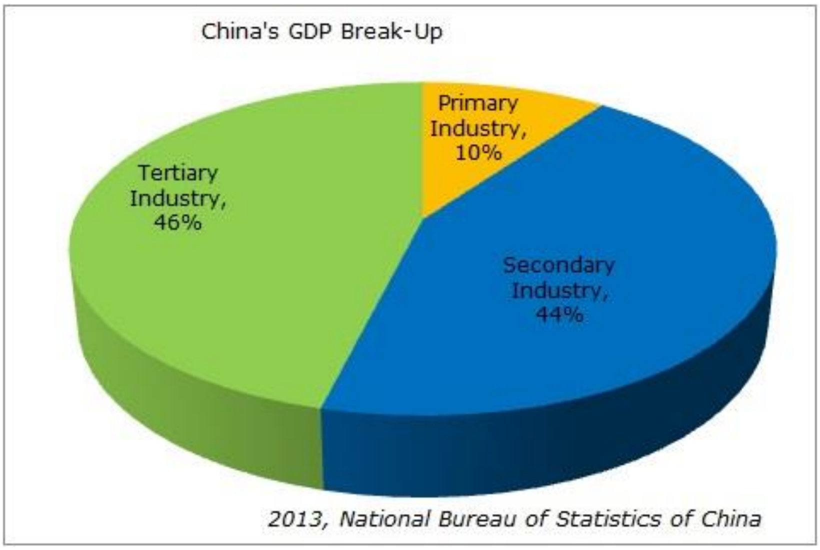
China's media system in template (draft)

Compiled by Deqiang Ji, Communication University of China

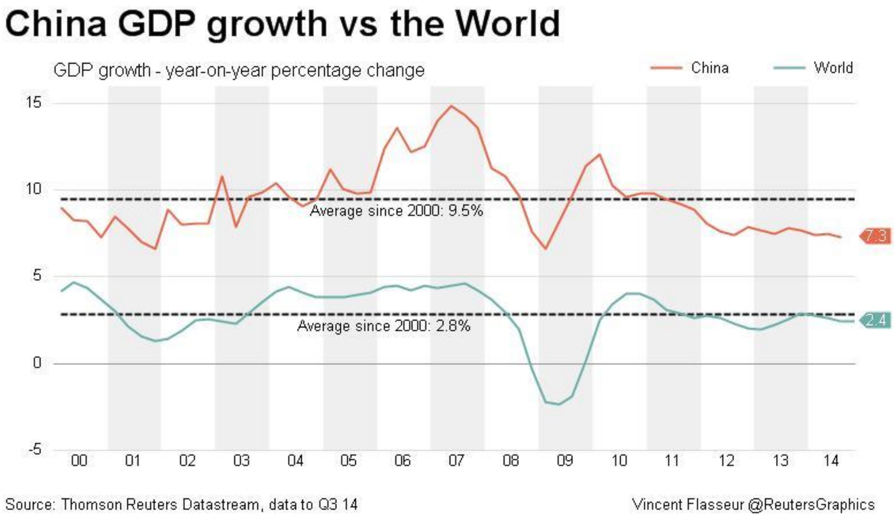
1. **Overall characterization of (a) Socio-political context and (b) Media system, as done in respective columns in Table 1 (from introductory chapter in *Mapping BRICS Media* – use your preferred terms and if needed more elaborate characterization)**

   Add indicators not included in Table 1, notably

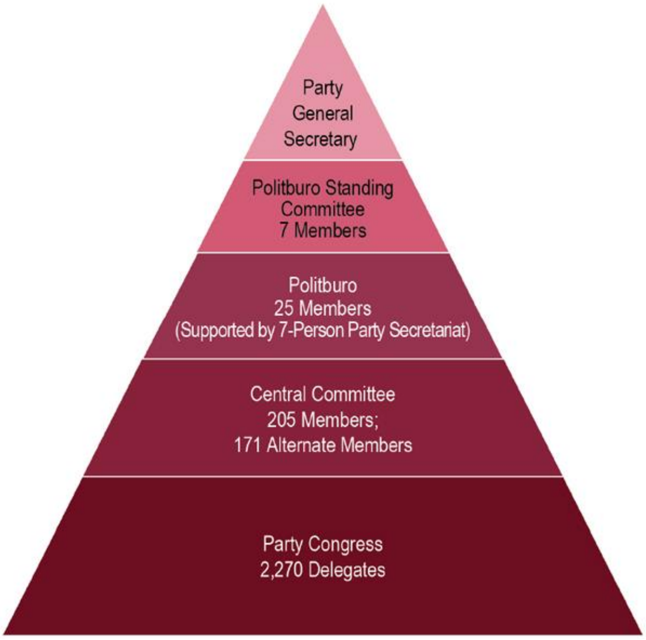
   (1) Major industrial sectors: ICTs and the broadly defined creative industries will play leading roles in transforming the whole economic system. The government will encourage people to start their own business and to make innovations.



   (2) Rate of economic growth: Annual growth rate of around 7% is guaranteed in the coming years.



(3) Main political parties and the fundamental political system: one ruling party (CCP, see below the organization of the CCP's leadership), political consultation system, People's Congress system, Inner-Party Inspection system, etc.

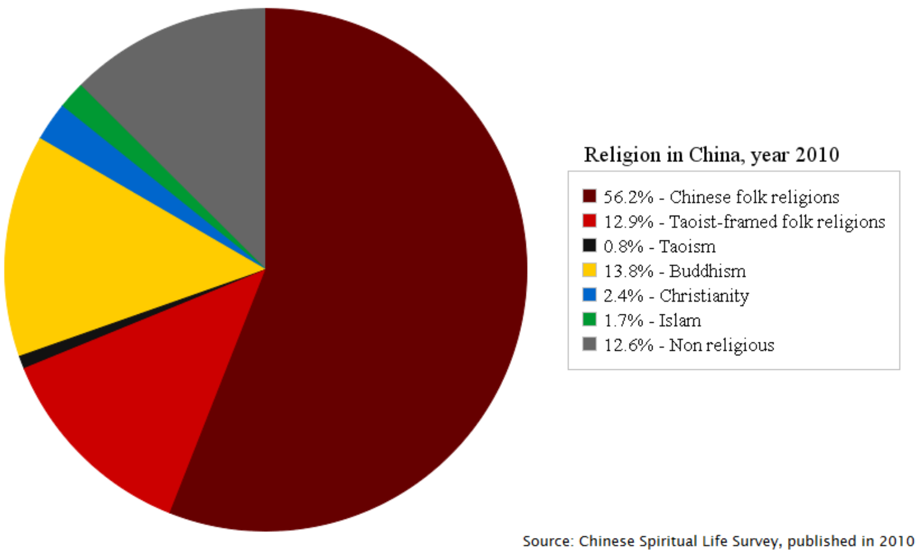


The CCP itself is changing over the time in terms of its leading ideological narratives and its representativeness of the social class (es) in transitional Chinese society. It is inappropriate to understand the Chinese Communist Party in a Western or, more precisely, liberal democratic sense.

In China, there are eight democratic parties (non-communist parties), who play consultative and supervisory roles with the CCP. They are Taiwan Democratic Self-Government League, China Democratic League, China Association for Promoting Democracy, Jiu San (September 3) Society, Revolutionary Committee of the Chinese Kuomintang, Chinese Peasants and Workers Democratic Party, China Democratic National Construction Association, and China Zhi Gong Party (China Public Interest Party).

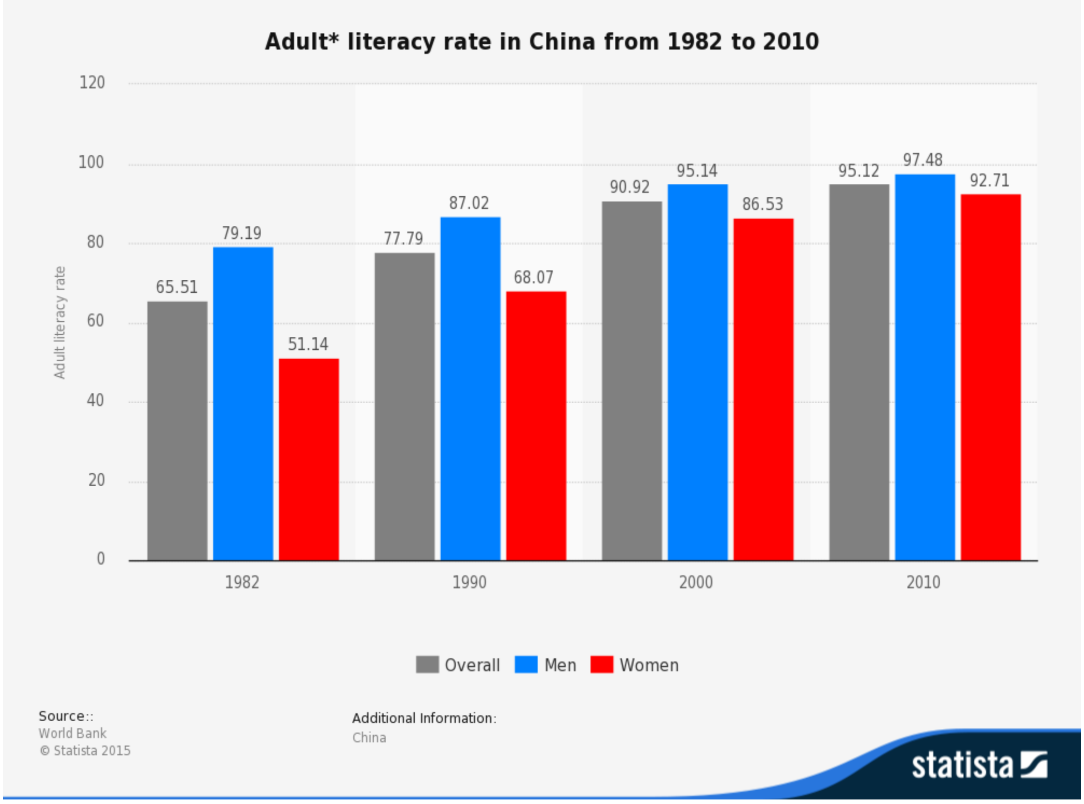
"China's non-Communist parties, with a combined membership of more than 700,000, or one percent of the 73 million of the Communist Party of China (CPC), represent specific interest groups, reflect complaints and suggestions from all walks of life and serve as a mode of supervision of the CPC." (China Daily, 2008)

(4) Main religions:

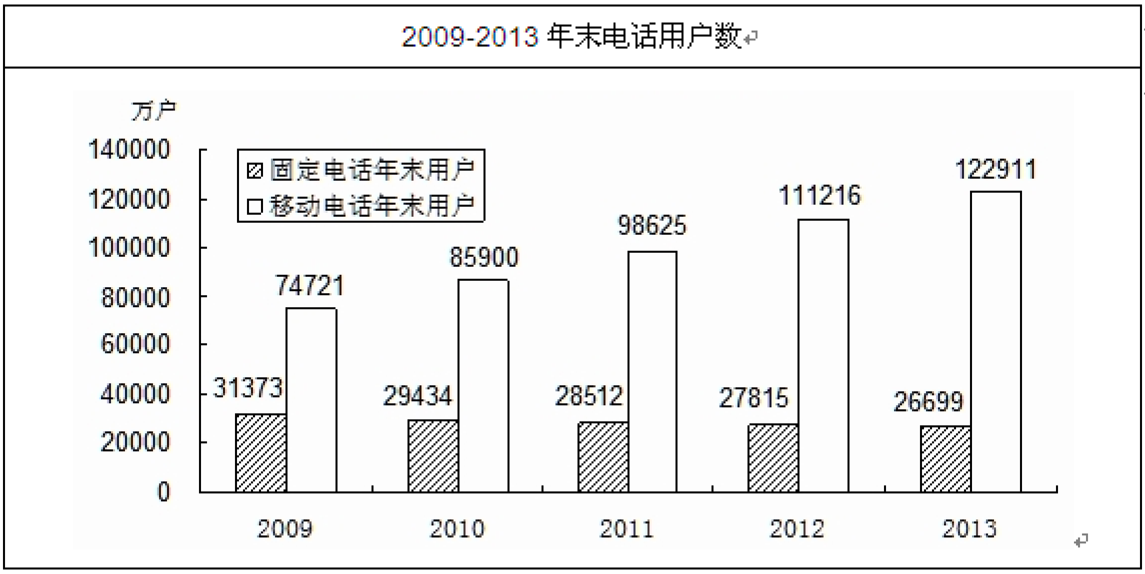


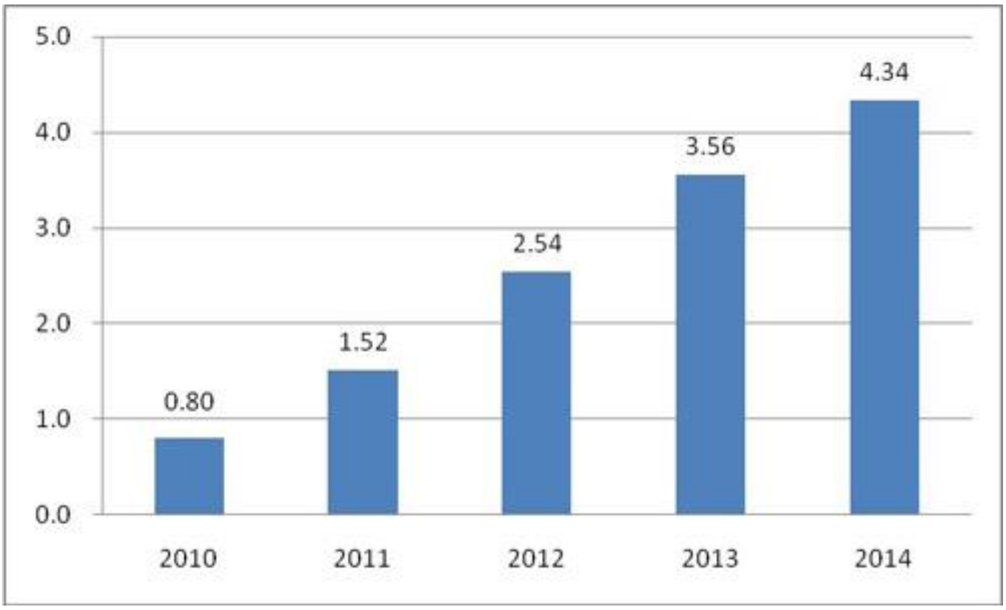
(5) Main languages:

(6) Literacy rate:



(7) Telephone penetration (fixed, mobile):



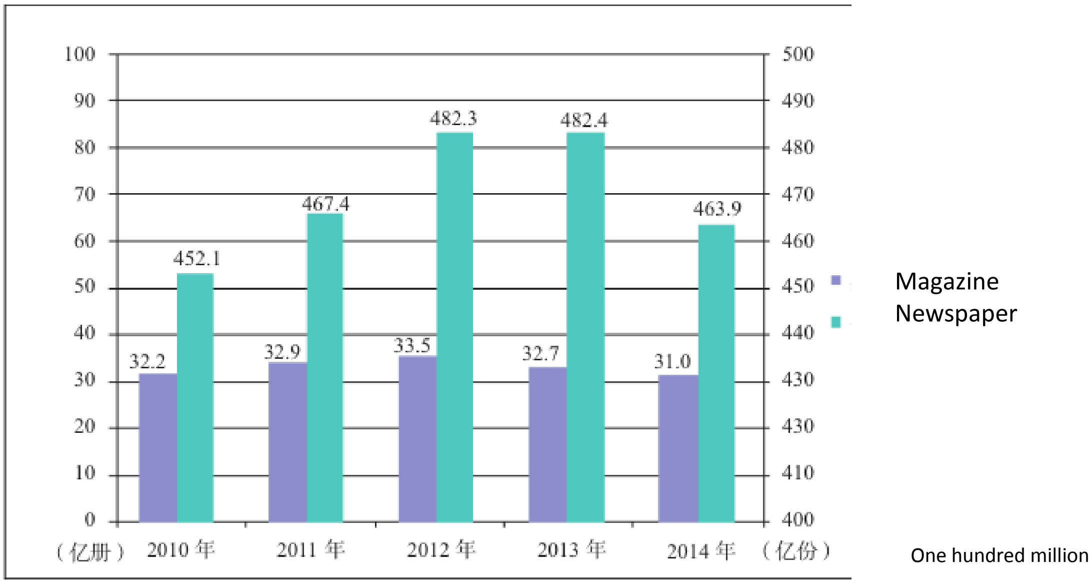


（Number of Mobile Phone Users between 2010 and 2014）

2. Media structure (see the statistics in the table)

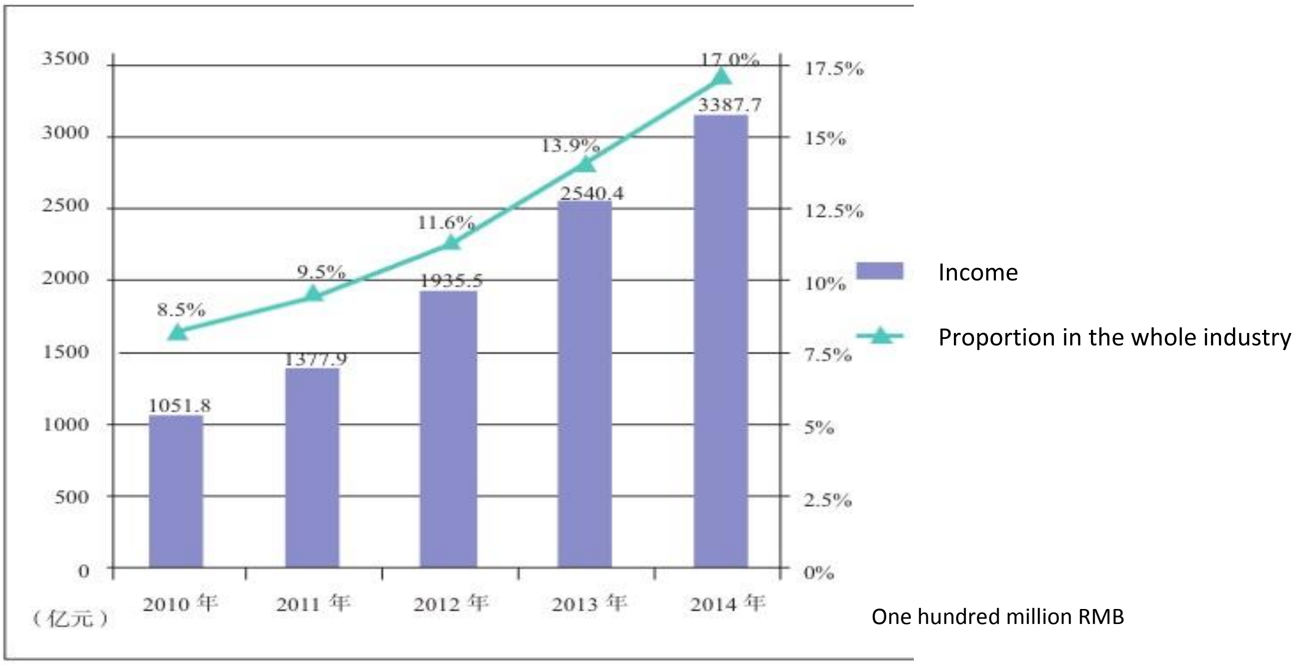
i. newspapers (dailies, weeklies)
ii. magazines

Annual Print Run of Newspaper and Magazine in China (2010-2014)



iii. books

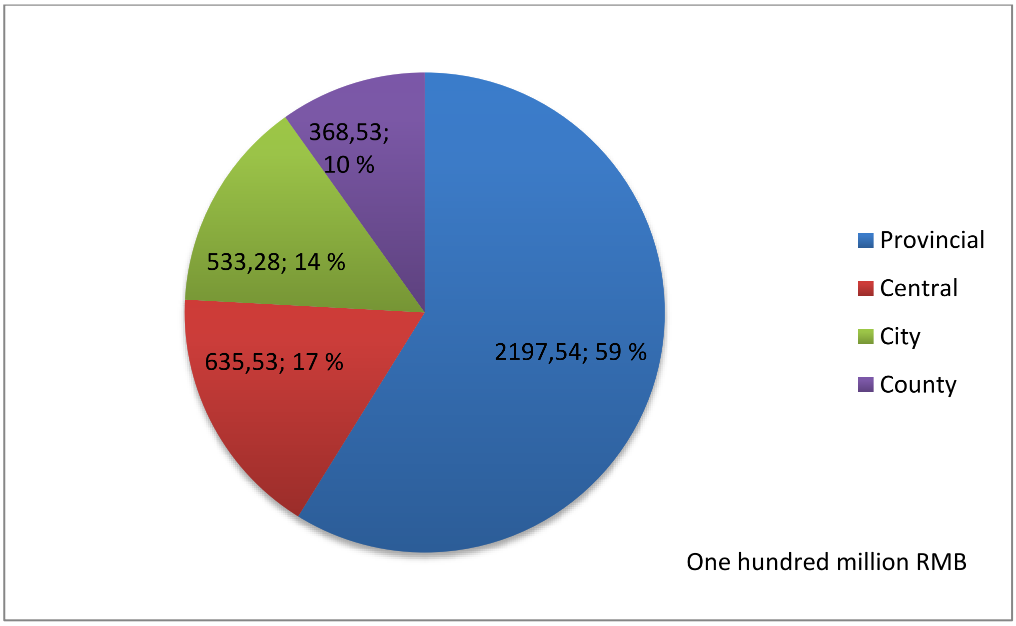
Annual Income of Digital Publishing in China (2010-2014)



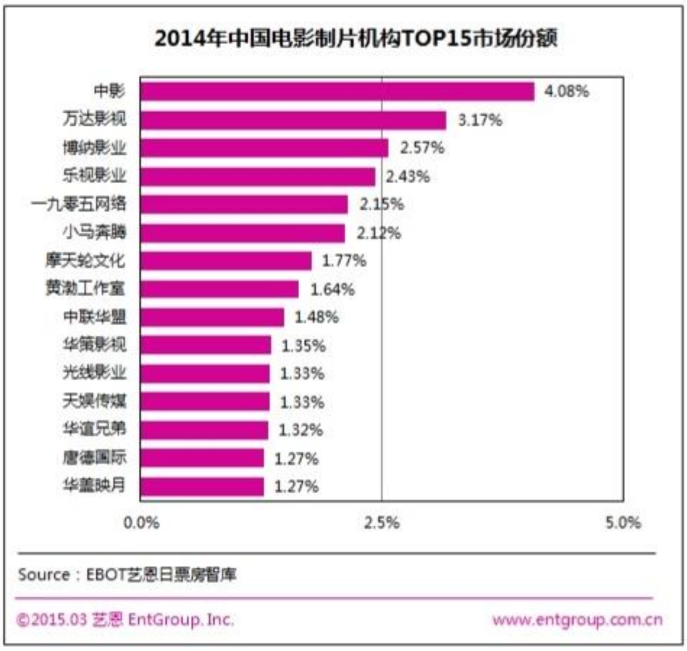
iv. **radio**

v. **television (terrestrial on-air broadcasters, cables, satellite)**

Income Structure of Broadcasting Industries in China (2013)

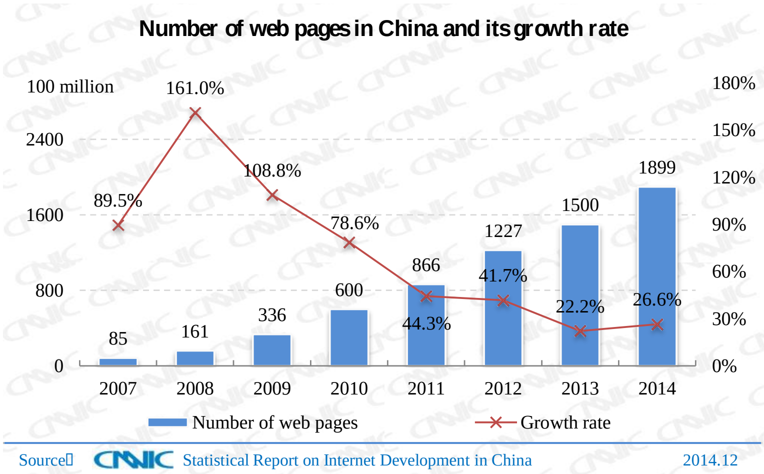


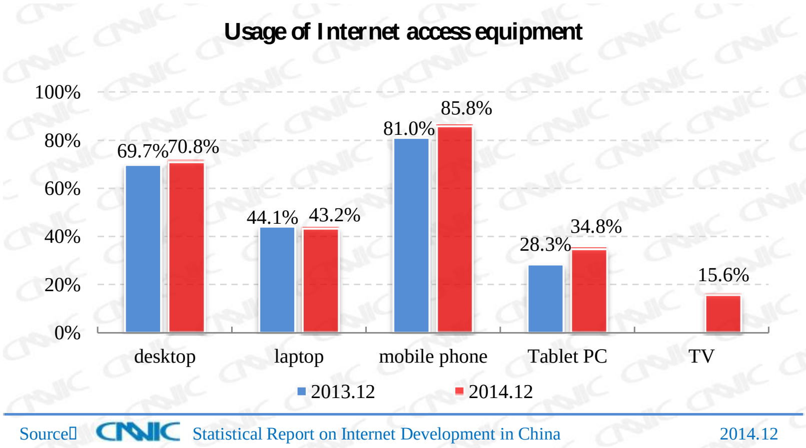
vi. **film: Top 3 film companies are China Film Group Corporation, Wanda, and Polybona.**

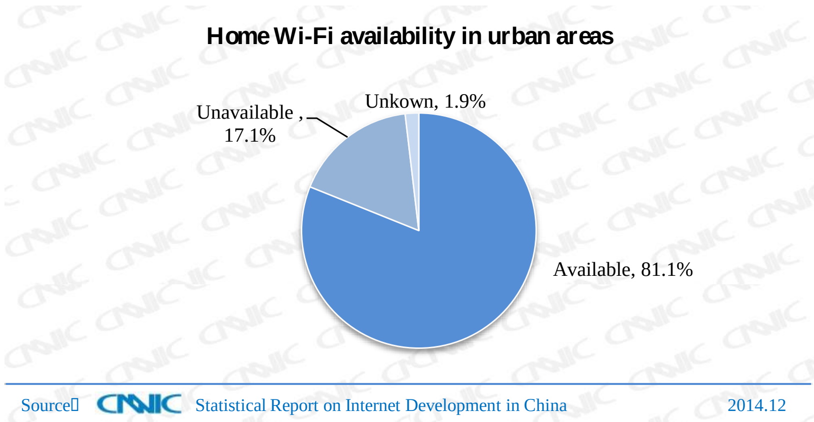


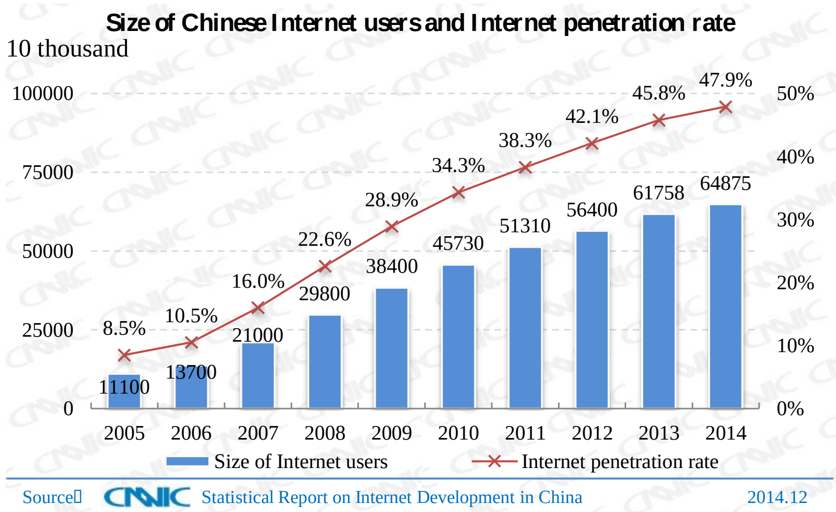
(Market share of film companies in Mainland China: 2014)

vii. **online media: Top 3 internet companies are Tencent, Alibaba & Baidu.**

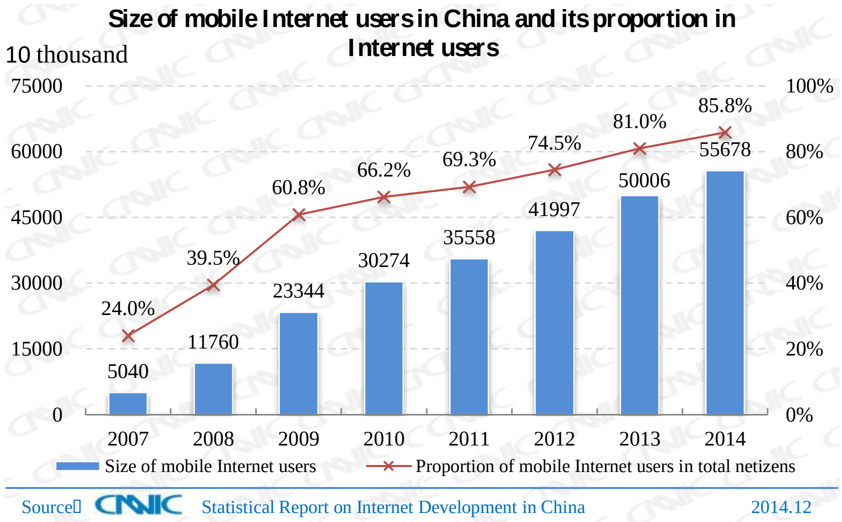

Number of web pages in China and its growth rate
100 million
2400
1600
800
0
180%
150%
120%
90%
60%
30%
0%
85
161
336
600
866
1227
1500
1899
89.5%
161.0%
108.8%
78.6%
44.3%
41.7%
22.2%
26.6%
2007
2008
2009
2010
2011
2012
2013
2014
Number of web pages
Growth rate
Source
CNNIC
Statistical Report on Internet Development in China
2014.12


Usage of Internet access equipment
100%
80%
60%
40%
20%
0%
69.7%
70.8%
44.1%
43.2%
81.0%
85.8%
28.3%
34.8%
15.6%
desktop
laptop
mobile phone
Tablet PC
TV
2013.12
2014.12
Source
CNNIC
Statistical Report on Internet Development in China
2014.12

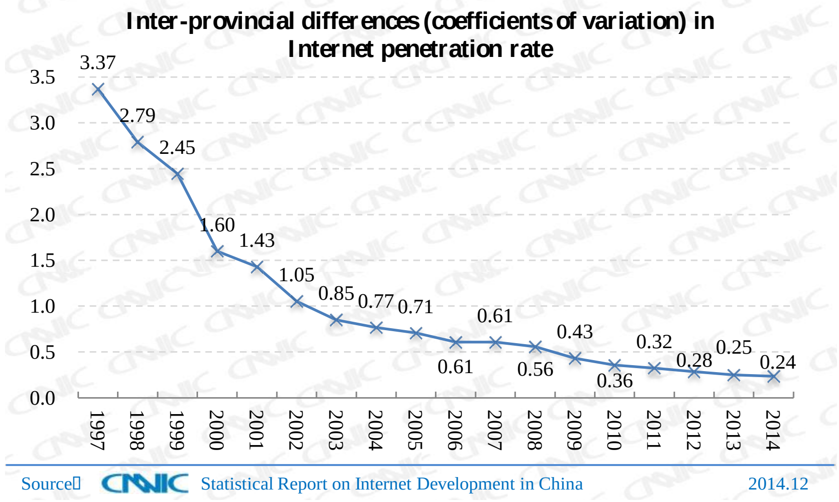

Home Wi-Fi availability in urban areas
Unavailable , 17.1%
Unkown, 1.9%
Available, 81.1%
Source
CNNIC
Statistical Report on Internet Development in China
2014.12



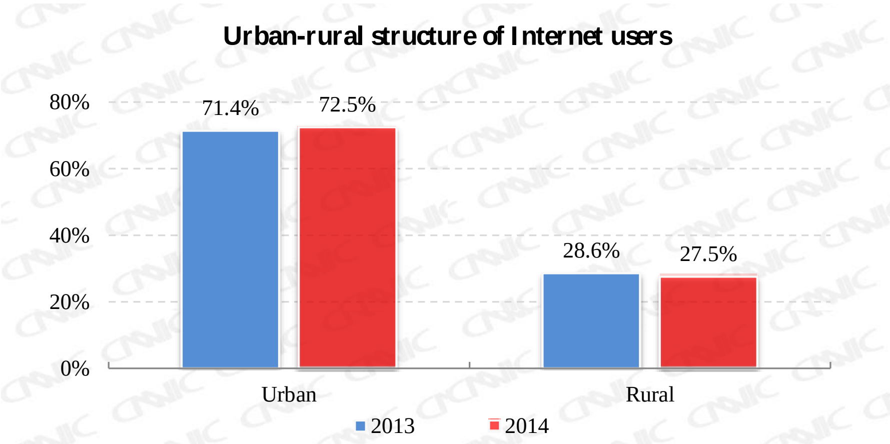
Size of Chinese Internet users and Internet penetration rate
10 thousand
100000
75000
50000
25000
0
50%
40%
30%
20%
10%
0%
8.5%
10.5%
16.0%
22.6%
28.9%
34.3%
38.3%
42.1%
45.8%
47.9%
11100
13700
21000
29800
38400
45730
51310
56400
61758
64875
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
Size of Internet users
Internet penetration rate
Source
Statistical Report on Internet Development in China
2014.12



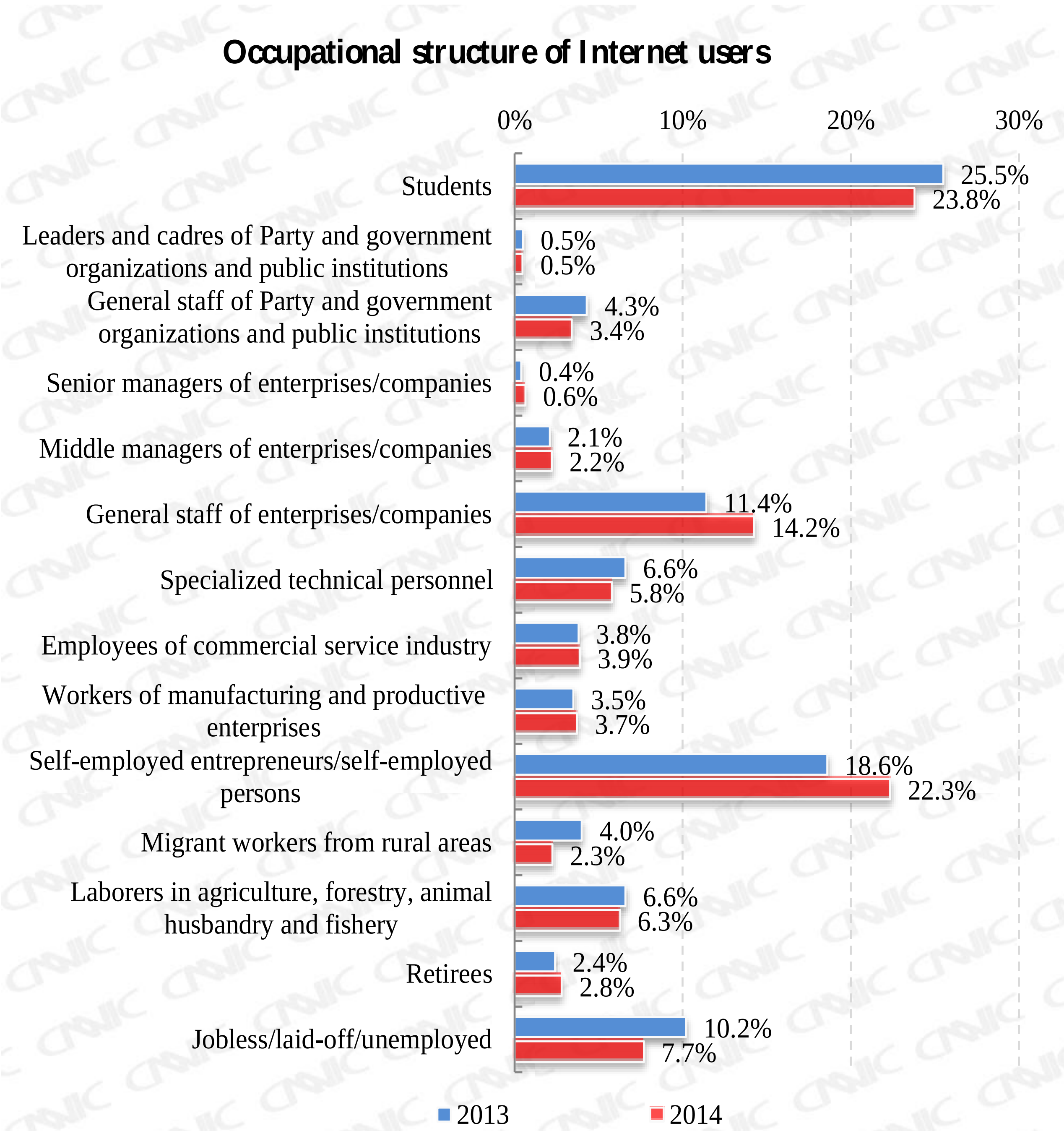
Size of mobile Internet users in China and its proportion in Internet users
10 thousand
75000
60000
45000
30000
15000
0
100%
80%
60%
40%
20%
0%
24.0%
39.5%
60.8%
66.2%
69.3%
74.5%
81.0%
85.8%
5040
11760
23344
30274
35558
41997
50006
55678
2007
2008
2009
2010
2011
2012
2013
2014
Size of mobile Internet users
Proportion of mobile Internet users in total netizens
Source
Statistical Report on Internet Development in China
2014.12



Inter-provincial differences (coefficients of variation) in Internet penetration rate
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
3.37
2.79
2.45
1.60
1.43
1.05
0.85
0.77
0.71
0.61
0.61
0.56
0.43
0.36
0.32
0.28
0.25
0.24
1997
1998
1999
2000
2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
Source
Statistical Report on Internet Development in China
2014.12



Source： CNNIC Statistical Report on Internet Development in China 2014.12



Source： CNNIC Statistical Report on Internet Development in China 2014.12

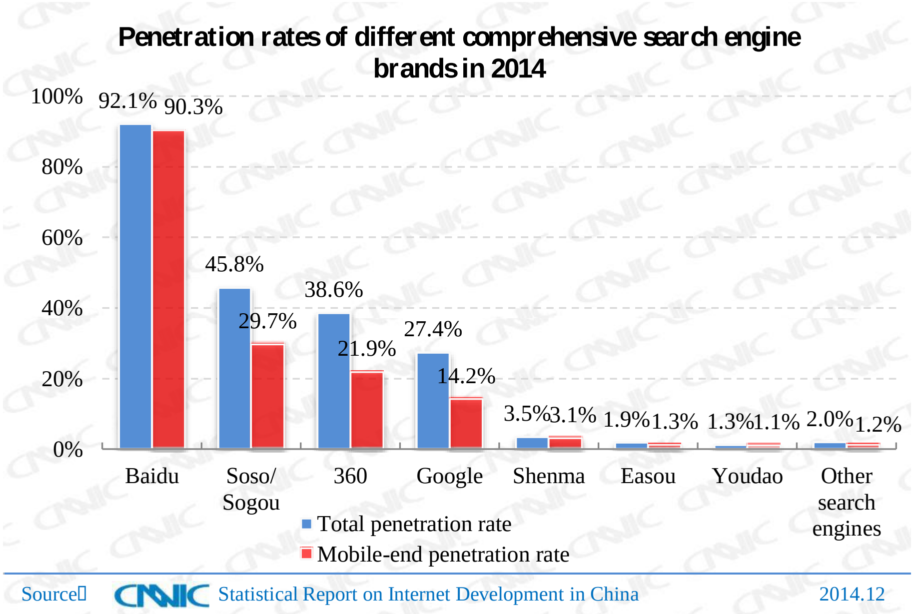
Table 7 Utilization ratio of Internet applications by Chinese netizens in 2013 and 2014

	2014		2013		
Applications	Number of users(10,000)	Utilization ratio	Number of users(10,000)	Utilization ratio	Annual growth rate
Instant messaging	58776	90.6%	53215	86.2%	10.4%
Search engine	52223	80.5%	48966	79.3%	6.7%
Online news	51894	80.0%	49132	79.6%	5.6%
Online music	47807	73.7%	45312	73.4%	5.5%
Online video	43298	66.7%	42820	69.3%	1.1%
Online games	36585	56.4%	33803	54.7%	8.2%
Online shopping	36142	55.7%	30189	48.9%	19.7%
Online payment	30431	46.9%	26020	42.1%	17.0%
Online literature	29385	45.3%	27441	44.4%	7.1%
Online banking	28214	43.5%	25006	40.5%	12.8%
E-mail	25178	38.8%	25921	42.0%	-2.9%
Microblog	24884	38.4%	28078	45.5%	-11.4%
Travel booking	22173	34.2%	18077	29.3%	22.7%
Group purchase	17267	26.6%	14067	22.8%	22.7%
Forum/bbs	12908	19.9%	12046	19.5%	7.2%
Blog	10896	16.8%	8770	14.2%	24.2%
Internet wealth management	7849	12.1%	-	-	-

viii. **news agencies: Only two are officially recognized in the Mainland, namely Xinhua News Agency and China News Service. Xinhua is responsible for news reporting and gathering in both the Mainland and outside, while the CNS is restricted to serve oversea Chinese. More importantly, Xinhua is even higher than CNS in terms of their position in Chinese bureaucratic system.**

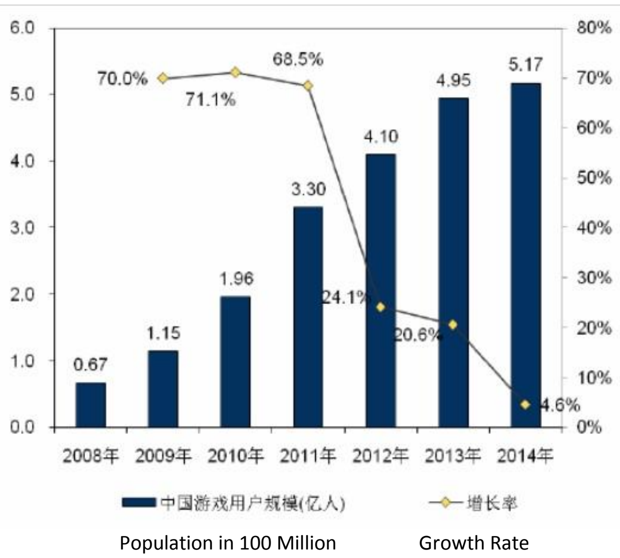
ix. **production companies (to be filled)**

x. search engines (national)



xi. other cultural industries (recorded music, computer games, etc)

Game industry in China has exceeded 17.3 billion US dollars by 2014, three times bigger than the box office.



For each give

- **numerical indicator of volume (N = number of units) divided by type of ownership (state, public/community, private) using Table 2 as a base – official statistics; if not available, your estimates**
- **economic value/turnover ($ = national currencies transformed to US$) divided as above – your estimates with footnote remarks about how much of it is made up of advertising**
- **share (%) of population roughly reached by each media – your estimates**

Also, list major media companies: top 3 in each media segment and top 3 for the whole media industry.

3. Media regulation

- **List relevant elements in the Constitution, media laws and in other legal regimes (criminal, etc) which serve as reference for media structures and operations (to be filled)**

- **Single out the agencies in charge of the legal regulation: Parliament, ministries, regulatory authority, etc**

There are two levels of regulation: central level and regional level. At the central level, there are two intertwined groups of regulatory bodies: the ones within the Party system (superior) and the State Council. As to the former one, there are the central leading group for network security and informatization (led by the general secretary Mr. Xi Jinping) and the Publicity Department of the CCP. As to the latter, there are a series of departments in the State Council, who are responsible for specific fields of the governance of information and communication, for example, the Information Office of the State Council, Ministry of Culture, the State Administration of Press, Publication, Radio, Television & Film, Ministry of State Security, Ministry of Industry and Information Technology, etc. At the regional level, the system of regulatory bodies are consistent with the central level, but lower in the bureaucratic system and restricted within a specific administration zone.

- **Summarize economic regulation (to be filled)**

- **Summarize new media regulation (to be filled)**

- **Summarize self-regulatory bodies of the media if existing**

All self-regulatory bodies are semi-official, because they are required to register with a clear affiliation to a specific government department. Therefore, those self-regulatory bodies have difference levels consistent with the government system. For example, the Association of National Journalists is at the central level with its sub-associations across China. Besides, there are other associations such as Association of Advertising, Association of Radio and Television, etc.

4. **Global and regional dimensions**
    - **More on global presence by national media content than in Table 1**

CCTV News, China Daily, People's Daily, Global Times, Xinhua TV Network, China Radio International, etc.

- **Economic presence/ownership of national media in markets abroad**

Single State-owned media are dominating, while joint venture is in the experiment.

- **Foreign ownership in national media:**

Strictly prohibited. So far, only the distribution sector has been open for foreign capitals, but still under the principle of state-controlled.

- **Foreign content in national media landscape**

More foreign content are consuming by Chinese audience in two ways: first, content trade, for example, TV Dramas and international news; second, glocalization production, like TV format, such as the Reality Show.

However, strict regulation is imposed to foreign content as regard to the potential threats to the ideological control and to the domestic industries as well.

5. **Journalistic community**
    - **Number of journalists – your estimates of full-time and freelancers**

There are around 250,000 registered journalists, namely the amount of legal journalists. However, there are a huge number of "unregistered" journalists working across China, especially under the county media level. It is believed that the amount of this group is three times bigger than the registered. In sum, the population of Chinese journalists is estimated more than 1 million.

- **Share (%) of these who are unionized**

All journalists are required to register to the National Journalists' Association of China (with a hierarchical structure consistent with Chinese government system), a semi-official organization, which is supposed to carry out self-discipline or self-regulation.

6. **Trends and issues under debate in the 2010s**

    While the preceding parts describe the existing national media system in factual terms, this part presents a more dynamic view of the pressures for change, including an analytical review of the issues in public debate. A rough outline is presented to the national seminar, which will thoroughly discuss it leading to a comprehensive report.

    One of the central questions facing Chinese media system is how media will converge (technically and commercially), and how media can be incorporated into the entire economic and social development, and the political reform?

    The CCP's leading group for comprehensive deepening reform is considering media convergence as a chance or challenge to revitalize the cultural leadership of the Party.

However, the industries, no matter broadcasting or telecommunication or internet economy in a broader sense, as well as other economic sectors, are trying to grasp the historical opportunity to upgrade themselves to a higher competitive position in the market, for example, manufacturing 4.0.

As to the dynamics of the Chinese society in transition, various media forms are gradually appropriated by diverse interests groups, no matter domestic or internationally-relevant, in order to pursue their respective political, economic and social benefits. As a result, media is not only the representation but also the means for a fractured society in China.

Possible trends (to be discussed):

1. Media will be more integrated into an informationized Chinese society.
2. Media will be partially replaced by a broadly defined ICTs industry, which is incorporated into an information-oriented economic system.
3. State-own media will be more likely playing leading roles in influencing the public opinion, as a result of the concentration of mediated communication power by the Party and the State.
4. New media platforms will be more likely used by fractured Chinese society to either consolidate existed interest groups or create new ones.
5. The state regulation regarding media tends to politically strengthening and economically liberating.
6. The declining of printing media is intertwined with the trend of digitization.
7. The "going-out" of Chinese media will encounter more structural difficulties during the process of localization in both Western and non-Western societies.

Table 1 BRICS political-economic and media indicators

Country	Population (million)	GDP ($ trillion)	Socio-political context	Media system	Number of newspaper and magazine titles	Internet penetration, % of population	Ad-spend ($ billion)	Main global presence
Brazil	203	2.2	Presidential democracy, Colonial history, Deep social inequality	Commercial, Limited public service, Abundant community media	11,000	52	15.9	Telenovelas
Russia	148	2.1	Presidential democracy, Imperial history, Socialist legacy, Social inequality	State control, Commercial, Limited public service, Multi-lingual	39,000	61	10.3	RT
India	1,236	1.9	Parliamentary democracy, Colonial history, Deep social inequality	Commercial, Strong public-service, Multi-lingual	94,000	20*	5.9	Bollywood
China	1,367	9.98	One ruling party (CCP) and political consultation system, People's Congress System, Indirect colonial experience, Socialist legacy, Social inequality	State-owned and State- controlled traditional media, Commercial new media (ICTs) with multiple ownership, Intertwined State and public service	11,792 (1915 news papers + 9877 magazines, by the end of 2013)	48.8 (by July 2015)	56.07(by the end of 2014)	CCTV News, China Radio International, Xinhua News Agency
South Africa	48	0.3	Parliamentary democracy, Colonial history and apartheid, Deep social inequality	Commercial, Strong public-service with community media, Multi-lingual	1,000	49	4.4	Entertainment, mainly in Africa

*Figures for 2014. All other figures for 2013, compiled from several sources: BRICS governments, World Bank, UN, ITU, UNESCO, ZenithOptimedia.

Table 2. Media structure in numbers (by 2014)

MEDIA	State owned			Public service			Private			Total		
	N	$	%	N	$	%	N	$	%	N	$	%
Newspapers	1915	10.9 Billion	100%							1915	10.9 Billion	100%
Magazines										9877	3.3 Billion	100%
Books										448 Thousand	12.5 Billion	100%
Publishers				54 (public institutions)			528 (business entities)			582 (221 central; 361 regional)	20.2 Billion	100%
Radio Stations	153									153	66.3 Billion	100%
Television Stations	166									166		100%
Radio and Television Stations	2207									2207		100%
Education TV Stations	42									42		100%
Radio Channels	2863									2863		100%
TV Channels	1336									1336		100%

Film										618	4.6 Billion	100%
Online												
Agencies												
Companies												
Search engines							5		99%	5	9.4 Billion	100%
Other												