



***Media Systems in Flux: The Challenge
of the BRICS Countries***

**Structure and Characteristics of the Brazilian
Media System**

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:: Structure and Characteristics of the Brazilian media system

- 1. Data from Project Frames and Media Development Indicators**
- 2. Analysis of Results**

8,547,403 km²
(40,6% of Latin America
territory; *Contiguous United
States: 7,824,535 km²*)

Population: 200,4 million

(34% of Latin America
inhabitants)

84% in urban áreas

27 states and 5,570 cities.



The economy driven mainly by services, industrial production and exportation of goods

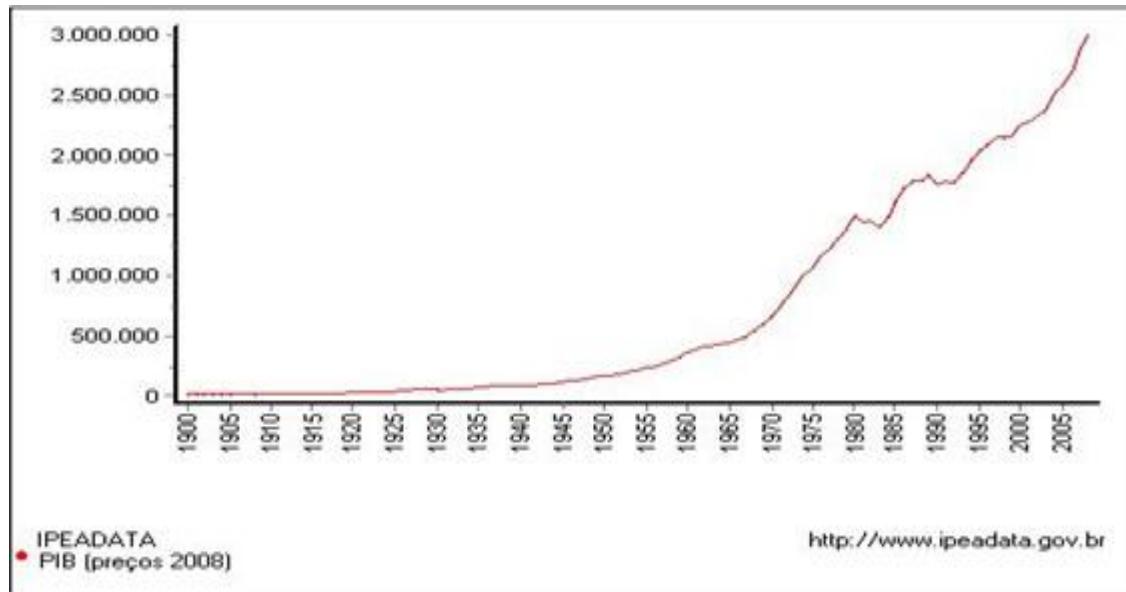


After a period of accumulated growth between 2001 and 2014, the economy dropped by 4.5% in 2015.

GNP: US\$ 2,24 trillion
(45,6% of Latin America)



GDP since 1900

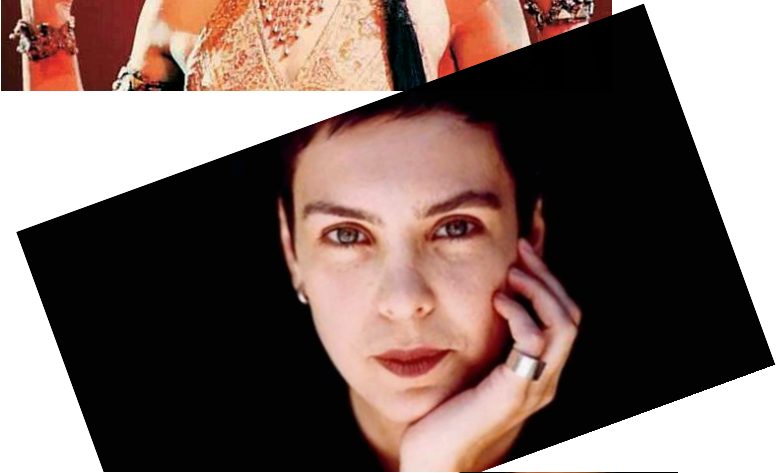


Number of inhabitants



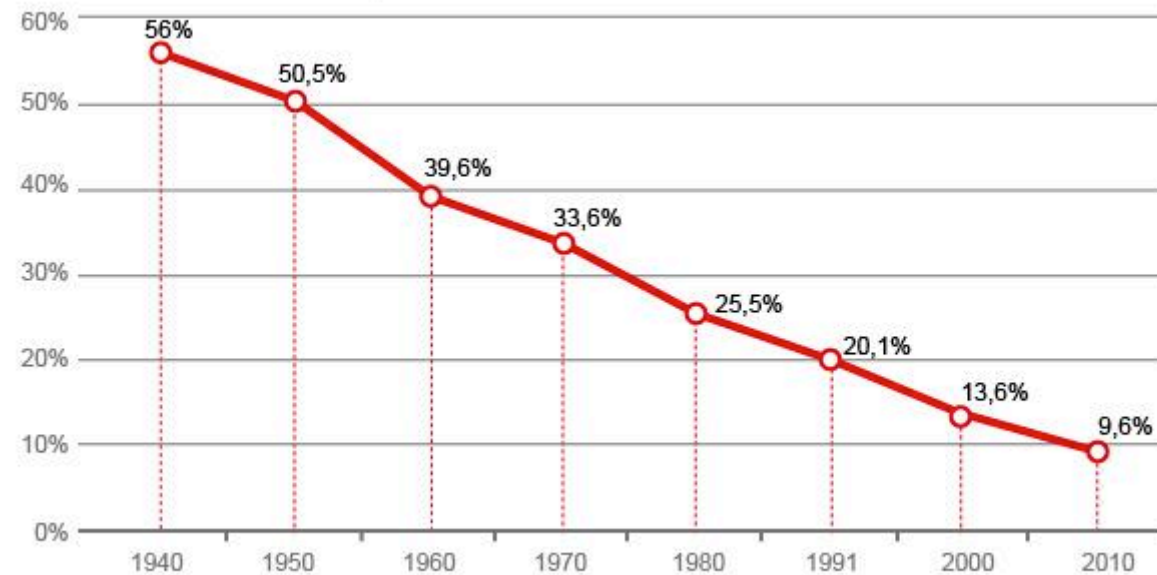
Brazil have just one official language (Portuguese performed by singers like Marisa Monte, Adriana Calcanhotto and Teresa Cristina).

The country faces challenges of income concentration and a considerable level of illiteracy (8.7% of the population).



Illiteracy rate (last 70 years)

Taxa de analfabetismo das pessoas de 15 anos ou mais de idade no Brasil - 1940/2010



The twenty-first century has seen an increase in the number of Protestant church members (at least 22% of Brazilians), a decrease in the number of Catholics (64% of the population)



After 21 years of military dictatorship (1964 to 1985), Brazil adopted a multi-party political system, holding regular elections

... and we need to keep it!



Significant number of people with access to information and communication technologies:

TV signal reaches 99 % of the territory and 97% of homes. Globo exports telenovela

High number of cellular phones (1.25 per person).

More than 100 million internet users (54,4% of the adults)



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In 2008, UNESCO launched an initiative called Media Development Indicators suggesting five categories of indicators that can be used to analyse the different realities of each nation:

- 1) A system of regulation and control
- 2) Plurality and transparency of media ownership
- 3) Media as a platform for democratic discourse
- 4) Professional capacity and institutions of support
- 5) Infrastructural capacity



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1. Inaccurate and dispersed data

The non-existence of an independent regulatory body for broadcasting services means **Brazil does not have centralized data or information on the sector.**

The Ministry responsible for Communications themes has only recently begun to disclose its data. Anatel does maintain systems for controlling grants but the information often does not reflect reality.

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2. Challenges for the media system

Application of the Media Development Indicators shows that there is a complex framework which combines reflections on the economic strength in a sector which has been developing since the 1960s, with **the distortions created by the fact that this development has occurred without a consistent regulatory framework.**

This economic strength is apparent in the practically universal system of open television and radio which generates a considerable amount of revenue and the capacity for producing personal content. Even though newspapers do not share this same economic strength, they have benefitted from a broader consumer market over the last years before the current crisis.

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But the private system strengthened itself without a regulatory body to guarantee pluralism and diversity. Of the more than **500 television channels on air, around 80% are connected to the main communication conglomerates.**

Audience participation and advertising revenue from the four largest broadcasters totals more than 70 and 90% of the market, respectively. In reality, the Public Power was directly responsible for building a group of networks out of partnerships with large national media groups and state political and economic groups.

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Around **one third of the members of National Congress have some kind of connection to television and radio broadcasters**, whether directly or indirectly.

There are **4,600 community radio stations operating under license, while another 20 thousand** are still awaiting theirs. The public, community and state channels are only available for those who are able to afford pay TV, this is true for most of the population.

The Brazilian Telecommunications Code has not been updated in a long while. Also, the articles of the Constitution dealing with Social Communication have not yet been regulated.

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Category 1 – A system of regulation conducive to freedom of expression, pluralism and diversity of the media

Four major issues:

- legal and policy framework
- defamation laws and other legal restrictions on journalists
- censorship
- regulatory system for broadcasting

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The 1988 Constitution, just like international treaties ratified by Brazil, guarantees freedom of expression and the press in accordance with the more elaborated international systems. It guarantees access to information, the right of reply, protection of privacy, and prohibits any kind of political, ideological or artistic censorship.

The Federal Constitution states that expressions of an intellectual, artistic, scientific and communicative manner are freedoms, they are independent of censorship or licensing, **and it guarantees access to information for all.**

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In practice, **the legislation is still too inconsistent to effectively guarantee freedom of expression.**

The indicators show that the effects of the abuse of defamation laws has inhibited public debate and represented a risk to freedom of expression.

The OEA's Special Report on Freedom of Expression related cases of journalists who were being persecuted politically for looking into allegations of irregularities in public funds.

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There is no legislation which supports prior censorship, but there are cases in which legal proceedings have created mechanisms blocking the treatment of certain issues or the citation of certain names, creating a *de facto* censorship.

The access to information (Law 12.527/11) does not define a specific ombudsman in public administration to handle appeals and act as an appellate court. The culture of transparency and conscience in the public's right to access information is still a fragile one in the country.

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Its regulatory bodies (Anatel, the Ministry of Communication, after Temer Ministry of Science, Technology and Communication, Ancine, CADE and the Ministry of Justice) are not enough. **The country needs constant and permanent monitoring so as to prevent the exploitation broadcasting services from being exploited.**

Also, **there are no spaces allocated for local participation whether that be for creating public policies or for renovating grants.** The only body under national law which has this role in the sector is the Council on Social Communication which serves only to support Congress.

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Category 2 – Plurality and diversity of media, a level economic playing field and transparency of ownership

Five major issues:

- Media concentration
- A diverse mix of public, private and community media
- Licensing and spectrum allocation
- Taxation and business regulation
- Advertising

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Monopoly and oligopoly of the forms of communication are formally prohibited in Brazil. Article 52.795/1963 of the 1988 Constitution states that one entity or the people who make up that entity's social and directive scope cannot include more than one type of the same radio broadcast service in the same area.

However, this article's lack of regulation, the failure to impose limits on creating networks, and **the lack of effective monitoring for impeding the concession of relatives or partners of media company owners** are all examples of how this constitutional article is not applied.

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Turning our attention to pay TV, Law 12,485 / 2011 reaffirms prohibition of monopolies and oligopolies. Telecommunication companies are limited to 30% of their capital for producing and programming content, and limit the participation of producers and programmers are limited to 50% of their capital for participating with telecommunications companies.

The law also establishes quotas for the transmission of national content, a minimum of 3.5 hours weekly in a primetime slot, half of which is produced by an independent Brazilian producer. **These obligations will cease to be in force 12 years after enactment of the law.**

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2012 marked the **first time** that the Ministry of Communication published an annual plan for monitoring broadcasting services, allegations, process stock and routine. Grant renewals became almost automatic.

Without this monitoring, the only requirement made of concessionaries is to pay their taxes on time. The criteria that ensures the licenses are conformed to are not used for non-renewals.

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Even though article 223 of the Federal Constitution imposes the principle of complementarity for private, public and state systems, it has never been regulated. Anatel, the regulatory body responsible for channel distribution, **does not consider pluralism when allocating frequencies which, in turn, generates a prevalence for commercial broadcasters.**

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A maximum of one frequency channel per community radio station is permitted in each locality. The combination of the one radio frequency per community, **a maximum broadcast radius of 1km**, and the minimum distance of 4km between broadcasters results in a maximum of only 20% coverage within the municipality, even if the radio stations were distributed in the best form possible.

There are no positive economic measures to motivate community media.

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When we look at the spread of official advertising, there have been advances in the distribution of public funds from the Federal Power; an example of transparency and diversification. From 2003 to 2013, the number of public funds received from the federal government grew from 499 to 9,663.

But, in 2013, open television received 68.95% of advertising (around 22.3 billion reais). Just Globo (direct or indirectly) received 74% of these resources.

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Table 1: Advertising expenditures by media in percentage of the total, by year (Intermeios)

Year	TV	Newspapers	Magazine	Internet	Pay TV	Radio	Outdoor	Other
2010	62.9	12.4	7.5	4.6	-	4.2	-	8.0
2009	60.9	14.1	7.7	4.3	4.4	4.4	3.0	5.3
2008	58.8	15.9	8.5	3.5	3.7	4.2	2.7	2.6
2007	59.2	16.4	8.5	2.8	3.4	4.0	2.8	6.0
2006	59.4	14.7	8.6	2.1	3.5	4.2	3.5	2.5
2005	59.6	16.3	8.8	1.7	2.3	4.2	4.7	2.8
2004	59.2	16.7	8.3	1.6	2.2	4.3	2.7	2.9
2003	59.0	18.1	9.4	1.5	1.7	4.5	5.7	-
2002	60.3	20.5	10.0	-	-	4.9	4.8	-
2001	57.8	21.7	10.8	-	1.6	4.9	4.3	-
2000	57.9	21.5	10.6	-	-	4.9	5.2	-

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Category 3 – Media as a platform for democratic discourse

Six issues:

- Media reflects diversity of society
- Public service broadcasting model
- Media self-regulation
- Requirements for fairness and impartiality
- Levels of public trust and confidence in the media
- Safety of journalists

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It was only in 2008 that the **complementarity foreseen in the Federal Constitution and the effective implementation of a national public system gained ground.**

There is, however, some confusion between public and state systems reflected in both the management of the EBC and in the more than twenty other state educational and cultural broadcasters. The reach of the EBC is quite limited considering its objective of being a national public communications company.

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Speaking about media self-regulation, even though the companies maintain internal codes of ethics and journalistic practice, **there are few self-regulation and media accountability mechanisms implemented in the field of communication.**

One exception is publicity. It relies on Conar (the National Council of Public Self-Regulation) which is criticized by civil society organisations.

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Even though 95% of journalists point to ethics as a major factor in journalism quality, the main national media and communication associations do not have ombudsmen capable of dealing with allegations and complaints from the public about ethical violations within media outlets.

There are only Public TV and Radios and two newspaper who act as ombudsmen (as compared to eight in the 1990s).

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The right to response is a fundamental right upheld in the Brazilian Constitution, yet its application is failed, especially due to:

- i) Communication companies **do not uphold the tradition of immediate** concession of the right to response which generally requires legalizing;
- ii) Regulation of the right to response lost its effectiveness when the Supreme Federal Court revoked the Law of the Press because it saw it as conflicting with precepts of the Constitution.

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According to the Social Trust Index, measured by the IBOPE, the public's trust in forms of communication has decreased.

The index registered **71** points in 2009, **67** points in 2010, **65** points in 2011, **62** points in 2012 and **56** in 2013. Data from the Secretary of Social Communication for the Presidency of the Republic in 2014 said that people do not have a high level of trust in news and commercials on television, radio, newspapers, magazines, sites, blogs and social media: **only 41% said they always or mostly trusted in the news on these mediums.**

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There is still a considerable number of physical and verbal aggressions directed towards journalists. Data from Fenaj (National Federation of Journalists) points to a large number of aggressions being directed towards politics or government authorities and **42% of the aggressions are related to political issues or public administration.**

Data from the Interamerican Press Society and from Article 19 point to an increase in the cases of journalists murdered. Research in 2012 from the CPJ (Committee for Journalist Protection) indicates that **Brazil is the country with the 11th highest number of journalist murders in the world that go unpunished.**

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Category 4 – Professional capacity building and supporting institutions that underpins freedom of expression, pluralism and diversity

This category includes the following issues:

- Availability of professional media training
- Availability of academic courses in media practice
- Presence of trade unions and professional organisations
- Presence of civil society organisations

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There are **549 courses in Social Communication** that include journalism as their skill..

There are more **than forty post-graduation programs in Communication**. Research data from IPEA and Socicom confirm a great increase in the number of courses in this field. The number of registrations for communication courses in public and private institutions shows a growth both in the number of courses available and the number of registrations which reached **186 thousand in 2012**.

(almost 1/1000 inhabitants)

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The indicators show how curriculum guidelines only cover issues of media rights, ethics, regulation and public policies superficially.

The relation between media and promotion of **democracy and human rights is not necessarily mentioned in Social Communication curriculum guidelines**. This is why media education requires two graduation courses: either in secondary schools or in civil society organizations. The media companies are also responsible for capacity building programs.

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There are at least **two dozen civil society organizations which monitor content and media ownership** in order to promote pluralism and diversity. There are still a number of organizations that focus on critiquing the media, including marginalized groups such as blacks, women, children and human rights defenders.

In the field of public and community communication there are also various bodies as well as a number of organizations that concern themselves with issues related to the Internet.

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Category 5 – Infrastructural capacity is sufficient to support independent and pluralistic media

This category looks at two issues:

- Availability and use of technical resources by the media
- Press, broadcasting and ICT penetration

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The current legislation (Law 9.612 / 1998) limits the power of community radio stations to 25W and a **1km radius which can make it difficult to** reach marginalized communities. The allocation of only one frequency per location and the requirement of a minimum distance of 4 km between one station and another also prevents many communities wishing to have a community radio license from doing so.

The range of community television is smaller still, since such stations do not have guaranteed space in the spectrum allocated to public televisions.

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Due to the limited reach of its signal, and being available only in a few municipalities, there is a low access rate to public broadcasting.

Commercial broadcasters have a much larger reach.

Although only **10.9% of the municipalities have television generators,**

due to the relays and repeaters, **open television is**

present in 95.11% of Brazilian

municipalities.

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The Internet reaches **54% of the country's households, 66% of them being broadband connections**, according to data from the Center of Studies on Information and Communication Technologies (CETIC.br) published in 2014.

Access is highest in the South and Southeast regions and reaches only 30% of households in the Northeast region and 26% of residences in the north.

While 98% of upper-class households have Internet access, this figure is only 8% for lower-class households. The pricing policy has been identified as a factor excluding marginalized communities: 58% of households that do not have a computer point to the price as a deterrent.

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In 2010 the government created the National Broadband Program with hopes of promoting access. However, by the end of 2015, the program had not reached its desired results.

The issue **of internet quality is seen as an industry problem** but there are prospects of improvement after Anatel had approved a regulation in 2011 requiring operators to ensure the continued delivery of the nominal speed.

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Data from the CETIC.br show a high ICT penetration in communication companies: **100% of the companies use computers and internet, with more than 47% of them using internet speeds of over 10 Mbps.**

The indicators also point to a growth in media distribution across multiple platforms including applications for phones and tablets as well as through partnerships with mobile operators.

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Steady increase in the number of cable subscribers in the past years.

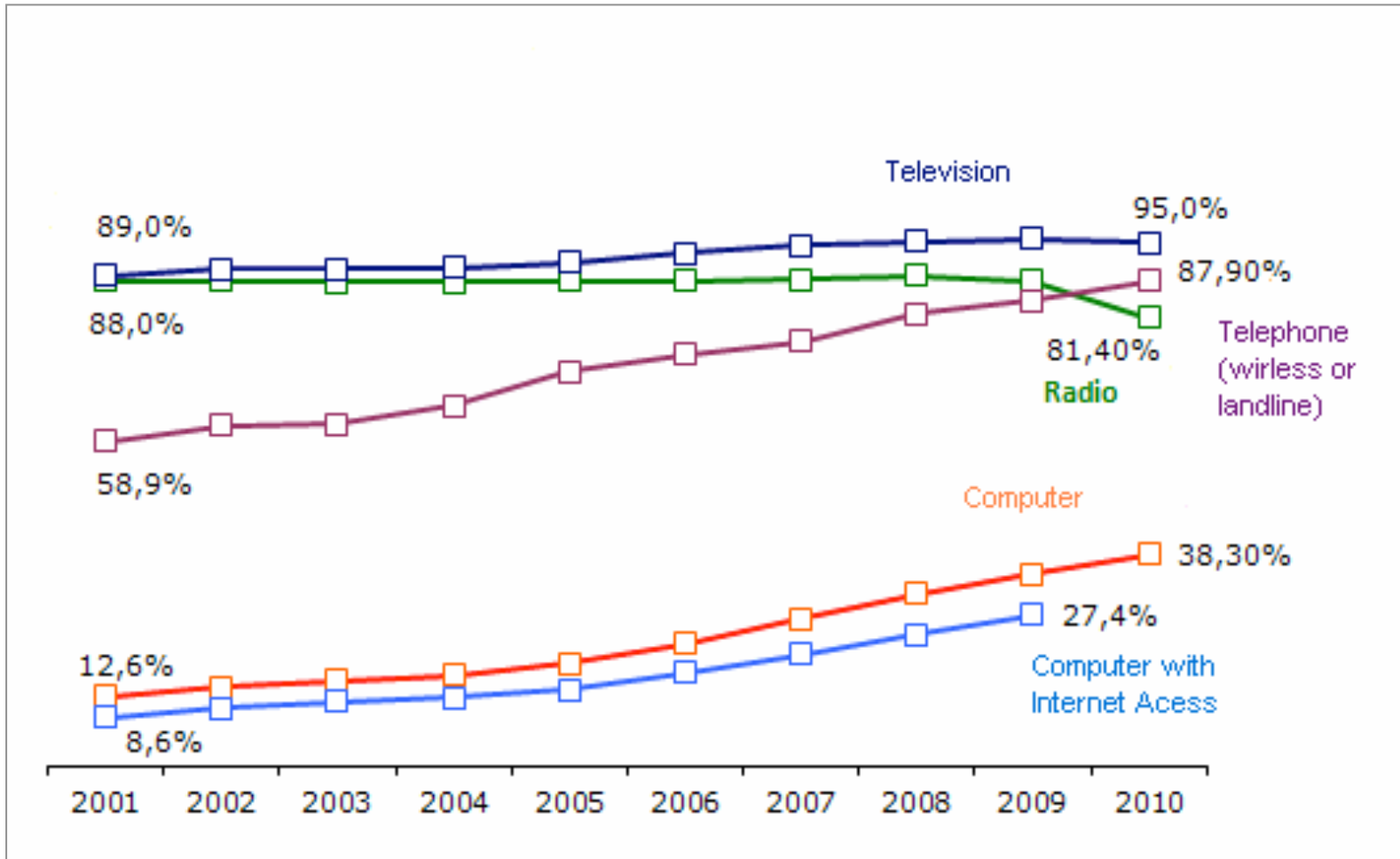
Recent studies show that **21.2% of television households (42 million people)** have legal access to cable television. It is estimated that the number is higher due to the existence of 700,000 “illegal” cable households

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Television digitalization has been mostly through pay TV. **At the end of 2013, more than 28% of subscribers were already watching channels in high definition.** Complete changeover should occur in 2018, two years later than anticipated. According to the Department of Licensing Services for the Ministry of Electronic Communication, 1323 television generators had received consignment by the end of 2014.

Regarding radio, Brazil has not yet determined which digitalization standard will be adopted. In 2012, an Advisory Board was formed to discuss the standard of digital radio, but it produced little advice.

Television remains the most regularly used medium. Less than half of the population (42.7%) said they have the habit of reading print newspapers. Internet and Cell phone uses have increased.



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In short and to conclude:

a) Television remains the most regularly used medium. Less than half of the population said they have the habit of reading print newspapers;

b) Concentration of ownership and reduced Communication Policies

c) Over-the-air television still dominates in terms of perceived importance, audience size and advertising expenditures, but it is losing audience last years;

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In short and to conclude:

d) Internet access is rapidly increasing getting more public and advertising;

e) Media and accountability remains underdeveloped;

f) Majority of journalists (“bachelors”) work outside newsrooms in communication/media public relations.



BRICS CONCEPT IS ALSO ABLE TO BE NOT JUST A STATES' IDEA

BRICS RESEARCHES ARE INTERESTING STARTING POINTS

DIFFERENCES CAN STIMULATE.... COMMUNICATION.

(KIITOS, KAARLE, FOR THIS OPPORTUNITY!)



Thank you!

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