

# Media Trends in the Nordic Countries

Newsletter from NORDICOM

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# Media use

## TV viewing in the Nordic countries in 2014

Television | Nordic February 2015

**Viewing of traditional TV continued to fall in Denmark and Sweden last year, while Finland reached its highest viewing time ever and Norway also noted an increase. This is shown in Nordicom’s comparisons of the 2014 TV data from the national survey institutes in the Nordic countries.**

The 2013 TV-meter reports showed a significant reduction in traditional TV viewing in all Nordic countries except Finland. In 2014, developments between the countries differ more greatly.

### *Highest viewing in Finland*

Around seven of ten Nordic people watch traditional television on a daily basis. Finland is on top with 73 per cent daily reach, and Sweden is last with 66 per cent. Daily reach remained stable in Finland, increased in Norway, and decreased in Denmark and Sweden. (Reach data for Iceland are not available.)

Finland also has the Nordic region’s most avid television viewers in viewing time, 184 minutes per day. Viewing time in Norway increased last year, from 168 to 174 minutes per day, after several years of decline. Television viewing increased in Iceland as well, but since Icelandic data emanate from a specific week instead of annual averages the results are more sensitive to individual television events. Both Denmark and Sweden saw a continuation of recent years’ decrease in viewing time. The Danish people watched 173 minutes per day (180 minutes in 2013), and Swedes 153 minutes per day (159 minutes in 2013).

**TV-viewing time in the Nordic countries 2004-2014 (minutes/day)**

	Denmark (Age 3+)	Finland (Age 10+)	Iceland (Age 12-80)	Norway (Age 12+)	Sweden (Age 3+)
2004	162	167	151	166	151
2005	152	169	147	164	146
2006	150	169	149	156	154
2007	148	166	126	154	157
2008	167	177	183	174	160
2009	189	176	158	184	166
2010	201	178	141	183	166
2011	198	178	136	178	162
2012	195	183	128	175	164
2013	180	182	118	168	159
2014	173	184	130	174	153

*Note:* TV-meter-data, except for Iceland 2004-2007 (diary). Yearly averages, except for Iceland (data for one week during autumn).

Sources: TNS Gallup Denmark, Finnpanel, Capacent, TNS Gallup Norge, MMS.

2014 was a year of major sports events, with both the Winter Olympics and the FIFA World Cup contributing to more viewing. The Danish report indicates that the Eurovision Song Contest (which

was held in Denmark) and the European handball championship with Denmark in the final also contributed to more TV time.

#### *Older watch more, younger watch less*

Older people, the group that spends the most time watching traditional television, increased as an audience throughout the Nordic countries in 2014. For children, adolescents and young adults, the trend is the opposite. Here, Denmark and Sweden stand for the largest decline in viewing – in all age groups except for the oldest – while the smallest drop is in Finland, and only among the young (aged up to 29 years). The largest drop is among Danish 12- to 18-year-olds, whose viewing time last year decreased by 21 minutes, equivalent to 21 per cent.

#### *Increased viewing of moving images*

With the growing range of digital services and increasing access to devices like tablets, traditional TV is experiencing more competition. Some of the national TV-meter reports are supplemented with other surveys showing that some TV viewing is moving from traditional viewing to other platforms and content, with the result that the viewing of moving images is overall stable or increasing.

For Finland and Sweden, the number of streaming starts for different web-TV services is reported. In 2014 in Finland, the average number of streaming starts per month was 41 million, up from 27 million in 2013 (including Yle Areena, MTV3's Katsomo and Nelonen Media's Ruutu). In Sweden, the number of streaming starts per month was 50 million in 2014, a slight increase from 49 million in 2013, and the average amount of time spent watching web TV per month amounted to just under 14 hours compared to 11 hours in 2013 (including the web-TV services of SVT, UR TV4, MTG TV and SBS Discovery).

In Denmark, DR Media Research estimates that 17 per cent of television viewing in 2014 consisted of streaming services, up from 12 per cent in 2013. That viewing of streaming services increased, while traditional viewership fell, means that the Danes watched about as much television and television-like content in 2014 as they did in 2013.

Sources: DR Audience Research Department/Gallup Denmark, Finnpanel, Capacent, TNS Gallup Norway, MMS (for links to sources and tables, see further below).

## **Fragmented TV viewing, but still large channels**

Television | Nordic March 2015

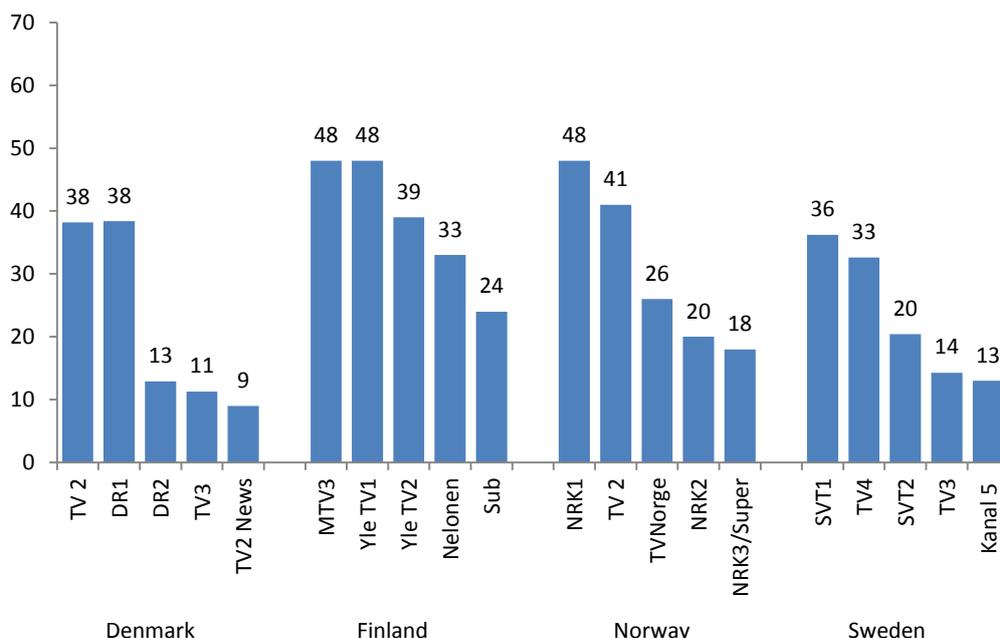
**Linear TV: Two television channels each in all the Nordic countries have about half of the respective countries' viewing time combined. And despite declining reach, three channels – of which two are in Finland – are watched by half the population on an average day. Comparing audience data in the Nordic countries over a ten-year period also shows that the largest channels then are still the largest now.**

Nordicom's overview of the overall linear TV viewing in 2014 shows that Finland and Norway watched TV slightly more than the year before, while Denmark and Sweden watched less. But has viewing traditional television changed in relation to the channels that have the greatest audience? What has happened over the past year, and what has happened in the past ten years?

*Three channels reach half the population every day*

Daily reach for the large TV channels shows a steady – for some rather drastic – decline over a ten-year period. But still, there are a number of channels that reach a great part of the population. The three largest – MTV3 and YLE TV1 in Finland and NRK1 in Norway – are seen by almost half (48%) the population in each country on an average day. In Denmark and Sweden, channel reach is lower. In Denmark TV2 and DR1 dominate, each with 38 per cent daily reach, while in Sweden 36 and 33 per cent of the population watch the leading channels SVT1 and TV4 on a daily basis.

**Daily reach for the top five TV channels in the Nordic countries in 2014 (share of population, per cent)**



Sources: TNS Gallup Denmark, Finnpanel, TNS Gallup Norway, MMS.

Last year, the daily reach of many of the Nordic major channels fell by one to two percentage points or remained at the same level. Reach data for Iceland are not available.

*Two channels per country = 40-50 per cent of viewing time*

In each country, two channels have significantly more viewing time than the others. The combined audience share for the two major channels ranges from 42 per cent in Sweden to over 80 per cent in Iceland, while the channels following them have audience shares of 4-8 per cent each. The exception to this is Finland, where Number 3, Nelonen, has 13 per cent of the viewing time.

The largest channels by audience share are more or less the same as those with the largest reach. The top channels are either public service or broad commercial TV channels (generalist channels).

**Combined audience share for the two largest channels in 2014 (share of viewing time, per cent)**

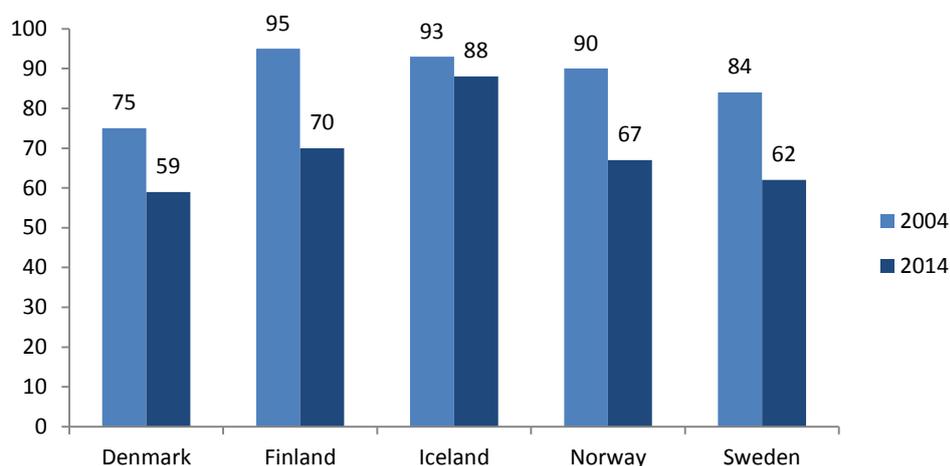
Country	Two largest
Denmark	46
Finland	44
Iceland	83
Norway	51
Sweden	42

Sources: TNS Gallup Denmark, Finnpanel, Capacent, TNS Gallup Norway, MMS.

### *Declining share for the five largest*

The five TV channels with the highest audience shares in 2014 are the same as the previous year. Several have kept their shares, while others have increased or decreased by one to two percentage points. Compared to ten years earlier the five major channels are still the same, although some have changed positions on the list. In Denmark, some of the smaller channels have been replaced over the years.

**Combined audience share for the five\* largest channels in 2004 and 2014 (share of viewing time, per cent)**



\* Iceland = the three largest channels.

Sources: TNS Gallup Denmark, Finnpanel, Capacent, TNS Gallup Norway, MMS.

The great difference compared with 2004 is that then, before the digitalization of terrestrial networks, the five largest channels stood for an overwhelming majority of viewing time, from 95 per cent in Finland to 75 per cent in Denmark. Thus, only 5 per cent of viewing time in Finland was spent on “other channels” (now 30 per cent); in Denmark this figure was 25 per cent (now 41 per cent).

But even though large generalist TV channels have lost market shares to narrower ones, the five leading channels – and as shown above, especially the two largest – maintain a considerable share of viewing time.

**Download tables** from Nordicom’s [table database](#) (Excel files):

[Daily TV reach 2004-2014](#)

[Daily TV viewing time, total 2004-2014](#)

[Daily TV viewing time by age 2005-2014](#)

[The five TV channels with largest daily reach 2014. Reach 2004-2014](#)

[The five TV channels with the largest audience shares 2014. Shares 2004-2014](#)

[Access to various media equipment at home 2003-2013](#)

[Nordic TV-meter surveys, basic facts](#)

**About the statistics:** Nordicom’s compilations are based on TV-meter data from national survey institutes responsible for the official TV surveys. The surveys measure traditional TV viewing, but the reports also present to various extents other surveys and estimates for non-linear viewing.

**Sources:** The TV data are compiled mainly from the following institutes and reports:

DR Audience Research Department: [Media Development reports](#) (TV-meter data by TNS Gallup Denmark)

Finnpanel: [Television viewing in Finland 2014](#) (see [TV year 2015 press event](#))

Finnpanel: [Results from the TV audience measurement](#)

Capacent, Iceland

TNS Gallup Norge: [TV-seing 2014](#) + previous reports (for [TV-data in English](#), see [medianorway](#))

MMS: [Annual reports](#) (in Swedish)

## “The new media reality is now commonplace”

Electronic media | Denmark March 2015

The DR Media Research Department annually publishes a report on the use of electronic media in Denmark. *Media Development 2014* is now available, and one of its main points is that streaming is still in the process of somewhat taking over audiences from traditional television.



“In 2013, streaming went mainstream in Denmark. In 2014, Danes became more inclined to take control over what they see on screen, so streaming now accounts for 17% of their TV viewing time. In other words, the new media reality is now commonplace,” says Dennis Christensen, Deputy Head of Research in DR Media Research. The report shows that the Danes’ use of streaming has grown by 38 per cent, while the use of traditional TV has declined by 4 per cent.

In recent years, there has been significant development among 60-74-year-olds as regards new digital devices. Access to a smartphone shows massive growth. Forty-four per cent of people aged 60-74 years have their own smartphones, a percentage that has almost doubled in just 18 months. Besides smartphones, particularly tablets have gained in popularity in the homes of older people: 42 per cent of Danes aged 60 to 74 years have access to a tablet at home. In 2012 and 2013 this group’s access to a tablet at home was 10 and 23 per cent, respectively.

When it comes to radio listening, the report shows some unexpected results. Danish teenagers consume more radio each day, and the decline in radio consumption in general is the lowest in years. Ninety-three per cent of Danes used the radio medium weekly in 2013, a figure that fell only slightly to 92 per cent in 2014. As for listening time, the average Dane listened to radio for 117 minutes a day in 2013, and 116 minutes in 2014. Teenagers, however, have actually increased their listening time from 55 to 59 minutes.

[Media Development 2014 is available via DR's website](#)

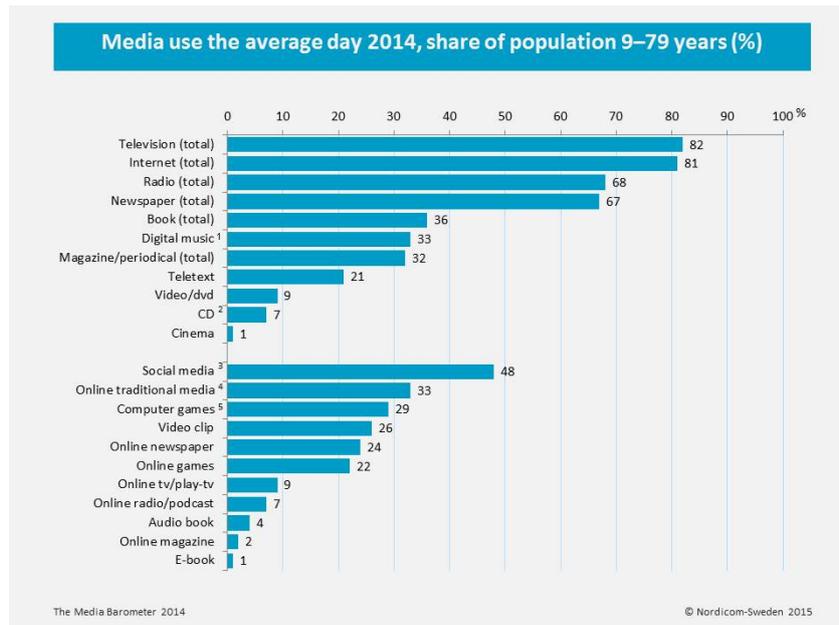
**More information:** *Media Development 2014* provides a status on Danes’ use of media content – on TV and radio as well as the Internet. Among other things, the report looks into both young and older people’s use of mobile units, how the population channel surfs, and the use of secondary devices when watching TV. The report also contains a thematic section, which looks at changes in Danish TV-viewing habits. Furthermore, media researchers speculate on the current trends in media technology, business models and viewer behavior.

# The media day 2014: Book, web TV and digital radio increases

Media use | Sweden March 2015

**In 2014 the consumption of newspapers, television and radio online continued to increase, but the use of traditional television, radio and paper products was still considerably higher. This is reflected in the first results from Nordicom-Sweden's annual media use survey, the Media Barometer, for 2014.**

The use of media on an average day in 2014 shows no dramatic changes from 2013. Based on the media development, the first results from the annual media use survey appear reasonable.



Source: Nordicom-Sweden's Media Barometer 2014 - the first results

[Download the graph in PDF-format](#)

[Compare data to "Media use the average day 2013" - download in PDF-format](#)

## *Book reading has increased*

Book reading on an average day increased from 34 per cent in 2013 to 36 per cent in 2014. The increase has occurred in several groups: women (+4 percentage points), children (+11 percentage points) and 15-24-year-olds (an increase from 29 to 37 per cent, i.e. +8 percentage points). This result is in line with sales data for 2014, presented by the Swedish Publishers' Association and the Swedish Booksellers' Association, which show a decline in total book sales but increased sales of children's books. One possible explanation for this, highlighted in their report, is that discussions about the Swedish results in the PISA study have put book reading in focus.

## *Internet use is growing among the older middle-aged*

It is especially when several years of surveys are combined that we see patterns in media use. What appears stable can be explained in part by how the results are reported. The presentation of "totals" – for example, using the entire population (9-79 years) and gathering several technical platforms together and presenting them under one medium – indicates stability over time. But when the population is divided into different groups and platforms, changes in media use appear.

One pattern is that Internet users are growing older. That is, those who were in their twenties when the world wide web developed in the mid-1990s have grown up and entered the age group of 45-64 years,

the so-called “older middle-aged”. This addition of experienced Internet users into this age group increases its share of Internet users and media use online. For example, between 2013 and 2014, 45-64-year-olds increased their online newspaper reading by eight percentage points and viewing of online videos by five percentage points. Things to consider include the fact that people in this group of older middle-aged have embraced both the Internet and digital platforms alongside having grown up with the media in their traditional forms.

#### *Web TV and digital radio is increasing among the younger*

The growing use of web TV and web radio/podcast is not found with those in the 45-64-year age group; the increase in these online media lies with those younger than 45 years. For radio, the preliminary results indicate that it is primarily the use of podcast that has increased in the ages of 15-44 years. There are no indications of gender differences.

The main report from the 2014 Media Barometer survey is published at the end of May/early June. The report is in Swedish, but a collection of basic tables in English is published online.

[The Media Barometer Fact & Figures: Basic tables, in English](#)

[The Media Barometer 2014 - the first results, in Swedish](#)

**About the survey:** The Media Barometer is an annual reach survey, providing data on the share of the Swedish population that, on an average day during the respective year, has used a number of different media: radio, television, teletext, film, music, video games, newspapers, magazines and periodicals, as well as advertising and media on the Internet and mobile phone. The aim is to describe the trends and changes in people’s media consumption. The survey is conducted through telephone interviews with a representative sample of the total population aged 9-79 years. In 2014, 6,010 people were interviewed (an increase from 4,797 in 2013). The Media Barometer started in 1979, and has since been conducted annually.

## **Internet in Europe increases, but differences between countries continue**

Internet | Europe January 2015

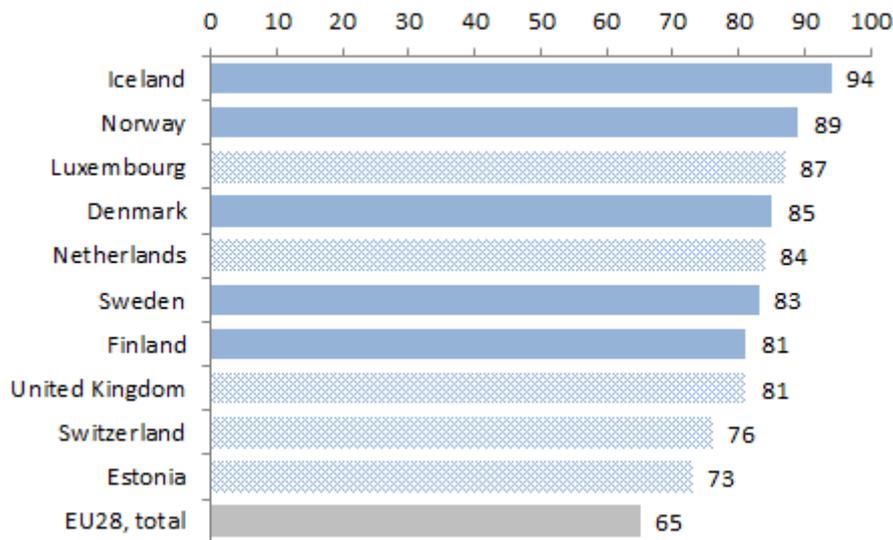
**Internet use continues to grow in Europe. Nearly two-thirds of Europeans aged 16-74 use the Internet daily, according to 2014 data from Eurostat. But the percentage of users differs widely between countries, ranging from just over 30 per cent of daily users in Romania to around 90 per cent in Iceland and Norway.**

The annual Eurostat ICT statistics are based on data collected from national statistical offices in the EU countries plus Iceland, Norway and Switzerland. Data show that both access to and use of the Internet are increasing throughout Europe, but there are still clear variations between countries. Ranking highest on most lists are a number of countries in northern Europe - including the five Nordic countries - while Bulgaria, Romania and Greece are examples of countries with lower Internet access and use.

#### *High Internet access and use in the Nordic countries*

Eight out of ten EU households have access to the Internet. In the Nordic countries the majority of households have Internet access, from 90 per cent in Finland and Sweden to 96 per cent in Iceland. Internet use is also widespread. Iceland takes the lead, with 94 per cent of its population claiming to be daily users.

**Individuals using the Internet on average daily or almost every day in Europe 2014: top ten countries plus EU28 (share of individuals aged 16-74 years, per cent)**



Source: Eurostat database.

Download [Daily internet use 2004-2014 in Europe](#) (Nordicom table database, Excel)

Download [Daily Internet use by sex and age 2004-2014 in the Nordic countries](#) (Nordicom table database, Excel)

### *18 per cent non-users in EU28*

Still, there are people who never use the Internet. Of Europeans aged 16-74 years, 18 per cent are non-users, which is a significant reduction from 43 per cent in 2006. Again, there are differences between countries. In Romania and Bulgaria one in three people are non-users, while this group represents only a few per cent in the Nordic countries (1-6 per cent).

### *One-fifth in EU28 use cloud services for storage*

Eurostat also presents the share of people using cloud services to store documents, photos, music or other files. Denmark tops the list, with 42 per cent of its population saving files using cloud services, followed by Norway with 40 per cent and the United Kingdom with 38 per cent. For other Nordic countries, the share is 35 per cent in Sweden, 34 per cent in Iceland and 24 per cent in Finland. Most popular are the free-of-charge cloud services – only 11 per cent of users paid for Internet storage space - and the most common purpose for this was to store photos.

Links to Eurostat, Nordicom tables and national reports/databases:

EUROSTAT [Internet and cloud services - statistics on the use by individuals](#) (article)

EUROSTAT [Information Society Statistics](#) (database, see Industry, Trade and Services)

NORDICOM [Media Statistics: Nordic and International](#) (table database)

Statistics Denmark [Information Society: ICT use by households and individuals](#) (database)

Statistics Finland [Use of information and communications technology by individuals 2014](#)

Statistics Iceland [Information technology](#) (database)

Statistics Norway [ICT usage in households, 2014](#)

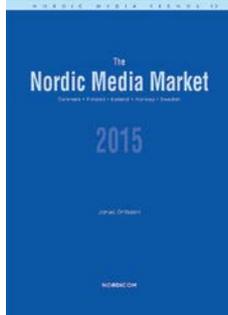
Statistics Sweden [Use of computers and the Internet by private persons in 2014](#)

**About the statistics:** The national statistical offices within the EU (plus non-members Iceland and Norway) conduct annual surveys on individuals' use of computers and the Internet. The surveys are part of a European project, and the data are reported to Eurostat. The statistics can therefore, in broad terms, be compared between countries. The surveys cover 16- to 74-year-olds, and in some countries older people as well. The data above refer to use during the second quarter of 2014.

# The Media Market

## The Nordic Media Market 2015

Media Market | Nordic countries March 2015



The media industries in the Nordic countries have often been used as examples of media industries that have been able to carry out the commercially delicate – but from a democratic perspective utterly important – task of providing both financially viable and socially meaningful media content. But is this still a valid description? Given the fundamental reshaping of the global media landscape in recent years, are the media structures of the Nordic countries still distinguishable from those in the rest of the Western world?

*The Nordic Media Market 2015* presents a comparative analysis of the news media industries of Denmark, Finland, Iceland, Norway, and Sweden. Building on a substantial amount of industrial data, this timely report explores whether there is still reason to speak of a Nordic media model. Author: Jonas Ohlsson, Nordicom.

[Read more and order](#)

**About:** *The Nordic Media Market 2015* is the thirteenth publication in Nordicom's [Nordic Media Trends series](#), which documents, describes and analyses developments in the media sector from a Nordic perspective.

## EAO Yearbook:

### Market stagnation despite growth in VoD and pay TV

Media Market | Europe January 2015

**The European audiovisual market experienced a year of stagnation in 2013. And worldwide the European audiovisual media groups have lost more than five per cent of their global market share over the last five years, according to the EAO Yearbook 2014.**

The European Audiovisual Observatory has published the 20th edition of its yearbook on television, cinema, video and on-demand audiovisual services. The publication covers 40 European states and offers country by country data as well as the pan-European picture and some worldwide comparisons.

#### *Growth in pay TV and VoD*

The European market has seen a rapid rise in on-demand services in 2013. But still the audiovisual sector in Europe experienced a stagnation, with a fall in market generated revenues from 2012 to 2013. The sector most affected is physical video (-11.3%), but for example cinema receipts and video games also experienced a downturn. The growth in the activities of pay TV platforms (+2.7%) and in the production of online video-on-demand services (+46.1%) could not compensate for the decline in the other activities.

### *Loss for European audiovisual groups*

The stagnation of the European market and the fact that the two growth areas are mainly controlled by American groups means that the European groups lost 2 per cent of their global market share between 2012 and 2013 and a total of 5.3 per cent between 2009 and 2013.

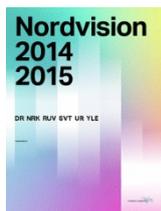
[Read press release 21/01/2015](#)

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

## **Nordic TV partnership breaks all records**

Television | Nordic March 2015

**2014 was a record-breaking year for Nordvision. Collaboration for children's programmes in particular increased, according to Nordvision's annual report for 2014/2015.**



The TV and media collaboration between Nordic public service broadcasters DR, NRK, RÚV, SVT, UR and Yle has shown its best results in its 55-year history, Nordvision reports. The volume of co-productions, programme exchanges, archive clips and news exchanges among the partners is rising. Furthermore, cooperation in developing and exchanging formats is increasing.

The broadcasters' collaboration rests on seven genre groups - children, drama, factual programmes, culture, youth, education and investigative journalism - plus the programme exchange collaboration and the Nordvision secretariat in Copenhagen.

The greatest advance has been in children's programmes, which went from 650 co-productions in 2013 to 950 co-productions in 2014.

[Read more and download the annual report](#)

**About:** Nordvision is a TV and media partnership involving DR (Denmark), NRK (Norway), RÚV (Iceland), Yle (Finland) and SVT and UR (Sweden). The annual report provides key data on co-productions and programme exchange for 2014 among the Nordic public service broadcasters.

## The Nordics best digital performers in new EU index

Digitalisation | Europe March 2015

**The European Commission has created an index to monitor Member States' progress towards a digital economy and society. Denmark, Sweden and Finland rank respectively first, second and fourth among the EU countries.**

The new Digital Economy and Society Index (DESI) will help in the assessment of Member States' progress towards the objectives of the Digital Agenda for Europe, giving a picture of each country based on five dimensions:

- *Connectivity* shows how widespread, fast and affordable broadband is;
- *Human capital* includes, e.g., share of net users, basic digital skills and share of ICT specialists;
- *Use of the Internet* includes a variety of activities, such as news reading and online shopping;
- *Integration of digital technology*, for example e-invoices and cloud-based services; and
- *Digital public services*, for example e-government and e-health.

The index combines more than 30 indicators and uses a weighting system to rank each country based on its digital performance.

### *Nordic region tops four of five dimensions*

Denmark, Sweden, Finland and the Netherlands fall into the cluster of high-performance countries. The matrix below shows the Nordic countries' rankings in the overall index and for the five dimensions. Denmark is best in the EU in the integration of digital technologies and the use of digital public services in the community (e-government, e-health services), while Sweden is on top when it comes to Internet use and Finland ranks first for human capital (Internet skills). As for the connectivity dimension, first place is held by Belgium.

**DESI Index: The Nordic countries' rankings among the EU28**

Rank	Denmark	Sweden	Finland
<b>DESI Index, total</b>	<b>1</b>	<b>2</b>	<b>4</b>
<i>Five dimensions:</i>			
Connectivity	5	4	10
Human Capital	3	2	1
Use of Internet	2	1	9
Integration of Digital Technology	1	2	5
Digital Public Services	1	5	4

Source: DESI Index (European Commission).

More detailed results for the indicators are included in the different areas presented in the profiles for each country. Data are also available for Iceland and Norway, although they are not part of the DESI compilation.

[Read more about DESI](#)

[Country profiles EU28 plus Iceland and Norway](#)

# Nordic Media Policy

## DAB development in the Nordic countries

Media Policy, Radio | Nordic countries March 2015

**During the spring, the Norwegian Government will decide when a transition to DAB radio can be concluded. A digital radio switchover is also on the agenda in Denmark and Sweden: in Denmark there has been a political decision to transition to DAB, while in Sweden a Government Official Report has suggested a technology shift for terrestrial radio.**



Since the mid-1990s, radio has been broadcast in DAB in the Nordic countries. During this time, a possible switchover to terrestrial digital radio in the form of DAB has been the subject of several government inquiries and debates. Should the analogue FM networks be switched off? And is DAB/DAB+ the future technology of radio?

### *For and against a switchover to DAB*

Switching the infrastructure of a medium is a major investment for both industry and users. Opinions differ as to whether DAB is a good and necessary investment, but regardless of whether they are for or against it, all parties are interested in creating clear conditions for the radio industry.

Advocates of a switchover point out that DAB offers space for more channels and players in the market. This will also create added value for listeners. Moreover, they emphasize that distribution exclusively through DAB will be cheaper than continuing with current FM parallel distribution, and that DAB networks are stable for contingency purposes, compared to other digital solutions.

Opponents argue that there is neither a need nor a market for more radio channels. Other arguments are that DAB is too expensive for both the radio industry and listeners, since all equipment would have to be replaced. The opponents also see DAB technology as outdated, and believe that the future of digital radio is rather on the Internet and mobile phones.

### *Straggling development in the Nordic countries*

In Norway and Denmark there have been political decisions to close down their respective FM networks and switch to DAB. In Sweden there is a proposal for a transition to DAB, which recently completed its public consultations. Finland and Iceland currently have no plans to close down their FM networks. Finland, which said no to DAB in 2005, broadcasts terrestrial digital radio in the digital TV net (DVB-T), while RÚV in Iceland has been broadcasting the music channel Rondo in DAB since 2004.

### *Terms for closing down FM transmissions*

The transition to digital terrestrial networks has been made conditional to a number of criteria. In Norway and Denmark, as well as in the proposal in Sweden, half of the listening should take place on digital platforms, and there should be suitable solutions for DAB radio in the car before an analogue shutdown. In Norway and Sweden the digital network must expand to the same coverage as the FM network, and listeners should be offered added value through supply and technology (Denmark has no

requirement for digital coverage, since the DAB network already had high coverage when the DAB decision was taken).

#### *Norway first mover*

In 2011, the Norwegian Government submitted a [government bill on digital radio](#) which ruled that the FM network can be closed down by 2017, subject to five conditions – three of which are absolute – to be fulfilled by January 2015. If these conditions are not met, the FM shutdown will be postponed until 2019.

January 2015 has now passed, and in February, the Norwegian authorities reported on the outcome regarding the conditions: [according to the National Communications Authority](#) (Nkom), the criteria for the national DAB network coverage have been achieved. The [Norwegian Media Authority](#), which has monitored how the shutdown conditions have been met over the period, states in a final report that the level of daily digital listening has been fulfilled. Moreover, the report describes the status of the two criteria concerning DAB radio in cars and added value for listeners, but the final assessment of whether these objectives have been reached will be made by the Government.

During the spring, the Norwegian Government will decide if all conditions have been met and, when this is deemed to be the case, the analogue network can be shut down. If a decision is taken to shut down FM in 2017, Norway could become the first country in the world to switch to DAB.

As for local radio, trial broadcasts have begun on a third DAB network, divided into 37 regions, a handful of which have started trial transmissions. A new report to Parliament (Storting) concerning the digitization of local radio is expected in 2015.

#### *Denmark expanding and upgrading*

The last two [Danish media political agreements](#) (Media Political Agreement 2012-2014 and 2015-2018) establish that the FM network will be switched off in 2019, provided that at least half of radio listening – including listening in cars – takes place on digital platforms by the middle of 2018.

In March 2014 the parties behind the media agreement presented an adjusted [roadmap for the expansion of digital radio](#) in Denmark. In the plan's first phase, the number of DAB stations will increase. Among other things, a third regional DAB net will be built and the regional licenses will be awarded to commercial operators. In the second phase, the existing networks will be upgraded from DAB to DAB+, which should also allow for more private players. In addition, the public service (DR) and the national broadcasting commercial operators will change networks with each other to provide DR with the possibilities for regional broadcasting. Phase 2 is to start no later than 2018, but the roadmap also includes a market survey in late 2015, the outcome of which could affect the timetable.

#### *In Sweden, digital radio proposal under scrutiny*

A [government bill](#) in 2013 posed the question of the digitalization of terrestrial radio. This led to the Government appointing a special investigator (also called a digital radio coordinator) to work for a shift from FM broadcasts to terrestrial digital radio. The stated starting point was that FM broadcasts should be closed down in 2022 and that the transition to DAB should be market-driven.

At the end of 2014, the coordinator presented a [roadmap for digitalizing terrestrial radio](#) in Sweden. According to the plan, FM broadcasting could be shut down in 2022 if four conditions – similar to those in Norway – have been met by March 2020. Even if the conditions are not fulfilled, it is

suggested that FM broadcast end in 2024. The proposal has recently been [circulated for public consultation](#), and a political decision on the plan is expected during 2015.

In 2014, the Swedish National Audit Office initiated [an audit of the proposal](#) on the switchover to DAB. The aim is to examine whether the State is taking into account the needs of its citizens and whether the implications for society have been made sufficiently clear, as well as to provide Parliament with more information for their decision. The audit report is scheduled to be published in April of this year.

**About DAB/DAB+:** The acronym stands for Digital Audio Broadcasting. DAB+ is a modern and technologically upgraded version of DAB. The Nordic countries' DAB broadcasts started in the original DAB format, but the networks are upgraded to DAB+ in pace with the expansion. Above, DAB is used as the general term, even in reference to DAB+.

#### NORWAY

[Stortingsmelding 8 2010-2011: Digitalisering av radiomediet](#) [Digitization of radio]

The Norwegian Communications Authority: [Coverage conditions for FM switch-off fulfilled in Norway](#)

The Norwegian Media Authority: [Digital switchover in Norway soon to be concluded](#) (PDF)

The Norwegian Media Authority's theme page in Norwegian: [Fra FM til digital kringkasting](#). [From AM to digital broadcasting]

#### DENMARK

[The Danish Ministry of Culture: Media Political Agreements](#) (in Danish)

[The Danish Agency for Culture theme page: Digital radio](#) (in Danish)

[Justeret køreplan for udbygning of digital radio in Denmark](#) [Adjusted roadmap for the expansion of digital radio]

#### SWEDEN

[SOU 2012/13:164 Bildning och tillgänglighet - radio och tv i allmänhetens tjänst 2014-2019](#)

[Government bill: Formation and availability - public service radio and television 2014-2019]

[SOU 2014: 77 From Analogue to Digital Terrestrial Radio - A plan from the Digital Radio](#)

[Coordinator](#), (English summary in PDF)

[SOU 2014:77 Från analog till digital marksänd radio - En plan från Digitalradiosamordningen](#) (Swedish)

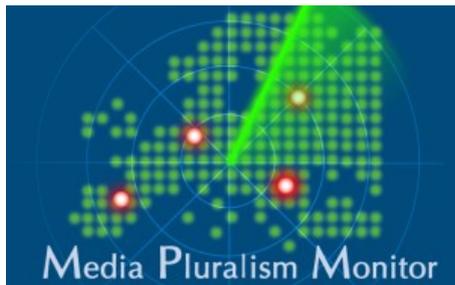
[Swedish National Audit Office: Ongoing investigation - State management of the transition to digital radio](#) (in Swedish)

# Media, Democracy and Freedom of Expression

## Media Pluralism Monitor Report

Media Pluralism, Media Freedom | Europe March 2015

**The Centre for Media Pluralism and Media Freedom has carried out a pilot-test implementation of the Media Pluralism Monitor, with the aim to assess the risks to media pluralism in a number of EU countries. The result for Denmark, the only Nordic country included in the study, shows a low/medium risk for media pluralism.**



The aim of the Media Pluralism Monitor, MPM, as a measurement tool is to assess the risks to media pluralism in the countries monitored. The examined risk domains are: basic domain, cultural pluralism in the media, geographical pluralism in the media, pluralism of media ownership and control, political pluralism in the media and pluralism of media types and genres.

The implementation was conducted in nine EU Member States: Belgium, Bulgaria, Denmark, Estonia, France, Greece, Hungary, Italy and the UK. The application of the MPM2014 demonstrates that there are various risks for media pluralism across the selected countries and every country has a specific weakness that creates high scores, meaning high risk. Due to the yet unfinished design of the MPM, in these cases a further investigation is needed to understand whether the high score means a clear and present danger for media pluralism, or whether it is a false positive.

In 2015 the CMPF is going to implement a “fine-tuned” version of the MPM2014 to the remaining 19 EU countries.

[Read more about MPM2014](#)

[Read the country report for Denmark](#)

## World Press Freedom Index 2015

**In February, Reporters without Borders published its annual Press Freedom Index. Seen to the world's total score, there was a drastic decline in freedom of information in 2014, according to the organization. The Nordic countries top the list, despite weaker scores.**



The index ranks the performance of 180 countries according to a range of criteria that include media pluralism and independence, respect for the safety and freedom of journalists, and the legislative, institutional and infrastructural environment in which the media operate. The index aims to provide a clear picture of the press freedom situation in individual countries and the world at large.

*Nordic countries at the top of the list*

Finland, which has been in first place for five years in a row, has kept its position, followed by

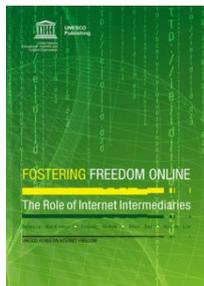
Norway (up one place) and Denmark (up four places). Sweden is in fifth place (up five places). Compared to last year the Nordics have received lower scores, but have still improved their positions on the list. Their climb upwards is explained by other countries having become worse. Iceland, which in last year's index was ranked Number 8, is now down to 21. Seen to larger regions, Europe leads the Freedom of Information list, while North Africa and the Middle East are on the other end of the scale.

[Reporters without Borders: World Press Freedom Index 2015](#) (report, analysis and interactive map)

## UNESCO Internet freedom series: *Fostering Freedom Online*

Freedom of Expression, Internet | International January 2015

**The report *Fostering Freedom Online: the Role of Internet Intermediaries* focuses on Internet service providers, search engines and social networking platforms. It examines how this recent phenomenon of Internet intermediaries impacts on freedom of expression and associated fundamental rights such as privacy.**



The goal of this report is to shed light on how Internet intermediaries both foster and restrict freedom of expression across a range of jurisdictions, circumstances, technologies, and business models.

Based on three case studies across ten countries, the authors highlight challenges and opportunities for Internet intermediaries in respecting and protecting online freedom of expression.

### *Findings and recommendations*

The research shows that Internet intermediaries are heavily influenced by states' legal and policy environments, but do have leeway in many areas of policy and practice affecting online expression and privacy.

The findings also highlight the challenge presented by the situation that many state policies, laws, and regulations are – to varying degrees – poorly aligned with the duty to promote and protect intermediaries' respect for freedom of expression.

The research also recommends specific ways that intermediaries and states can improve the respect for Internet users' right to freedom of expression, through promoting adequate legal frameworks and policies consistent with international norms, multi-stakeholder policy development, transparency of governance, accountability in self-regulation, mechanisms for remedy, and public information and education.

[UNESCO press release 19.01.2015](#)

[Download: Fostering Freedom Online: the Role of Internet Intermediaries \(PDF\)](#)

[Previous two titles in UNESCO Series on Internet Freedom](#)

**About:** The publication is a joint initiative by UNESCO, the Open Society Foundations, the Internet Society, and the Center for Global Communication Studies at the University of Pennsylvania's Annenberg School for Communication. The case study research, collaboratively delivered by 16 international researchers led by Ms Rebecca MacKinnon and Mr Allon Bar, as well as 14 members of the International Advisory Committee, covers three categories of intermediaries (ISP, search engines, social networks) and ten countries (China, India, Brazil, Egypt, Kenya, the US, the UK, Germany, Hungary and Russia).

## Research Articles, Open Access



### **Nordicom Review 2/2014**

[The whole publication](#)

Reading tips:

[The Legitimacy of Public Service Broadcasting in the 21<sup>st</sup> Century. The Case of Scandinavia](#) [Håkon Larsen]



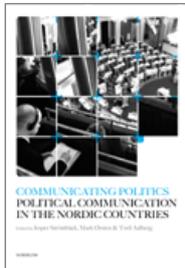
### **Nordicom Information 4/2014**

[The whole publication](#) (Scandinavian languages and English)

Reading tips:

[As it Happens. How Live News Blogs Work and their Future](#) [Karin O'Mahony]

## Anthologies, Open Access



### **Communicating Politics. Political Communication in the Nordic Countries**

The anthology *Communicating Politics. Political Communication in the Nordic Countries* (2008) is now available as open access (PDF).

Editors are Jesper Strömbäck, Mark Ørsten and Toril Aalberg.

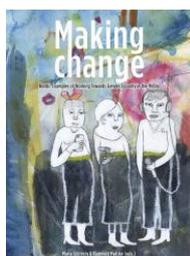
[Read more and download](#)



### **Media Innovations. A Multidisciplinary Study of Change**

The anthology *Media Innovations* (2013) is out of print but is available as open access (PDF). Editors are Arne H. Krumsvik and Tanja Storsul.

[Read more and download](#)



### **Making Change. Nordic Examples of Working Towards Gender Equality in the Media**

This publication (2014) presents a collection of inspiring media practices in the Nordic region and a compilation of comparative data on gender equality in the Nordic media sector. Editors are Maria Edström and Ragnhild Mølster. Available in PDF-format and print.

[Read more, order or download](#)

## Media Trends in the Nordic Countries

**Editor:** [Eva Harrie](#)

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Nordicom is an institution within the Nordic Council of Ministers.

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

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

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