26	30	26
Men	22	22	22	26	22
Women	28	27	30	33	31

Note: R & D expenditure 2010 (Iceland 2009); tertiary education achieved 2011 (Finland 2010).

Source: Nordic Statistical Bank (Nordic Council of Ministers), www.norden.org/sv/fakta-om-norden/siffror-och-statistik (data retrieved January 2013).

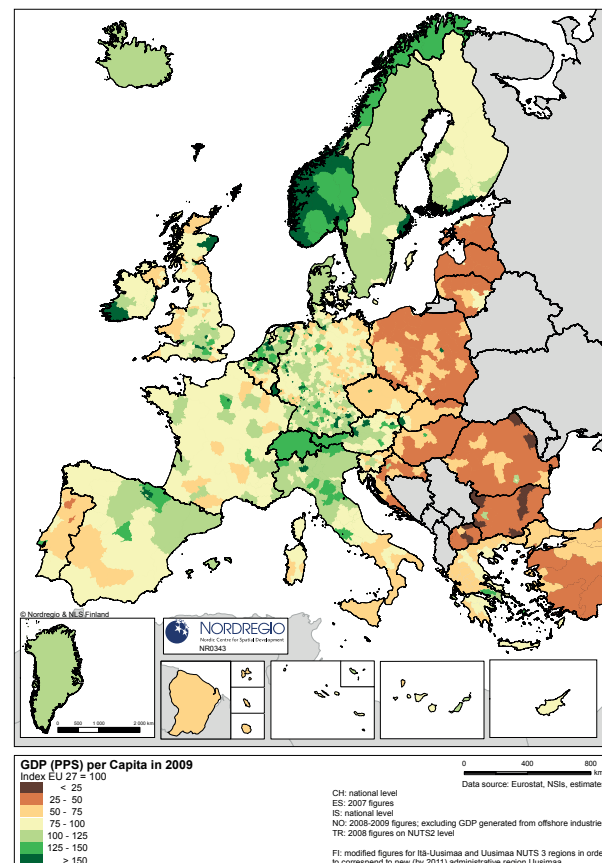
The Nordic countries in a European context

12. Population density in Europe



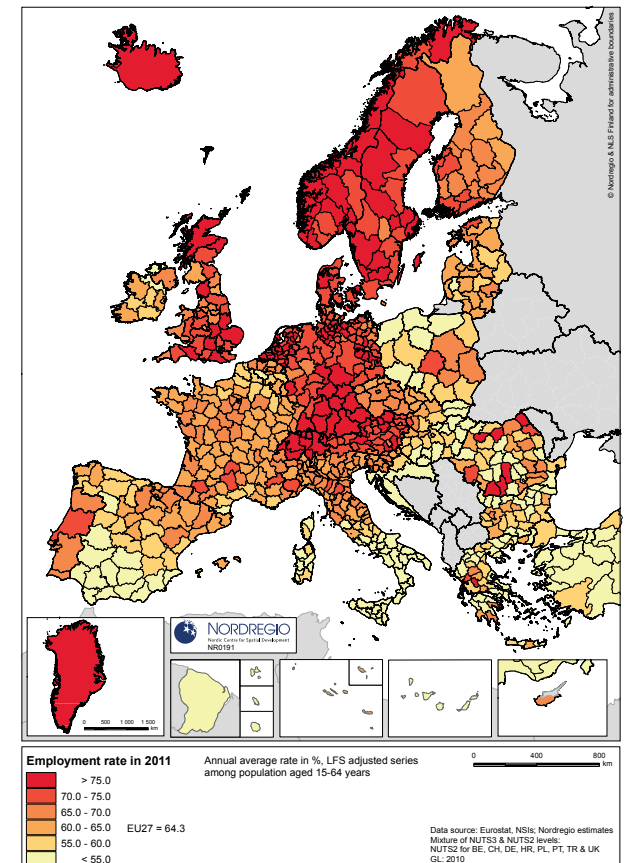
Source: Nordregio, www.nordregio.se.

13. GDP per capita in Europe



Source: Nordregio, www.nordregio.se.

14. Employment rate in Europe



Source: Nordregio, www.nordregio.se.

Global indexes

15. The Nordic countries ranking on Human Development Index, Gender Inequality Index and Freedom of the Press Index

	Denmark	Finland	Iceland	Norway	Sweden	World
Human Development Index, world rank 2011	16	22	14	1	10	*
Human Development Index, value 2011	0.895	0.882	0.898	0.943	0.904	0.682
Gender Inequality Index, world rank 2011	3	5	9	6	1	*
Gender Inequality Index, value 2011	0.060	0.075	0.099	0.075	0.049	0.492
Freedom of the Press Index, world rank 2011–2012	5	1	10	1	1	*

Definitions:

Human Development Index (HDI) A composite index measuring average achievement in three basic dimensions of human development – a long and healthy life, knowledge and a decent standard of living.

Gender Inequality Index A composite measure reflecting inequality in achievements between women and men in three dimensions: reproductive health, empowerment and the labour market.

Freedom of the Press Index (Freedom House): An annual survey of media independence in 197 countries and territories, which assesses the degree of print, broadcast, and internet freedom. The index provides numerical rankings and rates each country's media as free, partly free or not free.

Sources: Human Development Report 2011 (United Nations), <http://hdr.undp.org/en/reports/> and Freedom House, www.freedomhouse.org.

16. Human Development Index (HDI) and its components: Ranking countries 1–30

		Human Development Index (HDI)	Life expectancy at birth	Mean years of schooling	Gross National Income (GNI) per capita (Constant 2005 PPP\$)
HDI rank	(Value) 2011	(Years) 2011	(Years) 2011 ¹	(Constant 2005 PPP\$) 2011	
1	Norway	0.943	81.1	12.6	47 557
2	Australia	0.929	81.9	12.0	34 431
3	Netherlands	0.910	80.7	11.6	36 402
4	United States	0.910	78.5	12.4	43 017
5	New Zealand	0.908	80.7	12.5	23 737
6	Canada	0.908	81.0	12.1	35 166
7	Ireland	0.908	80.6	11.6	29 322
8	Liechtenstein	0.905	79.6	10.3	83 717
9	Germany	0.905	80.4	12.2	34 854
10	Sweden	0.904	81.4	11.7	35 837
11	Switzerland	0.903	82.3	11.0	39 924
12	Japan	0.901	83.4	11.6	32 295
13	Hong Kong, China (SAR)	0.898	82.8	10.0	44 805
14	Iceland	0.898	81.8	10.4	29 354
15	Korea (Republic of)	0.897	80.6	11.6	28 230
16	Denmark	0.895	78.8	11.4	34 347
17	Israel	0.888	81.6	11.9	25 849
18	Belgium	0.886	80.0	10.9	33 357
19	Austria	0.885	80.9	10.8	35 719
20	France	0.884	81.5	10.6	30 462
21	Slovenia	0.884	79.3	11.6	24 914
22	Finland	0.882	80.0	10.3	32 438
23	Spain	0.878	81.4	10.4	26 508
24	Italy	0.874	81.9	10.1	26 484
25	Luxembourg	0.867	80.0	10.1	50 557
26	Singapore	0.866	81.1	8.8	52 569
27	Czech Republic	0.865	77.7	12.3	21 405
28	United Kingdom	0.863	80.2	9.3	33 296
29	Greece	0.861	79.9	10.1	23 747
30	United Arab Emirates	0.846	76.5	9.3	59 993
World		0.682	69.8	7.4	10 082

¹ Data refer to 2011 or the most recent year available.

Definitions:

Human Development Index (HDI): A composite index measuring average achievement in three basic dimensions of human development – a long and healthy life, knowledge and a decent standard of living.

Life expectancy at birth: Number of years a newborn infant could expect to live if prevailing patterns of age-specific mortality rates at the time of birth stay the same throughout the infant's life.

Mean years of schooling: Average number of years of education received by people aged 25 and older, converted from education attainment levels using official durations of each level.

Gross national income (GNI) per capita: Aggregate income of an economy generated by its production and its ownership of factors of production, less the incomes paid for the use of factors of production owned by the rest of the world, converted to international dollars using purchasing power parity (PPP) rates, divided by midyear population.

Sources: *Human Development Report 2011* (United Nations), <http://hdr.undp.org/en/reports/> (data retrieved January 2013).

17. Freedom of the Press Index 2011–2012: Ranking countries 1–30

Rank	Country
1	Finland
1	Norway
1	Sweden
4	Belgium
5	Denmark
5	Luxembourg
5	Netherlands
5	Switzerland
9	Andorra
10	Iceland
10	Liechtenstein
12	St. Lucia
13	Ireland
13	Monaco
13	Palau
16	Germany
16	Marshall Islands
16	New Zealand
16	Portugal
16	San Marino
16	St. Vincent and Grenadines
22	Estonia
22	Jamaica
22	United States of America
25	Barbados
25	Canada
25	Costa Rica
25	Czech Republic
29	Bahamas
29	St. Kitts and Nevis

Definition: The global Freedom of the Press Index is an annual survey of media independence in 197 countries and territories, which assesses the degree of print, broadcast, and internet freedom. The index provides numerical rankings and rates each country's media as free, partly free or not free.

Source: Freedom House, www.freedomhouse.org.

Definitions and Comments

Radio and TV Audience Measurements

TV surveys

TV audience data in this publication emanate from national measurements, mainly electronic peplemeter systems. Electronic measurement was introduced in Finland 1987, Denmark and Norway in 1992, Sweden in 1993 and Iceland in 2008. Time shift within 7 days are included in Finland and Norway since 2008, in Sweden since 2010. The audience in Denmark is defined as 3+ years of age, in Finland 10+, in Iceland 12–80, in Norway 12+ and in Sweden 3+. The definition of daily reach differs as well. In Denmark and Sweden it means at least 5 minutes consecutive viewing, in Norway and Finland one minute. In Iceland there are no public reach data available from 2008 on (for earlier data, daily reach is defined as share of respondents who tuned in to the stations per day on average).

Radio surveys

Radio audience data in this publication emanate from national surveys, where different methods and definitions have been used, which impairs comparability between years and countries. Electronic measures PPM (portable peplemeter) were introduced in Denmark, Iceland and Norway in 2008, and Sweden in 2013. Methods for earlier years were either diary or telephone surveys. Data include listening to radio, irrespective of platform.

Share of viewing or listening

The percentage of the total time a viewing or listening audience spend watching/listening over a given period of time. This can apply to channels, programmes, time periods etc. For example, a share of 35% for a TV broadcaster or a unique channel would mean that, of all time spent on TV viewing, 35% was devoted to that broadcaster or unique channel and the rest of the viewing time (65%) was spent on other channels. The more time spent on a channel, the higher the share of viewing.

Share of viewers or listeners (share of reach)

The percentage of all viewers or listeners watching television or listening to the radio (over a given period of time) using the offer from a certain broadcaster or unique channel. For example, an 80% share of TV viewers for a channel on a daily basis would be interpreted as 8 out of 10 TV viewers having used that unique channel on that day. This means that a channel can have a 100% share of viewers during a 24h period if all TV viewers use that channel. This does mean that other channels used to the same extent can also

have 100% share of viewers. ‘Share of viewers’ indicates whether or not a channel is frequently visited. The more viewers who use a channel, the higher its share of viewers.

For more details on the Nordic survey institutes and their methods, see Public Service Media Map Volume 1, pages 162–163 (Harrie 2012).

Abbreviations

DAB	Digital Audio Broadcasting
DTT	Digital Terrestrial Television
DVB	Digital Video Broadcasting
ICT	Information and Communication Technology
IP TV	Internet Protocol Television
HDTV	High Definition Television
RSS	Rich Site Summary (web feed format)
VAT	Value Added Tax

Country Codes

DE	Germany
DK	Denmark
FI	Finland
FR	France
NL	The Netherlands
NO	Norway
SE	Sweden
UK	United Kingdom
US	USA

Changes on the Media Market

Media markets are in constant flux, and in the interval since we started work on this volume changes have occurred, some of which we would like to point out.

Denmark

DR will change its channel offerings in 2013. DR Update and DR HD will close down and make way for two new channels – DR Ultra, a new children’s channel for older children, and DR3, targeting 15–39-year-olds.

Finland

Since 2012, all Finnish public service channels are written as “Yle” instead of “YLE”, and the Swedish-speaking TV channel YLE FST5 has changed its name to Yle Fem.

Sweden

Since February 2013, SVT streams all its five TV channels simulcast on the web (SVT Play).

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Sources: Statistics

Denmark

Danish Agency for Culture: Provides services to the Danish Radio and Television Board and handles management and supervisory tasks in the field of radio and TV, including the administration of broadcasting licenses and public service value tests. The Agency is the Danish information centre regarding media, and offers online information on current issues, the Danish media structure, the Radio and Television Board, political advertising on TV, newspaper and magazine subsidies, and statistics. Information available at www.kulturstyrelsen.dk/english/media/.

DR: The Danish Broadcasting Corporation. Information from annual reports, 'public service audits' and the web site has provided data on the company, channels, license fees, radio listening and television viewing, etc.

FDIM Foreningen af Danske Interaktive Medier: Branch organisation for Danish Internet media. Presents data on Internet traffic (measured by Gemius).

Media Political Agreements (Mediepolitisk aftale): Agreements on media policy for broadcast and electronic media, worked out among parties in the Parliament. The agreements usually run for four years. Data are based on the Danish Media Political Agreement 2011–2014 (*Mediepolitisk aftale for 2011–2014*) and the later Danish Media Political Agreement 2012–2014 (*Mediepolitisk aftale for 2012–2014*), which replaced the first one. Documents are available at the Ministry of Culture's web site at www.kum.dk/Kulturpolitik/Medier/Medieaftaler/.

TNS Gallup Denmark: Statistics on television viewing (TNS Gallup TV-meter) and radio listening (TNS Gallup Radio-Meter), Denmark's official industry-recognised

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TV2/Danmark: Danish broadcasting company to which the main channel TV 2 has public service obligations. Data from annual reports and the company web site.

Finland

FICORA, Finnish Communications Regulatory Authority: A general administrative authority for issues concerning electronic communications and information society services. FICORA administers licence fees, supervises legal provisions on content, regulates advertising and sponsorship in radio and TV, etc. Provides data on TV licences and licence fees in Finland.

Finnpanel Oy: Research company owned by TNS Gallup Oy and A.C. Nielsen Finland Oy. Statistics on television viewing and radio listening based on electronic audience measurements (TV) and surveys (radio). Has also provided data on TV programming by content and programme origin.

Finnish Advertising Council: Advertising data for Finland are published annually in *Advertising spend in Finland* (together with TNS Gallup Finland). Provides net advertising revenue data for radio and TV.

TNS Gallup Finland: Conducts periodic surveys and presents statistics on media consumption and media habits in Finland, and here has provided data on the average media day for 2011 (TNS Atlas Intermedia 2011) and Internet traffic data. Advertising data for Finland are published annually in *Advertising spend in Finland* (together with the Finnish Advertising Council).

Statistics Finland: The Media Statistics unit publishes *Finnish Mass Media (Joukkoviestimet)*, a comprehensive statistical overview of the media scene in Finland, every second year. Data are also available online at www.stat.fi/til/jvie/index_en.html.

YLE, Yleisradio: Finland's national public service broadcasting company. Publications from the Audience Research Department at YLE have provided data on viewing and listening as well as television and radio programming by content. Other data were obtained from annual reports, the company web site and unpublished information.

Iceland

Capacent (previously ÍM Gallup): Conducts media surveys several times a year, including TV and radio audience surveys from 1999 and forward.

Modernus Web Measure: Runs the Coordinated Webmeasure® list in Iceland. Presents Internet traffic data for Icelandic web sites.

RÚV, Ríkisútvarpið: The Icelandic National Broadcasting Service. Annual reports, annual accounts and unpublished information.

Social Science Institute at the University of Iceland: Periodic surveys on media consumption and media habits until 1998 presented in special reports, *Fjölmiðlakönnun* [Media Use Survey] and *Neyslukönnun* [Consumer Survey].

Statistics Iceland: Publishes information on Icelandic media in *Landshagir* (*The Statistical Yearbook of Iceland*) and *Hagtiðindi* (monthly statistics). Online database available at www.statice.is/Statistics/Culture.

Norway

medianorway: A public information centre that documents media trends in Norway. Facts and figures are available in an online database at medienorge.uib.no.

Norwegian Post and Telecommunication Authority: Authority with monitoring and regulatory responsibilities for the postal and telecommunications markets in Norway. Provides statistics in the fields of telecom, cable TV, etc. The annual report on the Norwegian market for electronic communication services (*Det norske ekomarkedet*) provides data on revenue from TV services.

NRK, Norsk Rikskringkasting: The Norwegian Broadcasting Corporation. Information from annual reports, the company web site and unpublished information.

TNS Gallup Norway: Data on media penetration and consumption in Norway. TNS Gallup is responsible for the official radio listening data and, from the year 2000, the Norwegian TV Meter Survey. Data on Internet traffic and daily coverage for national media groups (from the survey Forbruker & Media) are also from TNS Gallup. Media reports can be found at www.tns-gallup.no/?aid=9072497.

Statistics Norway: Conducts the annual survey *Norsk Mediebarometer*, which covers penetration and use of a wide range of media in the population 9–79 years old, available online at www.ssb.no.

Sweden

KIA Index: The official measurement currency for Swedish web sites. The web site www.kiaindex.net presents weekly Internet traffic data. Behind the KIA index is, amongst others, the Association of Swedish Advertisers.

MMS – Mediamätning i Skandinavien: Research company owned by the major TV broadcasting companies, providing data on TV and web-TV audiences recognised by the industry. Annual reports with data on TV viewing and

TV-channel penetration are available online at www.mms.se.

Nordicom-Sweden: The annual survey *Nordicom-Sveriges Mediebarometer* [Nordicom-Sweden's Media Barometer] covers the penetration and use of a wide range of media in the population 9–79 years old.

Radiorätjänst i Kiruna AB: Collects the radio and TV license fees nationwide and verifies their payment. Part of Swedish public service, as the company is owned by SVT, SR and UR.

SR, Sveriges Radio: The Swedish public service radio company. Information provided by annual reports, public service audits and the company web site. Special analyses from the internal management system provided data on the channels' programming profiles.

SVT, Sveriges Television: The Swedish public service TV company. Information provided by annual reports, public service audits, the company web site and an online database with data from the Swedish public service companies' annual public service accounts, available at <http://statistikdatabas.publicservice.se/>.

Swedish Post and Telecom Authority PTS: The National Post and Telecom Authority, PTS, monitors the electronic communications and postal sectors. Its online database has provided data on revenue from TV services.

Swedish Broadcasting Authority: A state licensing and supervisory authority in the radio and television field. The annual publication *Svenskt tv-utbud 2011* [Swedish Television Offering 2011] has provided information on the programme profiles of Swedish TV channels.

The SOM Institute: An independent survey organisation at the University of Gothenburg, with focus on Swedes' habits, behaviour, opinions and values with respect to society, politics and media. Information on media trust in Sweden was obtained from the annual SOM survey 2011. More information at www.som.gu.se.

TNS Sifo: Publishes periodic surveys of the radio audience in Sweden. Earlier data in time series measured by RUAB and Sifo Media (later fused into TNS Sifo).

UR, Utbildningsradion: The Swedish Educational Broadcasting Company. Information provided by annual reports, public service audits and the company web site.

Nordic

IRM Institute for Advertising and Media Statistics (IRM Institutet för Reklam- och Mediestatistik): Research institute based in Sweden. Advertising data for the Nordic countries are published in *Den nordiska reklammarknaden* [The Nordic Advertising Market], an annual publication based on statistics compiled from national sources.

Nordregio: The Nordic Centre for Spatial Development is an international Nordic research institute in the broad field of regional studies. Maps on the Nordic region in a European context were retrieved from www.nordregio.se.

Nordvision: A television and media partnership involving the public service broadcasting organisations in the Nordic countries. The *Nordvision annual report 2010* has provided data on TV co-productions and programme exchange among the Nordic public service broadcasters. More information at www.nordvision.org.

Nordic statistical bank: Statistic database run by the Nordic Council of Ministers, which offers facts and statistics about the Nordic Region and the Nordic countries and makes it possible, amongst other things, to compare the Nordic countries on a number of parameters over time. Available online at www.norden.org/en/the-nordic-region/figures-and-statistics.

European and Global Sources

EAO, European Audiovisual Observatory (France): A European public service body comprising 35 Member States and the European Community, represented by the European Commission. Operates within the legal framework of the Council of Europe. Provides information about the European audiovisual industry: statistics, media law and policy, yearbooks and databases. Data on pay-TV revenue in Denmark come from the *EAO Yearbook 2011/volume 1: Television in 37 European States*.

EBU, European Broadcasting Union (Switzerland): Alliance of public service media organisations, with members in 56 countries in Europe and beyond. Its unit Media Intelligence Service (MIS) carries out research and analysis in the field of media. The report *Funding of Public Service Media 2011* (data accessed via SOU 2012:59, a Swedish Government Official Report; see reference list above) has provided data on publicly funded broadcasting organisations in Europe. Programming profiles in major Nordic TV public service channels are presented through data from EBU members' database at EBU Strategic Information Service, cleared by the providers in the Nordic region. Web site: www.ebu.ch.

Eurobarometer: Surveys from the Public Opinion Analysis sector of the European Commission. The standard Eurobarometer was established in 1973, and each survey consists of approximately 1,000 face-to-face interviews per country. Reports are published twice yearly. *Standard Eurobarometer 76, Media use in the European Union – autumn 2011* (country figures from the annex) presents data on media use and trust in media in the EU27 and candidate countries. Available at ec.europa.eu/public_opinion/archives/eb/eb76/eb76_en.htm.

Eurostat (Luxembourg): The statistical office of the European Union. Its task is to provide the European Union with statistics at the European level to enable comparisons

between countries and regions. The Eurostat database has provided data on Internet access and use in Europe. Available at epp.eurostat.ec.europa.eu/portal/page/portal/statistics/themes.

Freedom House (USA): Freedom House is an independent watchdog organisation that supports democratic change, monitors the status of freedom around the world, and advocates for democracy and human rights. Monitors the Freedom of the Press Index, an annual survey of media independence in 197 countries and territories, which assesses the degree of print, broadcast, and Internet freedom. More information at www.freedomhouse.org/report-types/freedom-press.

Institut für Medien- und Kommunikationspolitik (Germany): This institute for media and communication policy is an independent research and advisory institution in Berlin. Its media database, Mediendatabank, contains information on large media groups worldwide, and is available online at www.mediadb.eu.

ITU, International Telecommunication Union (Switzerland): The United Nations' specialised agency for information and communication technologies (ICTs). The ITU currently has a membership of 193 countries and some 700 private-sector entities. Global data from its database in this publication include ICT development index and Internet access and use in different regions: www.itu.int/ITU-D/ict/statistics/.

Ofcom (United Kingdom): Independent regulator and competition authority for the UK communications industries. Its annual *International Communications Market Report 2011* has provided data on daily TV viewing time and viewing of publicly funded channels in 2010 in a selected number of countries around the world. The report is available at stakeholders.ofcom.org.uk/binaries/research/cmr/cmr11/icmr/ICMR2011.pdf.

United Nations: *The Human Development Report*, an independent publication commissioned by the United Nations Development Programme (UNDP) and its database provide data on global development indicators, including the Human Development Index (HDI) and the Gender Inequality Index (GII). More information at hdr.undp.org/en/reports/.

Nordic Media Trends

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More Publications from Nordicom

Listed below are a number of publications from Nordicom covering public service media issues in the Nordic countries, Europe and the global arena.

A Nordic Public Service Media Map

A Nordic Public Service Media Map

Eva Harrie (compiled by) Nordicom, 2013, 97 p. (Nordic Public Service Media Map; 3), ISBN 978-91-86523-61-9.

Public Service Media from a Nordic Horizon. Politics, Markets, Programming and Users

Ulla Carlsson (ed.) Nordicom, 2013, 176 p. (Nordic Public Service Media Map; 2), ISBN 978-91-86523-60-2.

Public Service Media in the Nordic Countries – Facts & Figures

Eva Harrie (compiled by) Nordicom, 2012, 168 p. (Nordic Public Service Media Map; 1), ISBN 978-91-86523-37-4.

Other Publications Regarding Public Service Media

Exporting the Public Value Test. The Regulation of Public Broadcasters' New Media Services Across Europe

Karen Donders & Hallvard Moe (eds) Nordicom, 2011, 188 p. ISBN 978-91-86523-26-8.

Small Among Giants. Television Broadcasting in Smaller Countries

Gregory Ferrell Lowe & Christian S. Nissen (eds) Nordicom, 2011, 231 p., ISBN 978-91-86523-16-9.

Regaining the Initiative for Public Service Media. RIPE@2011

Gregory Ferrell Lowe & Jeanette Steemers (eds) Nordicom, 2012, 203 p., ISBN 978-91-86523-33-6.

The Digital Public Sphere. Challenges for Media Policy

Jostein Gripsrud & Hallvard Moe (eds) 2010, 168 p., ISBN 978-91-86523-02-2.

The Public in Public Service Media. RIPE@2009

Gregory Ferrell Lowe (ed.) Nordicom, 2010, 276 p., ISBN 978-91-978-91-86523-33-6.

From Public Service Broadcasting to Public Service Media. RIPE@2007

Gregory Ferrell Lowe & Jo Bardoel (eds) Nordicom, 2008, 259 p., ISBN 978-91-89471-53-5.

Cultural Dilemmas in Public Service Broadcasting. RIPE@2005

Gregory Ferrell Lowe & Per Jauert (eds) Nordicom, 2005, 330 p., ISBN 978-91-89471-32-6.

Broadcasting & Convergence. New Articulations of the Public Service Remit. RIPE@2003

Gregory Ferrell Lowe & Taisto Hujanen (eds) Nordicom, 2003, 335 p., ISBN 978-91-89471-18-0.

Available in PDF-format, free of charge, http://www.nordicom.gu.se/common/publ_pdf/81_ripe2003.pdf



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