

Indian media system in template

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1. Overall characterization: Socio political context

Major industrial sectors ¹	Agriculture & allied, industry, manufacturing, services
Rate of economic growth	7.6 % (economic survey of India 2016-17)
Main political parties ²	6 National and about 65 state level parties
Main religions ³ (census)	(Hinduism (79.8%), Muslims (14.23%), Christians (2.3%), Sikhs (1.7 %), Buddhists (0.7%), Jains (0.4%) other religions and persuasions (0.7%) religion not stated (0.2%)
Main languages ⁴	22 (official-schedule) languages, 100 non-scheduled Languages & 234 identifiable mother tongues.
Literacy rate	74.04 %

2. Media structure

2.1 Major indicators

Newspapers (dailies and weeklies) categorized as publications in India	According to registrar of newspapers in India, 105443 (total) out of which 7871 dailies
Magazines	85899 (classified as weeklies)
Books	90000 in English & 24 other languages. Their pattern of circulation and or sales figures etc., are not available
Radio	414 (state), 179 (community) & 245 (private)
Television	1416 (transmitter) & 67 studios (State) 817 (channels-licensed), 405 news channels (private). Television is distributed mainly by DTH and or Cable & Satellite and hence theoretically Indians have access to all licensed channels.
Telephones	Landline 25.2 million (2016); Mobile

	1033.33. Urban Teledensity 154.01 % and rural 51.75. Broadband subscribers 149.75 million.
Films	1602 films annually
Online	177 search engines
News agencies	4 main and a few other agencies
Other cultural industries	Mainly revolve around films and active gaming and animation sector.

2.2 Advertising market

Television	617 (INR billion) in 2016. Projected to 1097.6 in 2020
Print	305.2 (INR billion) in 2016. Projected to 412.5 in 2020
Films	158.7 in 2016. Projected to 412.5 in 2020
Radio	23.4 in 2016. Projected to 43.3
Music	12.1 in 2016. Projected to 20.6
OOH	28.3 in 2016. Projected to 45.2
Animation and VFX	58.3 in 2016. Projected to 108
Gaming	81.1 in 2016. Projected to 50.7
Digital	81.1 in 2016. Projected to 255.5
Total	1315 in 2016. Projected to 2260.

2.3 Top Media and Entertainment houses (2015) based on their listing in Stock exchanges. <http://www.top10listedcompaniesinindia.com/top-10-listed-media-and-entertainment-companies-in-india/>

Zee Entertainment Enterprises	www.zeetelevision.com
Sun TV Network	www.sunnetwork.in
Dish TV India	www.dishtv.in
TV18 Broadcast	www.network18online.com
DB Corp	www.bhaskarnet.com
Jagran Prakashan	www.jplcorp.in
PVR	www.pvrcinemas.com
Hathway Cable and Datacom	www.hathway.com
Entertainment Network India	www.enil.co.in
INOX Leisure	www.inoxmovies.com

2.4 Top dailies and their readership in Indian readership survey (IRS) <http://trak.in/tags/business/2015/03/30/top-publication-english-dailies-2015/>

Publication	Language	Periodicity	Readership
Dainik Jagran	Hindi	Daily	16,631 (000)
Hindustan	Hindi	Daily	14,746 (000)
Dainik Bhaskar	Hindi	Daily	13,830 (000)

Malayala Manorama	Malayalam	Daily	8803 (000)
Daily Thanthi	Tamil	Daily	8283 (000)
Rajsthan Patrika	Hindi	Daily	7905 (000)
Amar Ujala	Hindi	Daily	7808 (000)
The Times of India	English	Daily	7590 (000)
Mathrubhumi	Malayalam	Daily	6020 (000)
Lokmat	Marathi	Daily	5080 (000)

Note: Many newspaper publishers have expressed reservation about this survey.

2.5 Top TV news channels based on latest available ratings.

<http://www.indiantelevision.com/television/tv-channels/viewership/news-space-witnesses-mixed-ratings-barc-week-40-161013>

English	Hindi
Times Now	Aaj Tak
CNN News 18	India TV
India Today TV	India News
NDTV 24x 7	Zee News
News X	ABP

2.6. Top Indian social networking sites

Facebook	Hearty friends
Google	TopadsIndia
Twitter	Linkedin
Tagwitty	Starupville
You Tube	Thehinduforum
Bharat Student	FriendsQ
Link2connect.com	Infeeds
Indian Friend finder	

3. Media Regulation

Constitutional provision overall with respect to freedom	Constitutional Provisions The Indian Constitution does not provide freedom for media separately. But there is an indirect provision for media freedom. It gets derived from Article 19(1) (a). This Article guarantees freedom of speech and expression. The freedom of mass media is derived indirectly from this Article.
<ul style="list-style-type: none"> • Advertising • Broadcasting 	The list is exhaustive and about 75 different laws affect the concerns

<ul style="list-style-type: none"> • Censorship • Confidentiality • Contempt • Copyright • Corporate law • Defamation • Entertainment • Freedom of information • Internet • Information technology • Privacy • Telecommunications 	<p>pertaining to the overall communication and media situation. Overall telecommunication that forms the backbone of the structure is regulated through the Telecommunications Regulatory Authority of India (TRAI) Majority of the 75 plus acts and rules (annexed) that govern different aspects of media functioning in India are in the domain of the Central governments and administered through the nodal ministries or relevant provisions of the law whenever a civil or criminal case is filed. All acts and their interpretation are within the purview of the judiciary. Law and order being a state subject under a federal form of government is supervised by the relevant rules of the respective government</p>
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3.1 Media regulation with regard to investment

Media	Foreign direct investment
Print Media- dailies and periodicals in news and current affairs Publishing of Indian editions of Foreign newspapers and periodicals Online platforms dealing with news too need Investment approvals ⁵	26 % with the approval of the government 26%
Scientific and other content (Print)	100 %
1)Teleports(setting up of up-linking HUBs/Teleports); 2)Direct to Home (DTH); (3)Cable Networks (Multi System operators (MSOs) operating at National or State or District level and undertaking upgradation of networks towards digitalization and addressability);	74 % equity cap. 49 % automatic. 49-74% with government approval.

(4)Mobile TV; (5)Headend-in-the Sky Broadcasting Service(HITS)	
Cable networks and other MSOs minus upgradation	49% automatic
Terrestrial FM radio	26% subject to extant rules of the government
Up-linking of News and current affairs channels	26 % with government approval
Up-linking and downlinking of non-news channels	100 % with government approval

3.2. New media regulation

New media that operates on a convergent platform is subsumed within the overall framework of Telecommunications Regulatory Authority of India (TRAI) that oversees, monitors and regulates the backbone of new media i.e. telecom. The growth and spread of social media in India has further raised several concerns among the society with regard to privacy and abuse of social media platforms. It is governed by the Information and Technology Act as amended from time to time. Arrests consequent to posting of comments pertaining to politicians led to the scrapping of the relevant sections by the Supreme Court upholding free speech⁶ there is also off and on pressure by the government based on its security concerns to seek blocking of content through search engines. The moral concern regarding pornography led the government to initially seek blocking but subsequently it restricted it to child pornography sites. There is also an eagerly awaited Supreme Court judgment on the right to privacy that is embedded in many of the applications and use of new media.

3.3. Self-regulatory bodies

Anxieties pertaining to media practices and social media use and abuses have caused widespread concern with regard to the need for self-regulation. With a democratic framework that resists any form of state control or intervention, self-regulation is not only preferred but advocated.

The Media in India is unanimously against any form of control through and by the government. The Broadcast Industry has a standards council and the newspapers work through the Editors' Guild of India. For a long time, there is the Press Council of India that registers complaints against newspapers. It seeks comments and explanation but does not have prosecution powers. The [National Broadcasters' Association](#) is concerned with various aspects of the regulatory environment that includes: (This also reflects the trends and issues in the recent times).

4. Global and regional dimensions

India's media spread and access is globally recognized. The fact that newspaper circulation and readership are sustained and growing is unlike many other countries in the world where the print media consumption is on a rapid decline. India's regional presence in South Asia has been recognized notwithstanding bilateral issues within and among the countries in the region. Relatively, its track record of freedom of the press in the region and globally is fairly good. Notable growth engines of the media sector are in the entertainment sector with the film industry and its spin off audio-video sector dominating the revenue stream. Within BRICS, it compares well with China on many indices notwithstanding the fact that the political and governance structures of these countries are varied. In the past and at the height of the Non Aligned movement, India played a leading role in organizing the non aligned news agencies pool. In the events leading to the call for a new world information and communication order, India took a definitive stand on the call for a free and balanced flow of information. Its movement towards digitization is helped by what is considered as the largest pool of Information technology professionals. Progressively, the issues of digital divide are being addressed and the focus is more on citizen services especially in the financial and banking sector. India has a large diasporic presence in several countries and this also enables the spread and reach of its television content. Although official agendas in the various summits have not included media as an area for discussion, India could play a role.

5. Journalistic community

The large media sector is heavily skewed in favor of professionals and supporting skill personnel in the media and entertainment (M&E). Journalistic community is concentrated in the news and current affairs oriented media, especially television where nearly 400 channels are niche news channels. The growth and sustenance of the print media sector contributes to the professional pool.

Journalists' unions are still active although many media houses have by default moved to the contract based employment dynamics. Indian Federation of Working Journalists (IFWJ), National Union of Journalists (NUJ, India) and Indian Journalists Union are the main working journalists' unions/associations in India. Government regulates the wages only in the print sector through a statutory wage board which is a point of contention between newspaper owners and the government. Concentration and ownership of media is a critical area of discourse as it affects the public sphere aspect of our democracy.

As the journalistic community is not regulated by any government agency and media houses reluctant to share sector wise employment, estimates by trade bodies and entertainment sector reports only can provide indicative figures. Specific extrapolation exercise was undertaken for this project.

Based on returns filed by newspaper establishments with the government of India and estimations from the skill gap assessment study including data on the home pages of two news agencies, we can estimate that the total number of journalists as follows:

Print sector	29,000
Television sector	16,000
Radio as in AIR only	600
News agencies	1,500

The total estimated number of journalists is 47,100. If we add card holding and advertising sales force, particularly in the regional newspapers and stringers of various kinds, the number would be 50,000.

6. Trends and issues under debate in the 2010s

Developments in media that are processual and have a long period of planning and coming into the scene cannot be pegged on a particular year or date. The argument that media in India has furthered strengthened the democratic processes is a celebratory way of looking at the media. Commercialization and increasing corporatization of media is the main and overarching and concerning trend.

Corrupt practices of journalists and media houses resorting to paid content and advertorials. Breaking news syndrome and lack of sensitivity in coverage of tragedies. Security concerns being overlooked in terror related coverage.

While internet and mobile phone penetration is rising, the space and use of social media platforms came to the fore including the fact that the political party governing the country now made full and effective use of the social media and this has been acknowledged as a primary reason for the success. Politicians and those in power use tweets on a regular basis and this forms the peg for the news media to follow up and or use them in discussion.

¹ Economic survey of India

² http://eci.nic.in/eci_main1/PolPar/ListofPolParties2015.aspx

³ http://censusindia.gov.in/Ad_Campaign/drop_in_articles/04-Distribution_by_Religion.pdf and updated

<http://pib.nic.in/newsite/PrintRelease.aspx?relid=126326> further details <http://censusindia.gov.in>

⁴ http://www.censusindia.gov.in/Census_Data_2001/Census_Data_Online/Language/gen_note.html

⁵ <http://www.medianama.com/2014/07/223-newslaundry/>

⁶ <http://www.firstpost.com/india/victory-for-free-speech-as-sc-strikes-down-section-66a-of-it-act-heres-all-you-need-to-know-2169787.html>