



EPRA/2015/05c

41<sup>st</sup> EPRA meeting  
Berne, 14-15 May 2015

### **Ad-hoc Working group 3**

### **Research & Regulators: Towards an evidence-based approach**

Final output document<sup>12</sup>

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## **1. Introduction**

The ad-hoc working group of the EPRA meeting in Berne, dedicated to research needs and practices of regulatory authorities in Europe, was the first occasion that EPRA discussed this important subject in a meeting. The reason behind the decision to include it in the [EPRA Annual Work Programme](#) for 2015, dealing with the ultimate goals of media policy and the impact of economic and technological changes of the digital era, lied in the perception of the growing dependency of regulatory authorities on a robust knowledge-base to fulfil their missions in the increasingly complex media environment.

The session that took place on the first day of the [41<sup>st</sup> EPRA meeting in Berne](#) and was chaired by EPRA Vice-Chair Monica Ariño, offered an opportunity to confront constructively views of different sized regulators and academia. Presentations of the panellists [Prof. Dr. Manuel Puppis](#) of the University of Fribourg/ECREA, [Alison Preston](#) from Ofcom UK, [Marita Berqtun](#) from the Norwegian Media Authority, and [Hüseyin Demirbilek](#) from RTÜK, Turkey, were followed by a lively discussion during which several members took the floor. The discussion was backed by the outcome of a survey among EPRA members on the areas where they most often seek for research data and findings, their approaches to collecting and analysing data, the amount of funding and human resources they dedicate to research, the principles/rationales behind their research projects, and the extent to which the policies and decisions are based on the research

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<sup>1</sup> **Disclaimer:** This document has been produced by the EPRA, an informal network of 52 regulatory authorities in the field of broadcasting. It is not a fully comprehensive overview of the issues, nor does it purport to represent the views or the official position of EPRA or any member within the EPRA network.

<sup>2</sup> The earlier version of the paper published on 8 May 2015 is supplemented by a summary of the discussion that took place in the ad-hoc Working group 3: "Research & Regulators: Towards an evidence-based approach" on 14 May 2015 in Berne at the 41st EPRA meeting.

outcomes. The survey, which was conducted in April 2015, was complemented by results of an earlier EPRA internal inquiry with a slightly narrower scope.

The questionnaire circulated in April 2015 to EPRA members received answers from the following 30 regulatory authorities<sup>3</sup>: Communications Regulatory Agency (BA); Conseil supérieur de l'audiovisuel (CSA - BE); Flemish Regulatory Authority for the Media (VRM - BE); Federal Office for Communications (CH); Cyprus Radio Television Authority (CY); Council for Radio and TV Broadcasting (CZ); Directors' Conference of the Media Authorities (DE); Technical Surveillance Authority (EE); National Authority for Markets and Competition (CNMC - ES); Audiovisual Council of Catalonia (CAC - ES); Conseil supérieur de l'audiovisuel (FR); Ofcom (GB); National Council for Radio and Television (GR); National Media and Infocommunications Authority (HU); Agency for Electronic Media (HR); Broadcasting Authority of Ireland (IE); Communications Commission of the Isle of Man (IM); Agcom (IT); Radio and Television Commission of Lithuania (LT); National Electronic Media Council (LV); Agency for Audio and Audiovisual Media Services (MK); Broadcasting Authority (MT); Commissariaat voor de Media (NL); Norwegian Media Authority (NO); National Broadcasting Council (PL); National Audiovisual Council (RO); Regulatory Authority of Electronic Media (RS); the Agency for Communication Networks and Services of the Republic of Slovenia (SI); Broadcasting and Retransmission of the Slovak Republic (SK) and the Supreme Council for Radio and TV (TR).

Additional insight was provided by the responses to an earlier questionnaire on the research needs of regulators<sup>4</sup>, which had been circulated to the EPRA network in 2013 to collect relevant facts for a workshop organized by ECREA, the European Communication Research and Education Association, in Manchester on 25 October 2013. This very brief online survey had collected nine responses from: Communications Regulatory Agency (BA); Flemish Regulatory Authority for the Media (VRM - BE); Federal Office for Communications (CH); Directors' Conference of the Media Authorities (DE); Audiovisual Council of Catalonia (CAC - ES); Agency for Electronic Media (HR); Second Authority for Television and Radio (IL); Norwegian Media Authority (NO) and the National Broadcasting Council (PL).

The present paper is based on the responses to the two EPRA questionnaires and the highlights of the discussion at the ad-hoc Working Group 3 session at the 41<sup>st</sup> EPRA meeting in Berne. Its aim is to provide a short analytical summary on the use of research in the regulatory practice of EPRA members, the type of research input they most often need, the resources dedicated to internal or external research, on recent research projects they are conducting, and on proposals for related efforts at EPRA level. The identified common patterns and other significant highlights are illustrated with examples extracted from the responses to both

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<sup>3</sup> For further information, please check the full survey results on the EPRA-website: (EPRA members only)  
<http://www.epra.org/surveys/wg3-berne-research-and-regulators-towards-an-evidence-based-approach/results>

<sup>4</sup> For further information, please check the full survey results on the EPRA-website: (EPRA members only)  
<http://www.epra.org/surveys/two-urgent-questions-on-research-needs-of-broadcasting-regulators/results>

surveys and those provided by the discussants at the working group session. The structure of the summary roughly mirrors the structure of the last survey.

## 2. Importance and Implementation of Research

While it appears from the replies of the EPRA members that the research activities increasingly help them to ground their decisions and policies, there is a divergence between those that use research on a regular basis and those that refer to it only occasionally when the nature of the problem requires additional information and insight. At the opposite ends of the spectrum there are the regulators such as Ofcom in the UK, committed to be an evidence-base regulator, an orientation stemming from its statutory duties and regulatory principles, and regulators admitting that research findings are not broadly used in their decision- and policy-making as they are referring to them only in "borderline cases" or use them as guidelines in clarification of uncertainties (e.g. RRTV-CZ, CBR-SK). Most of the respondents however claim that research is generally forming the important basis for their decisions and policies. As an example, the Broadcasting Authority of Ireland states that *"Research is a key activity for the BAI in guiding and planning all aspects of its work. It generally underpins the development of broadcasting policy as well as the formulation and review of broadcasting codes and rules. Our research activities support the achievement of the BAI's strategic objective of continued emphasis on evidence-based decision making, informed by sound data, information and knowledge"*. In France, the need to provide for studies has been acknowledged by the recent amendment of the Broadcasting Act (Act of 15 November 2013 on the independence of public broadcasting) which demands that the CSA provides for an impact assessment, in particular an economic one, prior to agreeing on a substantial change of financing of a TV or radio service (on the terrestrial network).

It was also underlined that even if research findings may not appear as immediately useful, they can bring new ideas and contribute to debate (CSA-BE, CSA-FR), initiate legal amendments (DLM-DE), and in one way or another impact policy making, especially if they provide reliable and valid data (MBA-MT). For instance, in Belgium, conclusions of a study conducted by a CSA-BE researcher-in-residence initiated a debate on Belgian French speaking television production and was followed by a political decision to sustain and encourage the industry<sup>5</sup>. It should also not be overlooked that research is being used to contribute to the legal safety of decisions (CSA-FR), as well as a feedback regarding the activities and performance of the regulator (VRM-BE, NEPLP-LV) and examining the public knowledge on media regulation (NMA-NO).

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<sup>5</sup> Martin Smets, 2010: Etat des lieux et perspective de développement de la production télévisuelle indépendante en Communauté française, available on <http://www.csa.be/documents/1423>

Speaking from the perspective of a researcher, *Prof. Dr. Manuel Puppis* noticed that the demand for research related to regulation of the communication sector is greater than ever. According to him, as a result of convergence, the regulatory regime for the communication sector is crumbling and policy-makers need ideas for regulatory reform. Discussing the reasons for informing the policy process, *Puppis* stressed that communication policy research could contribute to improve decision-making and help interpreting situations by selecting a course of action, deciding how to address a policy problem and by designing specific policy measures. In his opinion, due to its greater independence from vested interests, academic research is in a unique position to focus on issues that go beyond the normal short-term horizons of policy-makers. By informing the policy process, communication policy researchers expand the range of possibilities contemplated by policy-makers and may assist them in understanding the choices available. However, good research is according to him not necessarily the one that helps regulators do a better job. Its influence is rarely direct, as it is often influential at a more abstract level, impacting which issues policy-makers choose to focus their attention on, and how a particular policy issue is framed.

### **3. Research Areas and Type of Research**

There is a wide range of areas in which regulators most often initiate research projects or search for available studies.

The most common appear to be issues related to **markets and audiences**. Regulators consult audience measurements and targeted market studies in support of monitoring activities, for instance when deciding upon the size of sanctions (e.g. NCRT-GR) or when assessing the fulfilment of the public service remit of broadcasters (e.g. OFCOM-CH, NMA-NO), in the licensing (e.g. DLM-DE) and policy-making processes (e.g. Ofcom-UK, BAI-IE, CSA-FR), or when monitoring media uses (e.g. RTÜK-TR, NMA-NO, CSA-BE) and media literacy (e.g. Ofcom-UK), specific phenomena in media performance (e.g. CRTA-CY, AAAM-MK, NEPLP-LV, NAC-RO, CSA-BE, BAI-IE), or specific aspects of media markets, such as the employment structure of the broadcasting industry (as in the case of AAAM-MK). Several regulators are referring to research exclusively on an ad hoc basis to solve a specific problem (e.g. RTCL-LT). On a less targeted basis, regulators are using it to feed their interest in market trends and evolution and for forming views and strategies (various respondents). As explained by CSA-FR: *“Outside the traditional remit of the CSA, research helps to get a better grasp/knowledge of the scope of more global challenges.”* Among the research practices that go beyond the particularities of a

given national market, it is worth mentioning comparative analyses of international media/communication markets, as conducted by Ofcom-UK on a yearly basis<sup>6</sup>.

Other big research clusters are **comparative media law analysis and sociological research**. The thematic level is spanning from pluralism and diversity to copyright issues, and includes areas as varied as media ownership and concentration, public service media, local and community media, gender representations, media literacy, protection of minors, political advertising, performance of media during elections, programme quotas and quality, accessibility to and findability of media content and others.

The **ratio between academic and market research** remains in most cases unclear. The members that answered the question provided different figures, ranging from 0 to 100 % in favour of market research (CSA-FR, OFCOM-CH, similarly also Ofcom-UK, however with 5% of academic research) to 30% to 70 % in favour of academic research (CvdM-NL). It seems however that market research is a predominant approach; both in terms of distribution of the provided indicative ratios and in terms of favorization of market research by authorities with biggest research budgets (Ofcom-UK, OFCOM-CH).

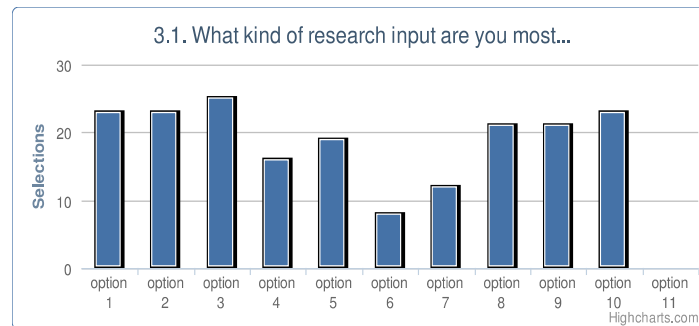
In this context, *Professor Puppis* revealed that communication researchers are themselves often criticized for their unwillingness to become engaged in the communication policy-making process. One needs to be aware also of the pitfalls of informing policy-making, stemming in his opinion from narrowing the analysis in line with the perceived needs of policy-makers to the possibility of being (ab)used for legitimizing decisions already taken. He drew the attention also to the views that see a greater reliance on research and empirical evidence as a mechanism for marginalizing citizens' input into policy-making and stressed that there is little reason to believe that a policy process based on data supplied by economists and lobbyists, and on 'scientific evidence' as opposed to personal, more critical or conceptually minded belief, is necessarily guaranteed to be more effective or less biased.

The **most often conducted types of research** according to responses to the latest EPRA survey on the research needs of regulators are numerically and graphically presented below.

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<sup>6</sup> Notably the ICMR, the International Communications Market Reports: <http://stakeholders.ofcom.org.uk/market-data-research/market-data/communications-market-reports/cmr14/international/>

Count	Answer
23	1. Surveys (general overviews, examinations)
23	2. Statistics (that quantify the problem)
25	3. Qualitative research (uncovering/explaining reasons, motivations, trends)
16	4. Case studies
19	5. Comparative reports
8	6. Benchmarking
12	7. Impact assessments
21	8. Expert opinions
21	9. Legal analyses
23	10. Market/audience analyses
0	11. Other



#### 4. Funding and Human Resources

The budget that regulators have at disposal for their research needs **differs substantially** and spans from no funds to figures as high as several hundred thousands, and rarely to a few millions EUR. Although many respondents replied that there is no special budget allocated for research, in most other cases the yearly research budget amounts to several tens of thousands EUR.

The undisputed leaders of the statistics, derived from the responses to the survey, are the two Ofcoms, the one of UK and the Swiss one, with research budgets of circa £5.3m and CHF1.8 respectively. In case of OFCOM-CH, the Swiss Federal Act on Radio and Television defines the source of its research budget. It corresponds to a part of the license fees paid by the licensed Swiss broadcasters, which amount to a maximum of 1 per cent of the gross revenue from advertising and sponsorship. *“The annual spending for research amounts to approx. 1.8 mio CHF /.../ has been very stable over the past years.”* With the biggest budget among the regulators, Ofcom-UK operates on the basis of the principles according to which: *“Each research proposal must be aligned with Ofcom’s strategic priorities, and we assess the cost against the risk of not conducting the research. Our processes allow us to test whether the research will deliver value for public money. All research spend goes through a competitive process.”*

On the other hand, many regulators reported **cuts in budget available for research** over the recent years. In this context, changes in practices seem to appear, i.e. greater reliance on

internal instead of external research (e.g. CSA-BE) or co-funding of research projects with other public institutions. The respondents that seem to have the narrowest possibilities limit their research operations on the presentation of existing data in tables (NCRT-GR) and looking for best practices, precedents and research of other authorities (IOMCC-IM). A not so small minority of the respondents however organised their research activities within **research departments**, most commonly small or moderate-sized, but also ranging up to 15 or 20 people.

Among the pros and cons of **internal against external research**, the respondents (CRTA-CY, CSA-FR, RTÜK-TR, NAC-RO, KRRiT-PL, CRA-BA, CSA-BE, DLM-DE, CAC-ES, AKOS-SI, AGCOM-IT) mentioned that the benefits of having an internal research department lay mostly in ensuring continued and adequate attention to research, anticipation of the research needs and faster responsiveness to acute questions, understanding of methodological traps, ability to formulate research questions correctly, as well as evaluate research findings, the absence of administrative procedure (call for tenders), immediate access to researched items at any stage of the process, easier access to information of the licensees, greater proximity to regulation reality, possibility of a continuous care for cooperation with academia and other research institutions, contribution to better circulation of findings and their implementation in the activities and workflows of a regulator, and after all also strengthening the knowledge and competence of the regulator's staff. External research, on the other hand, allows the access to knowledge, expertise, data, technical instruments and skills that are not available in-house, and on the other hand eliminates expenses of permanent staff.

## 5. Cooperation with Research Institutions and Academia

The survey showed that the substantial majority of the respondents established more or less **continuous forms of cooperation with research institutions and academia**. The most common forms include conferences, workshops and deliberative forums (CRTA-CY, KRRiT-PL, NMA-NO, CRA-BA, CSA-BE, TSA-EE, AEM-HR, Ofcom-UK, AKOS-SI, AGCOM-IT), but there are also several examples of memorandums or other forms of partnerships with universities (CRTA-CY, KRRiT-PL, CNMC-ES, CSA-BE), memberships in joint bodies and working groups (Ofcom-UK, NMA-NO), common research projects (NMHH-HU), prizes/awards for students or scholars papers on media related subjects (CSA-BE, VRM-BE, KRRiT-PL, CAC-ES), fellowships (CAC-ES), exchange of data (TSA-EE, AGCOM-IT), library centres (CSA-BE), research databases (DLM-DE), as well as management of research funds (NMA-NO, BAI-IE).

In Ireland, the BAI operates a media research funding scheme<sup>7</sup> which has been designed to develop and maintain links between the BAI, third-level institutions and the broadcasting sector; to drive quality research initiatives to provide a strong evidence base to the regulatory

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<sup>7</sup> [www.bai.ie/wordpress/wp-content/uploads/20130730\\_MRFS2013GuideForm-English\\_PK.pdf](http://www.bai.ie/wordpress/wp-content/uploads/20130730_MRFS2013GuideForm-English_PK.pdf)

environment of the BAI's work; to provide research that will facilitate the BAI in meeting the needs of viewers and listeners in Ireland. Similarly, the Norwegian NMA provides administrative support to an independent body, the Council for Applied Media Research "*Rådet for anvendt medieforskning*" (RAM), aimed at financing media research projects. The Council is an advisory body to the NMA, and a committee of researchers assists the Council in the assessment of the applications. The NMA has the final decision on the allocation of research grants.

Many regulators consider their cooperation with academic world **very important** and value the reflections coming from it (e.g. SATR-IL, CAC-ES, OFCOM-CH), however there are also critical voices that emphasise that these inputs are sometimes too "academic" and difficult to implement (KRRiT - PL) or call for application-orientated, interdisciplinary and connected to practice approaches (DLM-DE). According to some, the answer to this could be adequate funding enabling academia to increase the number of relevant researches and to perform them at a higher level of quality (AEM-HR). Regulators expect valid, strong and reliable scientific, empirical support for issues they are dealing with (OFCOM-CH) and not only research results, but also recommendations for action with concrete guidance (DLM-DE).

As a scholar in communication research, *Puppis* acknowledged that research cannot yield magic answers and underlined its continuous need of theoretical and methodological development, as well as expansion of range of subjects to preserve a position of relevance. He explained that the tendency to react to industry and government demands often results in more descriptive than theoretically grounded and analytical work, limited to reactions to changes in law and technology, involving a large degree of tautological reasoning and technology-driven assumptions. In his opinion, communication research should focus on all levels of governance by describing, explaining and criticizing the entirety of forms of regulation, and move from dealing predominantly with regulatory details and individual policies to analyzing the political processes, interests, ideas, institutions and other actors involved. Convinced that making use of research is highly important, he called for a continued dialogue with political actors in order to contribute to more informed decision-making.

## **6. Research Resources and Databases**

Many respondents mentioned the EPRA website and webpages of the fellow regulators as a resource they are commonly referring to. The ones with limited funding and human resources seem to rely on them importantly.

Apart from dedicated websites of other international associations and supranational institutions (e.g. EU, CoE/Obs, EPRA, EBU, ITU, OSCE), mainly legal, financial and statistical databases (EUR-LEX, Eurodata, Gallup, CIA Worldbook, PwC Global Outlook Report), web portals of audience or market research providers (e.g. BARB, Nielsen, GfK, IAB, IHS,



Mediametrie, Mediatel, Oxis, ComScore, RAJAR, Kantar, IREP, FrancePub), regulatory research and intelligence services (e.g. Cullen, M-lex) and sites specialised in media freedom and democracy (e.g. CMPF, SEE Media Observatory) stand out in the listed resources.

The second annex to this document compiles the sources and databases quoted by the respondents as useful resources for them.

## **7. Ongoing Research Projects**

Among the research projects that could be of interest to other regulators there is a group of projects with a common feature in their focus on media uses or market developments (e.g. AGCOM-IT, AKOS-SI, CRA-BA), others are dealing with public service broadcasting (OFCOM-CH, NMA-NO), diversity and pluralism (CSA-FR, CvdM-NL, KRRiT-PL), violence and crime on television (CRTA-CY) and children's consumption of television (AEM-HR). Research projects are often ad-hoc in nature, but there are also several cases of periodical or continuous research and of longitudinal studies being carried out for a number of years. For example, in Germany programme analysis is partly conducted *“in the context of the long term study “Kontinuierliche Fernsehprogrammforschung der Medienanstalten” (continual TV programme research of the media authorities) which has been monitoring and analysing the eight private TV programmes with the highest daily reach figures as regards to content and structure since 1998”*.

For additional information, the first annex of the present document compiles examples of recent and ongoing research projects and activities among regulatory authorities.

During the working group session, *Alison Preston* from Ofcom, *Marita Bergtun* from NMA and *Hüseyin Demirbilek* from RTÜK presented the foundations and organization of their research activities.

Ofcom, with a budget of more than £5.25m in 2013/14 and with their two internal research departments with approximately 30 staff, published 41 reports in 2014 plus 47 publications of official statistics. Although with far smaller budget and without the internal research department, the Norwegian authority is also engaged in a number of research projects and is as mentioned above responsible for administrative assistance to the Council for Applied Media Research. Its funds of approximately 400.000 EUR are allocated annually, and awarded to 20-25 research projects. Both authorities have a duty to promote media literacy and both have put in place longitudinal studies, which provide valuable information on trends over time. Media literacy is also one particular focus of the research conducted by the Turkish regulator.

[Alison Preston](#) presented an interesting example of the longitudinal study “Media Lives”<sup>8</sup>, based on qualitative ethnographic video interviews monitoring 15 people and their media habits, with trends over time since 2005, proving that media competence or digital confidence is not a linear progression and once for ever, but requires a lot of re-learning.

[Marita Bergtun](#) reported about the NMA’s studies on children and young people’s use and experience of digital media. They include a direct contact of researchers with children in different parts of Norway plus Sweden and Finland, and are being published every second year.

[Hüseyin Demirbilek](#) presented how the Turkish regulator is developing its research activity via its internal research department and with quite a modest budget of 40.000 EUR - at least in comparison with the research funds of the organisations of the previous speakers - but still enabling a number of on-going research projects, getting the needed input not only by field research, but also by using “rtükmobil” a recently launched application for mobile devices and social networks for getting the access to 28 million users.

Among the current subjects of communication research, *Professor Puppis* listed topics dealing with:

- (1) structures and processes, such as EU regulation, liberalization and neoliberal media regulation, policy-making process and influence/power, and governance and convergence;
  - (2) diversity and quality, such as public service media, media ownership concentration, gatekeepers/bottlenecks, funding of journalism, accountability of media, net neutrality, and influence of algorithms;
  - (3) basic rights, such as freedom of expression, freedom of information, privacy and surveillance;
- and last but not least (4) users and citizens, such as involvement of citizens in regulation and public service media, as well as user empowerment.

He stressed the need to keep pace with convergence of the broadcasting and telecommunications industries and changing technological, economic and social conditions in the media sector, and pointed to importance of comparative research, which can reveal patterns and problems unnoticeable in one’s own media system, help to understand the interplay of national contexts and communication policy, and indicate possible directions that could be followed when coping with technological transformation, political transition, and major institutional and market-restructuring processes.

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<sup>8</sup> [stakeholders.ofcom.org.uk/binaries/research/media-literacy/Media\\_Lives\\_report.pdf](http://stakeholders.ofcom.org.uk/binaries/research/media-literacy/Media_Lives_report.pdf)

## 8. Conclusions and Suggestions for Follow-up

The results of the questionnaire as well as the discussion during the working group session confirm **the variety** in concepts of mission, responsibilities and organisation of the participating regulatory authorities, as well as the great difference in size and resources.

One interesting finding of the survey is that there seems to be a **gap between rhetoric and reality**. Most regulators are advocating for evidence-based regulation, yet the extent to which policies and decisions are actually based on research outcomes seems to vary considerably.

Although many regulators recognise the advantages of internal research and have well-staffed research departments in place, the majority of the NRAs is not organised in this way.

The amount of resources invested in research in general and reports about their reduction in several countries allow a speculation that they represent a rather low percentage of total costs of regulation in average. This does not entirely support the assumption that research is given an increasingly prominent position within regulatory authorities. In that sense, the findings are **indicators of the difficult conditions** many regulators are currently operating under. This worrying trend had already been highlighted in a recent EPRA comparative document on the independence of regulators, which showed that budget cuts, along with a centralisation of the public sector and funding arrangements, are a major cause for concern across several EPRA members and might ultimately impact negatively on their functioning<sup>9</sup>.

Far-reaching differences in budgets - ranging from zero to a few million EUR - and other resources for research, along with discrepancies in the level of the implementation of research findings, also highlight the **dichotomy** between the regulators whose mandate is limited almost exclusively to the application of legal provisions and the authorities taking part in informing, guiding or developing policies.

Yet, research is deemed very important for the majority of regulators, and many of them have highlighted in their response the **virtuous circle of research and regulation**. Small-scaled initiatives may also go a long way. As an example in Belgium, starting from a research internship, the CSA has succeeded to put diversity on political and academic agendas, and enrich research findings in the field.

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<sup>9</sup> Comparative background paper for the Working group 2 on "Independence of NRAs: Tools and Best Practices" prepared by Maida Čulahović, CRA (BA) for the 40th EPRA meeting in Tbilisi, on 8-10 October 2014.  
<http://www.epra.org/attachments/tbilisi-wg2-independence-of-nras-comparative-background-paper>

As one of the objectives of the working group was to map research resources, but also to explore the ways of potential collaboration of regulators in research projects, the participants at the WG3 session were asked to come up with ideas and suggestions, and even if there were only a few minutes dedicated to that at the end of the session, a number of interesting proposals were given.

Among others, it was suggested (by AEM-MNE and supported by others) to think of a research topic of a common interest of the regulators and then undertake a research individually in each country, but on the basis of the same research methodology, so that the results would be comparable. In this context it was proposed to explore the possibilities for **comparative analysis in relation to media literacy** (Ofcom-UK), first because this is the area with a need and potential for globally applicable measures, even if not backed by legislation, and second because in many countries it is still under- or even un-researched.

It was also suggested that a list of **short overviews of the available research pieces** together with contact details of people who can provide more information would be welcome (Ofcom-UK, BA-MT, OBS-CoE). The EPRA Secretariat emphasised that the thematic overview of the country reports<sup>10</sup> prepared for every EPRA meeting currently includes a brief section on recent research projects and that this could be built upon in a more systematic matter by instructing the providers of country reports accordingly.

The need for a legal database, as not all the legal acts of the members are translated to English was highlighted (KRRIT-PL). The OBS-COE mentioned in this context that it was currently developing a database (AVMSDATABASE) that will ultimately provide access to the legal acts transposing the AVMS Directive in original language and in English and enable thematic searches.

Positive feedback of the EPRA colleagues, encouraging the group to continue the work started with the survey and the discussion in Berne, led to the suggestion to create a dedicated tool/section on the EPRA website, so to provide an adequate platform for exchange of information on research projects and facilitating other ways of collaboration, either in developing pan-country questions and common research methodologies or co-financing schemes for research.

For EPRA Members, **a dedicated online forum**<sup>11</sup> has now been created, as a place to centralise the information on the topic, and facilitate exchanges between colleagues. In addition, a

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<sup>10</sup> See for instance the overview of the reports for the Berne meeting: <http://www.epra.org/attachments/berne-an-overview-of-all-country-reports> (EPRA members' only)

<sup>11</sup> <http://www.epra.org/forum/topics/research-regulators-follow-up> (EPRA members only)

**specific search tag** “RESEARCH”<sup>12</sup> was created to help locating all relevant information on the EPRA Website. “MEDIA LITERACY”<sup>13</sup> is also a useful tag to search content.

As a potential complementary tool to ease interaction between those who are interested in the topic and other outside players, such as the ECREA, the European Audiovisual Observatory, the European Commission and other interested parties or individuals, the launch of a mailing list is being considered.

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<sup>12</sup> <http://www.epra.org/search?search=&tags=85>

<sup>13</sup> <http://www.epra.org/search?tags=32>

## Annex 1 – Examples of recent and ongoing research projects and activities among regulatory authorities<sup>14</sup>

**BA – CRA Bosnia and Herzegovina:** The CRA Council has initiated an extensive analysis of the broadcasting sector in the country, whereby the CRA has been collecting and processing a wide range of data from all broadcasters. **Contact person: Maida Culahovic**

### BE – CSA Belgium:

- Studies and Research Series: this e-collection gathers all the studies conducted by the CSA, by the researchers-in-residence, by CSA Prize laureates...  
<http://www.csa.be/documents/categorie/34> (FR)
- Library Centre <http://cdoc-csa.be/blog/> (FR)
- “Diversity” has become an in-house field of expertise since the government entrusted the CSA with the task of implementing and coordinating the two lines of action on which it is based: the annual publication of a Barometer of equality and diversity and the annual publication of an Inventory of good practices in the audiovisual media of the Wallonia-Brussels Federation (Action Diversity Plan).  
<http://www.csa.be/documents/2430> (EN)  
<http://www.csa.be/documents/2431> (EN)  
<http://www.csa.be/documents/2432> (EN)  
<http://www.csa.be/documents/2436> (EN)

**Contact Person: Muriel Hanot**

### CH - OFCOM Switzerland:

- OFCOM will contribute to an ongoing report by the Swiss Government for the Parliament concerning the future definition of public service broadcasting. One contribution to this report will be a study by Prof. Dr. Manuel Puppis of the University of Fribourg on a comparison of diverse public service broadcasting policies of selected countries in Europe and the rest of the world.
- Overview of research reports and contributions:  
[http://www.bakom.admin.ch/themen/radio\\_tv/01153/01156/index.html?lang=de](http://www.bakom.admin.ch/themen/radio_tv/01153/01156/index.html?lang=de) (DE)  
[http://www.bakom.admin.ch/themen/radio\\_tv/01153/01156/index.html?lang=fr](http://www.bakom.admin.ch/themen/radio_tv/01153/01156/index.html?lang=fr) (FR)  
[http://www.bakom.admin.ch/themen/radio\\_tv/01153/01156/index.html?lang=it](http://www.bakom.admin.ch/themen/radio_tv/01153/01156/index.html?lang=it) (IT)

**Contact Person: Oliver Gerber**

**CY - CRTA Cyprus:** The research project “Violence and Crime in the Cypriot Television Landscape and the Role of the Cyprus Radio-Television Authority” was designed and implemented by the Cyprus University of Technology in cooperation with the Centre for the Advancement of Research and Development in Educational Technology for the CRTA. A quantitative measurement instrument was developed to study the content of a sample of 1000 TV programmes (total duration 1255.92 hours), drawn with a stratified random sampling design from all broadcasts between September 2010 and June 2011. The study aimed at a descriptive analysis of the content of Cypriot TV with respect to elements of violence, non-violent crime, racism, fanaticism and natural disasters and accidents. At the same time, the content of 771 trailers was analysed with respect to the same elements.

**Contact Person: Marianna Aletrari**

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<sup>14</sup> Note that this is not an exhaustive list, as it only compiles sources quoted in the EPRA survey.

#### **DE - die Medienanstalten Germany:**

- In addition to research conducted by the individual regional regulatory authorities, the association of the Landesmedienanstalten finances joint research projects, for example the [media convergence monitor](#) or the continuous TV programme research of the media authorities “Kontinuierliche Fernsehprogrammforschung der Medienanstalten” which has been monitoring and analyzing the eight private TV programmes with the highest daily reach figures as regards to content and structure since 1998. Programme analysis is also done in the context of specific monitoring and/or licensing issues.
- An database allows to browse through the research projects of the regional regulatory authorities: <http://www.die-medienanstalten.de/service/datenbanken/forschungsprojekte-datenbank.html> (DE)

**Contact person: Maren Hohensträter**

#### **ES - CAC Audiovisual Council of Catalonia**

Link to research projects:

<http://www.cac.cat/web/recerca/index.jsp?MjM%3D&MQ%3D%3D&> (CAT)

See also the recently launched Newsletter on the media sector in Catalonia:

<http://www.epra.org/attachments/newsletter-on-the-media-sector-in-catalonia>

**Contact person: Mònica Duran**

#### **FR - CSA France:**

- Barometer of diversity: since 2009, the CSA has used this tool to measure the perception of diversity on television. Results show clearer evidence of uneven representations of some categories of the population. The results help to draw annual objectives that channels commit to achieve.

<http://www.csa.fr/csa/Espace-Presses/Communiqués-de-presses/Presentation-des-resultats-de-la-vague-2014-du-barometre-de-la-Diversite>

- Observatory for audiovisual equipment of households: mix of institutions + the data provided are useful to determine dates for major technological changes in the field of broadcasting (switch off, standards, etc.).

<http://www.csa.fr/Etudes-et-publications/Les-observatoires/L-observatoire-de-l-equipement-audiovisuel-des-foyers>

- Study on catch-up television: combination of data and interviews with stakeholders. Useful to the CSA to know more about the economy of the specific market + fuels the stakeholders with market data that can influence their strategy.

<http://www.csa.fr/Etudes-et-publications/Les-etudes-thematiques-et-les-etudes-d-impact/Les-etudes-du-CSA/La-television-de-rattrapage-une-pratique-installee-une-economie-en-devenir>

**Contact person: Kenza Zaz**

#### **GB - Ofcom United Kingdom:**

- The International Communications Market Report (ICMR), published each December, compares the availability, take-up and use of services in the UK and 17 comparator countries: France, Germany, Italy, the US, Japan, Australia, Spain, the Netherlands, Sweden, Poland, Singapore, South Korea, Brazil, Russia, India, China and Nigeria.

More information on the various market research projects:

[www.ofcom.org.uk/marketresearch](http://www.ofcom.org.uk/marketresearch)

- Media Literacy Activities include:
  - Annual survey and report of adults’ media literacy, with trends over time since 2005

- Annual survey and report of children aged 5-15 and their media literacy, with trends over time since 2005
- Annual small-scale qualitative tracking research [Media Lives](#) monitoring 15 people and their media habits, with trends over time since 2005
- Annual [Internet use and Attitudes Bulletin](#) (PDF) providing a summary of media literacy and other Ofcom data by age and other demographics
- See also the Ofcom quarterly Media Literacy update designed to provide short summaries of media literacy activities: [stakeholders.ofcom.org.uk/market-data-research/other/media-literacy/bulletins/](http://stakeholders.ofcom.org.uk/market-data-research/other/media-literacy/bulletins/)
- More information: [www.ofcom.org.uk/medialiteracyresearch](http://www.ofcom.org.uk/medialiteracyresearch)

**Contact person: Alison Preston**

**HR - AEM Croatia:** In January 2015, the AEM organised [a multi-stakeholder hearing](#) on the protection of children in the media based on research findings.

**Contact: Damir Hajduk**

**HU - NMHH- Hungary:** Permanent research areas include:

- comparative media law analysis (mostly EU legal practice);
- sociological researches (e.g. political representation in media services, audience analyses)
- media market analyses (e.g. advertising market analyses).

**Contact person: György Ocskó**

**IE - BAI Ireland:** Examples of reports funded through the research funding scheme include:

- Political Advertising: the regulatory position & the public view,
- Irish broadcasting and the 'New Ireland': Mapping and Visioning Cultural Diversity
- Irish broadcasting landscape: economic and environmental review for the BAI

This year, as part of the rollout of the audience research framework, the BAI is also developing a number of tracker surveys which is intended to provide ongoing market and audience data which should help to inform a number of work areas within the organisation.

<http://www.bai.ie/index.php/documents/research-publications/>

**Contact person: Declan McLoughlin**

**IT - AGCOM, Italy:** recent study on media consumption, creation of an Observatory on Italian journalism. **Contact person: Francesco Sciacchitano**

**LV - NEPLP Latvia**

Link to research projects: <http://neplpadome.lv/lv/sakums/academia/petijumi.html> (LV)

**Contact person: Agnese Berga**

**MK- AAAMS FYR Macedonia**

Since 2012, analyses of treatment of gender issues and of gender portrayal have been commissioned yearly. Analysis of Gender in Television Programme Services for 2013 (MK)

[www.avmu.org.mk/images/Analiza\\_2013.pdf](http://www.avmu.org.mk/images/Analiza_2013.pdf)

See also the Guide to Monitor "Hate speech":

[http://www.avmu.org.mk/images/Guide\\_to\\_monitor\\_hate\\_speech.pdf](http://www.avmu.org.mk/images/Guide_to_monitor_hate_speech.pdf) (EN)

Political pluralism during election campaign as an aspect of media pluralism:

[www.avmu.org.mk/images/Angliski.pdf](http://www.avmu.org.mk/images/Angliski.pdf) (EN)

**Contact person: Dragica Ljubevska**



**NL - CvdM, Netherlands:** Recent report of the diversity of the programme packages of cable operators in the Netherlands. See also the Media Monitor publications:

<http://www.mediamonitor.nl/publicaties/meest-actuele-publicatie/>

**Contact person: Marcel Betzel**

**NO - NMA Norway:**

- In 2009/2010 a group of researchers at the University of Bergen conducted a study on the PSB NRK's online services, on behalf of the NMA. In 2013 the researchers conducted a follow up study using the same analysis tools that had been developed.
- Recently the NMA conducted a study on the public's knowledge on media regulation. After product placement in television and VOD services was allowed, the NMA has on two occasions examined the audience's knowledge on product placement and understanding of the identification.
- Biannually the NMA publishes "Children and Media" - the largest Norwegian study on children and media; how they use it in their everyday life, and what they think of it.  
[www.medietilsynet.no/globalassets/publikasjoner/2015/rapport\\_barnogmedier\\_2014.pdf](http://www.medietilsynet.no/globalassets/publikasjoner/2015/rapport_barnogmedier_2014.pdf)  
(NO)

**Contact person: Marita Bergtun**

**PL - KRRiT Poland:** a tool has recently been created for measuring media pluralism from the consumer's perspective to track media exposure diversity. The report is expected in autumn.

**Contact person: Maria Borkowska**

**RO - CNA Romania**

Monitoring the quality of language on Romanian TV

<http://www.cna.ro/Rezultatele-monitoriz-rii-privind,5659.html>

<http://www.cna.ro/Rezultatele-monitoriz-rii-privind,5392.html>

**Contact person: Ruxandra Minea**

**SI - AKOS Slovenia:**

- Ongoing research projects include various surveys informing the radio policy creation and a multifold study on trends in media uses.
- Recent (concluded) research projects include audiovisual policies and content obligations in digital, connected and international audiovisual environment; Radio regulation in Europe: a comparative study with reflections on situation in Slovenia; Economic potential for new media and communication services in the South East Europe [http://www.see-digi.tv/shared\\_files/wp5/wp5a3\\_apekfinal.pdf](http://www.see-digi.tv/shared_files/wp5/wp5a3_apekfinal.pdf)

**Contact person: Tanja Kersevan Smokvina**

**TR - RTÜK Turkey:**

- Recent and ongoing research projects include:
  - Media Literacy Lessons Research 2015 (ongoing)
  - Radio Listening Tendencies Research 2014
  - Television Broadcasters Profile Research 2014
  - The Third Television Watching Tendencies Research 2013
  - Children's Media Usage Habits Research 2013
- List of research projects (TR): <http://www.rtuk.gov.tr/Home/SolMenu/26#>  
left menu bar "Araştırmalar"

**Contact person: Hüseyin Dermirbilek**

## Annex 2: List of resources regularly used by NRAs according to the EPRA survey<sup>15</sup>

### **Dedicated websites of European associations and supranational institutions:**

- Council of Europe Media and Internet Division: <http://www.coe.int/t/dghl/standardsetting/media/>
- European Audiovisual Observatory : <http://www.obs.coe.int>
- EBU: <http://www3.ebu.ch/> <http://www3.ebu.ch/mis>
- European Commission: <http://ec.europa.eu/>  
<http://ec.europa.eu/digital-agenda/en/audiovisual-media-services-directive-avmsd>
- EPRA [www.epra.org](http://www.epra.org)
- ITU - ICT Statistics: <http://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx>
- OSCE: <http://www.osce.org> <http://www.osce.org/fom>

### **Legal, financial and statistical databases:**

- CIA Worldbook: <https://www.cia.gov/library/publications/the-world-factbook/> free of charge
- EUR-LEX: <http://eur-lex.europa.eu/homepage.html?locale=de> free of charge
- Eurostat: <http://ec.europa.eu/eurostat/home> free of charge
- Hein Online (legal database): <http://home.heinonline.org/>
- IRIS Merlin (legal database): <http://merlin.obs.coe.int/> free of charge
- MAVISE (TV and AV service and companies in Europe) : <http://mavise.obs.coe.int/> free of charge
- National Bank Belgium: <https://www.nbb.be/nl/balanscentrale/jaarrekeningen-raadplegen?l=nl>
- Nomisweb (Official labour market statistics in UK): <https://www.nomisweb.co.uk/> free of charge
- Northern Ireland Statistical Service (NISRA): <http://www.nisra.gov.uk/> free of charge
- Norwegian media barometer: <http://ssb.no/en/kultur-og-fritid/statistikker/medie> free of charge
- Office of National Statistics UK: <http://www.ons.gov.uk/ons/index.html> free of charge
- Scottish Statistics: <http://www.gov.scot/Topics/Statistics> free of charge
- VRIND - Flemish regional indicators: <http://www4.vlaanderen.be/dar/svr/Pages/2014-11-20-vrind2014.aspx> (NL) free of charge
- Westlaw (Legal): <http://westlawinternational.com/>

### **Audience Research:**

- AGB Nielsen: <http://www.agbnielsen.net/>
- BARB (TV audience measurement): <http://www.barb.co.uk/>
- Comscore (website user measurement): <http://www.comscore.com/>
- EurodataTV- European data: <http://www.mediametrie.com/eurodatatv/>
- Gallup: <http://www.gallup.com/home.aspx>
- JICREG - audience data local papers UK: <http://www.jicreg.co.uk/data/>
- JNLR Joint National Listenership Research Ireland: English: <http://info.ipsosmri.com/jnlr>

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<sup>15</sup> Note that this is not an exhaustive list, as it only compiles sources quoted in the EPRA survey.

- Mediametrie: audience data France: <http://www.mediametrie.fr/> (FR)
- Mediatel (includes ABC - newspaper circulation and various advertising stats): <http://mediatel.co.uk/>
- NRS – newspaper readership measurement UK: <http://www.nrs.co.uk/>
- Oii – Oxis internet survey UK: <http://oxis.oii.ox.ac.uk/>
- RAJAR (radio audience measurement): <http://www.rajar.co.uk/>
- TAM Ireland Television Audience Measurement Ireland: <http://www.tamireland.ie/>

#### **Market research and intelligence services:**

- AA/Warc Ad Expenditure Report: <http://expenditurereport.warc.com/>
- Analysys Mason - telecoms and media data: <http://www.analysismason.com/>
- Centre for Media information (CIM) – Dutch: <http://www.cim.be/>
- Cullen - European data <http://www.cullen-international.com/>
- Decipher – MediaBug <http://www.decipher.co.uk/decipher-companies/research/quantservices/mediabug.html>
- Digimeter IMINDS (ownership and use of media among Flemish population): <https://www.iminds.be/nl/inzicht-in-digitale-technologie/digimeter> (NL/EN)
- FrancePub, advertising market France <http://www.francepub.fr/>
- GfK - European data: [www.gfk.com](http://www.gfk.com)
- IAB - Interactive Advertising Bureau: <http://www.iab.net/>
- IDATE: <http://www.idate.org/en/Home/>
- IHS Screen Digest: <https://technology.ihs.com/Industries/450465/media-intelligence>
- Indicator - market research Poland <http://www.indicator.pl/> (PL)
- IREP - Professional Association for advertising and communication: <http://www.irep.asso.fr> (FR)
- Kantar Media: <http://www.kantarmedia.com>
- MarketingMagazin: <http://www.marketingmagazin.si/> (SI)
- Mediana: Market research and consulting Slovenia <http://en.mediana.si/home/> (SI)
- M-lex: <http://mlexmarketinsight.com/>
- MT Research <http://www.mtresearch.pl/> (PL)
- Pentagon Research: <http://pentagon-research.com/> (PL)
- TNS market research Lithuania: <http://www.tns.lt/> (LT)
- TNS Market research Norway: <http://www.tns-gallup.no/medier> (NO)
- PwC Global Outlook Report: <http://www.pwc.com/gx/en/global-entertainment-media-outlook/>
- Radio Advertising Bureau UK: <http://www.rab.co.uk/>
- Union of Belgian advertisers: <http://www.ubabelgium.be/uba/view/nl/home> (NL)
- YouGov – Technology Reports: <https://yougov.co.uk/find-solutions/sectors/digital-media-and-technology/>

#### **Other Research Organisations Websites**

- Centre for Media Pluralism and Freedom - CMPF: <http://cmpf.eui.eu/Home.aspx>
- Department of Information Science and Media Studies, University of Bergen: <http://www.uib.no/en/infomedia>
- EU Kids Online: <http://www.lse.ac.uk/media@lse/research/EUKidsOnline/Home.aspx>
- Mirovni institute: <http://www.mirovni-institut.si/> (SI)
- Nordicom: <http://www.nordicom.gu.se> (Swedish/English)
- University of Oslo: <https://www.hf.uio.no/imk/english>

- Reuters Institute/digital news report: <http://www.digitalnewsreport.org/>
- SEE Media Observatory: <http://mediaobservatory.net/about>

### **Media Regulation**

- DCMS, Department for Culture, Media and Sport UK:  
<https://www.gov.uk/government/organisations/department-for-culture-media-sport>
- Conseil supérieur de l'audiovisuel, France : <http://www.csa.fr>
- Ofcom UK: <http://www.ofcom.org.uk/>
- RRT: Communications Regulatory Authority: <http://www.rrt.lt/lt/titulinis.html> (in LT)